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The European maritime strategy at a turning point

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Of its twenty-seven Member States, twenty-two are located on the coast, with exclusive economic zones covering 25 million km². A significant proportion of these – particularly in the case of France – are situated in its overseas territories, giving the continent a global dimension. This 'maritime reality'[1] led the European Commission, very early on, in the early 2000s, to advocate an integrated approach to maritime affairs, notably through the 2007 integrated maritime policy for the European Union. Centred on promoting the sustainable development of all activities relating to the sea and coastal regions, this vision took shape through the Marine Strategy Framework Directive 2008. The security aspect has not been overlooked: 2008 also saw the launch of the operation Eunavfor Atalanta designed to protect, through the pooling of resources from the European Union's naval forces, maritime traffic off the Horn of Africa, which has been affected by the rise in Somali piracy.

Conceived within the framework of 'happy globalisation', this strategy continued unchanged, failing to take account of the three major turning points of that very same year, 2008, which heralded the new geopolitical landscape in which we now live. The first turning point was the Obama administration's 'pivot to Asia', which has been the guiding principle of US policy as a whole to this day. Recognising that China was becoming a systemic rival, Washington realised that it needed to concentrate the bulk of its resources in that region, calling on the Europeans from that time onwards to take charge of their own security. The second turning point was the financial crisis, which resulted in the global economy being prompted for the first time in centuries, by a non-Western power, China, signalling at the same time that Beijing had become a powerful and enduring economic rival to both the United States and the European Union. Finally, the third turning point was the war in Georgia, where, whilst Moscow did not capture Tbilisi, it demonstrated that its policy had changed and that its imperial vision had returned. None of these warning signs was really taken seriously at the time by the European Union, which now finds itself facing a very real Russian threat, a United States focused on its own interests, and a China that is competing with – or even supplanting – a significant proportion of its economic sectors.

SHIPPING AND THE SHIPBUILDING INDUSTRY AT A CROSSROADS

The European Union is particularly dependent on the sea for its trade: 75.6% of its imports and 73.7% of its exports, by tonnage, are transported by sea[2]. Aware of the threat posed by Chinese exports and of its dependence on the US defence industry, it is certainly endeavouring to identify strategic sectors – minerals, defence, batteries – for which some form of European preference or local content requirement should be imposed. But for the time being, it remains somewhat caught in the middle, torn between its mantra of free trade and the realisation that the world is changing, relocating and, consequently, becoming inward-looking. A prime example of this is Donald Trump's tariff policy. It would be delusional to think that this is linked solely to one man: it follows in the footsteps of the Biden administration, which, through the *Inflation Reduction Act*, was already seeking to mandate

[1] This text was originally published in the « The Schuman Report on Europe, State of the Union 2026 », Hémisphères edition, Paris, May 2026

[2] These figures relate to imports from and exports to countries outside the EU. They do not include intra-EU trade by sea.

local production in a number of sectors – batteries, microchips, etc. More broadly, this trend is evident in a growing number of countries, from Indonesia – which, in the minerals sector, requires on-site processing – to China, which, through a whole series of norms and subsidies, favours its domestic players. Whether one regrets it or not, the world, faced with growing uncertainties, is shifting its production back home and favouring local sourcing (nearshoring) over global supply chains. In this context, whilst the agreement with the Mercosur countries is undoubtedly a driver of growth for European players, it also appears somewhat at odds with current trends. We must, moreover, remain vigilant regarding the risk that Chinese or other suppliers might set up operations in Brazil or Argentina to circumvent any barriers or restrictions that might be imposed on their products.

This new paradigm in maritime trade is evident amongst container ship operators who are expanding their activities into intra-regional trade, aware that the high seas are fraught with uncertainty: economically, due to this trend towards relocation; but also in terms of security, with maritime areas becoming more dangerous and unstable. The Covid crisis already served as an early indicator. Added to this are the initial effects of climate change on the Panama Canal – its water levels falling due to drought – ; the Russian invasion of Ukraine and its impact on grain exports via the Black Sea; and the Houthi attacks in the Red Sea; not to mention a resurgence of maritime piracy, in the Strait of Malacca for example. Far from being fleeting epiphenomena, these events seem rather to herald the world to come. A world of potential crises and conflicts, with maritime areas not escaping the turmoil.

In this context, it appears to be of strategic importance to be able to rely on a merchant fleet of our own; this is currently the case when considering vessels owned by European shipowners, although there are a few areas requiring vigilance.

