



Public consultation on the
EU Maritime Security Strategy

SUMMARY OF RESULTS

October 2022

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The Commission services and the High Representative jointly launched a public consultation on the way forward for the EU Maritime Security Strategy. The consultation contributes to a broad reflection on the EU Maritime Security Strategy, to face new challenges and threats.

A safe and secure maritime space is a prerequisite to preserving the EU's strategic interests such as freedom of navigation, external border control and the supply of essential materials. Additionally, it is crucial to protect the economic activities of the EU and its citizens, both at sea and onshore. Effective ocean governance and sustainable blue economy can only be implemented and reach their full potential if an adequate level of maritime security is achieved and maintained.

The European Maritime Security Strategy adopted in 2014 and its Action Plan (revised in 2018) have been the framework to address internal and external maritime security challenges for both Member States and EU institutions and to enhance civilian-military cooperation in this domain. Since their adoption, the global geopolitical context has changed significantly, with increasing strategic competition. The return of war to Europe, with Russia's unjustified and unprovoked military aggression against Ukraine, has brought new threats to maritime security. Maritime zones, critical sea lines of communication and several maritime 'hot spots' are increasingly contested, from the Mediterranean and the Black Sea to the Gulf of Aden, the Strait of Hormuz and beyond the Strait of Malacca. The Indo-Pacific area has become a new centre for global competition. Furthermore, the renewed efforts for stability and security along key trade routes such as the Gulf of Guinea and the Horn of Africa require stronger presence and action by the EU.

New and evolving challenges have arisen: both climate change and environmental degradation have progressed with implications for global peace and security and international stability. Hybrid and cyber threats have grown both in frequency and impact, targeting maritime infrastructure, which is increasingly dependent on digital technologies. The sabotage of the Nord Stream pipelines in September 2022 clearly demonstrates the significant economic,

geopolitical and environmental consequences that attacks on critical maritime infrastructure can have. The emergence of disruptive technologies ask for increased resilience; criminal organisations continue to operate at sea with renewed intensity (e.g. trafficking and smuggling of human beings, trafficking of goods, illicit drugs and weapons), exploiting new modalities and new technologies (e.g. the use of drones, on-line means etc.); the COVID-19 pandemic has also affected maritime security.

The Strategic Compass for Security and Defence for the EU, adopted on 21 March 2022, has provided a new comprehensive vision, as well as tools and actions to address the evolving maritime security challenges. Dealing with these new challenges requires enhanced preparedness and increased assertiveness, new state-of-the-art tools and coordinated actions, making use of enhanced information sharing and improved maritime situational awareness.

In response to the invitation from the Council of the European Union¹, the Commission and the High Representative, in consultation with the EU Member States, assessed and concluded that an update of the European Maritime Security Strategy and its Action Plan is necessary to further align the policy documents with the evolving geo-political context and the new security threats, in line with the guidance provided by the Strategic Compass. This will contribute to the attainment of the goals in the UN 2030 Agenda for Sustainable Development (in particular SDG14), the EU's International Ocean Governance Agenda and the implementation of the European Green Deal.

To support the update of the Strategy, a dedicated public consultation through EUsurvey ran from 16 June to 8 September 2022 to obtain the opinion of the public, including experts, regarding maritime security challenges and possible responses on how to address them. The results of the consultation will help the European Commission and the High Representative to reinforce the role of the EU in maritime security and propose a Joint Communication, providing elements to update the 2014 European Union Maritime Security Strategy and its Action Plan.

1 Through the Council Conclusions on Maritime Security, June 2021.

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CONTRIBUTIONS RECEIVED: NATIONALITY AND PROFILE OF RESPONDENTS

In the public consultation, 43 replies were received from stakeholders from 15 countries, including 13 Member States (Belgium, Bulgaria, Denmark, Estonia, Finland, France, Germany, Greece, Italy, the Netherlands, Portugal, Spain and Sweden) and two non-EU countries (Australia and Turkey). Representatives from the Navy, coastguards, ship owners, the industry, research centres and universities contributed to the consultation. Fifty-four percent of respondents have professional or academic experience in maritime security. Thirty-three percent of contributions come from EU citizens. Twenty-eight percent come from academia and research bodies, 12% from business associations 9% from companies working in areas related to maritime security, and 12% from public authorities). This demonstrates a relatively balanced distribution among actors involved, including citizens, industry, and sound scientific contributions. It is worth noting that no international organisation participated in the consultation.



