EGMONT PAPER 123

– JUNE 2023 –

War for Ukraine and the Rediscovery of Geopolitics

Must the EU Draw New Battlelines or Keep an Open Door?

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The author warmly thanks Emeritus Professor Rik Coolsaet for his comments on the first draft of this paper, and both him and Bernard Siman OBE for their inspiration. Thanks also to Dr Giovanni Grevi and Ambassador Mihnea Motoc for the fruitful exchange.

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INTRODUCTION

The essence of the war problem was not changed by its enormous scale. The line of the Central Powers from the North Sea to the Aegean and stretching loosely beyond even to the Suez Canal was, after all, in principle not different from the line of a small army entrenched across an isthmus, with each flank resting upon water. As long as France was treated as a self-contained theatre, a complete deadlock existed, and the front of the German invaders could neither be pierced nor turned. But once the view was extended to the whole scene of the war, and that vast war conceived as if it were a single battle, turning movements of a most far-reaching character were open to the Allies.

Sir Winston S. Churchill[1]

Just like many Allied leaders during World War One could only see what was right in front of them, i.e., the continuous line of trenches in Belgium and France, so many EU leaders today see only the land war in Ukraine. They disregard, at their peril, that for Russia, one of the vital interests at stake is control over the Black Sea and access to the Mediterranean. For years, in fact, Russia has been doing what Churchill advocated the Allies do in the Great War. In the face of the perceived frontal onslaught of EU and NATO enlargement into Eastern Europe, Putin has been turning Europe's flanks.[2] Russia has forged a special relationship with Turkey; it has intervened successfully in Syria, safeguarding its naval base in Tartus; and it has established a military presence from the shores of the Mediterranean to Central Africa. Europeans are forever debating which flank, East or South, should receive priority. Seen from Moscow this is one vast theatre, where Russia constantly acts as a spoiler, thwarting Europe's plans, with the aim of weakening the EU and NATO and diverting them from Eastern Europe.

All of this demonstrates the continued importance of geopolitics: how geography conditions strategy. Geopolitics is not the only driver, of course; resources, allies and partners, time, and other factors matter too. Nor does geopolitics determine strategy: the same geopolitical situation can inspire opposite strategies.[3] But geopolitics must not be ignored if strategy has to have any chance of success. Many EU leaders claim to have rediscovered geopolitics; in 2019 already, Ursula von der Leyen stated that she would lead a "geopolitical" European Commission. In reality, to this day, there is very little explicit geopolitical analysis underpinning EU decision-making, even as Russia's renewed invasion of Ukraine in 2022 has overturned the geopolitics of Europe.

ENTERING THE GAME OF GEOPOLITICS

When the EU took in ten new Member States, in 2004, Ukraine became its neighbour. Ever since and until last year, the EU has treated it as a buffer state, without naming it as such. An independent state wedged in between Russia and the EU, with which Brussels gradually developed close structural relations, which in its view need not have detracted from relations with Moscow. The EU certainly did not consider Ukraine a potential Member State. In the same vein, most European allies opposed the US push to offer NATO membership to Ukraine (and Georgia) in 2008, though they ended up accepting a compromise that left both countries stranded: a promise of membership, but without any timing. The Europeans thus hoped to have avoided setting in motion a train of events that could lead to confrontation with Moscow. But they were insufficiently aware that for Russia, which always saw Ukraine as part of its exclusive sphere of influence, the growing reach of the EU was a direct geopolitical threat as well. Unwittingly, the EU was sucked into a geopolitical zero-sum game.

Eventually, this led to Ukraine being confronted with two mutually exclusive offers – between which it ought not to have been forced to choose: either an association agreement with the EU or membership of Russia's Eurasian Economic Union. This produced the 2014 crisis: under Russian pressure, then Ukrainian President Yanukovych reneged on his commitment to sign with the EU, provoking wide demonstrations; the EU brokered a deal with the opposition, but Yanukovych fled the country anyway and a new government came into power. Thereupon Russia, which at a stroke had lost all influence in Kyiv, invaded, annexing the Crimea and fomenting an armed rebellion in the East of the Donbas.

