



EU



IN FOCUS

NOT EUROPE'S WAR, BUT EUROPE'S PROBLEM

Europe's response
to the Gulf crisis



Introduction

The April 2026 edition of EU in Focus by TRENDS Belgium Virtual Office examines Europe's response to the crisis in the Gulf region under the overarching theme: "Not Europe's war, but Europe's problem."



Triggered by U.S.–Israeli military operations against Iran, followed by Iranian retaliatory strikes on Gulf states and disruptions to shipping through the Strait of Hormuz, the crisis has quickly transcended its regional boundaries. What initially appeared as a distant conflict has had immediate and tangible consequences for Europe, affecting energy markets, maritime security, as well as the transatlantic relationship.

This edition focuses on how Europe has responded to this crisis, both politically and operationally. It traces the evolution of the European approach from an initial phase of cautious pragmatism and deliberate distancing to a more engaged crisis management mode, as the economic and security implications became increasingly difficult to ignore.

The report first examines the political reactions at both the EU and member state levels, highlighting the balance European governments sought to strike between maintaining transatlantic cohesion and avoiding direct involvement in the conflict. It then explores how the crisis has exposed deeper structural vulnerabilities for Europe, particularly in energy dependence, defence capabilities, and reliance on U.S. security guarantees, while also diverting attention and resources from other strategic priorities, notably Ukraine.

Finally, the report assesses the emerging challenges and opportunities for Europe's future engagement in the Gulf, including the potential for a more strategic and security-oriented partnership with regional actors, the forthcoming EU Middle East strategy, and enhanced cooperation in areas such as maritime security and defence capability development, particularly in counter-drone warfare.

I. Cautious Pragmatism: What has been Europe's reaction to the Gulf crisis?

Despite the clear risks to European interests, from rising energy prices and disruptions to maritime security to the potential weakening of EU sanctions on Russia, Europe's political reaction to the Iran war was marked by a tendency to keep its distance.



Initial distancing from the conflict

Responses of European governments differed, but they followed a broadly familiar pattern. Major Western European powers such as Germany, France and the United Kingdom adopted a cautious and calibrated approach, careful not to deepen already strained relations with Washington under President Donald Trump. Spain, by contrast, emerged as the clearest and most outspoken critic. Prime Minister Pedro Sánchez described the war as illegal and moved to restrict access to Spanish airspace and military bases for U.S. aircraft bound for Iran.

Yet most European NATO allies, including Germany, Greece, Italy, Portugal, Romania and the United Kingdom, ultimately granted the United States access to their respective military bases and airspace, in some cases subject to political or operational conditions.¹ Even those governments that quietly facilitated the U.S. operation, however, were careful to distance themselves from it in public, stressing that this was “not our war”, as both British Prime Minister Keir Starmer² and German Defence Minister Boris Pistorius³ put it.

At the EU level, Brussels walked a similarly fine line. It neither endorsed the U.S.–Israeli strikes against Iran nor openly condemned them. Instead, the EU focused its messaging on condemning Iran's retaliatory actions, calling for maximum restraint, and emphasising de-escalation, diplomacy and respect for international law.

1 Wall Street Journal. (2026, April 6). *NATO allies are quietly helping the U.S. in Iran*. Retrieved from <https://www.wsj.com/opinion/nato-allies-are-quietly-helping-the-u-s-in-iran-223e36a9>.

2 Anadolu Agency. (2026, April 1). *UK's Starmer says Iran conflict “not our war” as Trump weighs NATO withdrawal*. Retrieved from <https://www.aa.com.tr/en/europe/uks-starmer-says-iran-conflict-not-our-war-as-trump-weighs-nato-withdrawal/3888086>.

3 Reuters. (2026, March 18). *“Not our war”: Europe says no to Trump*. Retrieved from <https://www.reuters.com/world/europe/not-our-war-europe-says-no-trump-2026-03-18/>.



High Representative Kaja Kallas stressed that all 27 member states supported this line, while describing Iranian attacks on neighbouring countries in the Gulf region as “inexcusable.”⁴ Commission President Ursula von der Leyen likewise avoided backing the strikes directly, arguing that only a diplomatic solution could bring lasting stability, even as she pointed to Iran’s nuclear and regional activities as the root of the crisis.⁵ However, a few days into the crisis, von der Leyen appeared to signal support for regime change in Tehran, prompting criticism from Member States.⁶

Conflict spilling over and crisis management

As the conflict’s economic and strategic consequences became more tangible, the EU shifted from general calls for restraint to more practical crisis management, focusing on the Strait of Hormuz, maritime and energy security. Kallas emphasized freedom of navigation and rejected Iranian attempts to block the strait and, in later stages, impose transit fees.⁷ The Commission moved to prepare contingency measures, ranging from coordinating energy responses to considering stock releases.

