



European Maritime Strategies for the Middle East Struggling for Relevance?

Daniel Fiott

Maritime Strategies in the Middle East

Challenges & Opportunities

The Middle East is a major area of maritime trade, given the vast oil supplies in the Persian Gulf region and several gas exploitation and exploration projects in the Mediterranean region. The development of these prospects and maritime trade, however, are threatened by acts of piracy and terrorist attacks in the waters between the Suez Canal and the Strait of Hormuz. Such threats have frequently prompted insurance companies to raise their premiums for merchant ships that navigate these waters. In addition, the Middle East has been the arena of fierce competition not only among the external actors who have economic and strategic interests in the region but also among local powers aiming to position themselves as the uncontested hub for maritime freight. The papers in this series of *Insights* explore how the countries of the Middle East and key external actors envision their maritime strategies for the region.

Cover photo: Ships from the Standing NATO Maritime Group 2 (SNMG2) manoeuvre to moor alongside the wharf in Casablanca, Morocco, on 16 September 2010. They were part of NATO's fight against terrorism. Abdelhak Senna/AFP

European Maritime Strategies for the Middle East

Struggling for Relevance?

Daniel Fiott*

From trade to energy, the Middle East is undergoing profound geopolitical change that will affect European maritime interests. Russia's war on Ukraine and the United States' shift to the Indo-Pacific are likely to accelerate this shift. In this context, this article analyses the European maritime approach to the Middle East. It shows how Europe is finding it difficult to simultaneously balance its interests in different maritime regions such as the Mediterranean, the Gulf region and the Indo-Pacific. Furthermore, it reveals how the European Union's maritime strategy and policies are still fragmented and severely undermined by a lack of naval assets.

As a major trade actor, the European Union is highly dependent on maritime routes. The main goods imported to Europe by sea include petroleum products (34.2 per cent in 2020), chemicals (7.4 per cent), metal ores (7.2 per cent) and agricultural and food products (11.6 per cent).¹ The Suez Canal, Red Sea, Gulf of Aden and

¹ Eurostat, "Maritime Freight and Vessels Statistics", December 2021, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Maritime_ports_freight_and_passenger_statistics&oldid=218671#Most_EU_maritime_freight_transport_is_with_extra-EU_partners.

the Mediterranean are vital maritime transit routes for EU goods exported to the Indo-Pacific region. In this sense, the hubs and ports in the Middle Eastern countries along these routes are vital to sustaining Europe's trade and economic position. Even though the lockdowns and economic dislocations arising from the Covid-19 pandemic have affected maritime transport and shipping volumes, Europe continues to have a high dependency on the Middle East for its maritime trade. However, in addition to clear economic reasons for engaging the Middle East, there are security reasons as well: the maritime routes pass through contested zones (e.g., the Strait of Hormuz) or areas with known chokepoints (e.g., the Suez Canal) and are therefore highly vulnerable, as are the hubs and ports located in the littoral states.

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Indeed, no discussion of Europe's economic and trade relationship with the Middle East can avoid a reflection on the geopolitical undercurrents of the region. Most obviously, there are still unresolved conflicts in Libya, Syria and Yemen, and there is endemic instability in countries such as Iraq and Lebanon. Europe has an uncomfortable and complicated relationship with a number of countries in the region, starting with Turkey and extending to Saudi Arabia and Iran. The Europeans also are concerned that the energy transition away from fossil fuels may have a destabilising effect on socioeconomic

systems in the Middle East. Notwithstanding these circumstances, the United States is seen to have declining interest in the Middle East even as the region is increasingly of interest to Europe's strategic competitors, Russia and China. Russia's ongoing war on Ukraine complicates the picture, including by disrupting maritime trade and shipping through the Black Sea and the Middle East. Furthermore, should Europe seriously curtail its dependence on Russian oil and gas supplies in favour of alternatives from the Middle East, the region will only grow in geostrategic importance for Europe.

This article will outline the importance of maritime access to the Middle East and the Gulf for European economies and discuss the Europeans' ambitious maritime agenda in the Middle East. It will focus on Europe's major maritime commercial interests in the region and assess the approach of business actors in the region. Finally, the article will analyse the security and geopolitical dimensions of Europe's engagement in the Mediterranean and the wider Middle East.

