



Bridging Waters

Strengthening Europe's Maritime Security Engagement Through Partnerships with Rising Middle Powers

Benedetta Girardi and Pieter-Jan Vandoren

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Strengthening Europe's Maritime Security
Engagement Through Partnerships
with Rising Middle Powers – Annexes

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Annex 1:

Threat breakdown according to AMCAT methodology

Type of threat	Threat Category	Definition	Actor	Motivation	Capability	Action	Target
Geostrategic threats	Great Power Rivalries	Rivalries between major powers that may escalate into conflict, undermining freedom of navigation and regional stability.	States (notably US and China)	Power projection, demonstration of military superiority, control of resources and trade routes	High – advanced naval, cyber, and surveillance capabilities	Military exercises, naval confrontations, island militarisation, EEZ intelligence gathering, cyber operations	Warships, commercial vessels, maritime infrastructure
	Interstate Maritime Disputes	Disputes over islands, maritime borders, and exclusive economic zones, creating unsafe conditions for navigation.	States	Resource exploitation, assertion of sovereignty	Medium – use of naval and law enforcement assets	Aggressive patrolling, ship capture, fishing bans, escorted fishing operations	Commercial and fishing vessels, local populations
	Chokepoint Closure	Obstruction of key maritime chokepoints disrupting global trade and navigation.	States or non-state actors, the latter often within unstable regimes	Economic coercion, political leverage	High – control of territorial chokepoints and regulatory authority	Physical blockades, administrative restrictions, targeted closures	States reliant on chokepoints, commercial shipping, global trade flows
	Sabotage and Damage of Critical Underwater Infrastructure	Deliberate attacks on underwater installations such as communication cables, pipelines, or energy infrastructure.	State or non-state actors with maritime operational capacity	Disruption of economic or communication networks, political coercion	Medium to high – specialized diving, submersible, or remote-operating capabilities	Cutting, damaging, or tampering with cables, pipelines, or subsea equipment; underwater explosives	Submarine communication cables, energy pipelines, offshore infrastructure, national critical infrastructure

Type of threat	Threat Category	Definition	Actor	Motivation	Capability	Action	Target
Blue Crime	Terrorism	Acts of violence or sabotage targeting maritime assets, in particular ships, people, ports, or offshore facilities	Non-state armed groups, extremist organisations	Political influence, ideological objectives, destabilisation	Medium – small arms, explosives, limited maritime capability	Bombings, hijackings, attacks on ports or offshore facilities	Naval, commercial, and private vessels; coastal infrastructure
	Piracy and Armed Robbery	Illegal acts of violence or detention at sea for private gain.	Organised criminal groups, militias	Financial profit through ransom and cargo theft	Medium – small arms, vessels, intelligence networks	Hijacking, armed assault, kidnapping for ransom	Commercial and private vessels, fishing boats, offshore infrastructure
	Human Trafficking and Migrant Smuggling	Illegal recruitment, transport, or harbouring of people through coercion or deception for exploitation.	Transnational criminal networks	Profit from forced labour, sexual exploitation, or organ trade	Medium – transport networks, forged documentation, corruption	Recruitment, coercion, maritime transport of victims	Vulnerable populations (especially women and girls)
	Drug Trafficking and Smuggling of Goods	Illicit production, transport, and trade of drugs and goods across maritime borders.	Transnational criminal organisations	Revenue generation	High – organised logistics, concealment methods, corruption	Cultivation, transport, concealment, distribution	Domestic and international markets, youth consumers
	Illegal, Unreported, and Unregulated (IUU) Fishing	Fishing in violation of national or international laws or outside regulated areas.	Domestic and foreign fishing vessels	Revenue generation	Medium – unmonitored vessels, fraudulent registration, evasion of oversight	Illegal or unreported fishing, forced labour aboard vessels	Marine ecosystems, coastal economies, legitimate fishing fleets
Environmental disruptions	Climate Change Hazards	Natural disasters (e.g., cyclones, floods, sea-level rise) that threaten maritime operations, ecosystems, and infrastructure.	Natural phenomena;	N/A	Medium to high – depending on entity of disruption	Physical damage to ports and routes;	Vessels, ports, offshore infrastructure, coastal communities, marine ecosystems
	Maritime Pollution	Pollution from human activity that threaten maritime operations, ecosystems, and infrastructure.	Non-state actors (vessels, firms, offshore platforms)	Economic gain or negligence for human-induced pollution	Medium – exploit regulatory gaps and low enforcement	Waste discharge; oil spills; chemical and plastic pollution	Marine ecosystems, fisheries, coastal economies

Annex 2:

Threat breakdown according to AMCAT methodology for the South China Sea and Red Sea

Red Sea

Threat type	Actor	Motivation	Capability	Action	Target
Great power rivalries	Extra-regional and global naval powers (notably the United States, Russia, China and European or NATO member states) operating in and around the Red Sea and the Suez Canal.	Power projection, protection of sea lines of communication, safeguarding trade and energy flows and promoting preferred interpretations of freedom of navigation.	Medium to high: blue-water navies, expeditionary forces and basing or access arrangements allow a sustained and flexible maritime presence.	Deployment of naval forces, military exercises, port calls and crisis-response operations used to signal resolve and shape the security environment in the Red Sea.	Influence over key maritime routes, chokepoints and coastal states, rather than individual ships as such.
Interstate disputes	Regional littoral states bordering the Red Sea and Suez and their external sponsors competing for influence over waterways and coastal spaces.	Regime survival, regional status and control over economic and political benefits associated with canals, ports and adjacent maritime zones.	Medium: conventional naval and coastguard forces, and jurisdiction over ports, territorial seas and supporting infrastructure.	Use of military aid, security cooperation, port concessions and diplomatic pressure to bind coastal states into rival regional coalitions.	Political alignment and policy choices of coastal states and control of critical maritime infrastructure used by international shipping.
Chokepoint closure	States with jurisdiction over strategic chokepoints, especially Egypt in relation to the Suez Canal and Yemen around Bab el-Mandeb.	Leveraging control over waterways during crises or conflicts to coerce adversaries, assert sovereignty or respond to perceived external threats.	High: sovereign control over canals, ports and territorial waters gives authorities the practical ability to halt, restrict or condition maritime transit.	Partial or full closure of routes to specific flags or all traffic, and the introduction of restrictive procedures that significantly delay or divert flows.	Commercial and naval shipping dependent on the chokepoint, with disproportionate effects on global trade and on directly affected states.

Threat type	Actor	Motivation	Capability	Action	Target
CUI Threats	State and non-state actors, including terrorist groups, rival states, and criminal organisations targeting undersea cables, pipelines, and other critical maritime infrastructure.	Strategic disruption of communication, energy, and data flows, or economic sabotage, aiming to weaken adversary nations or influence maritime security dynamics.	Medium to high: access to advanced technology for cutting, intercepting or sabotaging undersea infrastructure, as well as stealth capabilities for operations in deep water.	Attacks or sabotage of undersea cables, pipelines, or power lines, including the use of remotely operated vehicles (ROVs) or submarines to damage or destroy these vital structures.	Undersea infrastructure, such as communications cables, oil and gas pipelines, and power cables, as well as the economic and national security systems reliant on these connections.
Terrorism	Non-state armed groups operating from coastal territories such as Sinai and neighbouring areas with access to nearby waterways.	Religiously and politically framed aims to protect co-religionists, oppose foreign military presence and disrupt symbolically important trade routes.	Low to medium: access to small arms, rockets and small craft and local support networks, but limited intelligence, surveillance and reconnaissance assets.	Attacks against shipping and canal infrastructure using small arms, improvised explosive devices or rockets launched from shore or small boats.	Commercial vessels and occasionally naval assets transiting strategic waterways, together with associated maritime infrastructure.
Piracy	Organised pirate groups, particularly in the Gulf of Aden and off Somalia, drawing on coastal communities and wider criminal networks.	Revenue generation through ransom payments, theft of cargo and resale or use of hijacked vessels.	Low to medium: small boats and mother ships equipped with small arms and sometimes rocket-propelled grenades, with variable organisational sophistication.	Approach, boarding and seizure of vulnerable vessels, kidnapping of crew for ransom and armed robbery at sea.	Primarily commercial shipping and, to a lesser extent, fishing and private vessels that lack adequate protection.
Human Trafficking and Smuggling	Transnational criminal networks and facilitators, sometimes overlapping with armed groups and corrupt officials in the Horn of Africa and the Arabian Peninsula.	Profit from transporting migrants and refugees towards Gulf states, Europe and Southern Africa.	Medium: control of or access to embarkation points, vessels, safe houses and overland routes, and detailed knowledge of maritime migration corridors.	Maritime smuggling of people across the Red Sea and the Gulf of Aden, often under unsafe and abusive conditions, followed by onward movement ashore.	Vulnerable migrants and refugees, with indirect effects on the border management and maritime security resources of transit and destination states.
Drug/Goods Trafficking and Smuggling	Clan-based militias, criminal groups and elements within state security forces, sometimes acting in collusion with insurgent or extremist organisations.	Revenue generation through trafficking of arms and other high-value goods along maritime and coastal routes.	Medium: access to storage facilities, vessels and land routes and the capacity to move weapons and contraband covertly across jurisdictions.	Covert maritime transport and trans-shipment of weapons and other contraband, including the supply of arms to pirates, insurgents and criminal actors.	Illicit markets and conflict parties that use the Red Sea as a logistical corridor, increasing levels of armament and criminality in the maritime domain.
IUU Fishing	Domestic and foreign fishing operators, ranging from small-scale artisanal fishers to industrial fleets active in the Red Sea.	Profit from exploiting marine living resources in contexts of weak regulation, limited monitoring and contested maritime jurisdictions.	Medium: fleets of fishing vessels and gear, sometimes supported by distant-water infrastructure, allow operations beyond effective national oversight.	Fishing without licences, in closed areas or in the exclusive economic zones of other states, use of prohibited gear and misreporting or under-reporting of catches.	Fish stocks and marine ecosystems, with knock-on effects for coastal communities and legal fishing industries that depend on sustainable resources.
Climate hazards	Non-intentional environmental processes, including desertification, sea-level rise, extreme heat and more frequent severe storms.	Not applicable, as hazards arise from physical climate dynamics rather than purposeful behaviour.	High potential impact: gradual and sudden-onset events can degrade infrastructure, reduce visibility, increase storm and flood risk and drive population displacement.	Increased incidence of dust storms, heatwaves, coastal erosion and extreme weather events that disrupt port operations and force rerouting or delay of shipping.	Coastal populations, ports, offshore installations and vessels whose operations, safety margins and routes are affected by changing climatic conditions.
Maritime Pollution	Commercial shipping, oil and gas operators and conflict parties whose actions damage, disable or sink tankers and other vessels.	Commercial transport and resource extraction or military objectives in armed conflict, with pollution usually an unintended consequence of those activities.	High: large tankers, storage facilities and bunkering operations hold quantities of oil and other hazardous substances sufficient to cause major spills.	Operational discharges, accidental spills and conflict-related incidents such as missile or drone strikes that breach hulls, damage cargo or sink vessels.	Marine and coastal environments, fisheries, coastal populations and critical maritime infrastructure exposed to contaminated waters and shorelines.