Yet the conflict has not remained distant. It has reached Europe’s immediate neighborhood, including Cyprus, an EU member state, reinforcing the reality that Europe cannot fully insulate itself. In response, France and UK deployed their naval and air defence assets to the Eastern Mediterranean and NATO raised its missile-defence posture following an Iranian missile incident involving Türkiye⁸. This underlined the fact that while Europe may avoid direct participation in the war, the alliance remains prepared to defend its territory and population against its consequences.

4 Council of the European Union. (2026, March 1). *Statement by the High Representative on behalf of the European Union on developments in the Middle East*. Retrieved from <https://www.consilium.europa.eu/en/press/press-releases/2026/03/01/statement-by-the-high-representative-on-behalf-of-the-european-union-on-developments-in-the-middle-east/>.

5 Reuters. (2026, March 2). *Only lasting solution in Iran is a diplomatic one, von der Leyen says*. Retrieved from <https://www.reuters.com/world/only-lasting-solution-iran-is-diplomatic-one-von-der-leyen-says-2026-03-02/>.

6 Politico. (2026, March 9). *Ursula von der Leyen faces blowback over diplomatic overreach*. Retrieved from <https://www.politico.eu/article/ursula-von-der-leyen-blowback-diplomatic-overreach-european-commission/>.

7 Kallas, K. [@kajakallas]. (2026, April). Under international law, transit through waterways like the Strait of Hormuz must remain open and free of charge... [Post]. X. Retrieved from <https://x.com/kajakallas/status/2045139218972766379>.

8 North Atlantic Treaty Organization. (2026, March 5). *NATO is well postured to defend Allied populations against ballistic threats*. Retrieved from <https://www.nato.int/en/news-and-events/articles/news/2026/03/05/nato-is-well-postured-to-defend-allied-populations-against-ballistic-threats>.



Following the 8 April ceasefire between Israel and Iran, both the EU and key European governments began to move from general calls for restraint toward more practical planning for the restoration of shipping through the Strait of Hormuz. Crucially, European leaders made clear that any such effort would be strictly defensive, would only be launched once hostilities had ceased, and would not draw Europe into combat operations.

At a meeting convened by France and the United Kingdom on 17 April, with representatives from roughly 50 countries and international organizations, European leaders discussed preparations for a possible multinational mission to secure maritime navigation through the strait once conditions allowed.⁹

In this regard, British Prime Minister Keir Starmer and French President Emmanuel Macron said that more than a dozen countries had already expressed willingness to participate, emphasizing that the mission under discussion would focus on defensive tasks such as intelligence-sharing, escorting ships and mine-clearing rather than offensive action.¹⁰ Importantly, Belgium, the Netherlands and France possess precisely the kinds of mine-clearing and maritime security capabilities that such an operation would require.

9 Deutsche Welle. (2026, April 18). *Europe looks to secure shipping in Strait of Hormuz*. Retrieved from <https://www.dw.com/en/europe-looks-to-secure-shipping-in-strait-of-hormuz/a-76838636>.

10 Prime Minister's Office, 10 Downing Street. (2026, April 17). *Joint statement by President Macron and Prime Minister Starmer, co-chairs of the international summit on the Strait of Hormuz: 17 April 2026*. <https://www.gov.uk/government/news/joint-statement-by-president-macron-and-prime-minister-starmer-co-chairs-of-the-international-summit-on-the-strait-of-hormuz-17-april-2026>.

On the EU side, Ursula von der Leyen said the Union could contribute to reopening the Strait of Hormuz by extending the EU's Aspides naval mission, currently deployed in the Red Sea, to the strait. She described freedom of navigation through Hormuz as being of "paramount" importance to Europe.¹¹ This marked a more robust line than in mid-March, when Kallas had said there was no appetite among member states to extend Aspides formally to Hormuz.

