



The EU Between Fractured Responses, Security Recalibration, and Realignment Strategies

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Executive Summary

The implications of the decision of the United States and Israel to launch military action against Iran exceed issues of energy, economy, and regional stability. Its repercussions are global in nature and raise fundamental questions about future order and the overall reliability of the United States. To be sure, China and Russia could potentially gain more power, not to the extent where they replace the U.S., but to the point that they could exploit the gaps that present themselves – whether in terms of regional influence, the energy market, or diplomatic norms.

The EU, meanwhile, is struggling with its response. The attacks have raised alarming questions about the bloc's strategic autonomy, its energy security, international norms, transatlantic relationships, and its overall global relevance, particularly in the Middle East. The European bloc's initial reactions mixed elements of hesitancy, caution, condonation, defiance, and support for regional allies. This demonstrated a major attempt at balancing levels of internal cohesion with solidarity with the GCC

states, limited criticism of the U.S. and Israel, while upholding the bloc's legal-normative commitment to de-escalation and multilateral diplomacy. Such a balancing act, however, can also be characterized as a lack of overall strategic direction.

For the GCC, Iranian attacks on Gulf territory gradually marked at least the temporary end of GCC-Iran rapprochement. It raised questions about the viability of American security guarantees and about the bloc's internal dynamics. It has led to calls for a new approach to Gulf security. At the same time, the ongoing developments will provide strategic openings to further enhance and possibly recalibrate the EU-GCC relationship, and reposition, on both individual and collective levels, the blocs' relationship vis-à-vis other parties.

EU Reactions: Balancing Support and Restraint

The initial EU reactions revealed internal, institutional contradictions. While [Ursula von der Leyen](#), President of the EU Commission, indirectly supported the attacks and called for a regime change in Iran built



on “credible transition” that reflects “the democratic aspirations of the brave people of Iran,” the EU’s [Kaja Kallas](#), High Representative of the Union for Foreign Affairs and Security Policy/Vice President of the European Commission, contextualized the situation within the framework of regional escalation with global security, diplomatic, and energy ramifications. Characterizing the developments as “perilous” and “dangerous” with no direct endorsement or condemnation of the attacks, Kallas framed her response to highlight the global implications of the conflict rather than justifying the attacks.

Individual EU member state leaders emphasized their non-participation and rejected regime change as a policy goal. French President Emmanuel Macron reiterated that the attacks fall outside the framework of international law, refusing to participate in further escalations. In addition to Germany’s Friedrich Merz, Macron reaffirmed the longstanding demands that Iran suspend its nuclear program, restrict its ballistic missile aspirations, cease destabilizing activities in the region, and halt the repression of the people of Iran. [Spain](#) remained the most outspoken critic of the unilateral

military intervention, projecting a clear public and institutional characterization of the strikes as “unjustified” and a breach of international law, highlighting that any cooperation should remain within the existing UN treaty framework.

On Iran’s attacks on GCC countries, EU leaders quickly and collectively reaffirmed their support for GCC sovereignty, security, and self-defense. The EU-GCC extraordinary ministerial meeting held on March 5, 2026, and subsequent diplomatic exchanges with GCC leaders, reaffirmed the EU’s explicit endorsement of the GCC’s right to take “[all necessary measures](#)” for its defense, security, and stability. In addition, individual EU states such as [Italy](#) and France indicated supplying military aid to the GCC, particularly air defense, in order to neutralize Iran’s launch capabilities that threaten GCC territory. [Germany](#), on the other hand, indicated no intention of sending additional military support. &D

At the bloc level, crisis management and economic security have been at the forefront of the EU’s response. The escalating tensions carry both predictable and unpredictable, as well as short and long-term, implications on



global energy supply and security. Iran's attacks on critical GCC energy infrastructure, the near-complete closure of the Strait of Hormuz and rising global energy prices all counteract the EU's diversification efforts to break away from Russian energy supply. Here, the EU continues to stress the need to safeguard freedom of navigation and maritime routes.

