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NAVAL GAZING?

The Strategic Compass and the EU’s maritime presence

by

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INTRODUCTION

Seventeen days prior to the accidental blockage of the Suez Canal on 23 March 2021 by the super container *Ever Given*, a French aircraft carrier strike group had passed through the canal on its way to the Indian Ocean [1]. It does not take an active imagination to think what could have transpired had these naval forces become trapped in the Suez Canal following a hostile act on their navigation systems. It is only possible to envision such scenarios because maritime security is increasingly beset by geopolitical tensions. We know that the European Union is heavily dependent on maritime trade routes for power projection and its economic prosperity — 75 % of goods entering Europe do so by sea today and Europe’s navies and shipping firms rely on free navigation. However, China’s naval expansion in the Indo-Pacific, Russia’s naval presence in the High North and the Baltic, Black and Mediterranean Seas and Turkey’s hostile maritime acts in the Eastern Mediterranean call into question the relative freedoms Europeans have enjoyed at sea for decades.

Of course, it remains to be seen whether the EU can generate a greater maritime presence in such a context. The Union has accrued experience in deploying

Summary

- The EU and its member states will find it increasingly difficult to sustain the rules-based order and the Union’s own economic prosperity without a sizeable and consistent investment in maritime power.
- The politics of the EU’s approach to maritime security is conditioned by questions of geographical priorities and how to balance ‘soft’ and ‘hard’ maritime risks.
- The Strategic Compass should set measurable targets that lead to a higher and more credible EU naval presence, and it may even instigate a shift in the way the EU thinks about maritime security more broadly.

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naval operations, undertaking border and coastguard functions, performing maritime safety tasks, countering piracy and conducting maritime surveillance assignments. More recently, the EU has even established new maritime initiatives such as the Coordinated Maritime Presence (CMP) concept, which is designed to enhance maritime security in fragile areas such as the Gulf of Guinea. EU member states such as France, Germany and the Netherlands have also invested in national strategies and guidelines for maritime engagement in the Indo-Pacific, and the EU will follow suit by the end of 2021 with its own strategy. A new EU Arctic strategy will be released in October 2021. NATO is also about to revise its own Strategic Concept, which will undoubtedly focus on maritime issues too.

At the same time, by March 2022, the EU will present a Strategic Compass for security and defence, which is in part supposed to provide clearer guidance on what type of maritime actor the Union should become. This is a challenging task. There is limited political agreement on the Union's maritime security role, and there is uncertainty about how far the EU should geographically extend itself when it has concerns closer to home. There is also the question of limited European naval capabilities. Tackling these issues, this Brief asks how the Strategic Compass can make a tangible difference to the Union's role as a maritime security provider. Our first port of call, however, is to better understand the contemporary nature of maritime threats, risks and challenges.

There is a security and economic rationale for enhancing the Union's maritime presence.

HARD AND FAST? THE CHANGING NATURE OF MARITIME SECURITY

Europe's navies are increasingly being called upon to perform maritime security tasks. Violent piracy in the Gulf of Guinea has been met with enhanced naval vigilance in the area, insecurity in the Strait of Hormuz has resulted in a European maritime awareness initiative (EMASOH) and longstanding crises in Libya and the Horn of Africa have required the deployment of EU naval forces in the form of Operations *Irini* and *Atalanta*. On top of this, countries such as France, Germany and the Netherlands have deployed or plan to deploy naval forces to the Indian Ocean and the South China Sea. Germany will deploy its frigate *Bayern* in the second half of 2021 [(2)] and France initiated 'Mission Marianne' — consisting of a support vessel and nuclear attack submarine — to the Pacific at the start of 2021 [(3)]. Although many of these initiatives have been given impetus because of the growing importance of the Indo-Pacific, it is important to note the geographical extent of Europe's maritime ambitions and the (direct/indirect) proximity of maritime threats, risks and challenges.

