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« Europe, geopolitics and the sea »

The resurgence of high-intensity geopolitics is thoroughly disrupting the global order, which had structured itself over the past two decades around economic globalization and the maritime shipping industries serving it. Through a comprehensive analytical triptyque, ISEMAR explores the relationship linking the world's three premier politico-economic superpowers to the sea regarding both geopolitics and geoeconomics. Following our structural audit of the United States and prior to addressing mainland China, let us evaluate Europe through its historical and contemporary maritimity, most distinctively face to modern geopolitical challenges. Is Europe a geopolitical dwarf, yet continuously endowed with powerful economic and maritime muscles?

The Formidable Global Dilatation of Europe

Geographically, Europe forms merely the Westernmost peninsula of the massive Asian landmass, entering written history through its Mediterranean shores with the rise of the Greek and Roman civilizations. The Roman Empire subsequently projected its footprint toward the Northwest, integrating Gaul and Great Britain. The world had to wait for the structural epic of the Viking expansion to see the North Sea and the Baltic Sea permanently embedded into the European maritime sphere.

Throughout the Middle Ages, seaborne trade structured intensely around the Mediterranean range via the Italian merchant republics of Venice and Genoa, the latter successfully establishing the initial commercial sea link with Northern Europe during the 13th century. In the northern range of the continent, the Hanseatic League of German ports operated as the supreme commercial master of the game, anchoring specialized factories (*comptoirs*) across diverse coastlines stretching from London to the deep Baltic.

During the 15th century, Portuguese navigators explored the West African coastline, ultimately opening direct transoceanic commerce with Asia, anchoring loops with India, the East Indies, China, and Japan. Simultaneously, Spanish expeditions discovered and systematically placed into colonial exploitation the new American continent, while Africa was weaponized as a reservoir for a catastrophic slave labor trade. By the 17th century, England, the Dutch Republic, and France experienced a massive surge in power, driving a European hegemony tailored around spheres of resource extraction, colonial servility, or mercantile trade. European geopolitics was sequentially written across the global oceans. While early bilateral treaties between Spain and Portugal originally partitioned the planet, it was through the roar of naval artillery at sea and landward cannons that Anglo-French-Dutch rivalries were bloodily arbitrated.

The independence of American nations at the close of the 18th century and the dawn of the 19th century transformed Europe's relationship with that part of the world into commercial trade relations, heavily propelled by the monumental wave of transatlantic migration. The 19th century stood as the golden age of undisputed European global domination: Africa and Southeast Asia were carved up into colonial domains, India—henceforth directly connected via the opening of the Suez Canal—was economically ravaged by British imperial emprise, and Imperial China was forcibly subjected to Western concessions and commercial interests.

Nevertheless, this global domination could not permanently prevent the rise of greenfield superpowers—the United States, the Russian Empire, and Meiji Japan—nor the dangerous escalation of imperialist rivalries between European powers themselves.

World War I operated as the premier military apocalypse of the 20th century; yet, Europe remained the undisputed epicenter of the planet, commanding empires from the executive cabinets of Paris, London, Brussels, The Hague, and Rome. While the colonial grip was preserved, the critical paradigm of crude oil logistics rapidly emerged across the Middle East.

However, Europe concurrently suffered a profound ideological fracturing, torn by systemic confrontations pitting liberal democracies, the USSR, and extreme-right fascist dictatorships against one another. World

War II reduced these blocks to a binary East-West layout, and Europe permanently lost its historical global primacy. The maritimity of the Old Continent changed radically within a few years: henceforth, the United States ascended as the dominant superpower anchoring the Western world, while forced decolonization movements progressively shrank Europe's global imperial footprint.

During the 1950s, Europe was violently sliced in two by the Iron Curtain, seeking existential protection under the American nuclear umbrella and the framework of the North Atlantic Treaty Organization. Economically, once post-war reconstructions concluded, Western Europe locked in a historic two-decade cycle of intense macroeconomic expansion—the famous *Trente Glorieuses*.

Throughout this boom, Europe stood entirely dependent on crude oil imports from the Middle East, a strategic region whose geopolitics rapidly transformed into the exclusive domain of Washington and Moscow. Europe steadily reduced its global projection, even though the British Commonwealth and Gaullist foreign policy temporarily maintained remnants of grand strategy for London and Paris, supplemented by their preserved Overseas territories which secured a global maritime projection and massive EEZs for both nations.

