

The Gulf Between Europe and Strategic Reality

Sven Biscop

Why does Europe have no impact on the war in the Gulf? Nor even on the diplomatic efforts to settle the war? Europeans could have mounted a collective operation to provide defensive assistance to partner countries in the Gulf. They could have offered to assist the legitimate government of Lebanon with its air defence. They must now certainly weigh in on a durable political settlement for the region, not least by being part of the security dimension of any arrangement. Indeed, Europe's interests may yet oblige it to deploy, even if there is no ceasefire. But between the strategic reality in the Gulf and the focus of the debate and the way decisions are made in Europe there remains – a wide gulf.

Europe was absolutely right not to join in the Israeli-American war against Iran. Not only was it illegal; it was strategic folly, because the US launched it without a clear political purpose. There had been no deal with Iran about its nuclear programme for eight years – since May 2018, when Trump himself, during his first administration, destroyed the Joint Comprehensive Plan of Action (JCPOA). The second Trump administration had started negotiations to arrive at a new nuclear deal, which it broke off. Not because there was any sign of an imminent threat but, according to [The New York Times](#), at the behest of Israel, which convinced Trump that it was feasible to decapitate the Iranian regime and destroy its military power projection capacity. But the US military leadership did not believe in the feasibility of Israel's ultimate objective of provoking a popular uprising and changing the regime. Which alternative political end-state the use of force was meant to produce, the US never made clear.

Joining a war without purpose could only have resulted in further damage to the European interest. The clear decision not to participate, in spite of Trump's insulting threats, was a strong message in itself: just like the US, Europe prioritises its own interests. But those interests cannot be safeguarded by calculated inaction alone. One may deplore that Europe has to help clean up the mess that the US and Israel have created, but it must, to preserve its own interests.

Moreover, that Trump started a war without a clear objective in mind, does not mean that others in the US strategic establishment did not see any strategic purpose, or that the US does not develop new objectives as the war goes on. The result of the double blockade of the Strait of Hormuz by Iran and the US, is that China's energy imports from the Gulf have been greatly reduced. Washington may well come to the conclusion that it wants to render its control of energy exports from the entire Gulf permanent, for example by using the military force that it is assembling to take control of one of the islands in the Strait. Washington may also decide that it does not care much if its actions prolong the current stalemate, given its own energy self-sufficiency. Trump will definitely not care if this hurts Europe; he does care that 90% of the MAGA base supports the war.

In that scenario, Europe's interest may oblige it to deploy a naval operation to escort its tankers and other ships before the conclusion of a ceasefire or peace agreement. Instead of "[masterly inactivity](#)", early strategic action may be necessary.

ESCORT OPERATIONS THROUGH THE STRAIT

There was no point in deploying European naval assets to the Strait of Hormuz while the shooting war was going on. Under these conditions, creating safe passage for commercial shipping was simply impossible, no matter how many ships Europe would send. Moreover, European navies would almost certainly be drawn into direct military action against Iran. Britain and France are forging a global coalition of the willing to deploy a strictly defensive naval operation once a settlement is in place. That is far from useless, as Trump's messages on X imply: any agreement will be highly fragile and must therefore be policed; shipping companies must feel confident that security is guaranteed; and demining will be necessary.

However, if the current situation of "no war, no peace" lasts, Europe's economic interests may not allow us to wait for a formal settlement. Europe may have to deploy an escort operation soon. For escorting to be effective, numbers are required, but Europe does not actually have that much naval capacity, while the US may decide to maintain its blockade and leave escorting duties to those who choose to undertake them. Forging a global coalition is sound strategy, therefore: the closing of the Strait of Hormuz is a problem for the global economy, not just for Europe; the more states participate in escort operations, the more effective they will be. But will other states be willing to deploy without a peace agreement in place?

The EU is divided about whether any deployment should be a CSDP operation, under the EU flag, or a coalition of the willing as now proposed by Paris and London. Why not make use of Article 44 TEU? This allows the Council to "entrust the implementation of a task to a group of Member States", who "shall agree among themselves on the management of the task", including which other states to involve. Britain and France could conduct the operation as envisaged, but the EU imprimatur would greatly enhance its political, in addition to the military, effect. That is, if Europe can muster the resolve to deploy when necessary.