These enhanced European maritime security initiatives have given rise to questions about what role naval power should play within the Strategic Compass. One can understand why, especially given a growing European recognition that freedom of navigation and the international law of the sea are steadily being eroded. Some EU member states are directly implicated in this challenge, and it is worth recalling that Denmark, France and Portugal have some of the largest Exclusive Economic Zones (EEZs) in the world when calculated in km2. However, free and secure seas and oceans are in the interests of all EU member states as they provide the basis for Europe's economic prosperity — consider that Europe is home to 329 key seaports [(4)]. There is a security and economic rationale for enhancing the Union's maritime presence. Even marine insurers are increasingly taking into consideration security and geopolitical considerations when insuring shipping companies, vessels and ports [(5)]. Regardless of whether a member state is landlocked or not, every EU member state feels the effect of maritime supply disruptions. For example, Covid-19 led to an immediate 4.1 % decrease in global maritime trade in 2020 in addition to disrupting supply chains, shipping networks and ports. [(6)]

Yet it is not just pandemics and canal blockages that threaten maritime trade. Increasingly, climate change will transform maritime spaces. For example, if climate adaptation and coastal protection efforts fail by 2100 approximately 48 % of the world's land area, 52 % of the global population and 46 % of global socio-economic infrastructures and activities are at risk of flooding [(7)]. Coastal areas in the EU and beyond are the most at risk from climate change. For the EU, this means that critical infrastructure such as ports, harbours and naval bases will be vulnerable and there could be resource depletion because of environmental risks. What is more, climate change could lead to the collapse of fishing stocks due to water warming, which in turn may lead to conflict between states and fishing companies, and new shipping lanes are likely to open up in the summer season in the Arctic. Increasingly, climate change could aggravate transboundary maritime disputes, especially where marine conservation spaces or resources overlap with contested EEZs. Finally, the increased use of renewable marine energy installations and connectors may

replicate well-known infrastructure vulnerabilities at sea [8].

The oceans and seas are not then only conduits for maritime trade: they are also home to food sources, vital critical infrastructure and strategic economic inputs. For example, consider that the Sea-Me-We-5 submarine telecommunication cable routes through six separate maritime zones such as the Mediterranean Sea and the Malacca Strait and has 18 different landing points including France, Italy, Myanmar, Oman and Singapore [9]. Subsea energy pipelines and offshore installations are also vulnerable maritime infrastructures — the EU imports gas and oil through the Mediterranean, Baltic and North Seas. Furthermore, critical raw materials that are essential for the European economy are located far beyond EU shores and this includes magnesium from China, palladium from Russia, ruthenium from South Africa and niobium from Brazil [10]. Criminal networks also operate across multiple seas and oceans. Safeguarding sea lines of communication (SLOC) will therefore be another key task for the Strategic Compass.

Although not all EU member states see an immediate need for a lurch towards the Indo-Pacific, China is a growing geopolitical maritime rival that cannot be overlooked. China now has the world's largest navy to accompany its global network of infrastructure projects, raw material interests and marine investments [11]. Although we should not overestimate the importance of the size of China's navy, or the fact that it has already conducted live exercises in the Mediterranean and is expanding its naval base at Djibouti, we should not underestimate China's overall maritime power. Beijing may not be a traditional sea power [12] but its rapidly growing commercial shipping industry, its shipbuilding market and its ownership of ports infrastructure make it a maritime power. While China may not yet seek naval conflict beyond its immediate maritime vicinity, it does use its navy to protect Chinese fishing fleets that operate in places like Ghana or the Galapagos [13]. Beijing also uses its maritime presence to undergird the activities of large state-owned enterprises (SOEs), which produce the largest share of Chinese goods and services [14] and export China's economic model — one at odds with Europe's.