During the 1950s, the Europe of merchants and industrialists successfully reinvented itself through the historical launching of European integration. Shifting over successive decades from the EEC (*CEE*) to the European Union (EU), member states engineered a unified single market backed by a shared currency embraced by a majority of nations.

The cumulative maritimity of the European bloc expanded with each consecutive enlargement wave, even though the Brexit of 2020 inflicted its premier historical territorial retreat. Today, a core macroeconomic reality of the European space—comprehensively encompassing non-EU partners Norway and Iceland—resides in the ultra-dense short-sea shipping grid interconnecting every coastline of its internal seas. Europe no longer rules the world; yet, it has never been so deeply integrated, encompassing the most advanced economies of the Mediterranean littoral, including Morocco, Tunisia, and Turkey. This Euro-Mediterranean common marketplace functions as an indispensable factor of regional geostrategic stabilization.

An Economic Superpower Within a Hyper-Globalized World

Europe's macroeconomic equation remains straightforward: it commands continuous requirements for raw materials, energy commodities, and mineral ores. However, the systematic reduction of energy dependencies, the structural implementation of environmental greening, and progressive domestic deindustrialization have mechanically mitigated a portion of this strategic dependence. In 2025, Europe imported approximately 85 million tonnes (Mt) of iron ore (contrasting with 105 Mt in 2019), 62 Mt of coal (down from 109 Mt), and 455 Mt of crude oil (compared to 475 Mt). This distinct form of European "de-petroleumization" successfully reduced the geostrategic risks traditionally tied to Middle Eastern choke points by diversifying supply ranges toward alternative exporters (including Algeria, Libya, West Africa, Kazakhstan, Azerbaijan, and Russia).

The secondary energy dossier centers on natural gas. Over recent decades, an energy-intensive Europe steadily phased out its reliance on coal. Mirroring the industrial trajectory of developed Asia, natural gas expanded in strategic relevance. In 1973, the first cubic meters of Soviet methane crossed into Bavaria; West Germany—following an identical infrastructure path as Italy—enacted the political choice to prioritize natural gas over nuclear energy, a strategy directly inverse to that pursued by France. By the late 2010s, Liquefied Natural Gas (LNG) transformed into a core pillar of the European energy mix, as local decarbonization mandates required substituting coal with gas across Spain, France, and the United Kingdom, pulling from a heavily diversified range of LNG source countries (Algeria, West Africa, and Qatar).

For Berlin, industrial growth since the 2000s demanded massive energy inputs, and the political decision to completely phase out nuclear power built a structural economic dependency linking Germany directly to Moscow. In 2012, the Nord Stream subsea Baltic gas pipeline entered full commercial operation. Capitalizing on its massive oil and gas windfalls, Russia found itself "economically rearmed" by European capital. Although repeatedly confronted with the Global Financial Crisis of 2008 and its own sovereign debt crisis of 2011, Europe intended to fully capture the growth cycles propelled by globalization while explicitly tolerating its energy dependence on Moscow.

Free trade has consistently operated as the core doctrine of Western Europe, serving as the third pillar of the global Triad alongside the United States and Japan. Free trade defines the operational mechanics of the EEC and subsequently the European Union, governing relations with Mediterranean rim nations as

well as the wider planet. European diplomats heavily backed the creation of the World Trade Organization in 1994 and accepted China's landmark accession to the WTO at the close of 2001, a move masterminded by Washington.

Consequently, European maritimity is deeply intertwined with hyper-globalized free trade. European corporations actively participated in the mass outsourcing of manufacturing and transnational subcontracting networks. Containerization operated as the ultimate logistical tool to repatriate manufactured consumer goods from Asia, alongside high-value agri-food commodities extracted from the Southern hemisphere. Today, Europe imports approximately 30 million laden TEUs annually.