South China Sea

Threat type	Actor	Motivation	Capability	Action	Target
Great power rivalries	China, US, and regional powers (e.g., Malaysia, Vietnam, the Philippines, and others)	Assertion of geopolitical influence, control over critical sea lanes, and protection of national security and economic interests.	High: Advanced naval forces, strategic military alliances, intelligence assets, and technological dominance in the region.	Frequent naval deployments, joint military exercises, freedom of navigation operations, and strategic partnerships to counterbalance opposing influences.	Rival powers and claims to maritime zones, particularly contested waters and key trade routes like the Malacca Strait.
Interstate disputes	China, Vietnam, Philippines, Malaysia, Brunei, Taiwan, and their external allies	Control over valuable maritime zones, fishing rights, and oil/gas reserves, alongside sovereignty assertions over disputed islands.	Medium to high: Regional naval and air forces, coastguards, and diplomatic pressure, with increasing reliance on external support (e.g., US).	Territorial disputes over the Spratlys, Paracels, and other islands, with regular naval standoffs, diplomatic exchanges, and strategic infrastructure developments (e.g., artificial islands).	States claiming jurisdiction over contested islands and waters, including China's Belt and Road Initiative and military outposts.
Chokepoint closure	China (in relation to the South China Sea), Philippines, and Vietnam	Geopolitical leverage over vital maritime chokepoints such as the Strait of Malacca, essential for international shipping and energy flows.	High: Sovereign control over important sea routes and strategic chokepoints that influence global trade, energy shipments, and naval operations.	Potential closure or restriction of sea lanes to strategic adversaries, including the use of military blockades or regional diplomatic pressure during crises.	Maritime shipping, international oil and gas trade, and key naval passages essential for security and economic stability.
CUI Threats	State and non-state actors, including terrorist groups, rival states, and criminal organisations targeting undersea cables, pipelines, and other critical maritime infrastructure	Disruption of communication, energy, and data flows, or economic sabotage by targeting critical undersea infrastructure to achieve strategic advantages.	Medium to high: Use of advanced technology such as remotely operated vehicles (ROVs), submarines, and drones for deep-sea sabotage.	Attacks or sabotage on undersea cables, pipelines, and other vital maritime infrastructure, undermining global communication and energy networks.	Critical undersea infrastructure, including telecommunications cables, energy pipelines, and other installations, critical for global communications and energy markets.
Terrorism	Non-state actors, including insurgent groups and radicalised organisations operating in Southeast Asia	Disrupt maritime trade, target foreign powers' influence in the region, and assert ideological positions on territorial sovereignty.	Low to medium: Small arms, explosives, and access to coastal areas for launching maritime attacks, with local support networks.	Attacks on maritime infrastructure, such as ports and ships, with attempts to disrupt regional stability and challenge the presence of foreign forces.	Commercial vessels, oil rigs, and military presence operating in or near disputed territories.
Piracy	Organised criminal groups, particularly off the coasts of Indonesia, Malaysia, and the Philippines	Financial gain through hijacking vessels, robbing ships, and taking hostages for ransom in busy maritime trade routes.	Medium: Small, fast boats and basic weaponry, with established criminal networks operating near shipping lanes and remote islands.	Hijacking of ships for ransom, theft of goods, and sometimes kidnapping of crew members in high-traffic maritime regions such as the Straits of Malacca and surrounding waters.	Commercial vessels transiting through high-risk piracy zones, particularly those in the vicinity of the Malacca Strait.
Human Trafficking and Smuggling	Criminal syndicates, often supported by corrupt officials or insurgent groups in Southeast Asia	Profit from smuggling people into Southeast Asia or further, exploiting vulnerabilities in maritime security and migration policies.	Medium: Control of embarkation points, knowledge of maritime routes, and access to trafficked vessels or smuggling boats.	Smuggling of migrants, often in overcrowded and unsafe conditions, from Southeast Asia or further afield, with onward movement across maritime borders.	Vulnerable migrants, with indirect effects on regional border management, law enforcement, and maritime security policies in Southeast Asia.

Threat type	Actor	Motivation	Capability	Action	Target
Drug/Goods Trafficking and Smuggling	Transnational crime syndicates, including Southeast Asian criminal organisations	Profit from the illegal trade in narcotics and other contraband, facilitated by poorly monitored maritime routes and shipping networks.	Medium: Use of commercial shipping routes, clandestine vessels, and hidden compartments to smuggle drugs, arms, and other illicit goods.	Smuggling drugs and contraband through the South China Sea and surrounding waters, using shipping lanes, private vessels, and islands as transit points.	Illicit markets, drugs and arms distribution networks, and regional conflict zones, exacerbating instability and supporting organised crime.
IUU Fishing	Domestic and foreign fishing fleets, with illegal operators often associated with regional or global criminal syndicates	Exploitation of overfished or unregulated areas, often driven by lucrative demand for marine products.	Medium: Fishing vessels with sophisticated gear, operating beyond national jurisdictions or in disputed waters with little oversight.	Unreported fishing operations, use of illegal techniques (e.g., dynamite fishing), and illegal entry into EEZs of rival states or protected areas.	Marine ecosystems, coastal economies, and legal fishing industries that are undermined by IUU fishing practices.
Climate hazards	Natural environmental processes, such as sea-level rise, typhoons, and rising ocean temperatures affecting the region	Environmental degradation, which impacts coastal infrastructure, fisheries, and shipping routes, driving displacement and insecurity.	High: The scale of climate change impacts can have far-reaching consequences for port infrastructure, shipping operations, and coastal ecosystems.	Increased frequency of extreme weather events (e.g., typhoons), ocean acidification, and rising sea levels leading to erosion and significant maritime infrastructure damage.	Coastal populations, infrastructure (ports, cities), and marine resources, with significant effects on the shipping lanes and regional food security.
Maritime Pollution	Shipping companies, offshore oil and gas operators, and regional naval activities	Accidental or deliberate release of hazardous substances into the sea, harming marine ecosystems and coastal populations.	High: High-volume discharges from commercial shipping, offshore drilling operations, and regional naval conflicts, leading to large-scale pollution.	Oil spills, chemical discharges, and other forms of marine pollution resulting from shipping accidents, offshore drilling mishaps, or military activities.	Marine life, coastal populations, fisheries, and tourism industries, with broader ecological and economic impacts.

Annex 3:

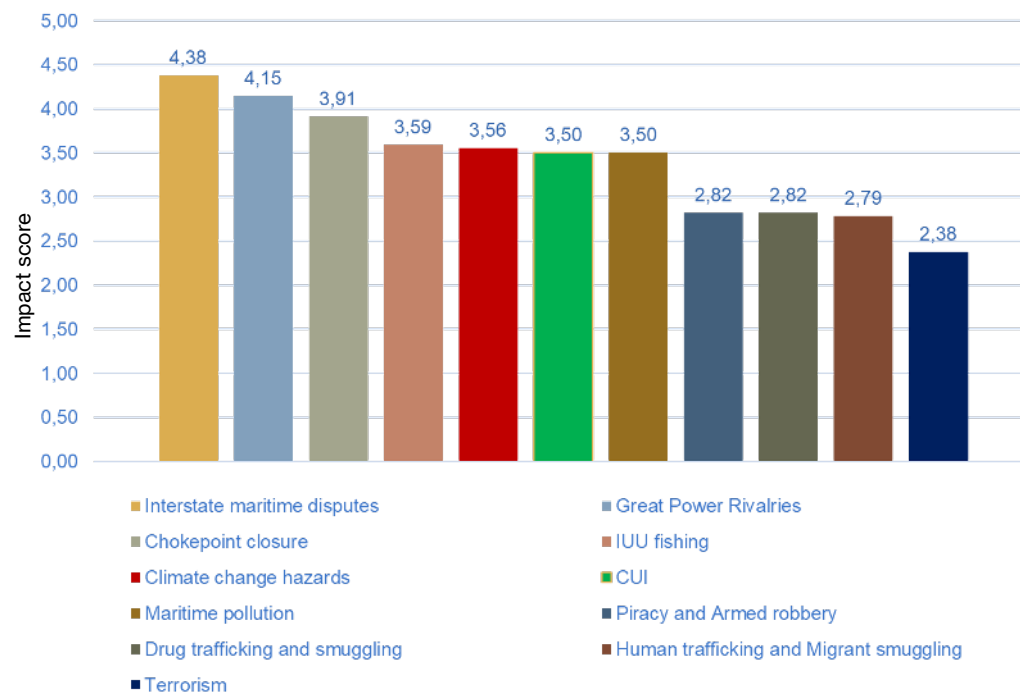
Survey results

1. Overview survey results South China Sea

Question 1:

Please rate the impact of the following threats occurring in the South China Sea (1 = Minimal, 5 = Severe)

"Impact" refers to the extent to which each threat is expected to disrupt maritime security, including the stability and functioning of sea lines of communication and trade routes in the South China Sea.