II. Energy shock, NATO strain, and distraction from Ukraine: How has the Gulf crisis impacted Europe?

The Gulf crisis has exposed a series of structural vulnerabilities in Europe's energy and security dependencies on external players, in particular oil and gas from the Gulf region for energy, and the United States as a key NATO ally and guarantor of European security. What initially appeared as a distant conflict has quickly been internalized in European thinking as a supply-chain and transatlantic crisis, rather than simply a regional Middle Eastern confrontation.

Energy shock

Disruptions to the Strait of Hormuz, through which roughly 20% of global oil and liquified natural gas (LNG) flows pass¹², have underscored Europe's continued dependence on external energy sources. Even limited instability has translated into higher oil and gas prices, increased shipping insurance costs, and renewed concerns about

11 Reuters. (2026, April 17). *EU calls on Iran to drop transit fee plans in Hormuz Strait*. Retrieved from <https://www.reuters.com/world/eu-calls-iran-drop-transit-fee-plans-hormuz-strait-2026-04-17/>.

12 International Energy Agency. (2026). *Strait of Hormuz*. Retrieved from <https://www.iea.org/about/oil-security-and-emergency-response/strait-of-hormuz>.

the resilience of European supply chains at a time when the continent is already grappling with sluggish economic growth, low competitiveness, politically threatened decarbonization, and efforts to cut its energy ties with Russia. Europe had previously imported more than 40% of its gas from Russia. That fell to around 13% in 2025, with plans calling for a full ban on Russian energy imports by late 2027.¹³

¹³ European Commission. (2026, January 26). *REPowerEU: Phase-out of Russian energy imports*. Retrieved from https://energy.ec.europa.eu/strategy/repowerEU-phase-out-russian-energy-imports_en.



The Gulf crisis translated quickly into higher energy costs in Europe. European wholesale gas prices have almost doubled since the war began on 28 February.¹⁴ The oil shock hit Europe quickly. Oil prices jumped by about 8% in the first days of the war, while physical crude cargoes for prompt delivery to Europe rose to near \$150 a barrel in mid-April as fears over Hormuz intensified.¹⁵ That mattered not only because of higher fuel bills, but because it pushed up transport and shipping costs and added to inflationary pressure.

Governments and EU institutions have responded with a mix of relief and emergency measures. Germany announced a €1.6 billion package including a temporary €0.17 per litre cut in fuel taxes.¹⁶ Ireland introduced a €500

million plan with a 10-cent per litre fuel-tax cut, a delayed carbon-tax increase, and subsidies for agriculture and fisheries.¹⁷ At the EU level, Brussels prepared grants and subsidies for transport and farming, while also urging member states to diversify jet-fuel supplies away from the Gulf and map refining capacity more closely.¹⁸

The impact was especially visible in refined products imported from the Middle East. The aviation sector was hit particularly hard. Europe imports roughly 30-40% of its jet fuel, with at least half of that coming from the Middle East. Jet fuel prices in Europe surged to about \$220 per barrel, while the Commission warned that, if supply through Hormuz remained disrupted, the EU might have to consider a coordinated release of jet-fuel stocks.¹⁹

¹⁴ The Guardian. (2026, March 19). *Oil prices and gas prices rise as Iran-Israel conflict escalates*. Retrieved from <https://www.theguardian.com/business/2026/mar/19/oil-prices-gas-prices-rise-iran-israel-donald-trump>.

¹⁵ Reuters. (2026, April 13). *Physical oil in Europe hits record high near \$150 a barrel as Hormuz crisis worsens*. Retrieved from <https://www.reuters.com/business/energy/physical-oil-europe-hits-record-high-near-150-barrel-hormuz-crisis-worsens-2026-04-13/>.

¹⁶ France 24. (2026, April 13). *Germany to cut fuel taxes amid Iran war energy shock*. Retrieved from <https://www.france24.com/en/live-news/20260413-germany-to-cut-fuel-taxes-amid-iran-war-energy-shock>.

¹⁷ Politico. (2026, April 13). *Ireland to cut tax on motor fuel in bid to quell protests*. Retrieved from <https://www.politico.eu/article/ireland-dublin-cut-tax-motor-fuel-bid-to-quell-protests/>.

¹⁸ Euractiv. (2026, April 14). *Brussels pitches state subsidy bonanza to combat Iran war energy shock*. Retrieved from <https://www.euractiv.com/news/brussels-pitches-state-subsidy-bonanza-to-combat-iran-war-energy-shock/>.