ASSISTING PARTNERS

Europe did assist with the air defence of several of the Gulf States, but in dispersed order. France and Britain in particular reinforced their military presence in the region, and actively helped to defend Bahrain, Kuwait, Qatar, and the UAE by shooting down Iranian weapons. Various other European states (including Belgium) received direct bilateral requests for support from individual Gulf States, but are still deliberating the response, or have too limited air defence capability to send more than symbolic aid.

This is a missed opportunity. Europe could have mounted a collective response, through the EU or a coalition of the willing, thus giving all willing European states the opportunity to be part of the effort. The political effect would have been much larger, at a time when the Gulf States, surprised at their vulnerability to attack and the inability of the US to ensure complete security, are looking to diversify their partnerships (while clinging to the American alliance, of course). That would also have allowed Europe to request a firmer stance on the Russo-Ukrainian War in return, notably when it comes to Russian capital flows to the Gulf. But apparently, within the EU only the possibility of an operation to evacuate European citizens was remotely considered, and that quickly proved superfluous as Member States each took individual action.

Ukraine, on the other hand, has scored a major coup. Deploying some 200 experts in air defence to Jordan, Kuwait, Qatar, Saudi Arabia, and the UAE, and exporting its own interceptor drones, it receives missile interceptors, financial assistance, and energy support in return. Ukraine is thus gaining a position as a critical defence partner in its own right – more critical than many other European states. This demonstrates again how important it is to treat Ukraine as an integral part of European security and defence. Not only because the effective defensive perimeter of Europe is the frontline in Ukraine (even though the other European states are helping to defend it as non-belligerents). But because Ukraine, thanks to its hard-won expertise, now actively contributes to the defence of the rest of Europe itself, and of Europe's partners.



What Europe seemingly did not consider, is aiding the legitimate government of Lebanon, notably with its air defence. This in spite of the fact that the EU and several Member States have ongoing programmes of support for the Lebanese armed forces and security services, and have explicitly condemned both the disproportionate use of force by Israel and attacks by Hezbollah. Moreover, European peacekeepers deployed under UNIFIL have become casualties of a war that cannot be dealt with separately from the war against Iran.

DEFENDING NATO AND THE EU

Europe must also stand ready to defend itself. Turkey is a NATO ally, Cyprus is an EU Member State: both have had to intercept drones and missiles in their airspace. Even if some of these attacks may not have been purposely aimed, the simple but dangerous fact remains that any war in the Middle East or the Gulf can easily draw in either country. In that scenario, we will have to activate collective defence under NATO's Article 5 and/or the EU's Article 42.7.

That is not only an issue of mobilising the required capabilities (which will be difficult enough). The immediate question would be: Which types of action do we take, for which military and political objectives, and who decides on that? Would Europe still limit itself to defensive measures, or start offensive operations? What would the military chain of command be, especially if both articles were to be activated alongside each other? In the current crisis, Turkey apparently made very clear its total opposition to any NATO involvement in the defence of Cyprus, even though in military-operational terms running two parallel operations in the same Eastern Mediterranean theatre would make little sense. Would our political objectives change in that scenario, notably vis-à-vis Iran? And who would set the strategy, in view of the asymmetric membership of the EU and NATO?

The first ever EU "wargame" on how to activate Art. 42.7 TEU, on 4 May 2026, is a very good step. It should lead to a fundamental reflection on European strategic decision-making. Trump and Netanyahu start a war in the Gulf: Who decides on what "Europe" does? Europe is lacking

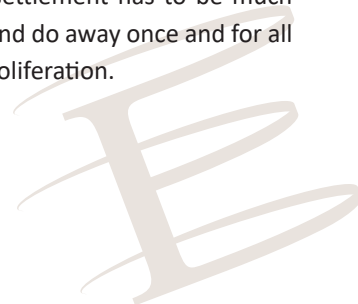
a "war cabinet", or a "European Security Council", that straddles the EU and NATO and can generate quick and concerted diplomatic and military action in times of crisis. But even if such a body would be created, it would only be effective if all key players really do show a European reflex and forge a European position by default, rather than only playing the national card.