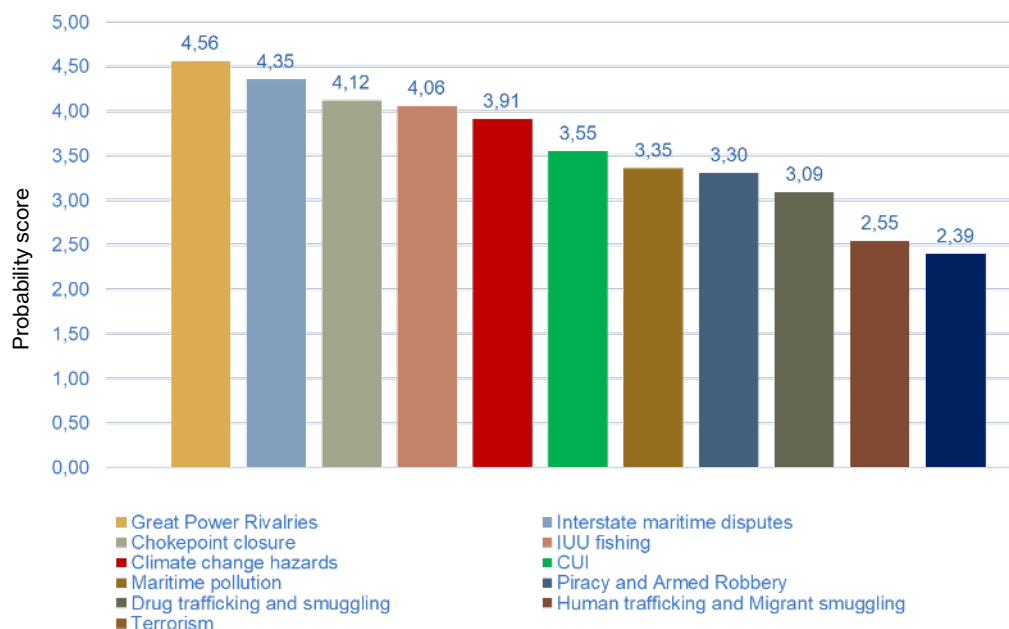


Respondents rate the potential impact of interstate maritime disputes and Great power rivalries the highest in the South China Sea. These two threats are strongly interlinked and are underlined by trends seen in the recent decade. IUU fishing, climate change, Critical Underwater Infrastructure protection and maritime pollution are ranked similarly while the potential impact of terrorism is ranked the lowest by the respondents.

Question 2:

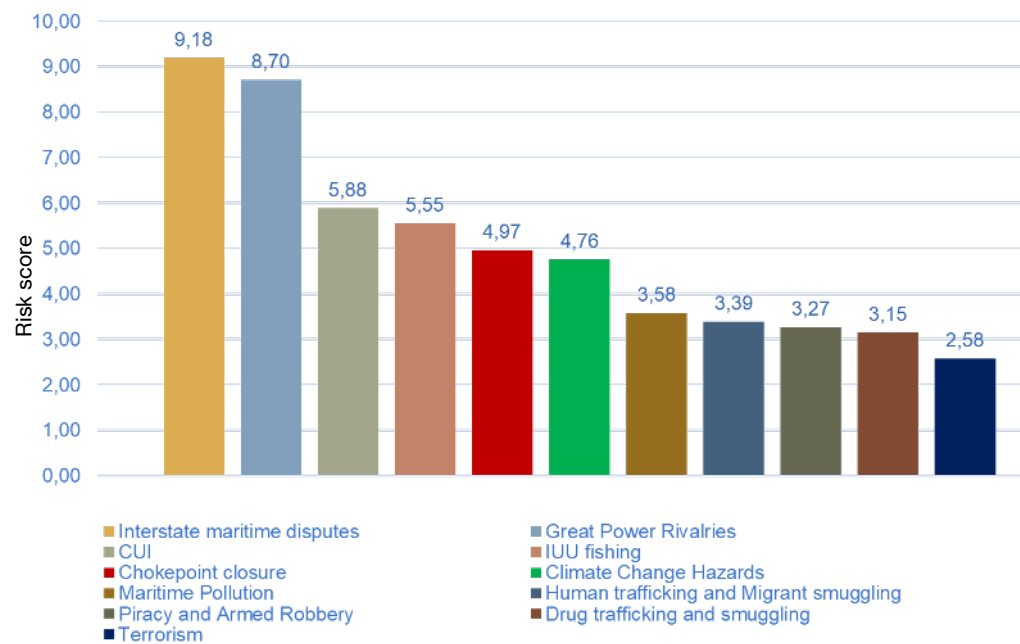
Please rate the probability of the following threats occurring in the South China Sea (1 = Minimal, 5 = Severe)

"Probability" refers to the assessed likelihood that each identified threat will materialize within the South China Sea region.



The respondents have a similar view on the probability of the different threats occurring in the South China Sea region. In the recent period, several incursions into the sovereign waters by a different state have caused tensions in the region. These tensions are linked with a growing rivalry between the USA alongside its allies and the growing dominance of China in the region. A theatre in which these tensions could come to fruition is the Malacca strait, which is why chokepoint closure is also ranked highly by the respondents.

Question 3:
Please rank the following threats in the South China Sea based on risk (impact times probability) from 1 (lowest overall risk) to 11 (highest overall risk)



The combined probability and impact as ranked by the experts provides a basic threat analysis for maritime threats in the South China Sea region. Interstate maritime disputes and Great Power rivalries take the top spots while maritime pollution, human trafficking, piracy, drug trafficking and terrorism are seen as least threatening. This analysis provides a basic overview of which threats should be most urgently targeted with sufficient measures.

Question 4:

What is, in your opinion, the most prominent maritime threat in the South China Sea, and why?

This is an open question; responses have been aggregated into the overview below.

The respondents expressed clear judgements in the survey responses. Interstate maritime disputes were named as the most prominent threat. Different threats like IUU fishing or the trafficking of drugs are noted as triggers of interstate maritime disputes. This exposes a new layer of complexity to SCS maritime threats. Great power rivalries take the second spot as ranked by the experts. IUU fishing is once again noted as a trigger. Sovereignty remains a big issue in SCS waters, while Chinese bullying of smaller powers creates strong alignments and increased tensions. Experts see these two issues as the main maritime threats in the region, although they sometimes have different triggers. Experts see these threats above all else as most threatening and problematic for regional maritime security.

A quick word on the definition used for preventive measures

A preventive measure involves proactive measures designed to deter, detect, or eliminate maritime threats before they materialize.

Within preventive measures, 'effectiveness' is defined as the extent to which a strategy successfully deters, detects, or eliminates maritime threats before they materialize — by reducing risk through early intervention, such as enhanced maritime domain awareness, training, port security, and international cooperation.

Next, we outlined the following preventive measures:

IUU fishing - Share real-time monitoring data with local maritime authorities and provide training on how to interpret and act on it to prevent illegal fishing.
Critical Underwater Infrastructure Protection - Conduct routine underwater inspections and maintenance missions with local partners, sharing expertise and equipment to keep infrastructure secure.
Drug trafficking and smuggling of goods - Supply modern scanning systems for ports and provide ongoing cooperative training for customs officers to improve early detection.
Terrorism - Deliver regular joint port security training, run random screening drills together, and share best practices to deter infiltration and attack planning.
Piracy - Support long-term capacity building by providing small patrol boats, equipment, and training to local coast guards to maintain visible, routine patrolling.
Chokepoint Closure - Provide technical support and co-financing for resilience upgrades at key ports and help develop alternative routing plans through shared scenario workshops.
Human trafficking and smuggling - Organise joint training for local port and border staff on spotting suspicious cargo and passenger behavior before it becomes a security incident.
Great Power Rivalries - Host regular joint training missions and communication exercises with regional navies to build trust and reduce the risk of accidental clashes.
Climate change - Co-finance resilient port infrastructure improvements, such as raised docks and flood defences, and conduct joint scenario planning for extreme weather.
Maritime pollution - Provide funding for pollution prevention equipment and work with local ports on regular inspections and staff training to ensure compliance with environmental standards.
Interstate Maritime Disputes - Fund and participate in joint hydrographic surveys and collaborative maritime boundary mapping with local authorities to reduce misunderstandings and prevent incidents.

A quick word on the definition used for responsive measures

A responsive measure involves actions taken to reduce the severity, impact, or consequences of a maritime threat after it has occurred or is imminent.

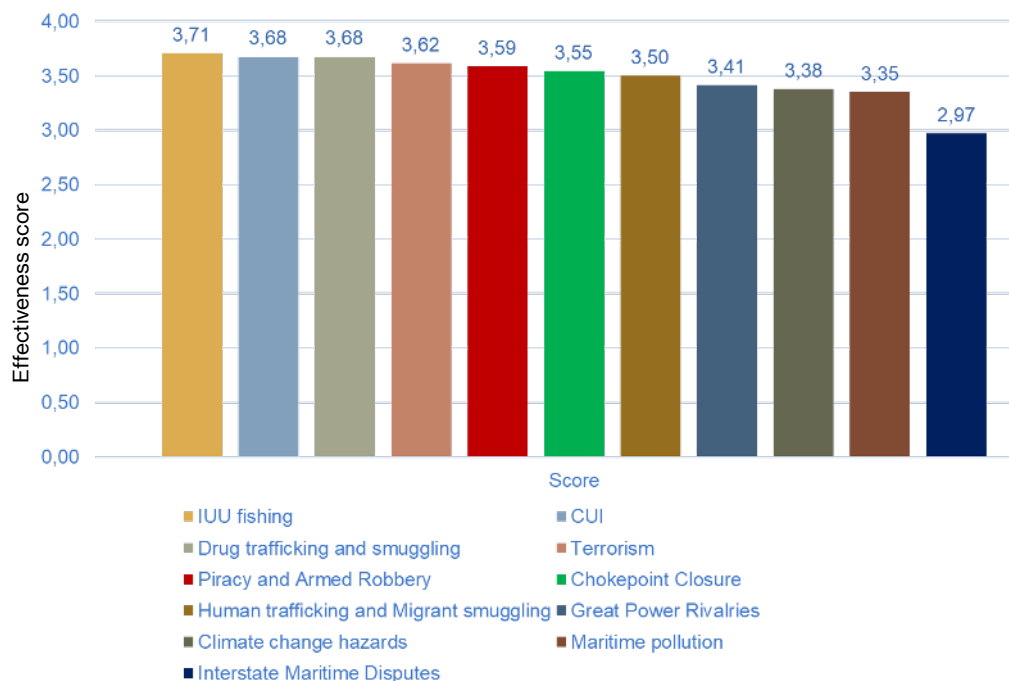
Within responsive measures, 'effectiveness' is defined as the extent to which a measure contributes to countering an existing or imminent maritime threat by reducing its severity, impact, or consequences — thereby containing damage, ensuring safety, and maintaining the continuity of maritime operations.