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Yet China's growing maritime power is not simply a concern from a naval perspective. In fact, one of the challenges facing the Strategic Compass will be how to effectively respond to the growth of maritime hybrid threats. The UN Convention for the Law of the Sea (UNCLOS), the UN Charter and customary international law sit ambiguously alongside each other and none of these legal instruments cover the use of force at sea and non-military maritime conflict at the same time. This is why it is difficult to craft responses to the construction of artificial islands, illegal sand dredging and sea mining, the collision of civil and military vessels, civil harassment of naval vessels, submarine threats or the use of fishing vessels or coastguards as proxy 'maritime militias' [15]. Legal ambiguity and the congestion inherent in the maritime domain give rise to legal and regulatory loopholes that can become security vulnerabilities [16]. China exploits these vulnerabilities through a tactic of combining military and constabulary forms of maritime coercion [17].

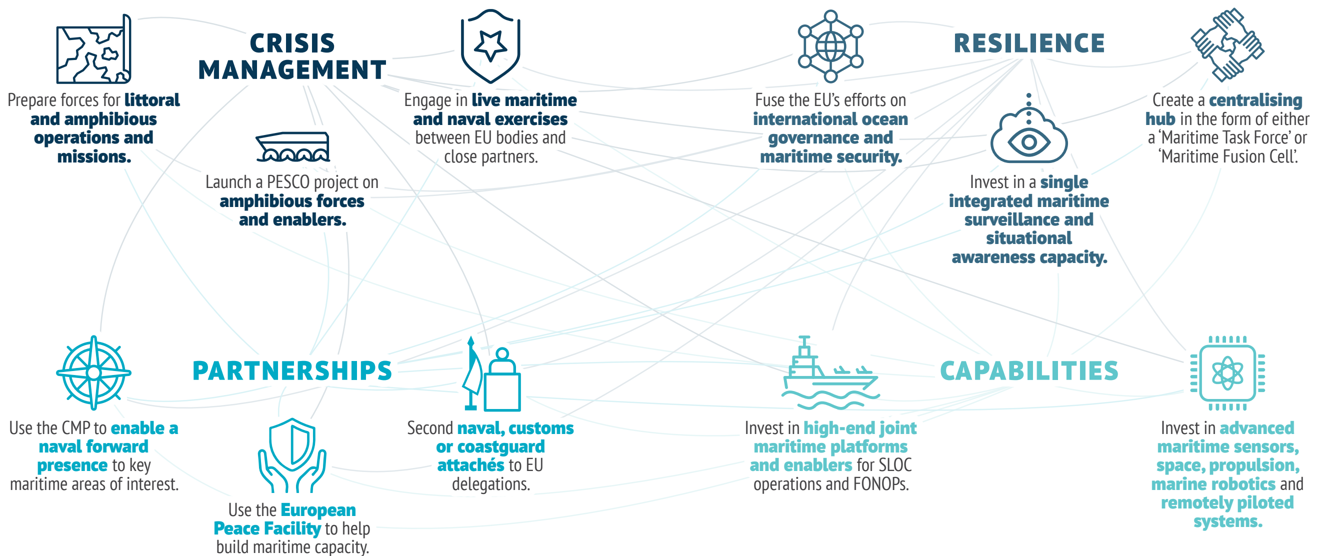
These hybrid tactics are not used by China alone. Turkey is employing similar methods in the Mediterranean through its use of survey vessels to illegally drill in Cyprus's territorial sea and EEZ. Maritime security closer to the EU is, therefore, another pressing issue for the Strategic Compass. Consider that the EU has a coastline of 68 000 km and over 2 000 inhabited islands [18] and the Baltic, Black, Mediterranean and North Seas are also implicated in security or geopolitical risks. Here, Russia remains a regional concern and the modernisation of its submarine fleet and long-range precision strike capabilities means that Moscow can threaten Europe via the Atlantic, the High North and Mediterranean Sea. Russia's navy already makes use of long-range Kalibr and short-range Iskander missiles, and they have used them from theatres such as the Mediterranean. Additionally, Russia has also sought to deploy hybrid tactics at sea, as can be seen from the construction of the Kerch bridge or its intimidation of workers laying undersea cables beneath the Baltic Sea.