¹⁹ Financial Times. (2026, April 17). *EU prepares for jet fuel sharing as supplies dwindle*. Retrieved from <https://www.ft.com/content/494c1181-7bc3-42f3-b1af-c1dff3f62886>.

Transatlantic relations under strain

The Gulf crisis also reopened a deeper fault line in transatlantic relations. Frustrated by the refusal of European allies to join offensive operations to reopen the Strait of Hormuz, President Donald Trump escalated his attacks on NATO and threatened to withdraw from the alliance altogether.²⁰ He even said he was considering leaving NATO, while also describing the alliance as a “paper tiger.”²¹

After meeting NATO Secretary General Mark Rutte, Trump sharpened the message further, writing that “NATO wasn’t there when we needed them, and they won’t be there if we need them again.”²² For European leaders, these remarks reinforced the fear that the United States could make its NATO security guarantees conditional on its wider foreign-policy priorities, casting doubt on the credibility of the alliance’s Article 5 commitment.

The result is a deepening sense of insecurity in Europe

20 Politico. (2026, April 2). *US President Donald Trump considering pulling out of NATO*. Retrieved from <https://www.politico.eu/article/us-donald-trump-considering-pulling-out-of-nato/>.

21 France 24. (2026, April 6). *Trump lashes out at “paper tiger” NATO while re-upping Greenland claim*. Retrieved from <https://www.france24.com/en/live-news/20260406-trump-lashes-out-at-paper-tiger-nato-while-re-upping-greenland-claim>.

22 BBC News. (2026, April 8). *Trump criticises Nato as alliance chief Mark Rutte describes meeting as “very frank”* Retrieved from: <https://www.bbc.com/news/articles/c05d8j9r5ejo>.

vis-à-vis Russia, at a time when the continent is already confronting the war in Ukraine. Any doubt cast by the U.S. president on NATO’s commitments risks weakening the alliance’s deterrence capacity the eyes of Moscow.