A European Maritime Strategy for Commerce in the Middle East?

Europe's maritime engagement with the Middle East is based largely on a commercial rationale. "Europe" is used here to refer not only to EU institutions but also the range of shipping and maritime actors that have vested interests in trade with and transit through the region. With Maersk, MSC, CMA CGM Group and Hapag-Lloyd, Europe is home to some of the world's largest shipping firms — Maersk is the largest

shipping company in the world.² Since 2010, the European Union has witnessed an increase in the volume of loaded containers handled in European ports despite the economic shocks caused by the pandemic in 2020.³ The Middle East is an indispensable region for the European Union's maritime trade.⁴ The region is important in its own right because it exports and imports goods to and from the European Union. For example, Egypt and Turkey are notable trade partners in the region, but Iraq (accounting for 9 per cent of the European Union's total oil imports in 2019) and Saudi Arabia (accounting for 8 per cent of the union's total oil imports) are essential as well.⁵ These trends are likely to increase given the war on Ukraine and global restrictions on oil and gas supplies from Russia, with the Middle East seen as an obvious candidate to make up for the energy supply shortfalls.

As the European Union's 2014 Maritime Security Strategy outlines, the "EU depends on open, protected and secure seas and oceans for economic development, free trade, transport, energy security,

² Ship Technology, "The World's Biggest Shipping Companies in 2020", 19 October 2020, <https://www.ship-technology.com/features/the-ten-biggest-shipping-companies-in-2020/>.

³ Eurostat, "Maritime Freight and Vessels Statistics", December 2021, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Maritime_ports_freight_and_passenger_statistics&oldid=218671#Most_EU_maritime_freight_transport_is_with_extra-EU_partners.

⁴ See, "Maritime Trade and its Risks: EU's Imports from Asia and the Middle East", IHS Markit, 2 July 2020, <https://ihsmarkit.com/research-analysis/maritime-trade-and-risks-eu-imports-from-asia-and-middle-east.html>.

⁵ Eurostat, "From where do we import energy?", n.d., [https://ec.europa.eu/eurostat/cache/infographs/energy/bloc-2c.html#:~:text=In%202019%2C%20almost%20two%20thirds,and%20Norway%20\(borh%207%20%25\)](https://ec.europa.eu/eurostat/cache/infographs/energy/bloc-2c.html#:~:text=In%202019%2C%20almost%20two%20thirds,and%20Norway%20(borh%207%20%25)).

tourism and good status of the marine environment”.⁶ Yet not all European states have the same approach to maritime policy. Some European states are land-locked or they rely mainly on short sea shipping routes to sustain intra-EU trade. In this respect, such states may be more concerned with maritime security within the European Union. Their concerns are in contrast with those EU member states that depend on global maritime shipping or are home to global shipping companies. Accordingly, the differences of opinion between European states hinge on whether they consider the Middle East an end destination for their goods or as largely a transit zone.

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Either way, the Middle East is an important geographical zone for Europe’s management of supply chains. For example, major European shipping companies increasingly invest in the Middle East as a pivot region for their wider trade with Asia. That is why some companies are investing in storage infrastructure or hubs in places such as Port Said, Egypt, or Port Salalah, Oman.⁷ Increasingly, commercial shipping lines

⁶ Council of the European Union, “EU Maritime Security Strategy”, 11205/14, 24 June 2014, p. 2, <https://data.consilium.europa.eu/doc/document/ST%2011205%202014%20INIT/EN/pdf>.

⁷ See for example, Maersk, “Maersk revamps Europe to Middle East & Indian Subcontinent Network”, 7 August 2020,

see the Middle East as a key location to achieve freight integration, with a focus on maintaining supply chain logistics that support maritime trade (i.e., supply chain service integration). Many of the major ports in the Middle East are state-owned, but even in such cases there is an appreciation of the need for public–private partnership arrangements. For example, the Saudi Ports Authority is planning to award concessions on a private–public partnership model to build and operate general cargo and other services in eight multi-purpose terminals across eight ports in the country.⁸

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Investments in maritime-related sectors is another crucial aspect of Europe’s engagement with the Middle East. To this end, the European Investment Bank (EIB) has invested approximately €1.79 billion in the development of marine transport infrastructure, sanitation, climate resilience and energy projects in countries such as Israel, Jordan and Lebanon.⁹ Separately, the European Bank for Reconstruction and Development (EBRD) also has invested some €10.5 billion in the

<https://www.maersk.com/news/articles/2020/08/07/maersk-revamps-europe-to-middle-east-and-indian-subcontinent-network>.

