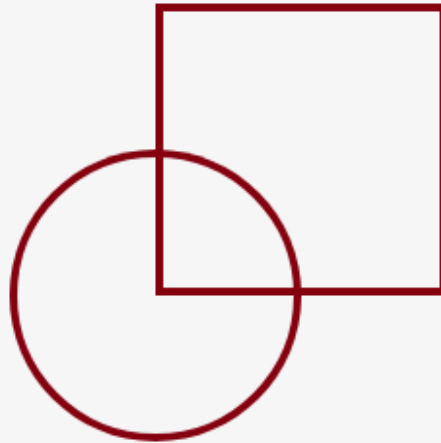




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Global maritime security: protecting flows in a space that has once again become strategic

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Angle

Maritime security is still too often thought of as the protection of ships against piracy, terrorism or naval confrontations. This framing has become insufficient. The real challenge now is to protect a global circulatory system made up of trade routes, straits, ports, submarine cables, pipelines, satellites, data and private supply chains.

The sea is no longer just the space through which economic power transits. It has become one of the places where this power can be interrupted, bypassed or instrumentalized. Maritime security therefore no longer depends solely on military control of the oceans. It is based on the ability to guarantee the continuity of flows in an environment where threats are dispersed, responsibilities fragmented and infrastructures difficult to defend in their entirety.

Executive Summary

Maritime transport accounts for more than 80% of world trade in goods by volume. However, this centrality does not mean that the maritime system is solidly secure. On the contrary, it reveals a massive dependence on a limited number of roads, straits, ports and technical infrastructure¹.

Successive crises in the Red Sea, the Black Sea, the Gulf of Aden and around the Panama Canal have shown that a localized disruption can have global consequences: longer journeys, higher costs, higher insurance premiums, port congestion, supply chain strains and higher prices for goods. In 2025, UNCTAD highlighted that protracted diversions around the Cape of Good Hope had increased delays, costs and emissions, while the reliability of supply chains continued to deteriorate.

But maritime vulnerability is not limited to trade routes. The seabed is home to telecommunications cables and pipelines that are essential to the functioning of contemporary economies. Ports have become complex digital and logistics platforms. Ships depend on navigation, positioning and communication systems that are exposed to jamming, hacking and manipulation.

Global maritime security is thus undergoing a major shift: it is no longer just about preventing an enemy fleet from controlling the sea. It consists in preventing a series of limited attacks, ambiguous sabotage, regional pressure or technical failures from progressively compromising the continuity of the system.

This evolution calls for a broader doctrine. Navies remain indispensable, but they cannot monitor every cable, escort every ship or protect every installation. Maritime security must therefore combine naval power, logistical resilience, intelligence, international cooperation, regulation of private operators and diversification of routes. Thus, the real strategic issue is not the abstract freedom of the seas. It is the concrete ability to maintain essential flows despite conflictuality.

Introduction

The sea gives the appearance of an opening. It seems to be a vast, fluid space that is difficult to close in the long term. This representation has long fed the idea that global maritime trade benefits from a form of natural resilience: when one route becomes dangerous, ships can take another. This flexibility exists, but it comes at a cost.

¹ UN TRADE AND DEVELOPMENT. (2025, SEPTEMBER 24). MARITIME TRADE UNDER PRESSURE: GROWTH SET TO STALL IN 2025. <https://unctad.org/news/maritime-trade-under-pressure-growth-set-stall-2025>

Bypassing a conflict zone lengthens distances, immobilizes more ships, increases fuel consumption, increases insurance costs and disrupts the organization of ports. An alternative route does not therefore replace a main road with constant conditions. It shifts vulnerability to transport capacities, lead times, inventories and prices.

The disturbances in the Red Sea provided a direct demonstration of this. Ships that previously used to use the Suez Canal have been diverted to the Cape of Good Hope, adding weeks to some rotations. UNCTAD now considers port disruptions and extended routes to be no longer just one-off accidents, but a long-term driver of volatility in shipping².

At the same time, the nature of maritime security has changed. Piracy persists and is experiencing regional resurgences. Attacks on ships can be linked to land conflicts. Underwater infrastructure is becoming potential targets. Navies are called upon to protect trade routes, monitor coastal approaches, secure pipelines, control illicit activities, and maintain a deterrent presence against other powers. The consequence is a continuous extension of the concept of maritime safety.