Symmetrically, containerization anchors European global exports. Industrial manufacturing on the continent is historically turned toward the North American market (shipping 5.2 million TEUs in 2025) but also targets rapidly emerging East Asian marketplaces (6 million TEUs), while preserving robust supply chains with the Middle East and the Indian subcontinent (3.8 million TEUs), Latin America (2 million TEUs), Sub-Saharan Africa (2.2 million TEUs), and Oceania (0.6 million TEUs). Because these exported commodities predominantly encompass high-value-added industrial tiers, they contribute decisively to maintaining a positive trade balance for the European Union.

The European Maritime Reality and Shipping Resiliency

The maritime transport sector serves as the absolute backbone of the continent's prosperity. It goes without saying that this sector adapts across centuries of historical cycles, shifting from legacy colonial monopolies and the early stages of merchant shipping to contemporary hyper-globalization. To be historically precise, the unraveling of European colonial empires during the 1950s and 1960s did not prevent the preservation of a dominant European maritime power across all operational sectors and trade corridors interconnecting the continent to the rest of the world.

In practice, the retreat of direct European territorial control did not hinder family-owned shipping lines from preserving an exceptionally high density of loops across every global maritime range. Regarding corporate longevity, and with the sole exception of the United Kingdom, the European shipping base suffered zero structural decline or flight of its shipowning fabric, contrasting sharply with the total industrial retreat experienced by the United States.

European maritime transport successfully massified its fleet capacities even as powerful greenfield actors accelerated across Asia: emerging initially during the 1950s in Japan, expanding throughout the 1980s in South Korea, Taiwan, and Singapore, and culminating after 2000 with the rise of mainland China.

Nevertheless, the supreme strength of the European maritime world resides in its verified capability to preserve its global power far beyond the raw import requirements of the continent itself. This structural reality is highlighted in a milestone institutional document published by the European Community Shipowners' Association, reminding that while Europe represents merely 9% of the global population and generates 25% of the worldwide GDP, it controls a monumental 35% of the global merchant fleet, aggregating a unified network of 14,000 vessels.

The ECSA resoundingly claims €183 billion in direct corporate turnover, supplemented by an indirect economic spillover impact of €128 billion, while sustaining 1.4 million highly specialized European jobs. The audit forcefully affirms the critical role wielded by the European maritime fabric in anchoring sovereign energy, logistical, and food security matrices. European maritimity is structurally capable of covering the continent's domestic requirements while extracting massive freight revenues to feed the wider continental macro-economy.

The sheer weight of these statistics unassailably imposes the eminent position of Europe (comprehensively encompassing the EU, the United Kingdom, Switzerland, and Norway). In 2025, eight European conglomerates were firmly entrenched within the Top 20 ranking of the world's largest shipowners. In terms of specialized fleet segmentation, Europe masterminds: 38% of global crude oil, and product tankers, 33% of global LNG carriers, 30% of global dry bulk carriers, 29% of global car carriers (PCTC), 49% of global cellular container ships.

Within the elite Top 5 of global containerization, the undisputed world leader is MSC, positioned immediately ahead of Maersk, with CMA CGM capturing the third position, and Hapag-Lloyd locking in the 4th rank. When factoring in their vertical integration and extensive global grid of proprietary terminal handling concessions, Europe's market stranglehold turns even more overwhelming.

Naturally, this European maritime powerhouse operates as a sophisticated industrial assembly spearheaded by two hyper-specialized seafaring nations: Greece and Norway. This ecosystem concurrently clusters Denmark—homeport to the giant Maersk, alongside *DFDS* and the *Lauritzen*

Group—Sweden propelled by *Wallenius Wilhelmsen* and *Stena Line*, and the heavy German shipowning houses of Bremen and Hamburg, the distant commercial heirs to the medieval Hanseatic League. Italy commands a high-performance maritime tradition driven by the *Grimaldi Group*, alongside the Aponte family's masterminding of MSC—although strategically headquartered in Geneva. Finally, since 1995, France has consolidated its historical shipping heritage through the meteoric expansion of the Saadé family's CMA CGM, building an undisputed global leader in logistics and shipping.

Geopolitical Storms Raging Around the Old Continent

In macroeconomic terms, contemporary Europe collectively wields an economic weight identical to that of the United States. From a maritime standpoint, however, a profound, systemic dichotomy unfolds: to the Old Continent belong the flows of global merchant commerce, while to the United States belongs the monopoly of global naval power.