In addition to coordinated diplomatic efforts to pressure Iran to halt its strikes, such as UN Security Council [Resolution 2817](#) (2026,) the EU response has been limited to the potential extension and geographical adjustment of Operation Aspides and related naval deployments for solely defensive reasons, even as EU leaders continue to express unwillingness to join President Trump's call for a larger coalition to forcibly reopen the Strait. Ongoing debates highlight EU leaders' reluctance to expand the mission, noting skepticism about its [effectiveness](#), and the significant legal, bureaucratic, and political concerns surrounding it. For European leaders, there are fundamental questions of mandate and mission at play here, with Europe wanting to avoid being drug into a conflict only to be held hostage to Trump's coercion.

Instead, the EU's support indicates a security-oriented trajectory that focuses on reinforcing the GCC's self-defense capabilities while ensuring that the mission remains defensive and effectively contains the spill-over from unilateral military actions. Yet, given that the decisions are taken at the individual EU member state level, the overall EU response has remained limited and, as a result, largely ineffective. Internal contradictions and the lack of bloc-level coordination continue to hinder the EU's ability to act as a unified, assertive agent. Moreover, while reluctance to align with the U.S. is intended to preserve the bloc's strategic autonomy, it has also reduced its leverage to respond more substantially to GCC defense needs. This, in turn, raises trust concerns within the GCC, while highlighting the growing gap between ambition and reality in the proposed EU-GCC Strategic Partnership approach.

EU and GCC Realignment: Key Scenarios

Given the aforementioned, several realignment options present themselves, which ultimately affect the broader EU-GCC relationship.



GCC Realignment:

- o *Driving harder bargains amidst great power competition:* The current escalations have proven that although the GCC may not be geographically advantaged, the bloc still holds strategic importance that can be leveraged by member states to reshape their partnership against the backdrop of great power competition. The GCC could demand more security guarantees from Brussels, Washington, and/or Beijing, in return for access to GCC energy exports, airspace, and bases, as well as overall cooperation with the bloc.
- o *Elevating GCC agency in regional crisis management:* The war has underscored the potential of GCC states to present themselves as more than mere hosts of great power projection. The GCC, both as individual states and as a collective bloc, is deeply concerned about the scope and direction of evolving dynamics and can leverage its strategic location to serve as an indispensable crisis mediator and manager. This could be done by further developing new and existing mediation and hedging efforts to propose practical de-confliction mechanisms and structured regional

security dialogues. The outcome is twofold: claiming institutional and operational ownership over post-war regional security architecture and increasing legitimacy, vis-à-vis third partners, of GCC agency and indispensability for any effective, durable arrangements.

- o *Accelerating internal defense integration:* The Iranian attacks revealed the strengths of GCC defense, but equally exposed its weaknesses. The gaps identified in political-military coordination (fragmented GCC-level coordination) air and missile defense (saturation vulnerability), the exposure of critical infrastructure and economies, as well as a lack of comprehensive civil protection, necessitate a rethinking of the GCC's defense strategy to a more integrated level, both on the individually and collectively. The focus here would be on, among other things, accelerating stagnant discussions on interoperable defense architectures, joint procurement, and early warning systems. A more integrated posture presents the bloc as a unified security agent and increases its bargaining power with third parties. A GCC-centric security architecture could rebalance



regional security dynamics by inviting and collaborating with the EU and NATO on maritime security awareness and missile defense networks.

- o *Deepening diversification:* The GCC states' national visions remain vulnerable to disruptions to maritime chokepoints and energy infrastructure. GCC countries can shift to accelerating investments in advanced manufacturing, war-resilient logistics corridors, regional food security, and digital services. Diversification here combines both the domestic (reform) and international (as a global public good) dimensions. This projects a secure GCC in the face of potentially prolonged Iranian coercive strategies.