Firstly, the decarbonisation of this sector. Whilst this is essential to meet Europe's greenhouse gas reduction targets, in the short term it may weaken European players, who are the only ones bound by these targets: the hoped-for global agreement, as part of the IMO, has not yet been established. European players will therefore lose ground in terms of competitiveness, to the benefit of rivals outside Europe.

Next, the crews. Maritime transport requires shipowners, vessels and, of course, seafarers. Yet the entirety of global maritime trade relies essentially on a few nationalities – Filipinos, Russians, Ukrainians – How much confidence can we place in them to ensure traffic to and from our continent if security risks arise or in the event of crises involving their countries of origin? Finally, an important area for vigilance is the shipbuilding industry. Whilst, unlike the United States, the European Union has managed to retain expertise in defence shipbuilding, cruise ships and certain service vessels, China poses an increasingly significant threat in the civilian sector. With more than 150 shipyards operating on an international scale, Beijing now accounts for 60 per cent of global orders for commercial vessels, with our continent as its leading customer, primarily for the purchase of bulk carriers, container ships and tankers. This dependence could become problematic due to US sanctions, as ships built in China – regardless of the owner's nationality – are subject to a tax ranging from $33 to $120 per container unloaded, thereby undermining the competitiveness of European operators. South Korean or Japanese shipyards may, admittedly, offer an alternative in certain segments, but here too, it will be more expensive. A strategy in this area is urgently needed, focused on the revival of certain shipyards in countries where costs remain competitive – Bulgaria or Romania, for example – but also on the protection of our existing markets – particularly the cruise sector – as Beijing is determined to make inroads into these markets, as it has done with the ferry sector, where it is expected to achieve total dominance before long.

MARINE RENEWABLE ENERGY: FROM EUROPE TO CHINA

Europe had long been the world leader in the production of offshore wind turbines before being overtaken by China in the early 2020s. In 2024, the world's top three manufacturers were Chinese

companies: Goldwind, Envision and Mingyang, driven by a domestic market in which China accounts for 60 per cent of global wind power generation capacity. Thanks to this domestic base, it is able to offer turbines at prices up to 50 % lower than those charged by European manufacturers, thereby winning contracts in both Italy and Germany. In the medium term, in a sector as strategic as energy, will we still be able to rely on European players in the field of marine energy?

The European Commission, having learnt from the experience of the photovoltaic industry – where all European and global players were driven out of the market by Chinese dumping – is determined to take action, notably through an investigation into the subsidies granted by Beijing, which is suspected of unfair practices, and possibly even an increase in customs duties; yet it finds itself caught between multiple contradictions. Protecting its own industries through a protectionist policy will inevitably lead to retaliatory measures by China in other sectors – such as agri-food, the automotive industry or others – which in turn will result in political pressure on the Commission from the Member States concerned. Furthermore, it will always be tempting for these same Member States to seek to meet greenhouse gas reduction targets at the lowest possible cost, given the state of their public finances, and thus to be lured by the prices of Chinese equipment.

Ultimately, the risk is that we will move from a long-standing energy dependence on hydrocarbons to another form of dependence. Not to mention new vulnerabilities linked to subsea cables – the power cables connecting offshore wind farms to the onshore grid of which they form part.

SUBMARINE CABLES: A NEW VULNERABILITY

With the outbreak of war in Ukraine, undersea cables have emerged as a very tangible example of critical infrastructure, vulnerable to acts of sabotage aimed at undermining the states that depend on them. Such actions are fully in line with hybrid warfare strategies, blurring the line between civilian and military operations, as the vessels involved in these incidents are rarely identified or prosecuted, largely due to the difficulty in establishing formal evidence of sabotage. Since the outbreak of the conflict, the northern countries of the European Union – particularly those bordering the Baltic Sea – have regularly faced cable breaks in circumstances suggesting deliberate acts. Whilst the spotlight is regularly on fibre-optic cables – the backbone of the global internet – the cut to the power cable linking Estonia and Finland in December 2024 received relatively little attention, even though this incident highlighted the vulnerability of a number of European Union Member States linked to the rise of renewable energy. By their very nature, these sources are intermittent and therefore require interconnection with neighbouring countries, with Norway's hydroelectric power coming from offsetting, for example, wind-generated electricity from the United Kingdom or Denmark, with much of the interconnection taking place via subsea cables. Securing these cables is therefore vital to ensuring the stability of electricity grids, which offer less resilience – and thus less redundancy – than fibre-optic cable networks. In this area, vulnerability is more closely linked to the American digital giants – Google, Meta, Amazon, etc. – which, in the space of a few years, have become the key cable operators, whilst Huawei has done the same in the Pacific region. We can, of course, still rely on Orange Marine or ASN, assets that must be protected, but they are now clearly minority players and symbolise the challenge that must be met if the European Union is to remain a key player in the maritime economy of the future.