This configuration stands as the direct legacy of the post-WWII structural settlement: to the United States went the global leadership of the liberal free-world camp, backed by the unmatched leverage of a massive financial, technological, industrial, and agricultural economy, an undeniable cultural soft power, and heavy military and naval force projection elements deployed across every corner of the planet. Conversely, shielded under the American nuclear umbrella and the security grids of NATO, European nations were fully empowered to focus on engineering their internal single market integration and fine-tuning their specialized industrial, commercial, and maritime economic capabilities.

The collapse of the Soviet bloc, the strategic anchoring of Eastern European nations, and the tightening of economic bonds with Russia collectively infused Europeans with a deep sense of security. Concurrently, the structural shift of the world's gravity center toward the Asia-Pacific has manifested since 2000 through two twin phenomena: on one hand, globalization, which transformed the Far East into the undisputed "workshop of the world," and on the other hand, the Obama administration's strategic pivot toward Asia, shifting Washington's primary focus away from traditional Atlantic frameworks to Pacific perspectives, particularly around China—operating concurrently as a paramount trade partner and a fierce political rival. This overarching concept of the Indo-Pacific theater clusters even more remote regions, yet sits exceptionally far from Europe's geographic core; notably, France stands as the sole European power capable of operationally integrating into this concept, by virtue of its sprawling network of Overseas territories.

During this era, Europe remained focused on its internal economic performance metrics or structural crises, notably the Eurozone sovereign debt crisis (2011–2015) and the Brexit shock of 2016. Global multilateralism and economic globalization continuously generated greenfield commercial partners, and comprehensive free-trade agreements were deployed to streamline trade loops, highlighting landmark treaties signed with Japan, South Korea, and Canada, alongside protracted negotiations with the *Mercosur* bloc.

Naturally, Europe could not remain entirely insulated from global security disruptions. The 2011 Arab Spring violently triggered the emergence of the Islamic State (ISIS) in the Middle East, mandating a joint Euro-American military and aerial intervention. Simultaneously, the continent had to compose with the aggressive resurgence of Vladimir Putin's Russia, marked by the brief war in Georgia in 2008 and the unilateral annexation of Crimea in 2014. As for China, Beijing established itself as an indispensable commercial partner yet a formidable trade rival, forcing Western Europe to thoroughly monitor its global diplomatic offensives, such as the sweeping Belt and Road Initiative (New Silk Roads).

By the mid-2010s, Europe successfully exited its cyclical economic contraction, hoping to permanently secure its positioning within globalized trade lanes. By political nature, European chancelleries heavily preferred Democratic administrations in Washington; yet, they were forced in 2017 to compose with the Republican administration of Donald Trump, whose flagship foreign policy resoundingly challenged the principles of multilateral free trade.

Throughout that initial Trump mandate, the commercial tariff war was overwhelmingly directed against a targeted China, branded by the White House as solely responsible for America's domestic deindustrialization and macroeconomic decline. Nevertheless, in a sharp blow to transatlantic solidarity, the United States concurrently imposed draconian 25% customs tariffs on European steel and a 10% levy on European aluminum imports in 2018.

Then came the great pause of the global public health crisis, which temporarily broke the momentum of Washington's challenge to economic globalization. Europe could then consider that Donald Trump's electoral defeat in 2020 removed the immediate threats weighing on free trade. The containment of the

COVID-19 pandemic was supposed to usher in better times; yet, they never materialized, as in February 2022, Russia launched its invasion of Ukraine. The aggressive sanctions policy enacted by the EU stands as one of its primary pillars of support for Kyiv. In practice, it completely shatters the structural economic bond built over two decades, which had established Russia as the premier energy supplier to the EU.

To the rigid importation bans targeting Russian coal, crude oil, and refined petroleum products—coupled with the upcoming baseline prohibition on natural gas—have been added successive rounds of sanctions packages. These include stringently targeted maritime provisions that form a genuine economic warfare against Moscow. Everything is by no means flawless; the war against the shadow fleet circulating through European waters could be heavily muscled up, and the two recent high-seas naval interventions executed by the French Navy to audit vessel legality provide a potential blueprint for state action.