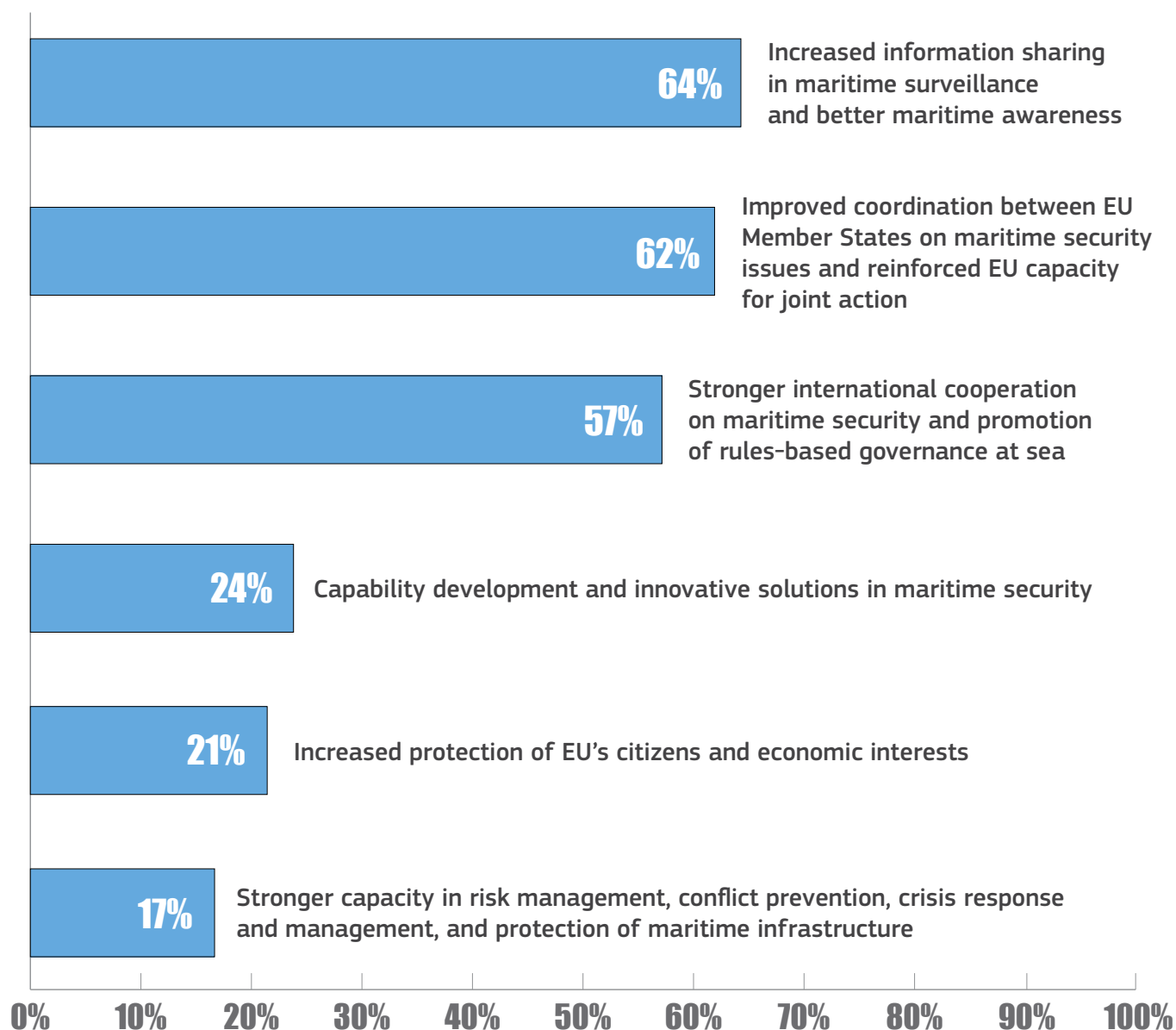
SUMMARY OF RESPONSES AND CONTRIBUTIONS

Almost 70% of the respondents indicate that the objectives of the 2014 European Union Maritime Security Strategy and its Action Plan have been largely achieved. Only 19% consider that the

European Union Maritime Security Strategy and its Action Plan are still fully relevant in addressing evolving maritime security threats.