MARITIME POWER: THE BERTH OF THE STRATEGIC COMPASS

Given the multitude of maritime threats, risks and challenges facing the EU it is necessary to reflect upon the ways in which the Strategic Compass could enhance the Union's approach to maritime security. We have seen that maritime security concerns are diverse and they emerge across different policy domains and geographical areas. Concrete policy ideas will have to directly respond to the threats outlined above, but it is worth acknowledging that responses cannot be framed solely in naval or hard power terms. A challenge will be how to balance the EU member states' varied approaches to maritime security. It will also be a test to ensure complementarity

Maritime and the Strategic Compass

Some options for the four baskets



between EU maritime security and the Union's crisis management and capacity building efforts on land, as well as the EU's broader efforts on ocean governance. With these caveats in mind, we now reflect on how maritime security could be treated by each of the four, interlocking, baskets of the Strategic Compass.

Crisis management

This first basket of the Strategic Compass should provide greater clarity for the types of EU naval deployments expected over the next 5-10 years. Consider that most European combat forces are still adapted to deployments in arid locations such as Afghanistan or the Sahel, and, with the exception of certain navy or marine forces, there is little recent knowledge of amphibious deployments in tropical zones such as those found in West Africa, East Africa or the Indo-Pacific. This is concerning if the EU is expected to respond to crises in these zones in the future. Keep in mind that approximately 40 % of the world's population or nearly 2.4 billion people reside within 100 km of coasts [19]. Consider also the amphibious forces and capabilities that would have been required had the Union decided to repel the Islamist attack on the Port of Palma, Mozambique, in March 2021. These types of interventions could become more likely in future given the lack of patrol and littoral capacities of coastal states [20] and the EU's need to ensure safe SLOC for trade. Given the disruptive impact of climate change, it is also likely that the EU might have to deliver humanitarian aid in or close to coastal zones affected by extreme weather events and/or temperatures [21].

The Compass could reformulate how the EU ties up its naval and land-based operations and missions. Despite its experiences in the Horn of Africa, the EU is not prepared to engage in amphibious operations in geopolitically contested maritime areas and to follow this up with land forces, if so required. A continuous and credible EU naval presence in littoral zones in the Gulf of Guinea, the Mediterranean, East Africa and the Indo-Pacific would have a deterrent effect and amphibious forces and associated sea-air assets could conduct maritime special operations, rescue and evacuation missions and support humanitarian efforts in case of climate-induced disasters. Amphibious forces could also provide the EU with an operational capacity short of the deployment of larger units, if this is operationally required [22]. It should not be overlooked that a more continuous and credible at-sea presence is likely to be welcomed by close partners dealing with China's growing naval power and it would contribute to the Union's overall diplomatic presence in regions like the Indo-Pacific.

These amphibious forces could in time become a possible Permanent Structured Cooperation (PESCO) project linking to existing and future projects such as 'co-basing', amphibious assault ships, precision-guided munitions, high-speed craft, intelligence, surveillance and reconnaissance (ISR) and air power capacities. In case of a need for follow-on forces after amphibious deployments, the EU could explore what role the EU Battlegroups, the PESCO project 'EUFOR Crisis Response Operation Core' (CROC) or other future EU entry force initiatives could play. Amphibious operations are challenging, but they are an indispensable part of maritime strategy and look likely to increase in importance. The challenge for the EU in creating such amphibious forces would be how to invest in enablers such as air assets and operational sustainability. For example, such forces are

easier to supply in the Mediterranean Sea but without host bases in locations such as the Indo-Pacific logistics will be challenging. Basing and logistics could perhaps be a focus of discussion under the recently announced EU-US dialogue on defence.

The Compass could also underline the importance of EU maritime exercises, especially given their growing relevance to the EU's maritime partnerships — the EU and Japan have conducted passing exercises (PASSEX) in the Horn of Africa. Yet, maritime exercises offer the Union a chance to develop its civil-military coordination efforts too. An interesting model that could be emulated under the Compass is the COASTEX exercises that are jointly organised by the European Fisheries Control Agency (EFCA), the European Maritime Safety Agency (EMSA), the European Border and Coast Guard Agency (Frontex) and member state authorities. For political reasons it may be unreasonable to expect Common Security and Defence Policy (CSDP) actors to participate in COASTEX, but EU-led live naval exercises could include EFCA, EMSA, Frontex and member state and partner maritime authorities in an integrated approach to tackling maritime security challenges, hybrid threats and climate-induced disasters.