Nevertheless, the EU continued to see Ukraine as a buffer rather than as a future member. Rather than breaking off relations with Russia, it adopted but limited sanctions, and brokered the Minsk Agreements between Kyiv and Moscow. Had these been fully implemented by both parties, Ukraine might have remained viable as a buffer state. By also signing the association agreement with Ukraine, the EU did, however, commit itself to Ukraine's survival no matter how the future developed. For once having associated Ukraine with the Union even after a Russian invasion, the EU could difficultly drop the country in case of further Russian aggression. While with this agreement the Commission purposely went against Russia's interests, this security implication was probably not fully realised. Instead, the seemingly stable situation[4] led to complacency about the non-implementation of Minsk and the continued reliance on Russian energy.

A NEW GEOPOLITICAL SITUATION IN EUROPE

Russia's renewed and large-scale invasion on 24 February 2022 brutally shattered that complacency. It also created a new geopolitical fact: from a buffer state, Ukraine has now become a border state. De facto, the independent Ukraine that is fighting for survival already today is a member of the Western security architecture. The EU underscored that by according the country candidate status in June 2022 (though that decision seems to have been motivated more by emotions than by conscious strategic thinking).

The consequence for EU strategy is obvious: it now is an important EU interest that Ukraine survives as the strongest possible border state, on as large a territory as possible, including access to the sea. That is why the EU and its Member States, and the US, are giving Ukraine all the support they can give while remaining non-belligerents themselves.[5] For if Ukraine falls, Poland, Slovakia, Hungary, and Romania will share borders with a second Belarus: a Russian satellite that no longer makes its own decisions, which would complicate Europe's deterrence and defence. A victorious Russia might also see Ukraine as a springboard for further incursions into the Black Sea region and the wider Mediterranean area.

Long considered a side-show, the Black Sea, therefore, must now be central to EU and NATO strategy. That reconfirms the traditional importance of Turkey's geopolitical position to NATO and the EU: not as a buffer against immigration and other challenges from the wider Middle East, as the EU has been treating it for years, but as a cornerstone of the bulwark against Russian encroachment. But if Turkey does not fully assume that NATO responsibility – and in recent years it has not – then Europe's South Eastern flank remains wide open. That its special relationship with Moscow allowed Ankara to mediate a deal to resume the interrupted grain exports from Ukraine does not weigh up against this strategic disadvantage. Meanwhile, Turkey has strictly applied the Montreux Convention that limits the passage of war ships through the Straits to and from the Black Sea, and thus the possibilities for an Allied naval presence. The naval capacity of Bulgaria and Romania, as riparian states, could be strengthened though. Ships could perhaps be transferred and reflagged as Ukrainian to build up Ukraine's own navy, which will be essential to safeguard its maritime trade. Otherwise, Odessa, currently the only major port in free Ukraine, could be strangled.

In the Black Sea the geopolitical situation for now remains fuzzy, because of what one might call Turkey's bid for "strategic autonomy". Elsewhere in Europe the main geopolitical consequence of the war is that dividing lines have hardened. Most evidently, Finland and Sweden have both abandoned their long-standing neutrality to join NATO. The delays caused by Turkey's bartering of their accession for concessions relating purely to its domestic political needs, furbished another example of Ankara exercising its autonomy. Denmark for its part ended its opt-out of the EU's Common Security and Defence Policy. The Western security architecture is consolidating.

On the other side of the divide, Belarus has become entirely vassalized by Russia. During the large-scale protests in 2020 and 2021, Moscow declined to intervene militarily (fearing, perhaps, that it would alienate even larger parts of the public from both regimes, of Lukashenko and Putin, as in Ukraine in 2014). Now, Russia has marched tens of thousands of troops into Belarus, and has announced the deployment of tactical nuclear weapons in the country. Nevertheless, the position is based mostly on repression and thus remains fragile.