As the number of threats increases, however, there is a risk that very different problems will be lumped together under the same term: piracy, naval warfare, terrorism, illegal fishing, trafficking, cyber-attacks, sabotage, environmental disasters or economic coercion. A definition that is too broad becomes unusable. A definition that is too narrow ignores the reality of the system.

Maritime security must therefore be understood as the ability to maintain the political, economic and strategic use of maritime spaces despite intentional threats, power rivalries and major disruptions. It is not about eliminating all risks. It consists of preventing a local vulnerability from interrupting a vital function.

² UN TRADE AND DEVELOPMENT. (2025). REVIEW OF MARITIME TRANSPORT 2025: STAYING THE COURSE IN TURBULENT WATERS. [HTTPS://UNCTAD.ORG/PUBLICATION/REVIEW-MARITIME-TRANSPORT-2025](https://unctad.org/publication/review-maritime-transport-2025)

I. The real issue is not the freedom of the seas, but the continuity of flows

Freedom of navigation remains a central principle of the international maritime order. It allows commercial and military vessels to circulate under the conditions defined by the law of the sea. But the legal freedom to navigate does not guarantee the material safety of navigation. A road can remain open in law while becoming economically unusable.

Military risk, increased insurance, crew refusal, shipowners' instructions or the threat to certain nationalities of ships can be enough to divert traffic. It is therefore not necessary to physically close a strait to greatly reduce its usefulness. This distinction is strategic.

An actor with limited means can produce a disproportionate effect if it acts in a space through which concentrated flows pass. He does not need to destroy a large number of ships. Sometimes it is enough to make the risk credible enough to change the economic calculations of shipping companies.

Maritime security is therefore not only measured by the number of successful attacks. It is also measured by the volume of traffic diverted, the cost of protective measures, the duration of delays and the ability of operators to maintain their services. The consequences of a maritime disturbance are also unevenly distributed.

Large economies can build up inventories, subsidize certain sectors, mobilize large fleets or temporarily absorb rising costs. Island states, landlocked countries dependent on port corridors and economies importing food or energy have smaller margins.

UNCTAD points out that developing countries are particularly vulnerable to increased costs caused by diversions and congestion, even though they often have fewer opportunities for diversification. Maritime safety is therefore also a question of economic hierarchy. The same interruption does not produce the same effects on all the actors. Contemporary maritime power is no longer just about controlling a route. It consists of being able to withstand its disruption longer than its competitors.

II. Straits have become power multipliers

Maritime globalization is based on a structural contradiction: it uses an immense space, but concentrates a decisive part of its flows in a few narrow passages. Canals, straits and port approaches are compression points for the system. The Suez Canal and the Bab el-Mandeb Strait connect Europe and Asia through the Red Sea. The Strait of Hormuz concentrates a major part of the energy flows of the Gulf. The Strait of Malacca is an essential link between the Indian Ocean and East Asia. The Turkish straits connect the Black Sea to the Mediterranean. These passages have a double function.

They reduce distances and allow for the efficiency of maritime trade. But they also transform limited geographical spaces into instruments of power. A coastal state, a naval power or an armed group capable of threatening a strait can influence actors far removed from the local theatre. Control doesn't have to be absolute. It is enough that uncertainty affects commercial and military decisions.

The Red Sea crisis confirmed this asymmetry. Attacks from a limited coastal area have led to the diversion of a significant part of international traffic and forced several powers to deploy naval assets to protect navigation. This situation reveals a fundamental fragility: the strategic value of a force depends not only on its own military power, but on the degree of global dependence on space that it can disrupt.

The straits are thus geopolitical multipliers. They allow regional actors to produce global effects, but they also impose on the great powers an increasing dispersion of their resources. Simultaneously protecting several passages, escorting ships and maintaining response capabilities requires large fleets, available and supported by basic networks.

The central question is therefore not whether a power can militarily reopen a crossing. It is to know how many passages it can secure sustainably at the same time.

III. The merchant navy is a private strategic infrastructure

Global maritime trade is mainly driven by private companies: ship owners, port managers, insurers, charterers, logistics operators, classification societies and digital service providers. This organization creates a dissociation between strategic interest and economic decision.

A government may consider that a road should remain open to preserve a political principle or to support a partner. A shipping company may decide that the level of risk, insurance costs or obligations to its crews make this route impractical. The State therefore does not directly control all the decisions that determine the continuity of flows.

This reality requires us to go beyond a strictly military conception of maritime security. A naval escort can reduce the risk of attack, but it does not guarantee that a shipowner will agree to return to a route. The perception of risk, the availability of insurance, and the predictability of operations are just as important as the presence of a warship.