⁸ Hellenic Shipping News, “Saudi Ports Authority invites companies to qualify for Priority Concessions Procurement PPP Project”, 13 January 2022,

<https://www.hellenicshippingnews.com/saudi-ports-authority-invites-companies-to-qualify-for-priority-concessions-procurement-ppp-project/>.

⁹ European Investment Bank, “EIB in the Mediterranean Partner Countries”, <https://www.eib.org/en/projects/regions/med/index.htm>.

southern and eastern Mediterranean regions. Although the EBRD is not an EU body, its investment role, along with the investments of the EIB, gives us a clear indication that European states and institutions are prioritising energy transition and transportation in the Middle East. In certain cases, the investments of both the EBRD and the EIB have also sought to relate the question of energy transition and climate change with migration. For example, the EIB's 2021 Climate Adaptation Plan specifically targets financial support for basic urban services such as housing, sanitation, energy, transport and water in vulnerable countries, particularly in cities that are likely to host displaced people, migrants or refugees.¹⁰

“Commercial shipping firms and navies will have to contend with growing hybrid maritime threats in the region.”

However, investments and maritime surveillance will not be enough to deal with the evolving maritime threat landscape in the Middle East. In this respect, commercial shipping firms and navies will have to contend with growing hybrid maritime threats in the region. This can be best seen in the growing use of unmanned vehicles to achieve political objectives at sea. As has been well documented, the attack on the Mercer Street merchant vessel in 2019 by Iran saw the use of military-grade

¹⁰ European Investment Bank, “The EIB Climate Adaptation Plan: Supporting the EU Adaptation Strategy to Build Resilience to Climate Change”, 2021, p. 25, https://www.eib.org/attachments/publications/the_eib_climate_adaptation_plan_en.pdf.

explosives delivered by unmanned vehicles, which resulted in the death of several seamen.¹¹ Such developments have implications for navies and commercial shipping firms. This is not to say that commercial operators are strangers to the risks of maritime transportation, for there is a long history of commercial adaptation to piracy hotspots in the Gulf of Aden and Gulf of Oman. However, what these new risks imply is closer collaboration between commercial authorities, maritime authorities and navies.

A European Maritime Strategy for Security in the Middle East?

Aside from commercial interests, and perhaps chiefly because of them, Europe has a vested interest in the maritime security of the Middle East region. By “Europe” we mean here the collective actions of the European Union, NATO and individual European states. For example, the European Union’s naval operation, Operation Irini, has attempted — admittedly with mixed success — to enforce the UN arms embargo on Libya (UNSC Resolution 2578) by operating in the high seas of the Mediterranean. Since taking over from a previous EU naval operation (Operation Sophia) in March 2020, Operation Irini, with its limited mandate and lack of naval resources,¹² has sought to monitor information on illicit exports of oil from Libya as well as train the Libyan

¹¹ For more details, see H. Decis and C. Le Breton, “A New Phase in the Gulf Shipping Threat?”, IISS Military Balance Blog, 24 September 2021, <https://www.iiss.org/blogs/military-balance/2021/09/a-new-phase-in-the-gulf-shipping-threat>.

¹² H. Decis and A. Lapo, “Operation Irini: EU’s Latest Libya Mission Short on Assets”, IISS Military Balance Blog, 17 July 2020, <https://www.iiss.org/blogs/military-balance/2020/07/operation-irini-eu-libya-mission-assets>.

coast guard and navy and disrupt human smuggling and trafficking networks.¹³ As far as NATO is concerned, Standing NATO Maritime Group Two (SNMG2) ensures the alliance’s presence in the Mediterranean. Since 2016, this group has played an important role in NATO’s Operation Sea Guardian and tasks such as counterterrorism at sea, capacity building and maritime situational awareness.