The future of Moldova, which also received candidate status in June 2022, has become closely entwined with that of Ukraine. If the latter falls, Moldova could be the next target (and with 1500 or so troops still in the breakaway region of Transnistria, Russia already has a bridgehead there). If it holds, both Moldova and Ukraine are set on the path to eventual EU membership. Meanwhile, in April 2023, the EU deployed a civilian mission to Moldova to help it strengthen its resilience against Russian hybrid actions. In the same vein, renewed energy must be injected in the prospect of EU membership for the Balkan countries, and Russian (and Chinese) influence curbed.

The Russo-Ukraine war has thus resulted in a sharply divided Europe again; the buffer zones are disappearing; states are on one side or the other of what is already turning into a new "iron curtain". NATO's New Force Model, a reorganisation of the Alliance's conventional posture in Europe, reflects this. Once again, as during the Cold War, the "border" will be divided in sectors, each allotted to a group of Allies that will maintain a rotational military presence there.[6] Relations between the West and Russia have indeed begun to resemble a "mini–Cold War": mini, as long as the entire world is not divided into two rival blocs that gradually decouple from each other.

It must also be understood that the consolidation of an enlarged EU had already changed the geopolitics of Europe years before the current war. In the past, Russia was one of several European powers that fought each other in ever shifting coalitions, from Peter the Great to Stalin. Today, there no longer is a European system of states. The EU, which has ended the possibility of war among its Member States, is now in itself the core of the European security architecture (with the alliance with the US as a further guarantee against threats from outside the EU). Since Russia cannot join the EU, it will never be fully part of the European security architecture in the sense of having decision-making power over its members.

The main question therefore is: does Russia want cooperative or confrontational relations with the EU? If a pragmatic Russian leadership emerges, which will likely remain authoritarian, but sincerely seeks a peace agreement with Ukraine, constructive relations may be restored, a "mini-Cold War" averted, and sanctions phased out. Eventually, a new bilateral EU-Russia partnership could be institutionalised. But the EU's economic decoupling from Russia, in the energy sector in particular, is structural, as is the distrust that Moscow has sowed.

WIDER GEOPOLITICAL RAMIFICATIONS

If in Europe a new geopolitical situation is crystalising, in the areas adjacent to Europe geopolitics are very much in flux. Since Russia's frontal assault on Ukraine turned into a war of attrition, Moscow has been intensifying its flanking movements.

Africa

In Africa, the war, although it absorbs massive resources, has had little impact on Russia's military presence (mostly through the Wagner Group). Before the war, Russia had been spectacularly successful with minimal means. Mali in particular, which expelled the military presence of France and other EU Member States (only the EU Training Mission is clinging on), represents a serious defeat for the West. Moreover, Russia has convinced large sways of the public and many governments in Africa and the Middle East that the West is to blame, both for the war and for the resulting economic disruption. Moscow is well-placed, therefore, to continue to exploit every opportunity to damage Western interests.

Indeed, one of the Sudanese army factions that in April 2023 launched into civil war has links with Wagner. The geopolitical risk is obvious: a Russian-backed warlord that controls Port Sudan on the Red Sea could create havoc for Europe's maritime trade, and block humanitarian access. Putting the Spanish frigate *Reina Sofia*, serving in the EU naval operation *Atalanta*, back under national command so that it could steam up the Red Sea not only enabled the evacuation over sea of EU citizens; it also demonstrated real European presence. If the civil war cannot be halted, a follow-on might well be needed, including, if necessary to secure the port, on land.