A DIPLOMATIC WAY OUT?

There is a very real risk that this war, which was pointless to start with, produces a situation that is worse than the status quo ante. The war could yet escalate, if the US were to decide that regime change in Tehran is the only way out, and Iran used all its power, across the region, to resist. Or Trump could lose patience, declare victory, but actually walk away with a suboptimal settlement, that provides weaker nuclear guarantees than the JCPOA and leaves freedom of navigation imperilled. Or, as stated at the outset, the US could choose to purposely maintain the situation of "no war, no peace", in order to strangle the regime and demonstrate its control over energy flows to China.

All three scenarios would seriously damage the European interest. Europe should step up its diplomatic efforts, therefore, to bring about a better outcome. Rather than broadening the war, diplomacy must be broadened.

If regime change in Iran cannot be engineered from the outside, an agreement must be found with the current regime, even though this leaves in place a brutal dictatorship. That means that, in addition to exercising pressure, positive proposals will have to be put on the table also, in the economic sphere, but likely also in terms of security guarantees. This would be a return, in fact, to the strategy of calculated engagement that inspired the JCPOA. One easily forgets that this was the strategy of Europe, China, Russia, and the US, until Trump forced an end to it, for no reason other than that Obama had signed the Iran deal. The game is now played for much higher stakes, though: any settlement has to be much more final than the JCPOA, and do away once and for all with the threat of nuclear proliferation.



Pakistan is playing a very active diplomatic role, facilitating negotiations between the US and Iran. It has not really registered in Europe that in 2025 Pakistan and Saudi Arabia concluded a Strategic Mutual Defence Agreement, that includes a mutual defence guarantee. In other words, if the war were to escalate and Saudi Arabia became a belligerent, Pakistan would be treaty-bound to defend it – and Pakistan is a nuclear power. The stakes are much higher indeed than is generally appreciated.

China plays a less visible but at least as important a role. Beijing provides certain support to its partner, Iran, but has also exercised pressure on Tehran to accept the ceasefire. China suffers fewer immediate consequences from the war than Europe, and its image benefits from the contrast between its calm public posture and Trump's aggressiveness (though China's, and Russia's, partners also cannot but conclude that close partnership is of little immediate use when the US starts a war against you). But China definitely needs to avoid a long, regional war or permanent "no war, no peace". At the same time, if a durable arrangement is found, it is important that Iran is not once again left to China, as de facto happened when Trump broke the JCPOA. Europe must ensure that Iran engages with it, and others, as well.

CONCLUSION: A ROBUST ROLE FOR EUROPE YET

EU leaders have stepped up diplomatic efforts, including on the spot in the Gulf. But the Union's diplomatic leverage is limited, because none of the key players are convinced that Europe, in whichever format, can play a significant role in future security arrangements for the region. Europe would do well, therefore, to consolidate its current dispersed efforts in the defence field, and tie them closely to an equally concerted diplomatic position, to ensure that it has impact. The EU, moreover, has cards to play in the economic realm, such as a potential investment treaty with the Gulf States. Another EU role could be to engage with India, which also has vital interests at stake yet until now has kept a very low profile. An Indian contribution to future arrangements would be important in light of the strong role that Pakistan and China are playing.

Europe must make its position clear, however: Is it willing to resume calculated engagement with Iran in return for guaranteed freedom of navigation and nuclear non-proliferation? And for an end to Iran's strategy of subversion and proxy wars in the Middle East and the Gulf? The logical complement to that would be a stronger EU stance, and effective measures, against illegal Israeli operations in Gaza and Lebanon, to arrive at a comprehensive peace for the broader region. The most urgent question, however, is: Are we able and willing to deploy a naval operation to escort commercial shipping immediately, with or without a ceasefire? Alas, hoping for a quick agreement between the US and Iran may just not be enough.

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