The merchant navy has thus become a strategic infrastructure whose ownership and management remain largely private. This situation produces several vulnerabilities. States may depend on foreign-flagged vessels, multinational crews, and companies registered in multiple jurisdictions. In times of crisis, they may find that they do not have sufficient control over the resources needed to supply them.

The concentration of the sector further accentuates the problem. A few large operators structure a large part of containerized transport. Their decisions to suspend or divert can quickly affect multiple economies. Maritime safety must therefore include a merchant fleet policy: national or allied transport capacity, service obligations in the event of a crisis, access to insurance, crew protection, port availability and cooperation with operators. A power that has a navy without reliable access to commercial transport remains strategically incomplete.

IV. Underwater infrastructure has shifted the frontier of vulnerability

The seabed is home to telecommunications cables, power interconnectors and essential energy pipelines. These infrastructures are difficult to monitor at all times and can travel thousands of kilometres in open spaces. They combine three characteristics that make them strategically sensitive. They are vital, geographically extensive and partially invisible.

Their protection cannot reproduce that of a terrestrial site. It is not possible to place a permanent military device along each cable. Security is therefore based on the monitoring of suspicious activity, the ability to quickly detect a break, the redundancy of networks and the availability of means of repair. Since 2024, NATO has strengthened its cooperation with civil authorities and companies to protect critical underwater infrastructure. This included creating a dedicated network, launching the Baltic Sentry business in January 2025 and integrating private operators more closely into oversight mechanisms³.

This development is revealing: the submarine infrastructure cannot be secured by the State alone or by the market alone. Operators have the technical data, maintenance vessels and network knowledge. The authorities have intelligence, surveillance and enforcement capabilities. The lack of sharing between the two produces systemic weakness. The main obstacle remains attribution.

A cable can be damaged by an anchor, a trawl, a navigational error or a deliberate act. A suspicious vessel may belong to a civilian company while being used to gather intelligence or prepare for sabotage. The line between accident and hostile action is particularly difficult to establish. This ambiguity provides a favourable space for hybrid strategies. A disruption may be severe enough to produce a political effect but not sufficiently attributable to trigger a response. The protection of underwater infrastructure therefore requires less an unrealistic promise of inviolability than an ability to quickly restore functions, multiply routes and punish suspicious behaviour when a set of clues becomes sufficient.

3 NORTH ATLANTIC TREATY ORGANIZATION. (2024, MAY 23). NATO HOLDS FIRST MEETING OF CRITICAL UNDERSEA INFRASTRUCTURE NETWORK. [HTTPS://WWW.NATO.INT/EN/NEWS-AND-EVENTS/ARTICLES/NEWS/2024/05/23/NATO-HOLDS-FIRST-MEETING-OF-CRITICAL-UNDERSEA-INFRASTRUCTURE-NETWORK](https://www.nato.int/en/news-and-events/articles/news/2024/05/23/nato-holds-first-meeting-of-critical-undersea-infrastructure-network)

V. The maritime threat becomes digital before it becomes physical

Ships and ports rely on complex digital systems: navigation, cargo management, machine control, automatic identification, communications, port planning and document exchange. This digitalization significantly improves transport efficiency. It also creates an attack surface that no longer corresponds to the physical boundaries of the ship or port. A cyberattack can disrupt maritime activity without firing a single projectile.

It can block a terminal, alter cargo data, delay customs operations, disrupt a supply chain or compromise a shipowner's systems. Jamming or tampering with positioning signals can also affect navigation and make it difficult to identify movement. The strategic problem does not lie only in the possibility of a major incident. It is due to the industry's increasing reliance on nested systems, managed by multiple actors and unevenly updated.

A large port can invest in advanced cybersecurity while remaining exposed through a subcontractor, an old system, or an inadequately protected logistics partner. The distinction between safety, security and efficiency then becomes less clear. A digital disruption can have the same effects as a physical shutdown: business shutdown, congestion, delays, and financial losses.

The response cannot therefore be limited to protecting military vessels or naval command systems. It must include the entire maritime ecosystem. International maritime security standards have historically been designed around the protection of ships and port facilities from unlawful acts. They must now be complemented by a more integrated approach to digital security, business continuity, and data dependency.

In this area, resilience is as important as defence. There is no such thing as a perfectly protected system. The decisive issue is the ability to isolate an attack, revert to degraded procedures, and maintain critical operations.