Next, we outlined the following responsive measures:

Critical Underwater Infrastructure Protection - Deploy underwater drones and inspection teams to protect and repair cables quickly.
IUU fishing - Donate patrol vessels and satellite tracking to enable rapid interception of illegal fishing boats.
Maritime pollution - Supply spill-response booms and conduct rapid response training for port staff.
Interstate Maritime Disputes - Provide satellite monitoring and real-time vessel tracking in disputed areas.
Chokepoint Closure (e.g. Malacca Strait) - Train port and coast guard teams in live crisis rerouting and rapid reopening drills.
Human trafficking and smuggling - Supply fast interception boats and detection tools for coastal enforcement units.
Great Power Rivalries - Run live deconfliction drills and naval communication exercises with local navies.
Climate change - Deploy mobile flood barriers and backup power for ports during severe weather.
Terrorism - Install advanced cargo scanners and train port staff to detect threats on the spot.
Drug trafficking and smuggling of goods - Run surprise port inspections with sniffer dogs and mobile inspection teams.
Piracy - Embed naval advisors in local patrols and conduct hostage rescue drills.

Question 5:

Please rate the effectiveness (1 = Not Effective, 5 = Very Effective) of the following preventive measures in the South China Sea:



The different preventive measures are ranked similarly effective by the respondents. Sharing monitoring data and providing trainings to combat IUU fishing is seen as most effective while collaborative funding and mapping of maritime boundaries to address interstate maritime disputes is seen as least effective. The perceived effectiveness of the different measures is closely linked to the nature of the issue, which provides an explanation for respondent ranking.

Question 6:

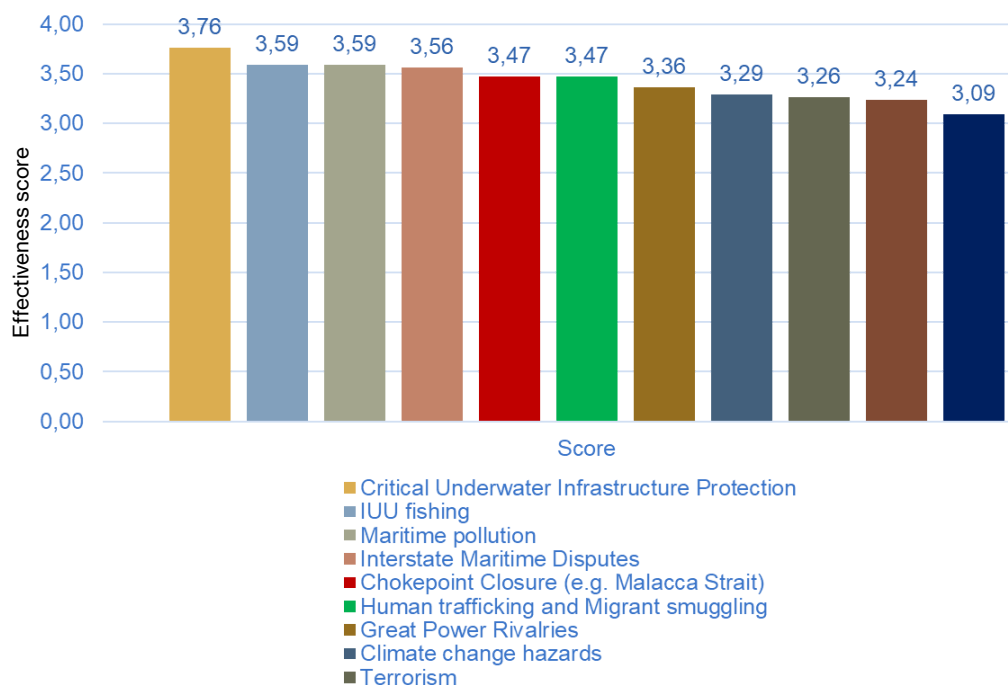
What additional preventive measures do you believe could help address maritime threats in the South China Sea?

This is an open question; responses have been aggregated into the overview below.

The experts reached a consensus on the need for extra coordination as an additional preventive measure to tackle the threats in the South China Sea. Better communication schemes, possibly via forums like ASEAN could in expert opinion get more players on board and reduce common threats. Trust is seen as the basis of problem-solving.

Question 7:

Please rate the effectiveness (1 = Not Effective, 5 = Very Effective) of the following responsive measures in the South China Sea



The measures targeting CUIP and IUU fishing are seen as the most effective responsive measures by the respondents. These involve deploying underwater drones and inspection teams to target CUIP problems and donating patrol vessels and providing satellite tracking to prevent IUU fishing. However, once again the experts rank the different measures within similar parameters, indicating that non single measure is seen as significantly more effective in relation to others.

Question 8:

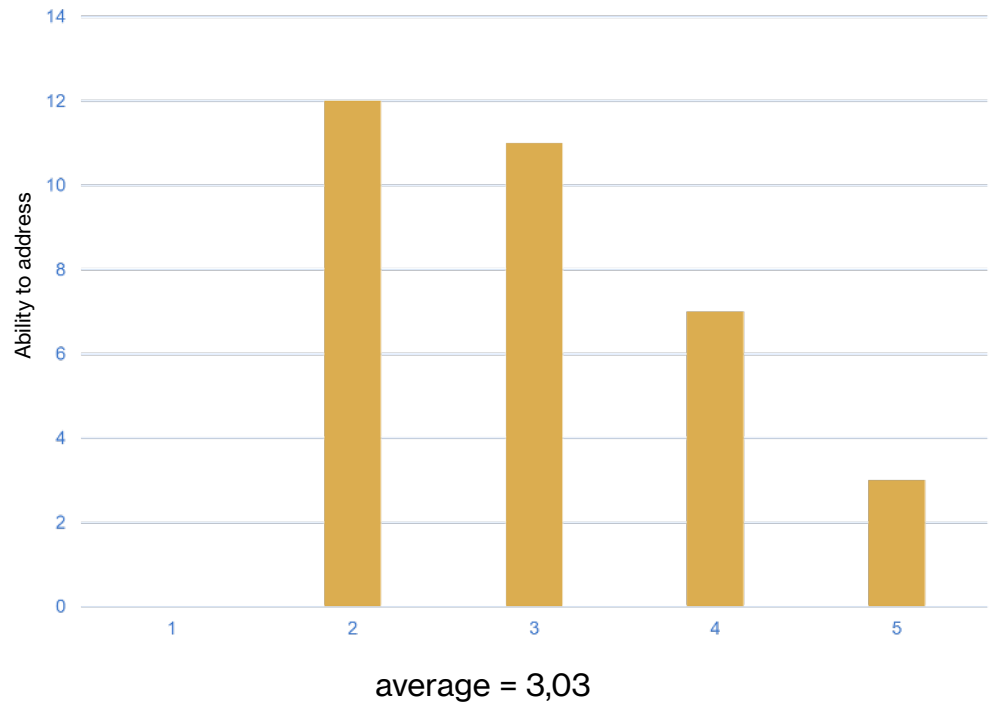
What additional responsive measures do you believe could help to address maritime threats in the South China Sea?

This is an open question; responses have been aggregated into the overview below.

The experts made different suggestions as to possible additional responsive measures that could be taken. Main sentiments revolve around strengthening governance and capacity building via renewed diplomatic efforts among broad coalitions. Legal gaps in current institutional infrastructure means cooperation is often difficult. Measures like finalising the ASEAN code of conduct can serve as a basis on which to build further trust through which responsive measures can have a bigger impact. Diplomatic unity could make sure naming and shaming has more effect and coalitions could provide more equipment to deal with asymmetric dangers.

Question 9:

To what extent can littoral states in the South China Sea address the range of maritime threats they face? (1 = To a very limited extent, 5 = To a great extent)



Respondents have awarded littoral states in the South China Sea region an average score of 3,03 in regards to the extent to which they can address the range of maritime threats that they are facing. None of the respondents give the littoral states a score of 1, indicating that the respondents are generally positive in the ability of measures being able to positively address the different threats. However, few respondents award a score of 5, meaning that there will be work to do in order to successfully deal with the challenges.

Question 10:

How can cooperation between littoral states in the South China Sea and European states and the EU strengthen maritime security in the South China Sea?

This is an open question; responses have been aggregated into the overview below.

Respondents look at European states and the EU as facilitators in conflict mediation and skills and technology sharing. European technology and experience in maritime security are seen as strong assets that can be used in mutual benefit programs. Capacity building is perceived as the main potential focus of the EU. Providing trainings both in the field as well as legal and policy training to governments is seen as a helpful measure.

Question 11:

What are the major obstacles to such cooperation, and how might they be overcome?

This is an open question; responses have been aggregated into the overview below.

Limited political will and alignment are seen as the main obstacles to further cooperation between European states and littoral states on the SCS. This lack of focus can be attributed to European efforts to prop up its own security while its sovereignty is increasingly being tested by Russian efforts and other hybrid forces. With the EU's priorities laying elsewhere it's difficult to allocate funding and other resources to maritime threats in the SCS. Efforts based on local needs, from the ground up, are seen as a potential basis for overcoming these obstacles. Smaller scale practical collaborations can serve as a strong starting point.

Question 12:

Which interregional multilateral framework offers the most opportunities for littoral states in the South China Sea and European states and the EU to strengthen maritime security in the South China Sea?