Resilience

The basket on resilience could outline a more coherent EU approach to maritime security. The EU is issuing a host of maritime-related documents on connectivity, the blue economy, the Indo-Pacific, ocean governance, the Arctic, maritime security and security and defence, but this comes with the risk of overlap and policy gaps. One way of managing overlap is to combine and replace existing strategies. Given the hybrid nature of maritime threats, an obvious place to start would be to merge the EU Maritime Security Strategy (EUMSS)[23] and the Joint Communication on International Ocean Governance (IOG)[24] through a consolidated strategic document. The process behind such an effort would also encourage the European Commission and the European External Action Service (EEAS) to work much more closely together on maritime security. It is worth recalling that the next phase in the implementation of the EUMSS Action Plan is foreseen for early 2022 – thus, at the same time as the delivery of the Strategic Compass. In time, the EU could consider combining the EUMSS and the joint communication on IOG with the newly published communication on a sustainable blue economy.

However, maritime resilience does not depend on strategy documents alone but policy action designed to protect maritime infrastructure protection – a key feature of countering maritime hybrid threats. Clearly, marine infrastructure will be mainly protected by commercial actors that operate ports, energy installations and undersea cables. The EU can support these efforts through its financing instruments under the Multiannual Financial Framework (MFF) and with regulatory means such as the forthcoming revision of the 2008 Critical Infrastructure Protection (CIP) Directive, the Network and Information Systems (NIS) Directive, plus the existing foreign direct investment screening mechanism. The EU could play a role in investing in new technologies to protect undersea cables and landing stations. Although mainly a regulatory issue, one cannot so easily discount a potential role for Europe's navies — it is worth asking whether civilian authorities would be able to respond to a hostile attack on undersea cables on their own or to deal with unexploded ordnance in places like the Baltic and North Seas. It is worth noting that military mobility transport networks would also benefit from enhanced marine critical infrastructure protection in the EU.

Europe's navies have a crucial role to play in maritime surveillance and intelligence, even if such a role is today hampered by the fragmentation of data collection, imaging and sensing efforts. In this respect, the Compass could push the needle towards a serious rationalisation of the Union's existing maritime surveillance capacities. For example, the 'MARSUR' project spearheaded by the European Defence Agency (EDA), which enables dialogue across European naval information systems, has only tentatively begun communicating with the EU's Common Information Sharing Environment (CISE), which links together approximately 300 maritime surveillance authorities to monitor illegal fishing, pollution and border control[25]. This joint endeavour provides for an automatic exchange software that also relies on geospatial intelligence gathered by the EU Satellite Centre (SatCen) and maritime data provided by EMSA and Frontex through services such as Copernicus.

Europe's navies have a crucial role to play in maritime surveillance and intelligence.

However, some of the most important maritime surveillance capacities available to the Union are not held in the hands of defence actors at all. EMSA uses remotely piloted aircraft systems to detect maritime pollution and emissions, ensure border monitoring and counter illegal fishing. Moreover, EMSA oversees the SafeSeaNet monitoring service for vessel traffic in EU waters. Frontex is also responsible for a range of maritime surveillance activities and along with member states it manages the European Border Surveillance System (EUROSUR) framework to develop situational awareness for cross-border crime and irregular migration. Since 2018, Frontex has developed a Maritime Intelligence Community & Risk Analysis Network (MIC-RAN) to collect data and disseminate risk analysis products on maritime threats,

risks and challenges [26]. MIC-RAN relies on a range of civil authorities, but military actors are part of the network too. Frontex, EFCA and EMSA have also recently increased their maritime situational awareness activities for coast guard and border purposes [27].