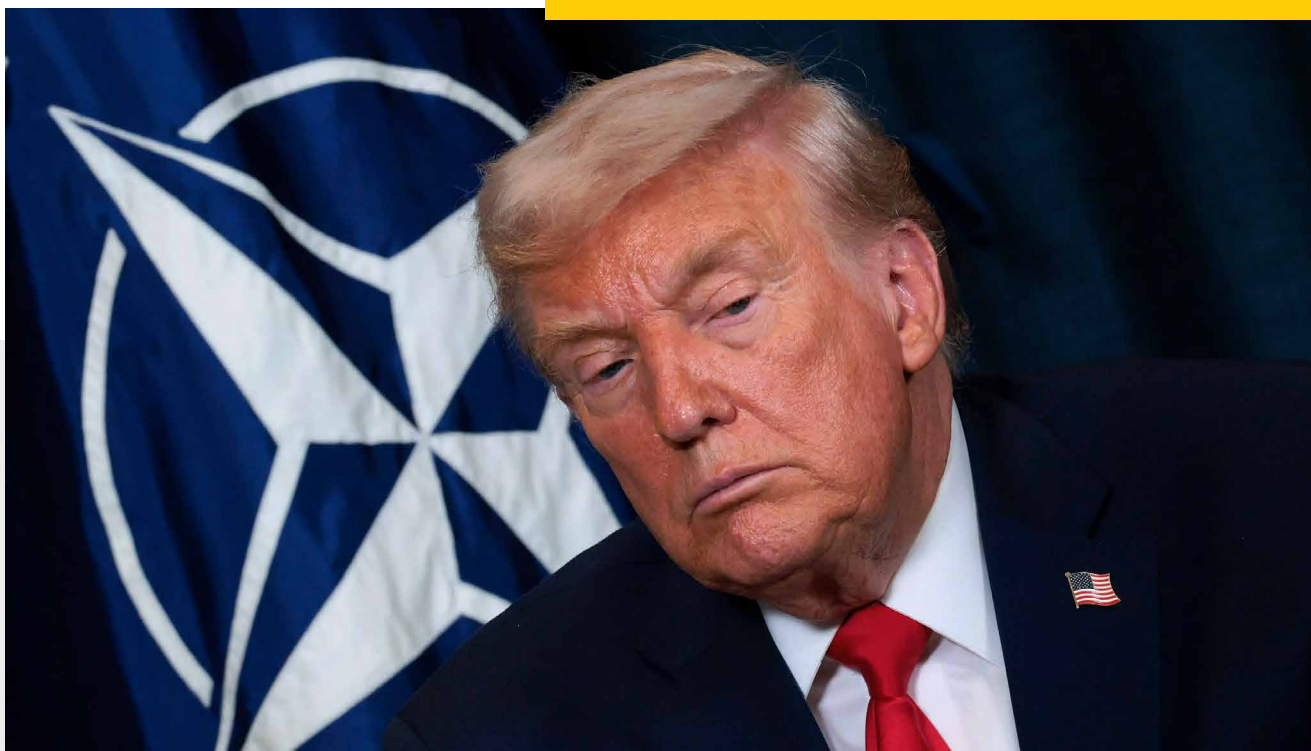
Europe’s capability gaps exposed

Europe depends for its security not only on the United States government and its armed forces but also on the American defence industry. The Gulf war exposed how quickly that dependence can become a liability. To intercept Iranian drones and missiles, Gulf states fired around 800 PAC-3 Patriot interceptors in the first three days of the war²³, while the United States used several hundreds of Tomahawk missiles²⁴ in the first month of the campaign, putting severe pressure on already stretched U.S. stockpiles.

The effects were quickly felt in Europe. Washington began warning European allies of delivery delays for previously contracted weapons. For instance, Switzerland said it was even prepared to consider cancelling its Patriot order unless the United States could provide binding delivery dates. The broader lesson for Europe is clear. As long as it remains heavily reliant on U.S.-made air-defence and long-range strike systems, it cannot assume that these capabilities will be available when multiple crises compete for the same finite inventories.

23 The Economist. (2026, March 13). *Gulf states are burning through interceptors*. Retrieved from <https://www.economist.com/international/2026/03/13/gulf-states-are-burning-through-interceptors>.

24 The Washington Post. (2026, March 27). *Iran war raises concerns over U.S. use of Tomahawk missiles*. Retrieved from <https://www.washingtonpost.com/national-security/2026/03/27/iran-war-tomahawk-missiles/>.





The conflict has also exposed persistent European capability gaps and the limits of Europe's capacity to project power overseas. While France and the United Kingdom have maintained a more consistent presence, notably in the Eastern Mediterranean, other European states have struggled to deploy and sustain assets at distance, revealing the uneven distribution of capabilities across the continent. Both Paris and London provided air-defence support to partners in the Gulf. Yet the troubled deployment of the British destroyer HMS Dragon to the region also illustrated the constraints of relying on a limited pool of high-end platforms, raising broader questions about Europe's ability to act autonomously in crises that affect its interests but unfold beyond its immediate neighborhood.

Ukraine

The war has also had a direct impact not only on Europe, but on Western support for Ukraine as a whole. Political, military and industrial attention has been partially diverted toward the Middle East, creating both immediate and structural pressures. The impact has been twofold. First, the energy shock triggered by the disruption of the Strait of Hormuz pushed up global prices and complicated Europe's broader effort to reduce dependence on Russian energy. Higher prices and continued demand made it more difficult to persuade third countries to abandon Russian supplies, particularly as the United States simultaneously issued sanctions waivers that allowed some Russian oil to remain on global markets.²⁵

²⁵ Reuters. (2026, April 18). *U.S. extends waiver allowing countries to buy Russian oil*. Retrieved from <https://www.reuters.com/business/energy/us-extends-waiver-allowing-countries-buy-russian-oil-2026-04-18/>.



Second, the strain on Western military stockpiles has become more visible. Ukraine continues to depend heavily on imported air-defence systems, particularly on U.S.-made Patriot missiles, yet part of these inventories has been redirected to the Middle East. At the same time, Washington has prioritized replenishing its own stocks, leading to delays in deliveries to European allies and raising concerns about the sustainability of support for Kyiv. Frustrated by Europe's unwillingness to engage militarily to reopen the Strait of Hormuz before the end of hostilities, President Donald Trump threatened that the United States might reconsider its participation in NATO's PURL scheme, through which European money is used to purchase U.S.-made weapons for Ukraine.²⁶ While deliveries have so far continued, the episode underlined how easily such arrangements can be unsettled by changes in U.S. policy.