1. Extent of achievements since 2014²

MAIN ACHIEVEMENTS OF THE EU MARITIME SECURITY STRATEGY SINCE 2014



Regarding the achievements of the European Union Maritime Security Strategy since 2014, approximately 60% of respondents consider that international cooperation on maritime security has been enhanced, that coordination among MS has improved and that information sharing has

increased. Conversely, only about 20% consider that risk management, conflict prevention, crisis response, capability development and innovation have improved, and that protection of EU citizens has been enhanced. In addition, civil-military cooperation on maritime security is considered of

² Respondents were asked to identify the main achievements of the EU Maritime Security Strategy since 2014..

great importance by 70% of respondents. Sixty percent are familiar with the Common Information Sharing Environment (CISE). Respondents indicated that while both CISE and the Maritime Surveillance project (MARSUR) had progressed in technical terms, their operational implementation is yet to be achieved. 79% believe that space technologies, such as satellite observation and geolocation can contribute significantly to enhance maritime security.

The results also highlight the necessity to improve cyber security of vessels, ports, and undersea cables through improved skills and knowledge, more advanced IT technology, and common EU standards.

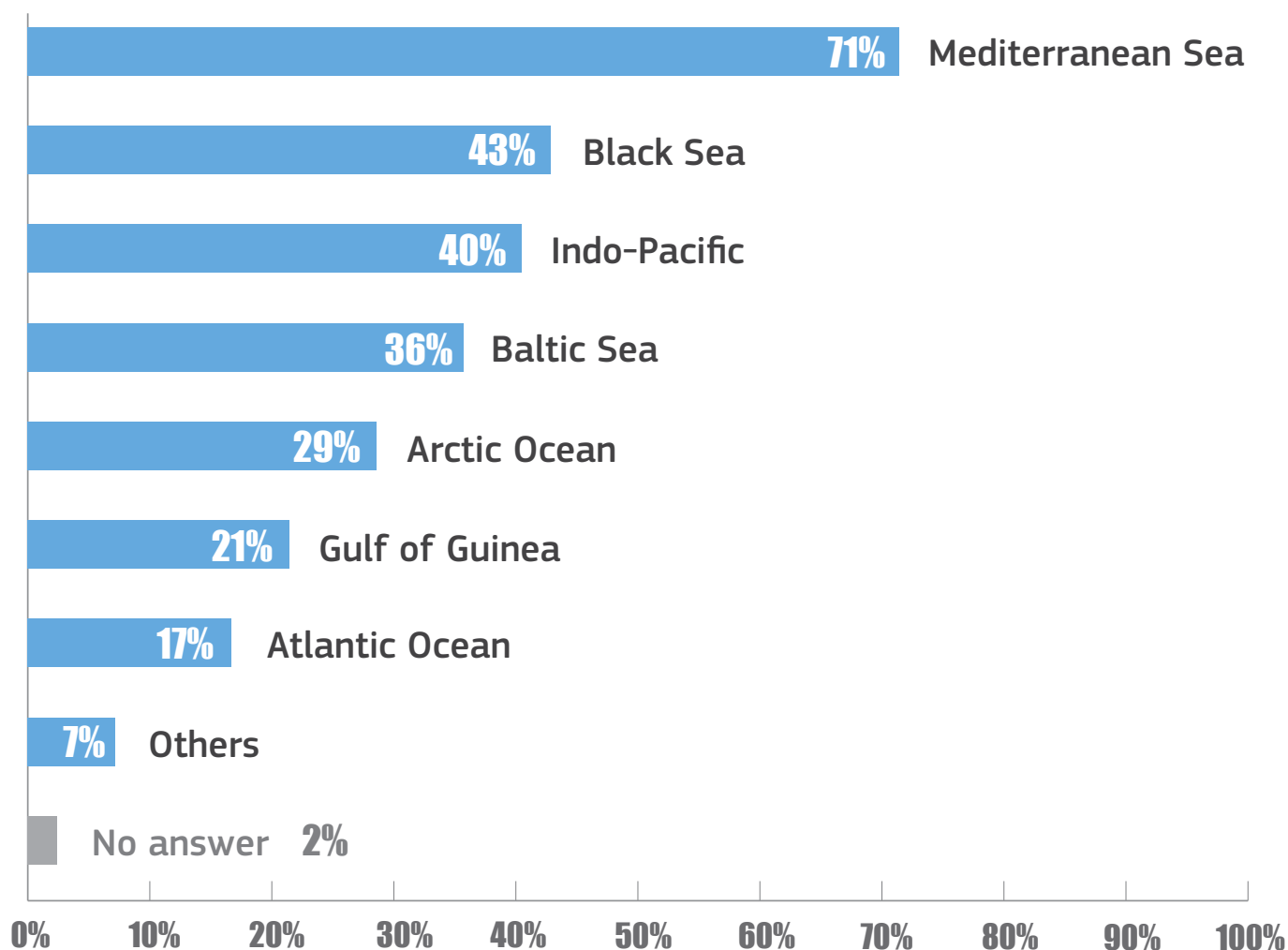
Capability development, along with naval operations, is confirmed as the key instrument for the EU's role in global maritime security. Some emphasis is put on enhancing relationship with NATO and partners.