Yet for all of these capacities there is no single maritime surveillance hub at the EU level that can respond to the needs of civil and military actors operating in the maritime domain. If the EU is to be able to collect, manage and act on maritime data in a coherent way there is a need to better link CISE, EUROSUR, MIC-RAN and SafeSeaNet with defence-specific capacities such as MARSUR, SatCen, the Hybrid Fusion Cell and the EU's Single Intelligence Analysis Capacity (SIAC). Accordingly, the Compass could either suggest ways of improving maritime surveillance coordination within the current structures or call for the creation of a centralising hub such as a 'Maritime Task Force' or a 'Maritime Fusion Cell'. Either way, there is a growing need for a single integrated maritime situational awareness picture that can simultaneously cover maritime security, maritime hybrid threats, climate-related crises, critical infrastructure protection, piracy and more. Such a system is not simply required for CSDP-related activities, but also the Union's civil protection efforts, border management and its mutual assistance and solidarity obligations.

There cannot be any ambitious EU maritime security presence without investments from member states and a commitment to use naval capabilities.

Capabilities

If it is correct to assume that the EU faces geopolitical competition, maritime hybrid threats and the effects of climate-induced maritime risks over the next 5-10 years, then this will call for clear capability priorities. It should be stated plainly that there cannot be any ambitious EU maritime security presence without investments from member states and a commitment to use naval capabilities. Yet, small steps are being made. Through PESCO and the Coordinated Annual Review on Defence (CARD), it has already been revealed that a European Patrol Corvette will be developed by 2030 for maritime security efforts in waters close to European territory [28]. PESCO is also home to six specific maritime projects that target mine countermeasures, maritime surveillance, underwater intervention, unmanned anti-submarine systems and patrol vessels — many more PESCO projects are relevant to the maritime domain (e.g. space, logistics and cyber). The CARD process has revealed that 12 out of 55 capability development opportunities identified in 2020 relate to the maritime domain. What is more, in time the EU's investments in space-based capabilities will also enhance the Union's maritime security capabilities.

The European Defence Fund (EDF) can be expected to invest in the maritime domain too, and its preparatory stages have already made investments in electromagnetic railguns, precision strike and maritime surveillance. We also know that the first call under the EDF will dedicate €103.5 million to naval combat capabilities in 2021, but there is a need to invest in strategic maritime platforms and enablers in the future. The recently published Action Plan on Synergies between the civil, defence and space industries could also unlock maritime sector innovation by blending existing EU financial tools. At present, European navies lack the high-end naval capabilities that would be required to undertake simultaneous SLOC operations. There is a lack of aircraft carriers, submarines, surface combat ships, mine countermeasures vessels, amphibious shipping, support vessels, offshore patrol vessels and personnel [29]. Developing some of these capabilities under PESCO or the EDF would be a gauge of how ambitious EU member states are about maritime security.

However, naval platforms alone will not be enough to ensure the EU's maritime security. Just as important will be investments in advanced maritime sensors, space-based assets, propulsion, remotely piloted maritime and aerial vehicles, marine robotics, directed energy and laser capacities, digital connectivity, precision strike and missile defence and an ability to use AI to manage vast amounts of maritime data produced by ports, marine operators and seafarers. There is also a need to counter the increased use of loitering munitions and drones at sea. Without such capacities, Europe will continue to lag behind the United States and China in maintaining its naval presence. The Compass could spell out how EU member states will achieve greater stealth, range and lethality at sea with specific timeframes for delivery and call for a healthy mix of naval platforms and enabling systems and technologies [30].