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Additionally, in response to at-sea harassment of commercial vessels by Iran in the Strait of Hormuz and wider Gulf region since 2019, a group of European states — outside the European Union and NATO frameworks — launched an initiative labelled the “European Maritime Awareness in the Strait of Hormuz” (EMASOH). A major part of the EMASOH initiative has been a naval deployment called Operation Agénor, which involves eight European countries and seeks to ensure safe passage for commercial vessels in the region. In many respects, a similar approach has been the focus of the EU’s naval deployment Operation Atalanta, which has successfully reduced piracy in the wider Horn of Africa region. Since its inception in December 2008,

¹³ EUNAVFOR MED Operation IRINI, “About Us”, <https://www.operationirini.eu/about-us/>.

Operation Atalanta has protected more than 1,500 World Food Programme vessels and helped to detain over 170 pirates.¹⁴

“The European Union is planning for a more consistent presence in the northwestern Indian Ocean, which is a key conduit for maritime security in the broader Middle East region.”

Beyond countering piracy, Operation Atalanta has conducted wider maritime surveillance tasks in the Horn of Africa region. The same can be said for Operation Agénor. Indeed, maritime surveillance and maritime capacity building have become the hallmarks of European naval engagement in the wider Middle East region. For example, from 2015 to 2019 the European Union established a Maritime Capacity Building Initiative (CRIMARIO I) to focus on the western Indian Ocean, but since 2020 this has evolved into adopting a wider focus on the Indo-Pacific through CRIMARIO II. Relatedly, this initiative, which will last until 2024, has given life to a regional information-sharing platform (IORIS) that brings together 19 national and regional maritime authorities. Since 2018, IORIS has facilitated exchange of information between Jordan, Saudi Arabia, Djibouti and a range of states in the Indo-Pacific.¹⁵

¹⁴ EUNAVFOR MED Operation Atalanta, “Key facts and figures”, <https://eunavfor.eu/>.

¹⁵ EU Crimario, “The IORIS Platform”, <https://www.crimario.eu/en/information-sharing/the-ioris-platform/>.

The European Union is also planning for a more consistent presence in the northwestern Indian Ocean, which is a key conduit for maritime security in the broader Middle East region. On 21 February 2022, the European Union announced the planned expansion into the Indian Ocean of a concept known as the Coordinated Maritime Presences (CMP) concept, which was earlier trialled in the Gulf of Guinea. In line with its broader Indo-Pacific Strategy (adopted in September 2021), the CMP in the northwestern Indian Ocean will enhance the European Union's naval presence, partnerships and maritime security efforts in the region. The CMP will initially be present in the northwestern Indian Ocean until February 2024, and it will cover “an area from the Strait of Hormuz to the Southern Tropic and from the north of the Red Sea towards the centre of the Indian Ocean” through increased maritime surveillance and naval presence.¹⁶

The Maritime Challenges Facing Europe

Despite Europe's collective efforts, however, there are a number of challenges to its role in maritime security in the Middle East. Firstly, there is a very clear mismatch between Europe's frameworks for maritime cooperation and the naval assets available for this purpose. As noted earlier, Operation Irini has under-performed because of political disagreement between EU member states and a lack of deployable naval assets. The reality for Europe is that no amount of maritime frameworks and operations (Irini, Agénor, CMP, etc.) can substitute the development

¹⁶ Council of the European Union, “Council Conclusions on the Implementation of the Coordinated Maritime Presences Concept in the North-Western Indian Ocean”, 6255/22, 21 February 2022, <https://www.consilium.europa.eu/media/54437/st06255-en22.pdf>.

and deployment of naval vessels. One study shows that from 1999 to 2018 European navies experienced a 30 per cent drop in the total number of available frigates and destroyers and more than 20 per cent of available submarines.¹⁷ Such cuts, deep in themselves, are drastic, considering that they are taking place when greater demands have been placed on navies. For example, countries such as France have historically witnessed a decline in available naval platforms but an increase in operations in the Gulf region and the Indo-Pacific.

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A lack of naval mass, as well as the strategic enablers that make naval platforms effective military assets (e.g., advanced radars and sensors, missiles, space-based assets and subsea vehicles), is likely to hurt European navies in the future.¹⁸ While some European navies are investing in new platforms such as submarines and nuclear-capable/powered naval platforms, the demands on Europe’s navies will

¹⁷ C. Major and C. Mölling, “The EU’s Military Legacy: Over-Institutionalised, Under-equipped and Strategically Divided”, in *The CSDP in 2020: The EU’s Legacy and Ambition in Security and Defence*, ed. D. Fiott (EU Institute for Security Studies, 2020), p. 43, https://www.iss.europa.eu/sites/default/files/EUISSFiles/CSDP%20in%202020_0.pdf.