VI. Piracy has not disappeared: it is changing its geography and function

Piracy is sometimes presented as an old threat, marginal in the face of rivalries between great powers. This reading is misleading. Acts of piracy and armed robbery at sea continue to affect several regions. After a modest decline in 2024, the United Nations reported a marked increase in incidents in the first quarter of 2025⁴. However, the threat evolves according to the context.

In some areas, it is mainly maritime banditry and kidnapping for ransom. In others, it is linked to smuggling networks, the weakness of coastal states, or broader criminal economies. Piracy is rarely a strictly maritime phenomenon. It thrives when groups have land-based safe havens, access to illicit markets, local support, and accurate knowledge of trade routes. The naval response can reduce attacks, but it does not address the conditions that make them possible.

International operations off the coast of Somalia have shown the value of escort, information sharing and self-protection practices for ships. They have also shown that results remain fragile when the political, economic and security causes on land remain. Piracy must therefore be understood as an indicator of maritime governance.

It reveals areas where the state does not sufficiently control its coastline, where legal economic activities are weak and where criminal organizations can convert maritime geography into a resource. Its persistence is also a reminder of a limitation of naval power: a fleet can monitor an area, but it cannot replace a political authority on land in the long term.

⁴ UNITED NATIONS. (2025, MAY 20). SECRETARY-GENERAL'S REMARKS TO THE SECURITY COUNCIL ON MARITIME SECURITY (BILINGUAL; DELIVERED, SCROLL DOWN FOR ALL ENGLISH AND ALL FRENCH). [HTTPS://WWW.UN.ORG/SG/EN/CONTENT/SG/STATEMENTS/2025-05-20/SECRETARY-GENERALS-REMARKS-THE-SECURITY-COUNCIL-MARITIME-SECURITY-BILINGUAL-DELIVERED-SCROLL-DOWN-FOR-ALL-ENGLISH-AND-ALL-FRENCH](https://www.un.org/sg/en/content/sg/statements/2025-05-20/secretary-generals-remarks-the-security-council-maritime-security-bilingual-delivered-scroll-down-for-all-english-and-all-french)

VII. Maritime security has become multidirectional

For a long time, naval strategy was dominated by one main question: how to confront or deter another power's fleet? This issue remains, particularly in the Indo-Pacific, the Baltic Sea, the Black Sea and the Arctic. But it now coexists with a multiplicity of missions: protection of trade, surveillance of infrastructure, fight against trafficking, control of approaches, rescue, presence, intelligence and protection of the environment. The navies are therefore faced with a problem of dispersion.

A vessel deployed to escort commercial vessels cannot simultaneously participate in a high-intensity exercise in another region. Extended presence missions consume crews, logistical support and operational potential. This constraint benefits players who seek to saturate attention rather than achieve total naval superiority. Simultaneous crises in several spaces force the powers to prioritize their interests, to solicit more from their allies and to accept different levels of risk depending on the theater. Global maritime security thus depends more and more on coalitions.

No single navy can guarantee the safety of all roads on its own. But cooperation is not automatic. States do not always share the same definition of threat, the same rules of engagement or the same commercial interests. A coalition created to protect shipping can be weakened by disagreements over the land conflict from which the threat arises. Partners can support the principle of freedom of navigation while refusing to be associated with certain military operations.

Maritime security thus reveals a constant tension between the public good and the national cost. All actors benefit from open roads. Not everyone is willing to take on the same level of risk to maintain them.

VIII. Maritime law remains indispensable, but it is not enough to produce security

The international maritime order is based on rules: the status of territorial waters, exclusive economic zones, the high seas, international passages, flag State obligations and coastal State jurisdiction. This framework prevents the sea from being reduced to a permanent confrontation of powers. It provides a common language, organizes user rights and facilitates cooperation against illegal activities. But the law does not guarantee its own respect.

Its effectiveness depends on surveillance, interception, investigation and sanctioning capabilities. A coastal state may have extensive rights on paper without possessing the vessels, radars, or institutions necessary to exercise them. Differences of interpretation are another difficulty. States may claim incompatible rights to the same areas, use their coast guards to gradually impose a presence, or present coercive activities as mere administrative operations.

The area between the civilian application of the law and the military use of force then becomes particularly sensitive. Coast guards, maritime militias, research vessels, fishing vessels, and private companies can be used to change the facts without immediately triggering a naval confrontation. The law remains essential because it makes it possible to qualify these practices and to build coalitions. But it cannot prevent their development if the states concerned do not have a credible operational presence. The maritime rule is only valid in the long term if it is supported by an ability to observe, document and challenge violations.