EU Realignments:

- o *The new regional security "manager," finally?* The current developments offer the EU the opportunity to claim a distinct role safeguarding critical energy flows and sea lanes and coordinating crisis-response mechanisms, as well as air and missile-defense support, without necessarily entering a

U.S.-offensive posture. The aim is to establish a gradual, yet visible, presence that institutionalizes EU security within the Mediterranean theater but also extends into an integrated Southern arc that includes the Red Sea and the Gulf Peninsula. This operational contribution will help strengthen the EU into a more geopolitically relevant stabilizer and de-escalator rather than a regime-change actor.

- o *Recalibrating strategic autonomy via the Gulf:* The theater in construction can help the EU with its quest for strategic autonomy. Vis-à-vis the U.S., the EU should operationalize its selective engagement without decoupling from the U.S. A substantially more supportive approach to Gulf security and Iran deterrence, while cautious on regime change, will help highlight that autonomy in the EU context is not anti-Americanism but based solely on differentiated red lines, threat assessments, and response instruments. Vis-à-vis Russia, EU-GCC deepening cooperation can help circumvent and weaken Moscow's energy leverage over the EU while enhancing support for Ukraine.



- o *Re-anchoring the Southern agenda:* Despite the EU's renewed interests and initiatives to reposition itself in the Southern Neighborhood, the bloc's recent attempts have been perceived as symbolic promises of renewal yet repackaging of old approaches. The EU is offered, and should seize, the opportunity to re-anchor Gulf, Mediterranean, and Red Sea security as interconnected components of EU security. By arguing for more political attention and resources for the Neighborhood, Brussels can repair its credibility gap and perceived eastern-centric security policy, presenting a more balanced, comprehensive portfolio of commitments.
- o *Win-win trade-off - Ukraine support for Gulf help:* A growing concern within the EU is the U.S. shifting attention from Ukraine to the Middle East, and ongoing trade-off negotiations between Washington and Moscow, such as the Kremlin stopping sharing intelligence with Iran if Washington ceases to supply Ukraine with intelligence about Russia. However, if leveraged effectively, the EU's emerging role in Gulf security can allow the bloc to argue for more sustainable and

predictable long-term U.S. commitments on Ukraine. In return for shouldering more responsibility supporting GCC self-defense, protecting shipping lanes, and managing some regional spillovers, the EU can frame its 'help in the Gulf' as part of a larger burden-sharing package contingent on Washington's engagement in Ukraine. Though delicate, the logic of the trade-off offers the EU a negotiation advantage with the Trump administration and the possibility to align both parties' security priorities - at least to a certain level. Furthermore, this will enable the EU to combine its Southern re-anchoring with the sustainability of its eastern priorities.

EU-GCC Realignment Strategies

- *Co-Ownership of Regional Diplomacy:* Rather than the limited "EU supports" and "GCC welcomes" approach, both blocs should seize the opportunity to achieve co-ownership of regional diplomacy, developing and establishing new diplomatic frameworks on maritime security, stabilization tracks for Lebanon, Syria, and Yemen, and de-escalation with Iran. As a co-owned framework, each bloc would be able to leverage



its comparative advantage, which, if effectively managed, would signal the weight of the partnership as a sustainable, indispensable, and credible regional arrangement. This also gives weight to both blocs on an individual level vis-à-vis other great powers, mainly Washington, Beijing, and Moscow.

- *Institutionalizing a Joint Regional Security Framework:*

- o *Rephrasi regional security agenda:* The war emphasized interconnectivity vulnerabilities, and the EU-GCC cooperation should seize the opportunity to reshape the regional security agenda into an integrated entity. That is, instead of a file-by-file crisis management approach, the EU-GCC cooperation should develop a single strategic ecosystem that combines, with equal attention, energy flows, migration, food security, maritime security, and unresolved conflicts. The new security framework would prioritize de-escalation, economic resilience, and critical infrastructure protection. This stands against the offensive agendas of the U.S. and Russia in the region and potentially set

terms for external involvements based on joint principles and interests.