The war in Sudan shows that while Russian influence in Africa obviously does not present a direct threat to European territory, indirectly it can cause major problems. It also increases the security risk for the European presence, military and civilian, in Africa, and weakens the West's diplomatic position in the multilateral institutions. The EU has yet to come up with a new strategy for its own position in Africa, following the Malian defeat. More broadly, Africa is at the centre of competition and rivalry between all of the great powers.[7] In Africa as in Europe, the fall-out of the Russo-Ukrainian war threatens to draw new dividing lines across the continent; certain states are at the verge of joining an exclusive Russian sphere of influence.

The Gulf

To its immediate South, Russia is intensifying relations with Iran.[8] Those that feel excluded from the system habitually look to each other for support.[9] Russia is deploying Iranian drones on the battlefield, while Iran gets access to advanced Russian weaponry. They are also developing a new trade route, through river and rail links and the Caspian Sea, by-passing Western sanctions.[10] Russia and Iran had a working relationship already, but Iran might not have tilted and become one of the very few countries to support Russia militarily had it not felt totally isolated after the US, under the Trump administration, broke up the nuclear deal in 2018. The Iranian regime itself then further alienated the West in its entirety, however, by its brutal repression of large-scale demonstrations, of women and girls in particular.

The most eye-catching recent development in the region is not a consequence of the Russo-Ukrainian war: in March 2023 Iran and Saudi Arabia, long-time geopolitical rivals for control of the Gulf region, announced a resumption of relations. Although the US too had begun to encourage negotiations, they chose to finalise and announce the deal through China – that is nothing less than a double diplomatic revolution. It also is a defeat for the avowed US strategy of allying with Saudi Arabia against Iran. And it underlines the impotence of the EU, which did resist US pressure to side with Riyadh against

Tehran, and in its 2016 *Global Strategy* undertook to deepen dialogue with Iran and the countries of the Gulf Cooperation Council (GCC) instead – yet ultimately the EU was not able to mount a serious effort to that end.

Saudi Arabia too maintains a working relationship with Russia.[11] That does not mean that the Gulf states are joining an authoritarian bloc around Russia and China. It does indicate that as the region evidently has become much less of a strategic priority for a US that is self-sufficient in energy and focused on China, these countries are hedging. They seek to maintain partnership with the US (see, for example, the US-brokered Abraham Accords between Bahrain, the UAE, and Israel) as they increase productive relations with China and Russia. The EU and its Member States are securing new energy deals as they are ending their energy dependence on Russia, but their actual strategic influence is limited, even though the region occupies a central geopolitical position, straddling the trade routes between Europe and Asia. If Russia ends up much weakened as a result of the war, its rise in influence may yet be limited, but China's strategic presence in the Gulf likely is a new structural factor. That does call for at least a European, if not also an American answer.

The Caucasus and Central Asia

In Russia's immediate periphery, in Central Asia and the Caucasus, the situation is shifting as well, but less obviously in Russia's favour. All eight states, except for Georgia, abstain from the votes on the war in the UN General Assembly, but none of them supports Russia militarily. Russia still is the security guarantor in both regions, but the perception clearly is that at least while the war is ongoing, its ability to act is restrained. Hence the temptation to try and change facts on the ground, as in the upsurges of violence between Armenia and Azerbaijan, and between Kyrgyzstan and Tajikistan in September 2022. Neither clash escalated, but tensions remain. If Russia would emerge so weakened from the war that its influence in Central Asia and the Caucasus would be structurally diminished, that would create a security void.

Until now, Russia's role as security guarantor left China in a comfortable position. Beijing welcomes Russian interventions such as the deployment of 3000 troops to Kazakhstan in January 2022, at the request of its president, who thus remained firmly in the saddle. China doesn't have to get its own hands dirty, and can continue to roll out the Belt and Road Initiative (BRI). Indeed, China has replaced Russia as the main economic partner in nearly all eight countries. If Russia no longer fully assumes the security role, China may feel forced to step in, especially in Central Asia – and might develop a taste for it. The EU can but difficultly project security into Central Asia (and the same probably applies to the US), though the Union is stepping up its economic and diplomatic engagement.