THE BLUE ECONOMY OF THE FUTURE

The traditional maritime economy covers a range of sectors, from fisheries to energy, including tourism, transport and the defence sector. However, in recent years, numerous start-ups have emerged in these sectors. Whilst the percentage of investment in Blue Tech may seem low – 1.24 % of total 'venture capital' investment – it has grown significantly over the past decade. In 2024, Europe was the global leader, with $1 billion invested, compared with $829 million in the United States and $363 million in Asia.

The United Kingdom, Sweden, France, Portugal, Norway and the Netherlands were among the top 10 countries to have attracted the most investment in the Blue Tech sector in 2024, behind the undisputed global leader: the United States.

Whilst European start-ups are among the most attractive in the maritime sector, they often need to seek investment abroad. This is due, in particular, to the lack of tools that identify these companies specialising in the maritime sector, which would help raise their profile amongst investors. This is, in particular, the aim of the Index Blue Tech developed by the French Maritime Cluster and its partners. Thanks to this Index, every year since 2023, 40 start-ups operating in a maritime-related sector have been showcased in order to attract funding and thereby accelerate their development. The stakes are high: these start-ups, which are often dual-purpose, such as Aegir, Diodon and Forssea Robotics, are drivers of growth for the maritime economy strictly speaking, as well as increasingly important partners for European navies facing the rise of drones and the expansion of artificial intelligence.

EUROPEAN NAVIES

In a geopolitical context where the use of force is on the rise once again, including at sea – an arena where it is possible to remain 'below the threshold' – the need to maintain a certain level of security for maritime trade flows is essential, given Europe's dependence on seaborne trade. Russia's attempt to block Ukraine's grain exports following the outbreak of the war, as well as the Houthis' attacks on merchant ships passing through the Bab-el-Mandeb Strait, serve as a reminder: the age-old naval tactic of trade warfare still has a bright future ahead of it if nations do not equip themselves to protect their ships. At the same time, widespread naval rearmament across the globe and the increasingly unrestrained use of violence by state actors suggest that disputes at sea – not to mention outright confrontation – have become highly likely. Yet Europe, which has long enjoyed naval superiority at sea alongside its NATO allies, is losing ground. It lacks China's shipbuilding capacity, and its Member States possess only medium-sized navies – even among the best-equipped. Faced with the sheer volume of naval resources possessed by certain major powers, or the widespread use of drones and cyberattacks, the only way to maintain operational superiority remains, as in the past, to focus on innovation and international cooperation. The latter is, in fact, essential in highly specialised fields such as access to space or control of the seabed.

Europe's navies must therefore join forces: in the short term to rebuild a force capable of deterring a rival, and in the medium term to invest in technologies that will restore their competitive edge. They are fortunate to have talented engineers and a still-robust industrial base within their borders. But Europe must dare to take the initiative, and its Member States must accept that the common good may sometimes require some sacrifices. In the fields of quantum technology, drones, digitalisation, laser weapons and so on, it undoubtedly has the potential to establish itself as a leading player – provided it does not miss the boat! After thirty years of reaping the dividends of peace, it must now consider reinvesting in areas such as munitions, maintenance and the protection of critical infrastructure. Here again, unity is a source of strength.

Some navies have already taken the step of breaking with the 'happy days' of the past: Italy and Greece are rebuilding their fleets by opting for well-armed heavy vessels, as firepower remains a key indicator of naval strategy. France is not to be outdone, with its programmes now underway for new-generation aircraft carriers, third-generation SSBNs, FDI frigates designed to be data-centred from the outset, and the acquisition of aerial, naval and underwater drones. Many European navies regularly gather off the coast of Portugal for the REPMUSS exercise, to test tactics for deploying drones of all kinds under real-world conditions. The United Kingdom, although no longer formally part of the European Union, remains closely linked to it in defence matters. With its 'Atlantic Bastion' concept, the Royal Navy is banking on a highly robotised navy to deter its Russian rival from acting against British interests in the North Atlantic.

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In the field of naval warfare, the European Union has reached a turning point. It can choose to lament the world of the past, now gone, where it ruled the seas alongside the United States. Or it can resolve to take action to re-establish itself in the future as a naval power unafraid to defend its interests, adapting swiftly to the pace of technological change, and equipped with an industry that has resolved the issue of its overly critical dependence on third countries. Just as on land, it is wise to be feared at sea in order to remain free and protect our maritime resources and trade flows – the lifelines of our economic prosperity.

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