At the same time, however, the crisis has also underscored Ukraine's growing role as a state-of-the-art defence innovator, particularly in areas such as counter-drone technologies and battlefield adaptation. As Gulf states confront similar threats, Kyiv is increasingly seen as a relevant partner beyond the European theatre. This shows that while the war may have diverted attention away from Ukraine, it also opened new avenues for cooperation, including joint ventures and technology-sharing between Ukrainian defence firms and their counterparts in the Gulf. To this end, Kyiv has signed or announced defence cooperation agreements with Saudi

26 Financial Times. (2026, April 1). Trump threatened to stop weapons for Ukraine unless Europe joined Hormuz coalition. Retrieved from <https://www.ft.com/content/d304071a-ca97-4b3b-be93-ff880a6645c3>.

Arabia, Qatar, and the United Arab Emirates, all tied to countering missile and drone threats that Gulf states have faced during the Iran war.²⁷

III. Challenges & opportunities: What comes next for the Gulf and Europe?

The crisis has created a clear opening for a deeper and more strategic partnership between Europe and the Gulf. What is emerging is not simply a deepening of existing ties, but a significant opportunity to transform the relationship from a largely economic and trade-based partnership into a broader, more strategic, security-centered and politically grounded one.

At the institutional level, this shift is likely to be anchored in the forthcoming EU Middle East strategy, which was initially expected to be adopted in the second quarter of 2026.²⁸ However, the volatile situation in the Gulf may delay the process. Crucially, the strategy is likely to integrate security, resilience, and geopolitical considerations more firmly into the EU's regional engagement.

This shift is already visible at the political level. The EU-GCC ministerial statement of 5 March set a stronger foundation for cooperation, explicitly aligning both sides around regional stability and condemning Iranian attacks on Gulf infrastructure.²⁹ That direction was further reinforced by the European Council's conclusions of 19 March, which called for safeguarding maritime security, upholding freedom of navigation, and deepening cooperation on counter-drone as well as air and missile defence, including through EU defensive maritime operations such as *Aspides* and *Atalanta*.³⁰

27 Reuters. (2026, March 28). *Ukraine, UAE agree to cooperate on defence, Zelenskiy says*. Retrieved from <https://www.reuters.com/world/middle-east/ukraine-uae-agree-cooperate-defence-zelenskiy-says-2026-03-28/>.

28 European Commission. (2025, February 10). Speech by Commissioner Šuica at the European Parliament plenary on the Middle East Strategy (SPEECH/25/500). Retrieved from https://ec.europa.eu/commission/presscorner/detail/en/speech_25_500.

29 Council of the European Union. (2026, March 5). *Joint statement by GCC-EU ministers' meeting on recent developments in the Middle East: Iran's attacks against GCC states*. <https://www.consilium.europa.eu/en/press/press-releases/2026/03/05/joint-statement-by-gcc-eu-ministers-meeting-on-recent-developments-in-the-middle-east-iran-s-attacks-against-gcc-states/>.

30 European Council. (2026, March 20). *European Council conclusions, 19 March 2026*. Retrieved from <https://www.consilium.europa.eu/en/press/press-releases/2026/03/20/european-council-conclusions/>.



These statements point to a partnership increasingly shaped by shared threats and complementary capabilities. Iran's use of drones and missiles has highlighted vulnerabilities that Europe and the Gulf states alike must address. In this context, EU member states, and in particular Ukraine, bring highly relevant expertise in areas such as counter-drone systems, integrated air defence, and rapid adaptation to evolving battlefield conditions.

Maritime security is likely to become another central pillar of this cooperation. European states possess highly relevant niche capabilities, particularly in mine-clearing. Countries such as Belgium, the Netherlands, and France have advanced mine countermeasure capacities that could play a critical role in securing vital chokepoints such as the Strait of Hormuz. Leveraging these capabilities would allow Europe to be more engaged in the region in a targeted, defensive, and politically sustainable manner.

At the same time, the Gulf states themselves are undergoing a process of security diversification. The war has shaken long-standing strategies of hedging between external powers, increasing demand for reliable and capable partners. This creates a tangible opening for Europe, not as a replacement for the United States, but as a complementary actor able to provide technology, coordination, and resilience.

This evolving security dimension is also likely to spill over into the economic and institutional domain. Ongoing free trade negotiations, notably with the United Arab Emirates, may gain new momentum, while discussions around more structured forms of security cooperation, potentially even a form of security pact, are likely to intensify as part of a broader strategic partnership.



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