IX. Limits and point of resistance: militarization can aggravate the insecurity it claims to reduce

The extension of maritime threats logically pushes States to strengthen their naval resources, their surveillance systems and their protection systems. However, this response can have perverse effects. The accumulation of military buildings in tight spaces increases the risk of an incident. Escort operations can be interpreted as support for one of the actors in a regional conflict. Infrastructure protection can be used as a justification for a sustained military presence. Finally, securing certain flows can shift traffic or threats to less monitored areas.

An exclusively military approach also risks marginalizing the land-based causes of maritime problems. Piracy, trafficking and illegal fishing are often linked to weak institutions, corruption, lack of economic alternatives and coastal conflicts. Naval means can contain the symptoms without altering these conditions. Security can finally come into tension with freedom of navigation. Stricter controls, exclusion zones or enhanced reporting obligations can protect certain infrastructures, but also create new restrictions and power relations. It is therefore necessary to distinguish between security and militarization.

The first seeks to maintain the collective use of maritime space. The second risks turning every infrastructure, every road, and every incident into an object of strategic confrontation. Maritime security will only be sustainable if military capabilities remain linked to rules, transparency mechanisms and civilian instruments of cooperation.

Recommendations

The first priority is to map critical maritime dependencies. States must identify the roads, ports, cables, terminals and transport capacities whose interruption would have the most severe effects. Protection should be prioritized according to functions, not evenly distributed.

The second priority is diversification. It is not a question of abolishing the major corridors, but of developing alternative routes, stocks, redundant port capacities and transport contracts that can be mobilised in times of crisis.

The third priority concerns the merchant navy. States must assess their actual degree of control over the ships needed for their strategic supplies, organise mechanisms for cooperation with shipowners and provide the conditions for public support in the event of a prolonged diversion.

The fourth priority is the protection of subsea infrastructure. It requires shared monitoring, rapid exchange of data between authorities and operators, available repair capabilities and sufficiently redundant routes to prevent a single breach from becoming systemic.

The fifth priority is digital. Ports, shipowners and logistics services must be integrated into a common maritime cybersecurity policy, including exercises, degraded procedures and notification obligations.

The sixth priority concerns allocation. Allies must develop common methods to distinguish between accident, negligence and hostile act, and then impose proportionate consequences when intent becomes sufficiently probable.

The seventh priority is support for coastal states. Global maritime security depends on their judicial, port, administrative and naval capacities. A sustainable approach must strengthen local institutions rather than multiply external deployments indefinitely.

Finally, naval coalitions must be organized around precisely defined objectives. The protection of navigation, the fight against piracy and the coercion of a hostile actor do not necessarily fall under the same mandates. Confusing them undermines the legitimacy of operations and reduces the number of partners willing to participate.

Strategic implications

Global maritime security can no longer be thought of as a peripheral mission reserved for navies. It has become a policy of national and international continuity. States depend on flows that they do not fully control, transported by private companies, along routes exposed to distant crises and based on often invisible infrastructure. This dependence modifies the nature of the potency.

The ability to interrupt a flow can produce more effects than the ability to conquer a territory. Conversely, the ability to continue to trade, communicate, and source despite disruption becomes a major strategic attribute. Control of the sea must therefore no longer be understood solely as military superiority in a given space. It includes the control of maritime information, access to ports, the availability of merchant ships, the protection of submarine networks, the capacity for repair and the strength of alliances.

The relevant maritime sovereignty is not complete autonomy. No state can rebuild the entire system alone. It lies in the ability to identify acceptable dependencies, reduce excessive vulnerabilities and quickly mobilise partners when flows are threatened.

Conclusion

Global maritime security has entered a period of structural stress. Trade remains globalized, but the routes that support it are increasingly exposed to regional conflicts. Infrastructures are more efficient, but also more digitized and interdependent. The navies have advanced means, but must cover an ever-increasing number of missions and spaces.

The main danger is not necessarily a global blockade or a decisive naval battle. It is the multiplication of limited disturbances whose effects add up: a strait that has become risky, a damaged cable, a paralyzed port, an unavailable insurance, a diverted fleet or a coastal state unable to control its approaches.

Taken separately, each of these events seems manageable. Together, they can transform maritime fluidity into systemic vulnerability. The answer is not to militarize every road or to promise absolute protection. It consists of building a system capable of continuing to operate under constraint. Maritime security is therefore no longer just the art of preventing the adversary from taking to the sea. It is the political, economic and military capacity to ensure that essential flows can still pass through it.