¹⁸ J. Stöhs, *The Decline of European Naval Forces: Challenges to Sea Power in an Age of Fiscal Austerity and Political Uncertainty* (US Naval Institute Press, 2018).

only increase in an era of high-intensity conflict.¹⁹ Without investments in appropriate numbers of naval platforms, and given the increasing need to focus on maritime deterrence in and around Europe because of Russia's belligerence, the bandwidth that European governments may have to dedicate to maritime security in the Middle East could be lower than even today's levels.

“The lack of a comprehensive and lasting regional maritime security architecture makes it difficult for European states to fully engage Middle Eastern states.”

Second, the lack of a comprehensive and lasting regional maritime security architecture makes it difficult for European states to fully engage Middle Eastern states.²⁰ Maritime security in the region is dealt with on a mainly bilateral or minilateral basis, and any regional structure is bedevilled by political rivalry and mistrust between states. What is more, Middle Eastern states still prefer to organise their maritime security efforts in partnership with the United States rather than with the European Union or NATO. In January 2022, the secretary general of the Gulf Cooperation Council (GCC), Nayef Al-Hajraf, called

¹⁹ P. Morcos and C. Wall, “Are European navies ready for high-intensity warfare?”, War on the Rocks, 31 January 2022, <https://warontherocks.com/2022/01/are-european-navies-ready-for-high-intensity-warfare/>.

²⁰ C. Adebahr, “Collective Security in the Persian Gulf: Preparing for an Opening”, Carnegie Endowment (Europe), 20 July 2021, <https://carnegieeurope.eu/2021/07/20/collective-security-in-persian-gulf-preparing-for-opening-pub-84959>.

for closer maritime cooperation with Washington.²¹ Such calls reflect a familiar pattern of maritime security cooperation for the GCC states.

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Indeed, as a distinct initiative from EMASOH and Operation Agénor, the United States set up the International Maritime Security Construct (IMSC) in November 2019. It may appear peculiar that two distinct operations, the IMSC and EMASOH, both operate in the same region and with similar objectives. The reason for the duplication can be traced back to transatlantic disagreements over Iran during the Trump presidency, with the United States — unlike its European counterparts — wanting to scrap the Iran nuclear deal. Nevertheless, like EMASOH, the IMSC is geared towards ensuring freedom of navigation in the Persian Gulf, but, unlike EMASOH, it includes regional states such as Bahrain, Saudi Arabia and the United Arab Emirates (UAE) in addition to the United States, United Kingdom, Albania, Estonia and Lithuania. At the sharp end of IMSC is the Coalition Task Force (CTF) Sentinel Bear in mind that Combined Maritime Forces has been present in the region since 2001 and has seen 34 nations — including 11 European countries — cooperate through four CTFs in the region. The European

²¹ Kuwait News Agency, “GCC eyes deeper maritime security coop with US – Al-HajraP”, 4 January 2022, <https://www.kuna.net.kw/ArticleDetails.aspx?id=3020006&language=en>.

Union and NATO lack a like-for-like set of arrangements with Middle Eastern states on maritime security.

“There is a lack of commonality between the European states themselves on maritime security beyond their shores.”

Third, the difficulty of engaging Middle Eastern states on maritime security is not just a function of disunity and rivalry in the Middle East. Indeed, there is a lack of commonality between the European states themselves on maritime security beyond their shores. For example, in disbanding EU Operation Sophia in favour of Operation Irini, EU member states displayed disagreement on the fundamental rationale for the operation — some believed an EU naval operation should be scrapped entirely as it was viewed as a pull factor for human trafficking. The Europeans can, therefore, be fairly accused of not providing a coherent or robust political mandate for wider naval operations, the lack of which potential partners can obviously detect when assessing whether the European Union can play a meaningful maritime role beyond its shores. Additionally, there are disagreements between European countries on how to handle crises such as that in Libya. Even on the question of Turkey and its disruptive activities in the eastern Mediterranean, there are tensions between EU and NATO members. Countries such as Greece have formed a stronger defence

relationship with France²² while Cyprus, Greece, Israel, Egypt and certain Gulf states have increased their maritime security cooperation outside the scope of NATO and the European Union.²³ Such pragmatic steps should be seen in light of fundamental differences of opinion in European security, with some states prioritising the threat from Russia over Turkey's illegal activities in the eastern Mediterranean.