- o *Co-develop a new framework with the GCC to negotiate security arrangements with Iran:* A priority for both blocs is to develop a regional security framework to be presented to Iran. This approach would consider the Iranian regional vision and needs. In the short-term, this framework could prove more effective than a ceasefire as it would structurally cover non-interference, respect for sovereignty, missile and drone deterrence, and gradual demilitarization. In the long term, it could establish a mutually agreed-upon regional understanding of security, covering the presence and roles of foreign military bases. This would ensure that EU, GCC, and Iranian threat perceptions and priorities are reflected.

- *Operationalizing Security Cooperation:*

- o *Moving from dialogue to operational security partnership:* While the EU-GCC cooperation



should acknowledge the existing frameworks, it is more rational to expand into a more comprehensive, operational, cross-sectoral strategy. Information-sharing on maritime and drone missiles, practical coordination on missile defense and critical-infrastructural protection, and closer cooperation between GCC and EU navies are primary sectors in which both blocs need to shift from talking about security to jointly managing shared threats and risks. The idea is not to replace the U.S. security umbrella, despite how feasible and/or realistic it may seem, but for the EU to establish itself as a complementary pillar and embed itself into GCC security ecosystems, anchoring its geopolitical and institutional role in tangible deliverables while the GCC diversifies its security portfolio.

- o *Expanding Operation Aspides and building EU-GCC crisis mechanisms for Hormuz:* Though constrained by internal skepticism, bureaucratic, legal, and political concerns, expanding Operation Aspides' naval presence could help mitigate the evolving threats in the

regional maritime theater. The aim should not be to transform the mandate or expand its mission under a larger U.S. coalition to offensively open the strait, but rather to signal the EU's commitment to defending GCC and global security. Brussels should also propose an EU-GCC crisis mechanism focused on Hormuz. This would add a practical layer to the EU-GCC security partnership by sharing real-time information, playbooks for managing crises in the air or at sea, and pre-agreed upon communication channels.

- *Coordinating on Iran and Emerging Power Configurations:*
 - o *Shaping the “day after” in Iran:* Whether it is regime change or the reinforcement of the current administration, potential scenarios for the “day after” are of existential importance to the GCC and EU. Both blocs should focus on joint contingency planning, frameworks for humanitarian access, coordinated incentives or sanctions, or perhaps even eventual reconstruction and transition. Preparing for multiple “day after scenarios” would equip



both blocs with shared instruments and assessments to better position themselves, mitigate regional contagion, and better shape outcomes once the change occurs.

- o *Quadrilateral EU-GCC-China-Iran coordination on collective regional security:* It is evident that American presence in the region is indispensable, but this should not equate to the absence of other actors or under-exploring a more pluralistic architecture in which Washington is no longer the only commander. China's role in the future Gulf security architecture should not be ignored. It could further serve as a bridge between the GCC and Iran, and with the presence of the EU, the countries could explore issue-based coordination. The focus could be less on institutional building but more on creating a structured space where the EU, GCC, China, and Iran can exchange their respective understandings, interests, and concerns on maritime safety, post-war economic stabilization, and crisis de-confliction. This configuration could help gradually integrate Iran into more predictable regional patterns without necessarily aiming to transform its regional ambitions.

Collectively, these EU-GCC realignment strategies would encourage the recalibration of the cooperation between both blocs towards a results-oriented policy and security partnership. These strategies could support the existing partnership framework and help the EU and GCC graduate from reactive observers to co-shapers of the Gulf strategic environment. The transition would enhance both blocs' capacities to anticipate, respond to, and effectively manage crises. Moreover, these shifts would consolidate the EU's geopolitical credibility as a regional security actor and enhance the GCC's strategic diversification, as well as lay the groundwork for a more balanced and pluralistic regional and global security order based on agency and shared norms and mechanisms.

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