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Between Moscow and Tehran: Brussels's Chronic Energy Insecurity

Houda Barroug
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The Kremlin's attack on Ukraine in early 2022 and subsequent scrambling efforts in Brussels to address its energy reliance on Moscow were meant to close a chapter of vulnerability. The bloc's energy realignment was aimed at solving, at least to a certain extent, this conundrum. The response was multidirectional: the U.S. and Norway emerged as the primary volume replacements, absorbing the gaps created by the departure from Russia pipeline gas, while the GCC producers grew in strategic salience, contributing, though not dominating, in volume terms. The GCC's liquefied natural gas cargoes and crude sources supplemented the pipeline flows from the east. While this has reduced the risk of deliberate weaponization by hostile suppliers and decreased some of Brussels's insecurities, it has increased Europe's overall imports, which have been concentrated around a combination of Atlantic suppliers and GCC producers and exposed to maritime disruptions. The US-Israeli joint attacks on Iran, and the latter's retaliation on GCC countries and critical transport and energy infrastructures, have proven that this growing orientation towards the Gulf has rewritten rather than resolved the story of dependency.

The assessment of the EU's realignment from Moscow and its growing engagement with the Gulf reveals new risk profiles across sectors of affordability, availability, acceptability, and accessibility. The domino effect of the regional dynamics raises questions about the EU's growing engagement in the Gulf, particularly whether it is a genuine diversification or an emerging dependency-in-the-making- a scenario which though not yet structurally entrenched, is consolidating faster than the governance frameworks designed to manage it. This is not to say that EU engagement with GCC suppliers is misguided; rather, the trajectory indicates potential replication of the structural flaw at the heart of the Russia model. This is not a current reality, but a foreseeable outcome if current trends are left ungoverned. This raises questions about its sustainability and the future of EU strategic autonomy.

EU's Takeaways from Russian Model:

The pipeline infrastructure under the EU-Russia energy framework rested on features that seemed efficient but proved strategically unsustainable and fragile. Before the 2022 attacks, Russia delivered approximately half of EU gas imports, underpinned by long-term, oil-indexed [contracts](#) that raised exit costs and concentrated market power. This granted Russian suppliers inside-the-border levers, such as in [Germany](#) and [Austria](#); trading desks, where Russia successfully served as a market participant operating from within rather than just an external supplier; and retail supply portfolios.

This architecture was supported by Berlin's Ostpolitik idea, believing that deeper economic integration would stabilize relations. The EU-Russian energy interdependence was treated as a substitute for deliberate resilience-building, despite constant warning signs such as the 2014 Ukraine crisis and earlier [gas disputes](#) in 2006 and 2019. The 2022 Ukraine invasion has proven, however, that this era of interdependence masked asymmetric vulnerability with commercial optimization crowding out security criteria. This is evident in the eventual collapse of flows through key routes and the [rupture](#) of the Nord Stream pipelines in September 2022.



These developments underscored the EU's mistake of commercial interdependence for strategic resilience. Although the existing framework maximized short-term efficiency, it embedded high switching costs and concentrated risks. Addressing the dependency required emergency measures at great political, economic, institutional, and strategic expenses, leaving Brussels more exposed to global energy and transport routes' volatility and vulnerabilities. It reframed Brussels's approach to its strategic autonomy, highlighting the need to prioritize diversification, flexibility, and governance safeguards to avoid recreating lock-ins in new guises.

Trading One Risk for Another: Europe's Energy Realignment and Emerging Geopolitical Vulnerabilities

The EU's engagement with the GCC deepened meaningfully after the 2022 Ukraine invasion. In volume terms, the [primary beneficiaries](#) of the EU's post-Russia diversification are the U.S. and Norway, which became the largest single gas supplier overall. GCC countries, primarily Qatar, grew in strategic importance without yet matching the volume dominance, though the share has declined as Qatar reoriented exports towards Asian markets and could potentially [decrease more](#) under the EU's CSDDD.

In the EU-GCC energy infrastructure framework, each GCC country plays a different role. While [Saudi Arabia](#) provides crude flexibility and serves as a future supplier of low-carbon ammonia and hydrogen, the [UAE](#) brings diversified energy investment and equity in European infrastructure. [Qatar](#), on the other hand, offers scale LNG volumes and pricing tied to its expanding liquefaction capacity. The growing interdependency channels first materialized through the 2022 Strategic Document and continue to gain momentum through ongoing MOUs and [SPAs](#). Despite the modest current volume share, the GCC countries have nonetheless positioned themselves as structurally significant nodes in EU energy security, supply gap planning, and transition frameworks. This engagement differs from the Russian model by providing flexibility (LNG over pipelines) and a greater number of suppliers. However, it did not address the bloc's concentration risks, where even a marginal, but growing share of EU LNG supply transits through the Strait of Hormuz, which is constantly exposed to regional shocks and policy decisions and where disruption effects transmit globally regardless of the EU's proportional dependence. It also did not address the crucial need for coordinated risk management and institutional alliances.