In the Caucasus, in contrast, the EU is playing an active role. Following an EU-brokered agreement in October 2022, the Union deployed first a temporary monitoring capacity and then a civilian mission in Armenia, alongside the border with Azerbaijan. At the same time, in December 2022, the EU announced an investment of over €2 billion in an electricity cable from Azerbaijan through Georgia and under the Black Sea, one of the first prominent projects under the Global Gateway, the Union's global infrastructure investment programme.

In the country with the closest links with the EU and NATO, however, Georgia, important political forces have started to hedge. This is understandable, for if ever Russia, which already militarily supports the breakaway regions of Abkhazia and South Ossetia, would aggress Georgia in the way it has invaded Ukraine, it would be very complicated for the West to support the country, given its geopolitical situation: it shares no border with the EU. Certainly, it would be impossible without the active contribution of Turkey, on which it does border (unlike Ankara's role in the Russo-Ukrainian war). That in June 2022 the EU accorded candidate status to Ukraine and Moldova but not to Georgia further increased the perception of vulnerability.

In addition to deepening its economic presence, the West will have to decide how far it is willing to go in terms of diplomatic and military commitment, in both Central Asia and the Caucasus. If constructive relations with Russia were restored, the Organisation for Cooperation and Security in Europe (OSCE) could resume an important role in managing these remaining buffer zones between the powers (though China is not represented there), but for now it is mostly paralyzed by the hardening divide in Europe.

CHINA, RUSSIA, AND EURASIA

Apart from just how far Russia is willing to go to achieve its war aims in Ukraine, the question that fascinates strategists around the world is: how unlimited really is the partnership without limits that China and Russia declared on 4 February 2022, just weeks before the invasion? Depending on where one stands, a Sino-Russian alliance dominating Eurasia would be a geopolitical dream or nightmare.

Seen from Moscow, the geopolitical nightmare would be an unfriendly China on the other side of the border (of over 4200km), as after the Sino-Soviet split in the 1960s. Already today, there is significant Chinese penetration, not just in Central Asia and the Caucasus, but into Eastern Russia (which has less than 35 million inhabitants but harbours a lot of resources). That is Russia's real geopolitical challenge, but one the regime cannot acknowledge, because it dares not and cannot confront China.[12] Hence, Russia can vent its frustration at the perceived slights to its great power status only on its Western borders. At the same time, Russia is allergic to the idea that in a partnership with China it would play second fiddle, although by all standards it is now the junior partner (except in the size of its nuclear arsenal). The greater the imbalance of power, the more friction in the bilateral relationship. But having now completely antagonised the West, Russia has precisely become more dependent on China.

China, for its part, sees Russia as its main partner against Western, and particularly American, dominance. Therefore, for China, Russia cannot end up too weak – and probably that goes for the West too, if a balance of power between Russia and China is to be maintained. On the other hand, China takes very good care not to become too exclusively dependent on Russia. That surely is one of the motivations for its role in Saudi-Iranian reconciliation. Stability in the Gulf allows China to build closer relations with all parties and to secure its energy imports from the region. In the same vein, China will never let Russia determine its relations with the EU and the US: those are far too important. Some in Russia dream of a Eurasian bloc against the West, but Russia simply doesn't have the means of launching such a project, which nobody in Asia is waiting for anyhow. China therefore will continue to do just enough to ensure that Russia does not lose too heavily, but for China that doesn't have to come at the expense of its relations with the West. With that middle position, China gains credit in many other countries that prefer to stay neutral in this war.

Moreover, it probably to some extent suits China that Russian aggressiveness is reaching its limits, as its mostly geoeconomic strategy (epitomised by the BRI) requires stability. In that sense, Russian and Chinese interests in Africa might at times diverge. Furthermore, China was likely not amused at all by the large-scale invasion. Many see the 4 February 2022 declaration as proof of Chinese assent. In reality, the last thing on Putin's mind is to ask Xi for permission for his moves. There are indications that he did warn Xi of an impending "special military operation". Had Russia indeed undertaken a short and successful action in the east of Ukraine, then China would likely have lived with the results (as might many in Europe, in fact). The February 4 statement actually condemns military interventionism, however (be it with an eye to Western interventions, of course). The large-scale invasion of the whole country, without real prior warning, can therefore also be seen as a loss of face for Xi.