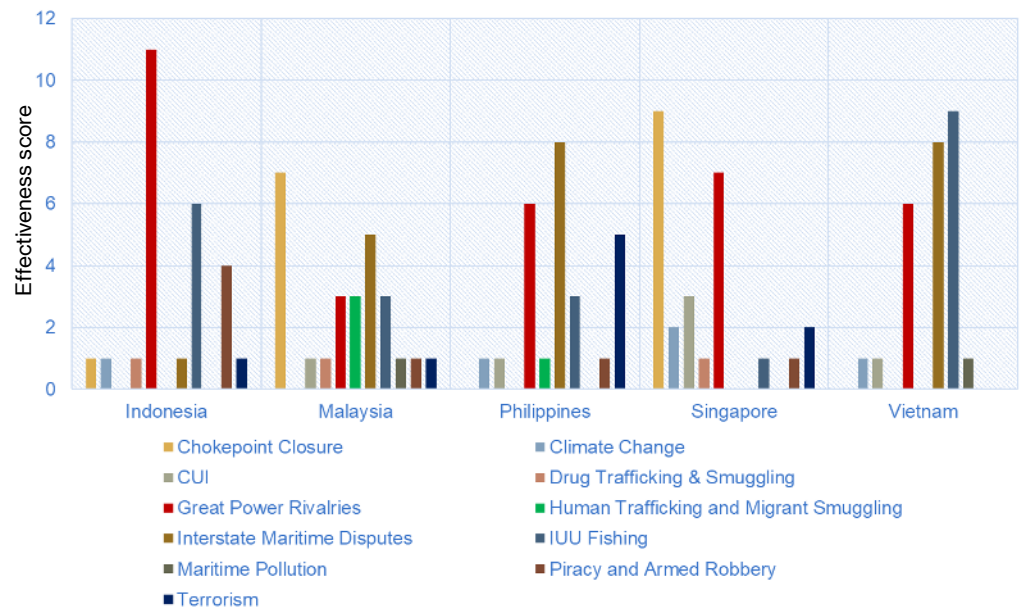
This is an open question; responses have been aggregated into the overview below.

Examples include: ASEAN (including ASEAN-EU meetings), Asia-Europe Meeting (ASEM), Enhancing Security Cooperation in and with Asia (ESIWA), Critical Maritime Routes for the Wider Indian Ocean (CRIMARIO), Indian Ocean Naval Symposium (IONS), ReCAAP, Interpol, and the UN Office on Drugs and Crime (UNODC)

ASEAN is seen as the main framework through which the most opportunities can be realised. Its steady status as a forum for negotiations and cooperation in the region makes it central in any form of regional collaboration on maritime security. ReCAAP and ESIWA are seen as organisations that can offer a more practical role and operational focus to combatting specific issues. Some respondents argue there should be a more collaborative approach to strengthening maritime security, arguing for a combination of frameworks that offer a more effective way of tackling differing issues. The EU is also well-positioned as a partner in a security framework. Its well-established position and role within different international frameworks make sure European states can leverage their position for more effective policy.

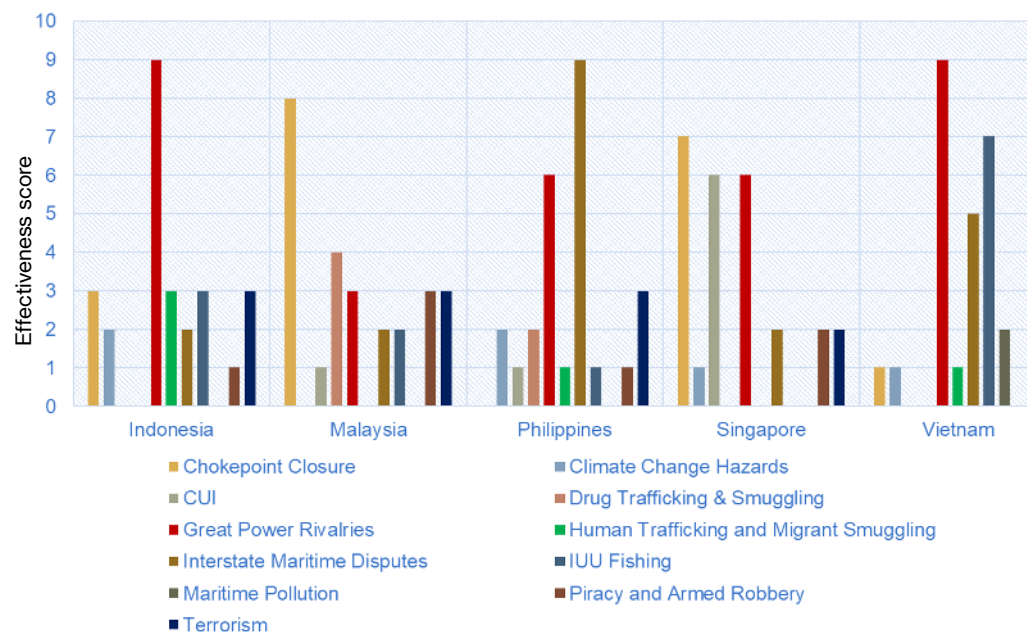
Question 13:

Which combination of littoral state(s) and preventive action do you consider most effective for enhancing maritime security in the South China Sea region?



Respondents were asked to rank the effectiveness of different preventive measures for specific countries in the South China Sea region. The measures targeting Great Power Rivalries are highlighted for Indonesia, it is a pivotal actor in regional maritime governance. Its longstanding policy of non-alignment and strategic hedging is now under increasing strain, heightening the importance of Indonesia's role in managing tensions and preventing escalation. For Singapore and Malaysia, the closure of chokepoints such as the Malacca and Singapore Straits remains the most pressing concern.

Question 14:
Which combination of littoral state(s) and responsive action do you consider most effective for enhancing maritime security in the South China Sea region?

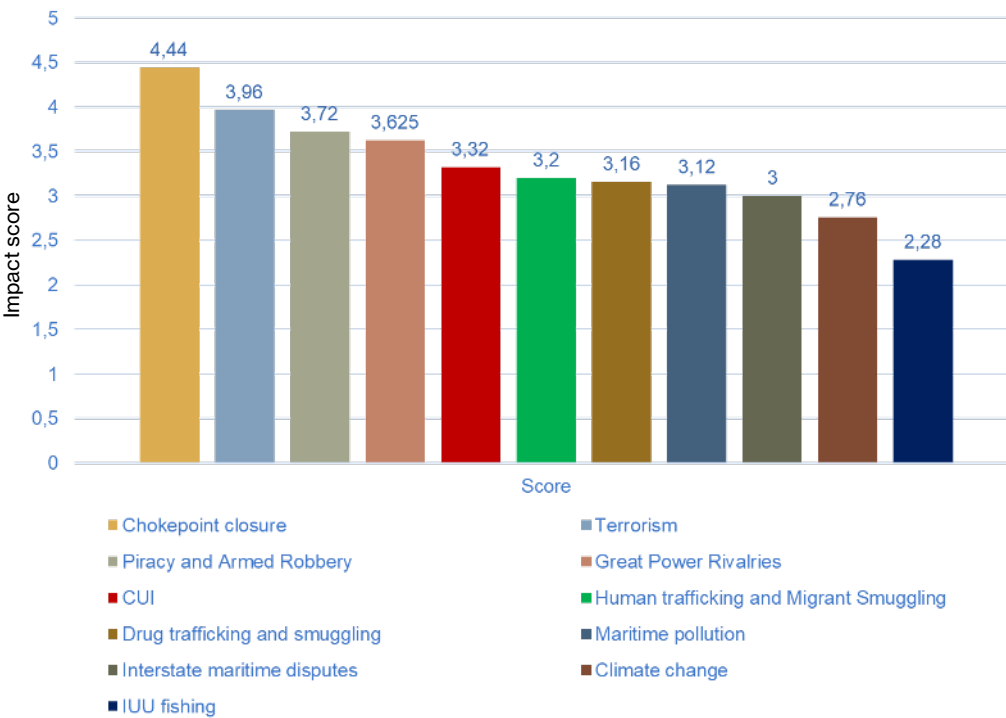


The respondents also ranked the effectiveness of different responsive measures for specific countries. Indonesia once again scores high on measures targeting Great Power rivalries, while Vietnam is now also noted for targeting Great Power Rivalries. The Philippines are ranked as most effective in addressing interstate maritime disputes, as recent navy show-downs with Chinese shipping vessels have caused severe tensions. Singapore and Malaysia best fit trainings to respond to chokepoint closures in order to adequately deal with possible disruptions in this regard.

2. Overview survey results Red Sea

Question 1:
Please rate the impact of the following threats occurring in the Red Sea (1 = Minimal, 5 = Severe)

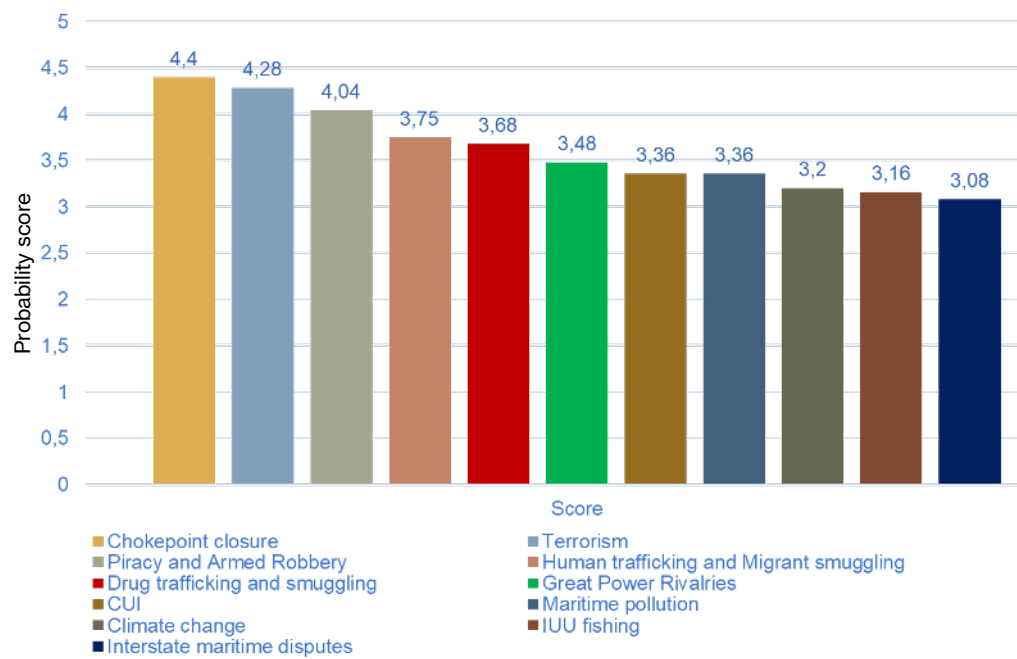
Impact” refers to the extent to which each threat is expected to disrupt maritime security, including the stability and functioning of sea lines of communication and trade routes in the Red Sea.