2. Geopolitical and geographical priorities for the future

Seventy-one percent of respondents identified the Mediterranean as the priority area where the EU should enhance its role and actions in maritime security. A more determined and active engagement of the EU in the Eastern Mediterranean and a greater involvement in EU inter-agency cooperation

among Mediterranean States, including through training, are suggested. Energy related issues in the Mediterranean are also pointed out in the context of the EU energy dependence and of the economic importance of certain maritime infrastructure (e.g. pipelines).

PERCENTAGE OF RESPONDENTS WHO CONSIDER EACH GEOGRAPHICAL AREA A PRIORITY IN TERMS OF MARITIME SECURITY



In terms of geographical priorities³, the Mediterranean is followed by the Black Sea (43%), the Indo-Pacific (40%), the Baltic (35%), the Arctic (28, 6%) and the Gulf of Guinea (21%). More specifically, defence should be prioritised in the Black Sea; security and safety in both the Arctic and the Indo-Pacific.

In terms of other actions that the EU could take to respond to the geopolitical developments affecting maritime security since 2014 and upcoming threats and challenges, some respondents propose to:

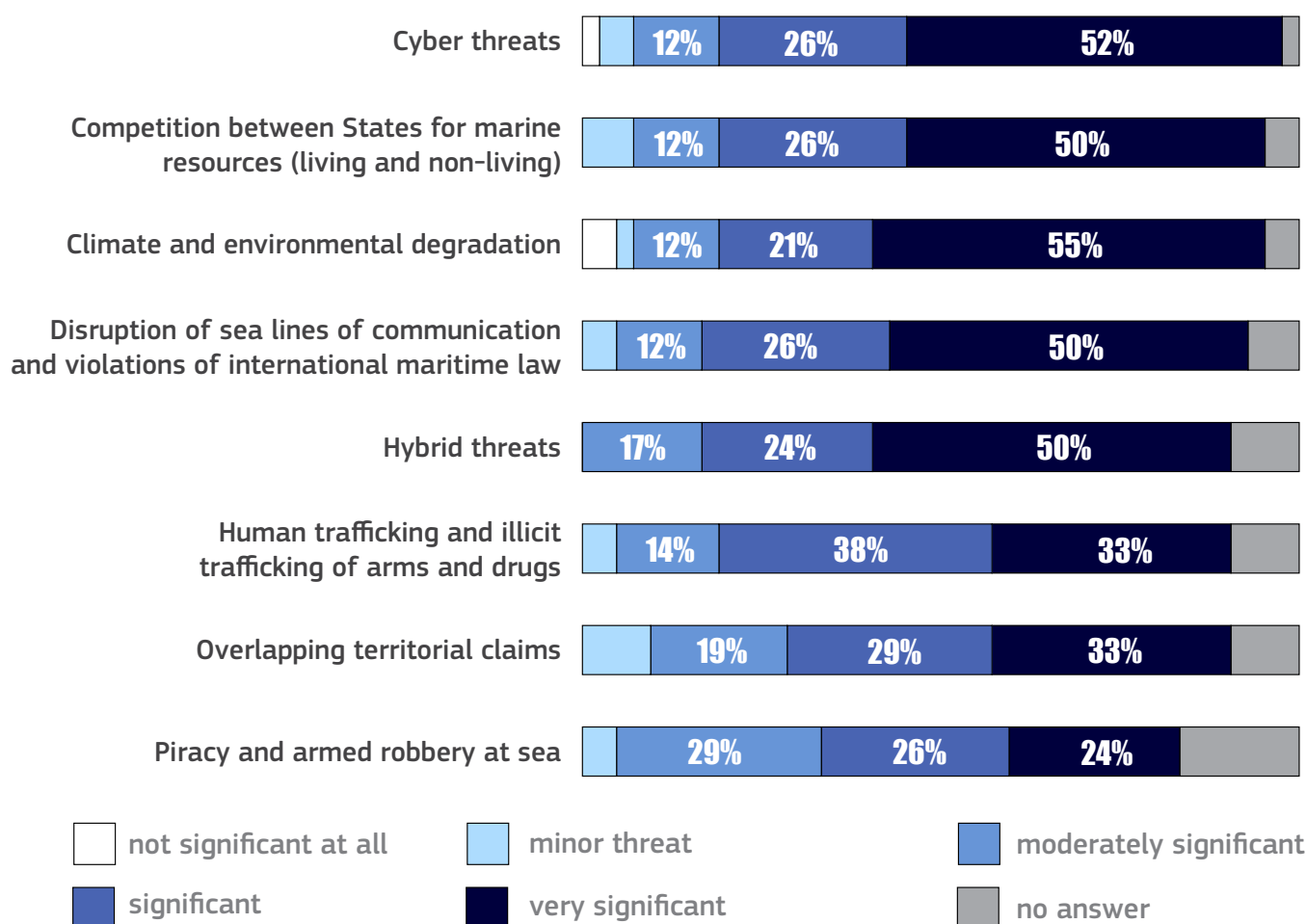
- enhance capacity building in Northern African States;
- better cooperate/integrate naval forces and operations at EU level (in complementarity with