In practice, China's policy therefore has remained: non-intervention. China will certainly not drop Russia, but it has not lent military support either. President Xi did visit Moscow on 20-22 March 2023, allowing Putin to demonstrate that he is not isolated – but he did not obtain any direct support for the war. Russian energy exports to China have sharply increased, but at a price far below what it could charge to Europe before the invasion of Ukraine. China has committed to invest in Siberia and in the northern sea route, but in a way that demonstrates Russia's weakness: it is not able to fully exploit its natural resources and geographic position on its own. Moreover, it will be impossible to operate the northern sea route anyway as long as Russia remains in a mini-Cold War with Europe. Putin's announcement of the deployment of tactical nuclear weapons to Belarus just two days after the visit, while China's so-called 12-point peace plan of 24 February 2023 explicitly condemned nuclear sabre-rattling, can be seen as an assertion of Russian independence in the face of Russia's weakening position vis-à-vis China. Xi, for his part, on 5-6 April 2023, received President Macron and Commission President von der Leyen in Beijing, who repeated the justified message of deterrence that Chinese weapons for Russia would be a game-changer.[13] And on 26 April 2023, Xi finally had a phone conversation with President Zelenskyy.

The conclusion is that, for now at least, the Sino-Russian marriage remains one of convenience. That is not a call for complacency on the part of the EU, but for nuance and creative diplomacy, exploiting the differences that do exist between China and Russia. The EU should take China at its word: if Beijing's 12 points mention sovereignty and peace, what is it going to contribute to bring them about?

A NEW WORLD ORDER?

By not applying sanctions, China does support Russia indirectly. But in that it is not alone: only the EU and NATO countries and their closest partners, such as Australia, Japan, New Zealand, and South Korea, have adopted sanctions. The rest of the world, including major democracies such as Brazil, India, and South Africa, has not followed suit. On the other hand, only six countries consistently vote with Russia in the UN General Assembly, and only Iran and North Korea provide it with direct military support. In other words, most states prefer to stand aside from the war.

To many in the West, this came as an unpleasant surprise, and it does show the waning of Western influence. But it is understandable that in the Global South, where others that are the victims of war have often received but limited Western support, most don't feel the urge to choose sides in this war only because it is a conflict that Europeans and Americans care about. Just as one can comprehend that many cringe whenever a Western leader states that in the 21st century it is unacceptable that one state still invades another, for people have not forgotten the 2003 US invasion of Iraq – which was as illegal as the Russian invasion of Ukraine. Though that argument should be used with care: it obviously does not mean that Russia can therefore also invade one country of its choice…

What this is not, is evidence of a new world order. Rather it demonstrates that the world order remains multipolar, as it has been since at least the end of the bipolar Cold War.[14] Many people react as if the statement that the world is multipolar implies condoning an evil Russian or Chinese plan to make it so, and is therefore anti-American. The reality is that multipolarity, i.e., the existence of several great powers that compete and cooperate in ever-changing constellations, cannot be purposely created or averted. It is just the normal state of international politics, resulting from the interaction between states that seek to increase their power so that they can pursue their interests more effectively.

Today, just like in the Interbellum, there are various great powers, which are constantly competing for markets, resources, and influence, hence the balance of power between them is constantly evolving, and tensions are permanent.[15] Some of today's powers are linked in close partnership or even an alliance, but they are not aligned in two exclusive rival blocs.