Respondents argue that chokepoint closure is the threat with the most potential impact that the Red Sea Region is facing. The substantial role that the Red Sea plays in global trade makes disruptions costly. Trends of terrorism and piracy in the region have also left their mark, as experts rank them 2nd and 3rd. Interstate maritime disputes, climate change and IUU fishing are seen as less potentially impactful issues.

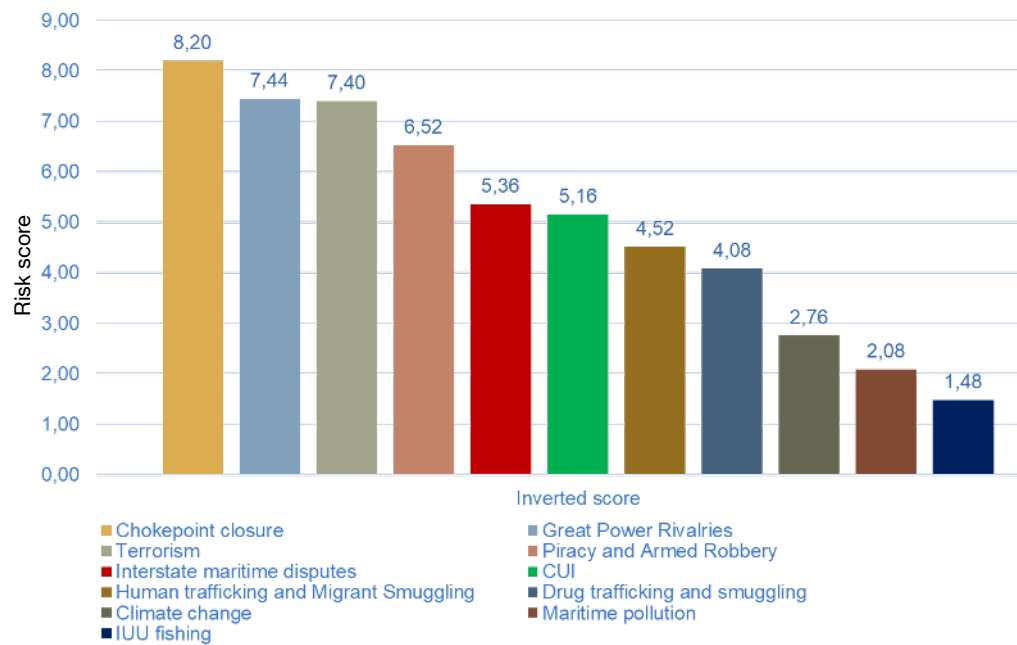
Question 2:
Please rate the probability of the following threats occurring in the Red Sea (1 = Minimal, 5 = Severe)

“Probability” refers to the assessed likelihood that each identified threat will materialize within the Red Sea region.



The experts argue that while chokepoint closure, terrorism and piracy are also the most impactful threats, they are also the most probable. The major economic damages stemming from closure and disruptions in the recent period have left experts feeling grim. Interstate maritime disputes are seen as the threat least probable in the region, this reflects the stable state of sovereignty in the region.

Question 3:
Please rank the following threats in the Red Sea based on risk (impact times probability) from 1 (lowest overall risk) to 11 (highest overall risk).



With both factors combined, the data shows which threats are most problematic in the region and which require less urgent solutions. The data reflects a combination of recent events alongside long-term trends and provides a basis for targeted policy.

Question 4:
What is, in your opinion, the most prominent maritime threat in the Red Sea today, and why?

This is an open question; responses have been aggregated into the overview below.

Experts view regional conflicts as the most prominent threats in the Red Sea region. Houthi attacks on shipping claim the top spot. Some respondents argue that great power rivalries are stirring up regional conflict, which creates more instability in the region resulting in a variety of different increasingly difficult maritime threats.

A quick word on the definition used for preventive measures

A preventive measure involves proactive measures designed to deter, detect, or eliminate maritime threats before they materialize.

Within preventive measures, 'effectiveness' is defined as the extent to which a strategy successfully deters, detects, or eliminates maritime threats before they materialize — by reducing risk through early intervention, such as enhanced maritime domain awareness, training, port security, and international cooperation.

Next, we outlined the following preventive measures:

Piracy - Support long-term capacity building by providing small patrol boats, equipment, and training to local coast guards to maintain visible, routine patrolling.
Terrorism - Deliver regular joint port security training, run random screening drills together, and share best practices to deter infiltration and attack planning.
Critical Underwater Infrastructure Protection - Conduct routine underwater inspections and maintenance missions with local partners, sharing expertise and equipment to keep infrastructure secure.
Chokepoint Closure - Provide technical support and co-financing for resilience upgrades at key ports and help develop alternative routing plans through shared scenario workshops.
Drug trafficking and smuggling of goods - Supply modern scanning systems for ports and provide ongoing cooperative training for customs officers to improve early detection.
Human trafficking and smuggling - Organise joint training for local port and border staff on spotting suspicious cargo and passenger behavior before it becomes a security incident.
Interstate Maritime Disputes - Fund and participate in joint hydrographic surveys and collaborative maritime boundary mapping with local authorities to reduce misunderstandings and prevent incidents.
Climate change - Co-finance resilient port infrastructure improvements, such as raised docks and flood defences, and conduct joint scenario planning for extreme weather.
IUU fishing - Share real-time monitoring data with local maritime authorities and provide training on how to interpret and act on it to prevent illegal fishing.
Maritime pollution - Provide funding for pollution prevention equipment and work with local ports on regular inspections and staff training to ensure compliance with environmental standards.
Great Power Rivalries - Host regular joint training missions and communication exercises with regional navies to build trust and reduce the risk of accidental clashes.

A quick word on the definition used for responsive measures

A responsive measure involves actions taken to reduce the severity, impact, or consequences of a maritime threat after it has occurred or is imminent.

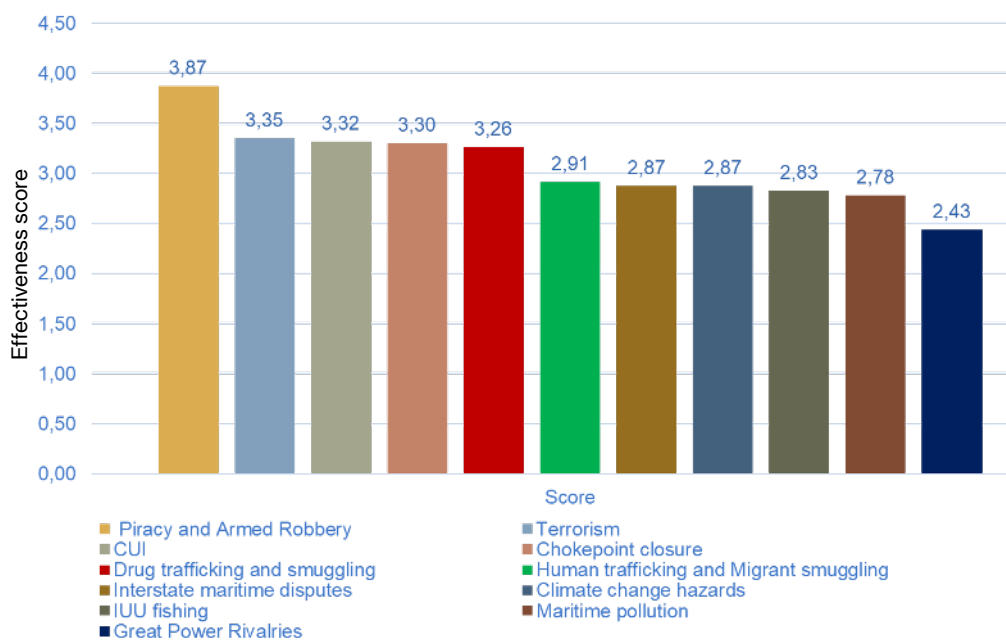
Within responsive measures, 'effectiveness' is defined as the extent to which a measure contributes to countering an existing or imminent maritime threat by reducing its severity, impact, or consequences — thereby containing damage, ensuring safety, and maintaining the continuity of maritime operations.

Next, we outlined the following responsive measures:

Critical Underwater Infrastructure Protection - Deploy underwater drones and inspection teams to protect and repair cables quickly.
Terrorism - Install advanced cargo scanners and train port staff to detect threats on the spot.
Piracy - Embed naval advisors in local patrols and conduct hostage rescue drills.
Human trafficking and smuggling - Supply fast interception boats and detection tools for coastal enforcement units.
Chokepoint Closure (e.g. Malacca Strait) - Train port and coast guard teams in live crisis rerouting and rapid reopening drills.
Drug trafficking and smuggling of goods - Run surprise port inspections with sniffer dogs and mobile inspection teams.
IUU fishing - Donate patrol vessels and satellite tracking to enable rapid interception of illegal fishing boats.
Interstate Maritime Disputes - Provide satellite monitoring and real-time vessel tracking in disputed areas.
Maritime pollution - Supply spill-response booms and conduct rapid response training for port staff.
Climate change - Deploy mobile flood barriers and backup power for ports during severe weather.
Great Power Rivalries - Run live deconfliction drills and naval communication exercises with local navies.