NATO level);

- integrate and streamline EU Member States' naval operations in the Indo-Pacific into the overall EU approach/policy in Asia;
- enhance information sharing Computer emergency response teams, NATO, Europol and interoperability of surveillance systems and maritime data;
- involve and make use of Member State coast guards in capacity training;
- reinforce naval presence and naval diplomacy in high-tension regions (Black, Baltic Sea, Indian Ocean).

3. Main threats to maritime security⁴

SIGNIFICANCE OF VARIOUS MARITIME SECURITY THREATS



³ Respondents were asked to identify up to three geographical areas from the list given, where the EU should enhance its role and actions in maritime security.

⁴ Respondents were asked to rate the significance of each of the maritime security threats listed, from “not significant at all” to “very significant”.

Almost 75% of respondents agree that competition for marine resources (living and non-living) among states is a very significant threat. For instance, focus should be put on tackling the threats related to energy dependence, commercial routes or IUU fishing (for instance by reflecting on a revision of the IUU instruments). Forty-nine percent of respondents indicate that disruption of sea lines of communication (shipping routes), as well as violations of international maritime law, particularly UNCLOS, are significant threats.

At the same time, only 30% indicate that overlapping territorial claims are a major threat. As regards hybrid and cyber threats, more than 70%

of respondents agree that these are very important to address.

Climate and environmental degradation are also considered as substantial, very important threats by 74% of respondents. Some new threats identified in the results are worth noting, for instance those stemming from Russia's war of aggression against Ukraine, as well as reckless actions in the Azov Sea. These include blockades and mine warfare, food and energy security threats, proxy conflicts, disruption of maritime commercial routes, foreign investments in critical infrastructures (ports, shipyards) and disruption of critical maritime infrastructure (above and underwater).