The structural decoupling from Russian energy forces a rapid migration toward alternative supply markets, drawing from two primary resources: the Middle East and the United States. Initially, the Persian Gulf secured the short-term supply relay; today, however, it is the United States that provides 14% of Europe's crude oil, 24% of its refined products, and 28% of its coal.

The alternative challenge centers on the substitution of Russian natural gas—both overland piped methane and seaborne LNG—and here again, the United States has captured the lion's share, masterminding 59% of European gas imports in 2025. Consequently, the historical geoeconomic deal with Moscow, destroyed by the war in Ukraine, is replaced by an ultra-dense transatlantic energy corridor, unfolding at the exact historical juncture when Washington is heavily mistreating us. Multiple critical voices are already calling to aggressively avoid the structural pitfall of a greenfield, single-source dependency.

As a global superpower, Washington is mandated to involve itself across all regional theaters, facing local strategic chessboards that are turning increasingly complex. Within the Middle East, the deep individualization of the geopolitical postures chosen by regional protagonists (Turkey, Egypt, Saudi Arabia, the UAE, and Qatar) structurally accelerates the fragmentation and fuels antagonisms across localized civil wars (Libya, Yemen, Sudan). The region is becoming increasingly illegible for European diplomats, who can only hope to prevent a total systemic degradation linking Israel and Iran. Any major regional escalation would exert catastrophic consequences on crude oil spot prices, mechanically penalizing the European macro-economy through intense inflationary echoes.

The Hamas attack on Israeli territory in late 2023 and the subsequent war in Gaza triggered the unexpected involvement of the Houthis rebellion in Yemen, directly targeting international merchant shipping throughout the Red Sea. For two years now, global containerized and bulk flows have massively bypassed the region to reroute around Africa via the Cape of Good Hope without major structural economic collapses. While European naval surface assets have been operationally deployed to secure the southern Red Sea (*Operation Aspides*), the European maritime economy is anxiously awaiting a risk-free return of merchant transit through the Bab el-Mandeb Strait, while deeply dreading the regional impact of joint US-Israeli strikes against Iranian assets.

The latest disruptive variable tearing through global markets stems directly from the transactional diplomacy of Donald Trump. His greenfield commercial policy translated into sweeping customs tariffs that every sovereign partner is mandated to individually negotiate with Washington—including the European Union, which currently composes with a 15% tariff baseline, although its long-term legal future remains erratic following the Supreme Court's systemic reconfigurations of executive and presidential authority.

As a premier global exporter, the EU remains fiercely attached to multilateral free trade; it must rapidly finalize its free-trade agreement with the *Mercosur* bloc and seal comprehensive treaties with India and Australia, while simultaneously preventing its single market from being completely drowned under cheap, mass-manufactured Chinese goods.

Europe must carve out its positioning within the economic multipolarity of globalization; yet, this operates as the single easiest task for European policymakers. Conversely, securing a coherent stance within the wider geopolitical multipolarity is vastly more complex. For the contemporary era, this manifests as a frontal, uncompromising opposition to Russia alongside Ukraine.

Beyond this Eastern front, the Middle East represents a shifting maelstrom where only France and the United Kingdom possess the historical and military capability to project leverage. A symmetric constraint locks in the Indo-Pacific range; it goes without saying that an armed Sino-Taiwanese conflict would confront the EU with deeply embarrassing, existential questions regarding its economic dependencies on Beijing.

What is frankly difficult to endure from a geostrategic standpoint is the deepening fracture tearing through the transatlantic alliance, single-handedly driven by the Trump administration—a decoupling that expands vastly beyond the provocative dossier of buying Greenland. Europeans are struggling to accept what appears to be the terminal erosion of the historic transatlantic nuclear and military umbrella.

The Europe of merchants and industrialists is now structurally mandated to transform into a Europe of diplomats and soldiers. Projecting to trade across global seas with the entire planet commands a completely new strategic dimension from Europeans. To the post-colonial retreats of the 1950s and 1960s has succeeded a hyper-globalization that does not exclusively operate as a peaceful arena of commercial trade under the aegis of the god Mercury; it fundamentally requires accepting the return of high-intensity conflictuality under the aegis of Mars. As for the affairs of the sea, unfolding under the sovereign aegis of Neptune, the underlying metrics remain, to this day, eminently positive and resilient for Europe.

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