Question 5:

Please rate the effectiveness (1 = Not Effective, 5 = Very Effective) of the following preventive measures in the Red Sea:



Within the rated effectiveness of the different preventive measures, the measure targeting piracy is ranked by experts as most effective. However, the data covering the different proposed measures shows results close together.

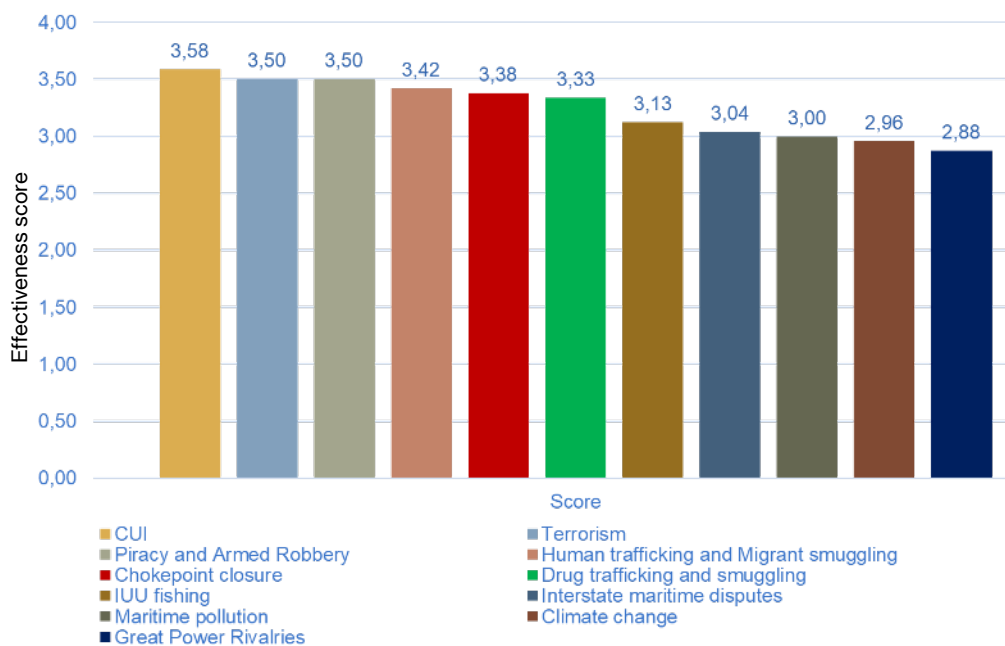
Question 6:

What additional preventive measures do you believe could help to address maritime threats in the Red Sea?

This is an open question; responses have been aggregated into the overview below.

Experts address additional collaboration between with the EU and between littoral states in the Red Sea region as major benefits for addressing maritime threats. Conflict de-escalation through renewed diplomacy or collective security can help prevent future crises and build stability in the region. Some experts argue that the EU should play a bigger role in this and renew its focus and presence in the region. This gives opportunity for practical solutions.

Question 7:

Please rate the effectiveness (1 = Not Effective, 5 = Very Effective) of the following responsive measures in the Red Sea

Within the data rating the perceived effectiveness of different responsive measures, 'deploying underwater drones and inspection teams' is ranked the highest by the respondents. The perceived effectiveness of different measures is again ranked very closely together. The measures targeting Great power rivalries are once again seen as least effective, indicating a different approach to the issue might be necessary.

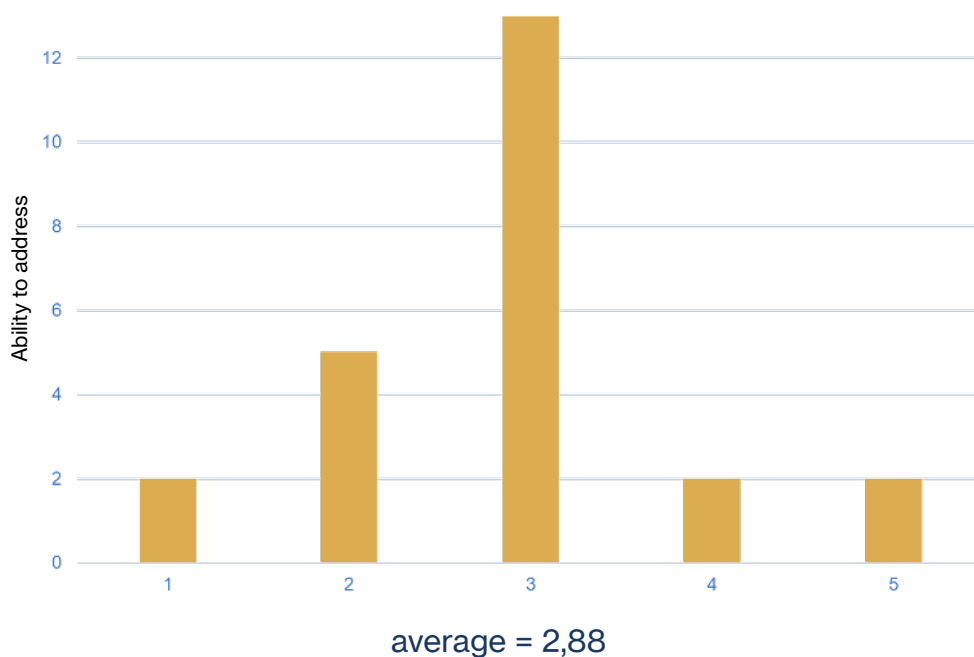
Question 8:

What additional responsive measures do you believe could help to address maritime threats in the Red Sea?

This is an open question; responses have been aggregated into the overview below.

The main responsive measures mentioned by the respondents focussed on deterring Houthi attacks and resolving interstate disputes and great power rivalries. The current conflictual climate in the region causes severe harm to the stability that is necessary for solving the different threats in the region. Coordination and increasing naval presence are named as possibilities.

Question 9:

To what extent can littoral states in the Red Sea address the range of maritime threats they face? (1 = To a very limited extent, 5 = To a great extent)

Respondents overwhelmingly indicate that littoral states in the Red Sea have at least some capacities to address the range of threats they are facing. With an average of 2,88, most respondents are neither super positive nor negative about the supposed prospects. This indicates that potentially through collaboration with the right partners, some important steps in securing a safer Red Sea can be achieved.

Question 10:

How can cooperation between littoral states in the Red Sea and European states and the EU strengthen maritime security in the Red Sea?

This is an open question; responses have been aggregated into the overview below.

Cooperation between littoral states in the Red Sea and European states and the EU can strengthen maritime security through de-escalation and increased enforcement of security. Experts argue that through European investment in the Red Sea security it helps itself. The EU should therefore take a bigger role in this process and look for cooperation opportunities. Improving relations and building trust can come a long way in improving the maritime security. By improving relations, the EU can work on de-escalation in regional rivalries and develop a stronger vision based on more mutual confidence.

Question 11:

What are the major obstacles to such cooperation, and how might they be overcome?

This is an open question; responses have been aggregated into the overview below.

Divergent interests and lack of resources are cited as the main obstacles in cooperation possibilities. Lack of willingness or even selective engagement are difficult to overcome. The EU has other issues to focus on, making Red Sea maritime security not a top priority. Regional rivalries and lack of trust make effective engagement difficult and costly. International cooperation is hard when misalignment plays a role, as well as potential disengagement by the US.

Question 12:

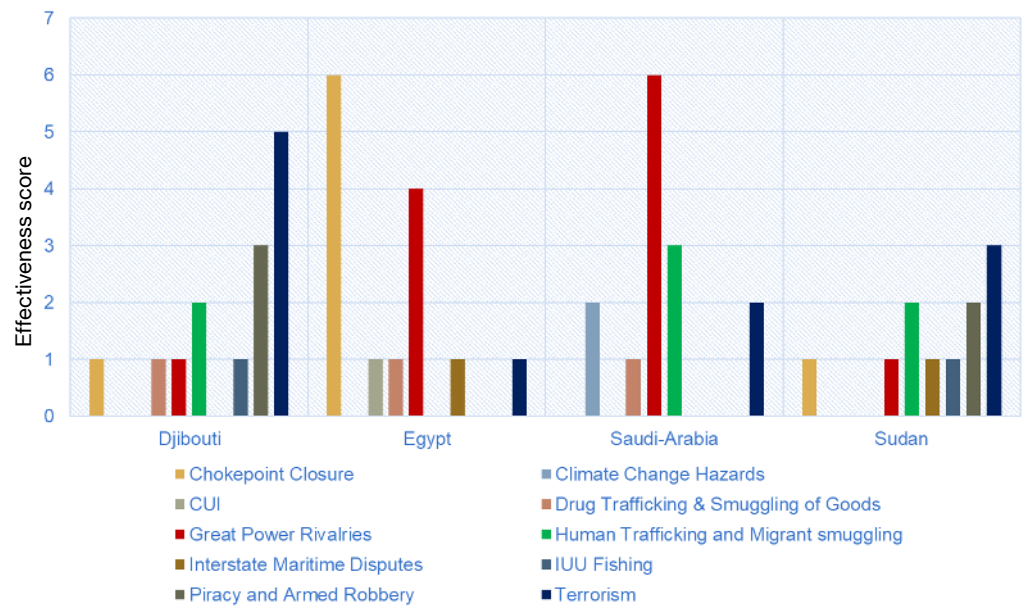
Which interregional multilateral framework offers the most opportunities for littoral states in the Red Sea and European states and the EU to strengthen maritime security in the Red Sea?

Examples include: Djibouti Code of Conduct (DCoC), Council of Arab and African Littoral States of the Red Sea and the Gulf of Aden

This is an open question; responses have been aggregated into the overview below.