EU's growing engagement with GCC producers has nonetheless reoriented its exposure from a hostile supplier to partners operating within a volatile regional framework chronically characterized by tensions and escalations. The current crisis has highlighted how security shocks translate into supply and price shocks globally, and for Europe, undoubtedly. Sustained disruption of vital infrastructure corridors has removed a substantial share of regional oil supply from the global market and increased prices, especially given the decreased supply and increasing demand among Asian and European demanders. In the present escalation cycle, the dynamics amplifies Europe's exposure to producer risk management and maritime chokepoints, evident in the ripple effects reaching European airports directly and the call for rationing aviation across various member states. This creates a contingency, if not an inevitability, that reprices risk and complicates the bloc's procurement strategies.



So, while growing engagement with the GCC spared the EU from overt weaponization of pipeline flows and deliberate coercion, it finds itself exposed to regional escalation dynamics and the vulnerability of seaborne routes. Though the bloc has succeeded in reducing intent risk, it is now accumulating exposure to a form of energy insecurity defined by events it can readily neither deter nor control.

Between Commercial Engagements and Governance, Transition Coherence, and Strategic Design: An Unmatched Pace

Despite setbacks and deadlocks, the EU-GCC institutional relationship continues to be characterized by an ambitious commercially outpacing architecture- one in which deal-making has consistently run ahead of the frameworks needed to govern it. Nevertheless, the current dynamics point to energy trade without a common treaty framework, binding transparency obligations, and functioning dispute resolution mechanisms. This was evident with the first EU-GCC Summit in 2024, which signaled growing mutual interests and commitments but predominantly only produced declarations rather than enforceable structures. In this framework, energy-specific governance remains absent.

The situation echoes a familiar failure mode, similar to that underlying the EU-Russia relationship, which it was governed by frameworks not capable of withstanding political rupture. This is not to argue against institutional engagement, but for better-designed channels with enforceable commitments and genuine reciprocity rather than ad-hoc, retrospective management in times of crisis. EU internal dynamics and fragmentation exacerbate this, compounding the issue as member states pursue bilateral energy arrangements driven by national urgency and the quest for supply assurances. Moreover, while the GCC countries are investing heavily in renewables and clean hydrogen, which is in alignment with the EU's green deal vision, the current trajectories seem to be prioritizing supply continuity over transition coherence. The framework lacks explicit transition benchmarks embedded in energy agreements. As such, the EU risks building the architecture of future dependency faster than it is building the governance to constraint it, which based on the Russian experience, is a dynamic that can remain invisible until it is too late to reverse.

All in all, the two engagement models differ less in degree than in character. In both cases, supply concentration risks replicating the same structural logic: commercial relationships deepening faster than the political and institutional capacity to manage their failure. The adversarial geopolitical risks, under Russia, have been substituted by ambient ones, where the GCC is bound by complex regional entanglements and exposed to infrastructural instabilities the EU cannot readily deter.

**Houda Barroug is a Researcher at the Gulf Research Center (GRC)*

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المعرفة للجميع



**Gulf Research Center
Jeddah
(Main office)**

19 Rayat Alitihad Street
P.O. Box 2134
Jeddah 21451
Saudi Arabia
Tel: +966 12 6511999
Fax: +966 12 6531375
Email: info@grc.net



**Gulf Research Center
Riyadh**

Unit FN11A
King Faisal Foundation
North Tower
King Fahd Branch Rd
Al Olaya Riyadh 12212
Saudi Arabia
Tel: +966 112112567
Email: info@grc.net



**Gulf Research Center
Foundation Geneva**

Avenue de France 23
1202 Geneva
Switzerland
Tel: +41227162730
Email: info@grc.net



**Gulf Research Centre
Cambridge**

University of Cambridge
Sidgwick Avenue,
Cambridge CB3 9DA
United Kingdom
Tel: +44-1223-760758
Fax: +44-1223-335110



**Gulf Research Center
Foundation Brussels**

Avenue de
Cortenbergh 89
4th floor, 1000
Brussels
Belgium



@Gulf_Research Gulfresearchcenter gulfresearchcenter gulfresearchcenter

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