Partnerships

Over the next 5-10 years closer EU-NATO and EU-US cooperation will be necessary, especially with regard to maritime security in areas such as the Baltic Sea, Black Sea, the High North and the Mediterranean, and in light of the fact that a large part of Europe's ballistic missile defence (BMD) is provided at sea through the Alliance. The NATO 2030 Report has already called for an update of the Alliance Maritime Strategy and closer EU-NATO consultations about maritime

security in the southern dimension. This will not be easy given current tensions with Turkey over its truculent activities in the Eastern Mediterranean. EU-NATO maritime cooperation will also be moulded by the competing demands of enhancing NATO Standing Naval Forces in order to deter Russia, and increasing US-led initiatives to ensure the Alliance responds to China in the Indo-Pacific. In such a context, only a significant and sustained increase in naval platforms and enablers over the next few decades will allow European navies to meet their responsibilities in the EU and NATO.

Another key issue related to partnerships will be how the EU can enhance its naval cooperation in the future with the United States, the United Kingdom, India, Australia, Japan, South Korea and others. For the time being, we should expect bilateral or minilateral modes of naval cooperation such as close France-US-UK exercises and Freedom of Navigation operations (FONOPs) to be the norm. In time, however, the EU could develop a flexible and attractive maritime cooperation framework — not least to allow Denmark to play a greater role without calling into question its military opt-out from the CSDP. The CMP, a non-CSDP tool designed to ensure communication between European navies operating in specific maritime zones, could be the flexible model the Union and its partners need. The CMP is currently being refined in the Gulf of Guinea, but the plan is to expand it to the Indian Ocean. In addition to enhancing its geographical reach, the CMP could in time become a cooperative anchor for the EU and partners to exchange maritime intelligence, exercise together and create *ad hoc* naval groups. Regional CMPs could even be physically embedded in maritime hubs or naval bases to bring together EU coastguard, customs or naval officers with officials from regional and international organisations and partner navies. More ambitious regional CMPs could also help deliver maritime capacity building with the assistance of the European Peace Facility (EPF).

The Strategic Compass could also underline the importance of existing maritime capacity building mechanisms such as the Critical Maritime Routes (CMR) programme, which supports coastguard and maritime law enforcement capacity building in 40 countries in the Gulf of Guinea and the Indian Ocean. The Compass can draw on the planned expansion of CMR to South East Asia, and, potentially, to the Southern Pacific [31]. A similar expansion of the EU-financed Maritime Security Programme (MASE) to these regions could be explored in order to combat piracy and share information in the broader Indo-Pacific with regional organisations, UN bodies and Interpol. The EU can also work closely with newly established bodies such as The Atlantic Centre to engage new maritime partners in the Atlantic Ocean, and bolster its presence in the Shared Awareness and De-Confliction (SHADE) forums while also exploring ways of expanding the model to Asia.

No serious EU level of ambition in maritime security can be achieved without investments and capabilities.

OCEANS APART? EU MARITIME AMBITIONS AND THE REALITIES

Unlike the United States and China, which profit from a relative abundance of nationally sourced raw materials and industrial capacity, Europe survives on its maritime interdependences. As this Brief has argued, maritime security threats, risks and challenges are mounting in core geopolitical areas that have a direct bearing on the EU's security and economic prosperity. There is no way around the fact that no serious EU level of ambition in maritime security can be achieved without investments and capabilities. Naval power is a critical component of the EU's overall maritime ambitions. The reality today is that, with the exception of only a few European states, maritime power in Europe has been neglected and this has hit overall naval unit numbers. This affects both the EU and NATO. If Europe is serious about maintaining free access to the global commons and maintaining its economic power, this situation must change rapidly.

However, greater European maritime power cannot be calculated solely in terms of the number of naval vessels member states own. Naval power and maritime power are related, but distinct. There can be no coherent maritime strategy for the EU without clarity on why the maritime domain is intrinsic to European security, freedom and prosperity or how and where Europe should act to safeguard its interests and values. Accordingly, the Strategic Compass can clearly articulate an operational strategy that links together sea, air, land, cyber and space domains. The Compass can also underline that the EU is uniquely placed to generate maritime power especially if it successfully fuses its trade and investment, partnership, connectivity and security and defence policies. This fusion will require joint management of maritime security by the Commission and the EEAS, but this is what was surely implied by the European Council when it called for the Strategic Compass to make 'use of the entire EU toolbox' [32].

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