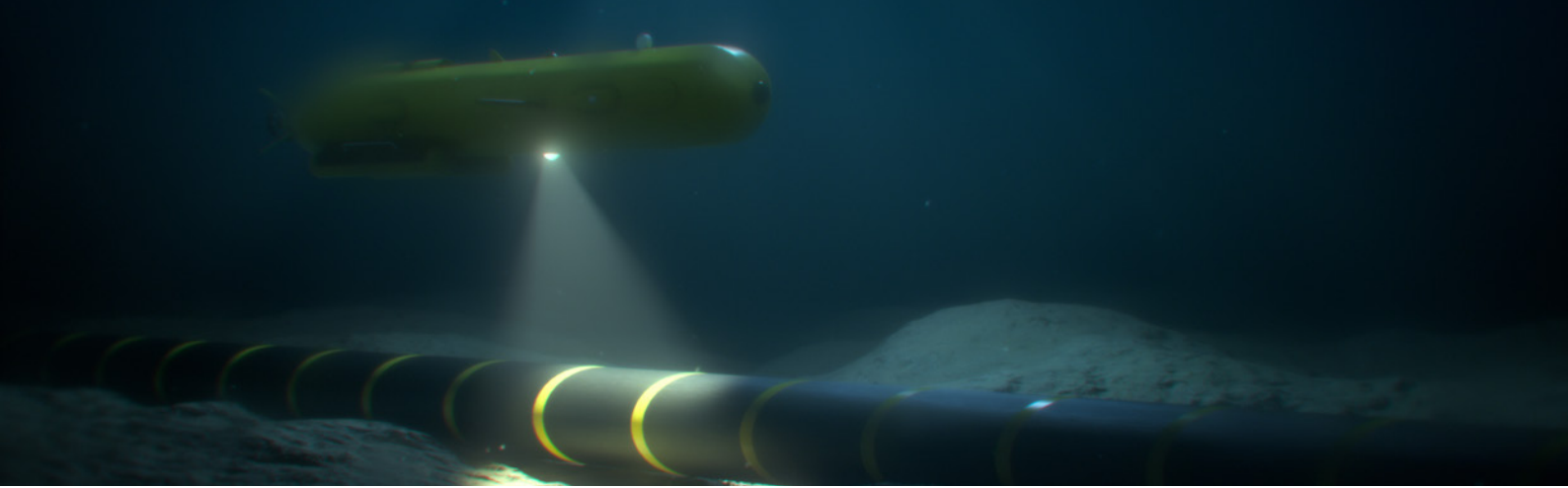
4. The impact of climate change and environmental degradation

A large majority of respondents confirm that actions need to be taken by the EU to reinforce its resilience against maritime security threats caused or exacerbated by climate change, environmental degradation, and competition for natural resources. To address these challenges, 84% of respondents agree that increased cooperation between EU and international partners is important. Enhanced cooperation between authorities and the scientific community, as well as additional investment in this respect, is suggested by 77% of the participants. Developing early warning systems is also largely

recommended (77% of respondents). Finally, conducting risk assessment for critical maritime infrastructure and preparing for disaster recovery is also a preference for 75% of respondents.

With regards to the priorities of the sustainable blue economy, some respondents suggest that offshore wind farms develop appropriate safety plans, resulting from a dedicated analysis of risks and threats. To better protect sea cables, the pooling of a fleet to help repair such cables within the EU is suggested.





5. Preparedness and resilience: facing hybrid and cyber threats

Respondents consider that cyber threats significantly affect maritime security. The majority agree that concrete actions could significantly reinforce the cyber security of vessels and ports and increase resilience and preparedness against cyber-attacks. Respondents deem that strengthening expertise in cyber-security for actors in the maritime domain is the most important challenge. This is followed by the need to ensure a high level of cyber-security standards for IT equipment and ensuring risk assessment and business continuity plans (BCP) and disaster recovery (DRP) for critical infrastructure.

The participants to the survey also recognise that developing a common tool at an EU level to monitor and analyse incidents at sea – both regarding vessels and critical infrastructure – is

imperative. To increase security at sea, including through the protection and resilience of critical maritime infrastructure, capabilities for underwater surveillance and interdiction should be enhanced. Staged civilian-military response plans could also be developed. They believe that there is a real need to improve knowledge and expertise in the domain of cyber security specifically applied to the maritime domain. In addition, recommendations include raising awareness of ‘cyber-hygiene’ across all industries and ensuring implementation of the Directive on security of network and information system (NIS)⁵, which supports a wider culture of cyber security and preparedness across the Union Member States and economic sectors.

6. Maritime situational awareness

Seventy-nine percent of respondents consider that maritime security information exchange between civilian and military authorities is very important, whereas a majority of those who responded consider that the current level of such exchange is very low or not satisfactory.

Most of the participants expressed familiarity with the Common Information Sharing Environment (CISE) (60% of them declared to know it). They also acknowledged the importance for the EU to further improve the exchange of information among Member States and across the various sectors involved in maritime sphere. Some of the actions proposed in this respect are:

- better defining needs in information sharing;
- harmonising classification requirements;
- enhancing responsibilities to share up to RESTRICTED;
- creating a network of networks;
- developing a centralised maritime surveillance information hub to share data among the maritime surveillance authorities, connecting civilian and military actors;
- establishing strong communication among critical ports security management;

⁵ [NIS Directive](#) is the first EU-wide piece of legislation on cyber security. It provides for legal measures to increase the general level of cyber security in the EU.

