

The CNMC proposes improving competition in services provided in Spanish ports

- In two studies, it analyzes the services of pilotage, towing, mooring and unmooring, *marpol*, *bunkering*, stowage and passenger services.
- Existing regulation hinders competition and, in many of them, a monopoly regime persists.
- Reforms in key services such as stevedoring would improve the competitiveness of the economy and consumer welfare.

Madrid, October 22, 2025.- The CNMC has analysed in two studies ([E/CNMC/004/24](#)) and ([E/CNMC/005/24](#)) how the main services provided in the network of ports of general interest in our country work, where, in general, there is little competition and an inefficient regulation persists.

Boosting competition in ports could improve the economy and consumer welfare, promoting lower costs, better quality of services, more freight and passenger traffic, the arrival of new industries, or the incentives for innovation and investment.

Analyzed services in ports

The studies analyze the following services:

- Those provided directly to ships ([E/CNMC/004/24](#)): technical-nautical services (pilotage, towage, and mooring and unmooring), the waste generated by ships reception service (MARPOL, *marine pollution*) and the *bunkering* service.
- Those for the handling of goods, or stowage, and the passenger service ([E/CNMC/005/24](#)).

Barriers to competition and efficiency

In many cases, services are provided under a monopoly regime or with little competition. This is due to barriers to competition, which in general are related to regulations (including the specifications that establish the rules in ports), licensing systems and concessions.

In addition, there are limitations in the updating and transparency of specifications and concessions, and in some cases, excessive requirements to operate (human and material resources, public service obligations, maximum rates, etc.). Pilotage is provided under a monopoly regime by law. There are also restrictions on the access to the profession of pilot and stevedore that make difficult to access them. In towage, tugboats must fly a Spanish flag. In the handling of goods, there are rigidities in the organization of work (shifts, functional mobility or equipment), in hiring and in automation.

Recommendations

To boost efficiency and competition in these services, that would result in improvements for ports, the economy and consumers, it is recommended to:

- Promote a transparent, efficient and competitive framework:
 - Update the specific terms and conditions to current regulations and design them with a pro-competitive approach.
 - Reform the system of licenses and authorizations, including maximum rates, to allow the highest levels of competition possible, and promote the transparency of public concessions through the creation of a register.
 - Establish systems of competition *for* the market through public tenders in cases where competition in the market is not viable.
 - Establish pro-competitive incentive and performance systems.
 - Consider introducing an independent regulator and supervisor.
- Promote more competition and efficiency in services provided to ships:
 - In pilotage: eliminate the legal monopoly and improve access to the profession, to make the ship's exemptions more flexible and consider introducing pilotage from land.
 - In towing: ensure proportionality in its obligation, rethink the requirement of a Spanish flag on tugboats and evaluate pro-competitive alternatives on the ownership of assets.
 - In the reception of waste (MARPOL): delimit the types of licenses to maximize competition, standardize the concepts subject to tariffs and review them in case of persistent mismatch between income and expenditure.
 - In fuel supply (*bunkering*): clarify the legal classification of the service without increasing regulatory barriers and increase price transparency.
- More competition and efficiency in the goods handling service:
 - Facilitate access to the stevedore profession: reviewing the duration of training, facilitating the recognition of European workers and strengthening the independence of the evaluations.
 - Assess the efficiency of the existence of Port Employment Centres (CPEs), rather than temporary employment agencies, and remove unjustified obstacles to the freedom of companies to choose between models to obtain port workers.

- Increase the flexibility of the organization of port work and eliminate the system of preference for workers in CPEs.
 - Improve the regulatory framework to avoid hindering investment in automation.
 - Strengthen efficiency at Border Inspection Points.
 - Review the port concession system: mainly, by analyzing the optimal deadlines and promoting price competition.
- In passenger services, examine the efficiency of the different terminal models.

The CNMC is the independent regulatory body of the markets that guarantees and promotes the existence of effective competition for the benefit of consumers and users. This study is carried out within the framework of its functions of promoting competition.

Related content:

- [E/CNMC/004/24](#): Port Study I: technical-nautical services, MARPOL and bunkering.
- [E/CNMC/005/24](#): Port Study II: Handling of Goods and Passenger Service.
- [Blog \(22/10/2025\)](#): Unblocking ports (I): How to improve port services in Spain?