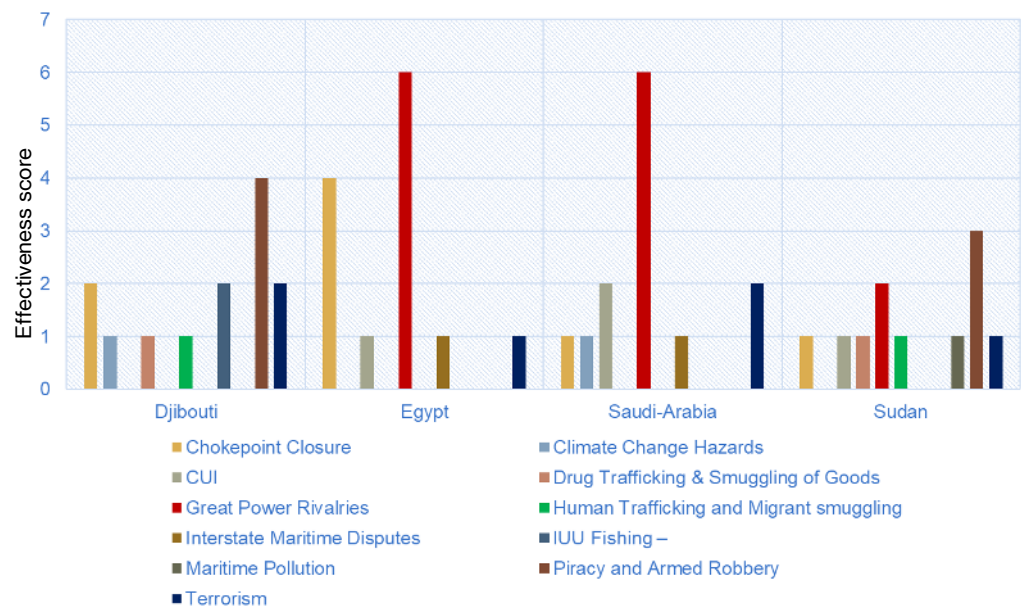
Experts most prominently name the DCoC as a framework that offers the best opportunities. Its existing operational structures offer possibilities for increased regional cooperation, especially with strong EU backing. The Council of Arab and African Littoral States also provides opportunities, but internal divisions may make it difficult to achieve strong progress. NATO is also mentioned as a potential key player, securing safety in the region via a strong naval presence might provide the necessary stability on which further cooperation can be built.

Question 13:
Which combination of littoral state(s) and preventive action do you consider most effective for enhancing maritime security in the Red Sea Region?



Respondents were asked to rank the effectiveness of different preventive measures for specific countries in the Red Sea region. The measures targeting chokepoint closure are singled out for Egypt, the severity of a possibility of chokepoint closure are the highest in Egypt, which makes resilience investments most likely to make a positive impact. Saudi Arabia is especially awarded Great Power Rivalries since its tensions with Iran could cause instability in the Red Sea region.

Question 14:
Which combination of littoral state(s) and responsive action do you consider most effective for enhancing maritime security in the Red Sea region?



The data showing results for the combination of responsive measures and specific states shows similar results as seen earlier with the preventive measures. Some key differences are mainly an increased score for Great Power Rivalries measures in Egypt and measures targeting terrorism in Djibouti. Saudi Arabia is once again seen as keen on targeting threats occurring from Great Power Rivalries.

Annex 4:

Country-specific score of Risk X CEAF

Preventive measures South China Sea

Threat	Preventive Measure	SCS R/ CES	SCS Risk	SCS CES Average	Indonesia	Malaysia	Vietnam	Philippines
Great Power Rivalries	Host regular joint training missions and communication exercises with regional navies to build trust and reduce the risk of accidental clashes.	H/H	H	H	H	M	H	H
Interstate Maritime Disputes	Fund and participate in joint hydrographic surveys and collaborative maritime boundary mapping with local authorities to reduce misunderstandings and prevent incidents.	M/M	M	M	M	M	H	H
Chokepoint Closure	Provide technical support and co-financing for resilience upgrades at key ports and help develop alternative routing plans through shared scenario workshops.	M/M	M	M	M	H	M	M
Sabotage and damage of CUI	Conduct routine underwater inspections and maintenance missions with local partners, sharing expertise and equipment to keep infrastructure secure.	M/H	M	H	H	H	M	M
Terrorism	Deliver regular joint port security training, run random screening drills together, and share best practices to deter infiltration and attack planning.	L/H	L	H	H	H	M	H
Piracy and Armed Robbery at Sea	Support long-term capacity building by providing small patrol boats, equipment, and training local coast guards to maintain visible, routine patrolling.	L/H	L	H	H	H	H	H
Human Trafficking and Migrant Smuggling	Organize joint training for local port and border staff on spotting suspicious cargo and passenger behaviour before it becomes a security incident.	L/H	L	H	H	M	H	H
Drug Trafficking and Smuggling of Goods	Supply modern scanning systems for ports and provide ongoing cooperative training for customs officers to improve early detection.	L/M	L	M	M	M	M	M
IUU Fishing	Share real-time monitoring data with local maritime authorities and provide training on how to interpret and act on it to prevent illegal fishing.	M/M	M	M	M	M	M	H
Climate-related Hazards	Co-finance resilient port infrastructure improvements, such as raised docks and flood defences, and conduct joint scenario planning for extreme weather.	M/M	M	M	M	M	H	M
Maritime Pollution	Provide funding for pollution prevention equipment and work with local ports on regular inspections and staff training to ensure compliance with environmental standards.	L/H	L	M	M	M	M	M

Responsive measures South China Sea

Threat	Responsive Measure	SCS R/ CES	Risk	SCS CES Average	Indonesia	Malaysia	Vietnam	Philippines
Great Power Rivalries	Run live deconfliction drills and naval communication exercises with local navies.	H/H	H	H	H	M	H	H
Interstate Maritime Disputes	Provide satellite monitoring and real-time vessel tracking in disputed areas.	M/H	M	H	H	M	H	H
Chokepoint Closure	Train port and coast guard teams in live crisis rerouting and rapid reopening drills.	M/M	M	M	H	H	M	M
Sabotage and damage of CUI	Deploy underwater drones and inspection teams to protect and repair cables quickly.	M/M	M	M	M	M	H	M
Terrorism	Install advanced cargo scanners and train port staff to detect threats on the spot.	L/H	L	H	H	H	H	H
Piracy and Armed Robbery at Sea	Embed naval advisors in local patrols and conduct hostage rescue drills.	L/H	L	H	H	H	M	M
Human Trafficking and Migrant Smuggling	Supply fast interception boats and detection tools for coastal enforcement units.	L/M	L	M	H	M	M	M
Drug Trafficking and Smuggling of Goods	Run surprise port inspections with sniffer dogs and mobile inspection teams.	L/M	L	M	M	M	M	M
IUU Fishing	Donate patrol vessels and satellite tracking	M/H	M	H	H	M	H	H
Climate-related Hazards	Deploy mobile flood barriers and backup power for ports during severe weather	M/M	M	M	H	M	H	H
Maritime Pollution	Supply spill-response booms and conduct rapid response training for port staff.	L/M	L	M	H	M	M	H

Preventive measures Red Sea

Threat	Preventive Measure	RS R/CES	RS CES Average	RS Risk	Saudi Arabia	Egypt
Great Power Rivalries	Host regular joint training missions and communication exercises with regional navies to build trust and reduce the risk of accidental clashes.	M/M	M	M	M	M
Interstate Maritime Disputes	Fund and participate in joint hydrographic surveys and collaborative maritime boundary mapping with local authorities to reduce misunderstandings and prevent incidents.	L/M	M	L	M	M
Chokepoint Closure	Provide technical support and co-financing for resilience upgrades at key ports and help develop alternative routing plans through shared scenario workshops.	H/H	H	H	H	H
Sabotage and damage of CUI	Conduct routine underwater inspections and maintenance missions with local partners, sharing expertise and equipment to keep infrastructure secure.	M/M	M	M	M	M
Terrorism	Deliver regular joint port security training, run random screening drills together, and share best practices to deter infiltration and attack planning.	M/H	H	M	M	H
Piracy and Armed Robbery at Sea	Support long-term capacity building by providing small patrol boats, equipment, and training local coast guards to maintain visible, routine patrolling.	M/M	M	M	M	M
Human Trafficking and Migrant Smuggling	Organize joint training for local port and border staff on spotting suspicious cargo and passenger behaviour before it becomes a security incident.	L/M	M	L	M	H
Drug Trafficking and Smuggling of Goods	Supply modern scanning systems for ports and provide ongoing cooperative training for customs officers to improve early detection.	L/M	M	L	M	M
IUU Fishing	Share real-time monitoring data with local maritime authorities and provide training on how to interpret and act on it to prevent illegal fishing.	L/M	M	L	M	M
Climate-related Hazards	Co-finance resilient port infrastructure improvements, such as raised docks and flood defences, and conduct joint scenario planning for extreme weather.	L/H	H	L	H	H
Maritime Pollution	Provide funding for pollution prevention equipment and work with local ports on regular inspections and staff training to ensure compliance with environmental standards.	L/M	M	L	M	M

Responsive measures Red Sea

Threat	Responsive Measure	RS R/CES	RS CES Average	RS Risk	Saudi Arabia	Egypt
Great Power Rivalries	Run live deconfliction drills and naval communication exercises with local navies.	M/M	M	M	M	M
Interstate Maritime Disputes	Provide satellite monitoring and real-time vessel tracking in disputed areas.	L/M	M	L	M	M
Checkpoint Closure	Train port and coast guard teams in live crisis rerouting and rapid reopening drills.	H/H	H	H	H	H
Sabotage and damage of CUI	Deploy underwater drones and inspection teams to protect and repair cables quickly.	M/M	M	M	M	M
Terrorism	Install advanced cargo scanners and train port staff to detect threats on the spot.	M/M	M	M	M	H
Piracy and Armed Robbery at Sea	Embed naval advisors in local patrols and conduct hostage rescue drills.	M/M	M	M	M	M
Human Trafficking and Migrant Smuggling	Supply fast interception boats and detection tools for coastal enforcement units.	L/M	M	L	M	M
Drug Trafficking and Smuggling of Goods	Run surprise port inspections with sniffer dogs and mobile inspection teams.	L/M	M	L	M	M
IUU Fishing	Donate patrol vessels and satellite tracking	L/M	M	L	M	M
Climate-related Hazards	Deploy mobile flood barriers and backup power for ports during severe weather	L/H	H	L	M	H
Maritime Pollution	Supply spill-response booms and conduct rapid response training for port staff.	L/M	M	L	M	H



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