- considering the possibility of establishing physical joint centres;
- better including industries in policy-making processes, by improving the function of legacy systems; establishing a clear policy for information exchange between authorities and stakeholders;
- establishing multi-mission operations, using the mandate of several EU-agencies and Member State authorities from the same platform (vessel);
- pooling of maritime intelligence (European information centres) through improvement and increase of sources (e.g. satellite) and through diversification (e.g. including ELINT satellite data in data distributed by EMSA for integrated maritime services).

Attention was given to Earth Observation through Copernicus, as a game changer in understanding and anticipating marine events that can have an impact on maritime safety and security operations⁶.

Some participants emphasised that CISE should be promoted as the Common “Gold Standard” for information exchange across civil and military authorities. Some stress the critical importance of maritime domain awareness, including CISE’s important potential as ‘force multiplier’ for the EU in maritime security and the need to enhance efforts to strengthen intra-European architecture. Others suggest that the exchange of information and connection to CISE should be made mandatory for the information systems of the EU agencies.

7. Capability Development, Research, Technology and Innovation

Capability development, R&T and innovation are still considered a priority to strengthen the EU’s maritime security. Respondents indicate that new funding EU tools, such as the European Defence Fund (EDF) and the European Peace Facility (EPF) should be used to support the implementation of the EU Maritime Security Strategy.

Research and innovation work to improve the development of effective maritime capabilities continue to be prioritised by the respondents, to be carried out through national and collaborative projects and programmes, including within the framework of the EU through the European Defence Agency.

Overall, respondents indicate that the EU and Member States should further invest in naval assets and enablers and better link the actions of the Strategy with appropriate funding mechanisms. Some state that improved interoperability is certainly still a necessity. As measures to further develop effective maritime capabilities, respondents suggested enhancing the development and use of autonomous and/or unmanned systems including capabilities for continuous underwater surveillance

(dual-use), remotely operated underwater vehicles, and remotely piloted aircraft systems. Furthermore, it is suggested that radars and sensor performance should be improved and novel early warning technology should be developed.

Regarding disruptive technologies, results are mixed with 23% of respondents expecting a severe negative impact of these technologies on maritime security and 37% anticipating both positive and negative consequences. Seventy-nine percent of respondents consider that space technologies, including Earth observation technologies and geolocation, can play a considerable or crucial role in enhancing maritime security through improved maritime surveillance and situational awareness. According to some participants, the potential of Big Data analytics, Block Chain, Artificial Intelligence, infrared optical imaging systems, laser-enabled sensors and weapons, and railgun technologies should also be taken into account in the update of the Strategy.

6 They may improve navigation risk modelling and shipping routes, vessel identification and location (shape, dimension and route); tracking objects at sea; monitoring marine pollution such as oil spill detection; accident and disaster response; search and rescue operations as well as maritime border and fisheries control and law enforcement.

CONCLUSIONS

The results of the public consultation confirm that the European Maritime Security Strategy has contributed to strengthening international cooperation on maritime security, promoting rules-based governance at sea and increasing cooperation and information sharing among Member States and across different sectors at sea (in particular with the development of the Common Information Sharing Environment - CISE), thereby enhancing the overall EU capacity to face maritime security threats.

However, the contributions confirm that the EU Maritime Security Strategy needs a forward-looking update to allow the EU to preserve its strategic interests, considering the evolving security threats. Accordingly, some elements to be reflected upon are:

- better consideration of the protection of flows and resources in EU areas of interest;
- more transversal and inclusive maritime governance / ocean governance;
- enhanced maritime situational awareness and reinforced information exchange across countries and sectors involved in maritime surveillance;
- strengthened ability to detect and respond to hybrid threats affecting the maritime domain;
- strengthened ability to prepare for and respond to cyberattacks;
- build coherent and ambitious capabilities and boost research, development, and innovation;
- more flexible maritime security operations to be even more effective; and
- use of new tools to face the emerging threats.

Respondents indicated that the above objectives are relevant in particular in the geographical areas surrounding Europe, particularly the Mediterranean, the Black Sea, the Baltic, and the Arctic Sea Basin. The Indo-Pacific also featured prominently as a geographical priority. As regards information exchange, respondents widely agree that the Common Information Sharing Environment (CISE) launched by the Commission, expected to be operational by the end of 2023, should be a key tool in enhancing maritime situational awareness. Lastly, participants believe that the EU must continue to be responsive to emerging challenges also by finding appropriate and timely answers to environmental security and climate change impacts at sea.