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Either way, the Europeans are seeking to enhance their maritime presence in the Middle East and wider region. For example, the reflection group tasked with the NATO 2030 Report has already flagged the importance of a more consistent NATO approach to the “South”, including far closer cooperation with the European Union and regional actors such as the GCC, League of Arab States and others on maritime security.²⁴ Such a call is expected to be reiterated in NATO's 2022

²² H. Decis, “France, Greece and Mediterranean Currents”, IISS Military Balance Blog, 22 December 2021, <https://www.iiss.org/blogs/military-balance/2021/12/analysis-france-greece-and-mediterranean-currents>.

²³ Y. Guzansky and G. Lindenstrauss, “The Growing Alignment between the Gulf and the Eastern Mediterranean”, Middle East Institute (Washington), 25 May 2021, <https://www.mei.edu/publications/growing-alignment-between-gulf-and-eastern-mediterranean>.

²⁴ “NATO 2030: United for a New Era — Analysis and Recommendations of the Reflection Group Appointed by the NATO Secretary General”, 25 November 2020, p. 35, https://www.nato.int/nato_static_fl2014/assets/pdf/2020/12/pdf/201201-Reflection-Group-Final-Report-Uni.pdf.

Strategic Concept. For the European Union, the “Strategic Compass”²⁵ — a sort of “white book” on defence that was adopted on 21 March 2022 — also grapples with maritime security and the Middle East. This entails further developing the union’s maritime surveillance apparatus and enhancing the development of naval capability.²⁶ In this respect, the European Union has to find a more effective way of matching its maritime surveillance efforts with key partners in the Middle East, as well as determinedly projecting naval power through a more credible set of naval assets.

Conclusions

This article began with the objective of assessing Europe’s maritime approach to the Middle East from both a commercial and a security perspective. Geography clearly dictates that the Middle East is a vital location for European maritime interests. Not only is the region an important trading partner and key maritime transit region, but it is also the location of a range of geopolitical challenges. Shifts in the patterns of globalisation and energy consumption mean that the Middle East is undergoing profound political challenges that will affect European maritime interests. Russia’s war on Ukraine, plus the United States’ shift towards the Indo-Pacific, will no doubt hasten the importance of the Middle East for the Europeans. Not only will Europe need to respond to

²⁵ Council of the European Union, “A Strategic Compass for Security and Defence — For a European Union that Protects its Citizens, Values and Interests and Contributes to International Peace and Security”, 7371/22, Brussels, 21 March 2022, <https://data.consilium.europa.eu/doc/document/ST-7371-2022-INIT/en/pdf>.

²⁶ D. Fiott, “Naval Gazing: The Strategic Compass and the EU’s Maritime Presence”, EUISS Brief, No. 16, July 2021, https://www.iss.europa.eu/sites/default/files/EUISSFiles/Brief_16_2021.pdf.

challenges such as climate change and migration in the region, but there is a sense in which the Middle East, as a pivot between Europe and Asia, may fast become the terrain on which global strategic competition is played out.

This article has highlighted some of the challenges facing the Europeans and their maritime engagement with the Middle East. First, there is still some degree of disunity among European states on how to deal with certain crises and Middle Eastern governments. This can be seen in their differing approaches to Libya and Turkey, which implies shifting political and security relationships in the region. Second, there is still a lack of clarity over how Europe should balance its maritime interests in the Mediterranean and Gulf regions with its growing aspirations in the Indo-Pacific. While one may argue that the Mediterranean and Indo-Pacific represent a maritime continuum, the varied pressing geopolitical demands (i.e., the territorial security of Europe vs. its global maritime presence) and lack of resources mean that some degree of prioritisation is needed. Third, this article has argued that while the European Union has developed a range of maritime policies that affect its approach to the Middle East, these policies remain fragmented; the union needs to consolidate its energy, infrastructure, maritime security, climate change and ocean governance strategies so that there is an overarching approach. Finally, there can be no credible European maritime strategy for the Middle East without a determined development and deployment of naval assets. ◆

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