China sees no interest in linking its fate to Russia, just like in the EU there is no consensus about blindly following America's China strategy. Rather the powers cooperate in various overlapping bilateral, minilateral, and multilateral formats. Given that it is never sure which great power will come out on top on which issue, the other states naturally engage in hedging: most keep open their options and build constructive relations with all powers rather than aligning exclusively with just one of them.

Artificially dividing the world into a "good", democratic and a "bad", authoritarian camp, is a misreading of the dynamics of global politics, therefore. It risks being counterproductive, as it may exactly push states into the arms of Russia or China. The EU's interests oblige it to work with authoritarian states; the latter's domestic policies, however reprehensible, do not affect those interests; and the EU anyway has but little leverage to force a change in domestic policies. The EU must compartmentalise therefore: between domestic policies (which it can and must criticise when they violate human rights, but which sanctions will rarely change) and foreign policies (against which it must push back and/or retaliate when they threaten its interests). Like all other states, the EU should heed Lord Palmerston's dictum: "We have no eternal allies and we have no eternal enemies. Our interests are eternal and perpetual, and these interests it is our duty to follow".[16]

Despite the inherent tensions, a multipolar order can remain stable for long periods of time if the powers manage to agree on a set of core objectives and rules that they all (more or less) observe, because that allows them to pursue their interests more effectively and efficiently than the far less predictable alternative. The balance of power obviously has been shifting to the benefit of China, but for now that change is taking place within the system – it does not ipso facto amount to a new world order. Beijing is not attempting to overturn the institutions and rules that are meant to govern the multipolar world, but to gain more influence within the existing system, so that it can shape its future. Russia, of course, has gravely violated and thus destabilised this rules-based order, but by itself does not have the power to undo it.

The emergence of a new world order is not impossible, of course. The world notably remains at risk of being divided in two camps again. China might shift gear and militarily support Russia's war against Ukraine; or could itself revert to war to pursue its aims (to end the status quo on Taiwan, for example); or might begin to seek an exclusive sphere of influence (by coercing states that have joined the BRI to sever relations with other powers). An internally divided and therefore more inward-looking US might limit its investment in the rules-based order; or translate its unease with the shift in the balance of power into a more confrontational attitude towards China. These and other evolutions could provoke an escalation of Sino-American rivalry. The EU has every interest in avoiding a new cold war-like confrontation, which would produce grave economic hardship, trigger a worldwide geopolitical race to convince or coerce other states to take sides, and end any prospect of a successful climate policy.

CONCLUSION AND RECOMMENDATIONS FOR FUTURE EU STRATEGY

The geopolitical environment is not changing in the EU's benefit. In Europe itself, one might say that the EU and NATO are consolidating, but at the same time an impenetrable border is being drawn across the continent again – fortunately, much further to the East than in 1945. Unless a constructive leadership emerges in Russia, the EU can do little to prevent it, but it can ensure that Ukraine and Moldova, now de facto members of the Western sphere, become strong and prosperous independent states. On the EU's southern flank, the ongoing loss of influence may not pose a direct threat to EU territory, but if not arrested, this development may result in the EU being surrounded by states that are indifferent, if not openly hostile to its interests. Yet the EU needs to partner with its southern neighbours to tackle challenges such as energy supply, migration, and climate change. In Central Asia and the Caucasus, EU influence is far from guaranteed. At the global level, fortunately, there is for now no hostile Eurasian bloc in the making, but an escalation of rivalry might yet end the multipolar order and provoke a new Cold War.

Which strategy must the EU adopt to deal with today's geopolitical shifts? First of all, the EU does not become "geopolitical" by announcement. Decision-making must be based on much more explicit geopolitical analysis, and it must become more explicitly strategic: thinking in terms of interests, ends, ways, and means, and of the balance of power between allies and adversaries.[17] The changes in the world since the adoption of the *Global Strategy* in 2016 evidently call for an update of the EU's grand strategy. This should be a priority for the next EU legislature. Grand strategy is *Chefsache*, because it concerns vital interests and covers all dimensions of power. Drafting the next iteration of the Global Strategy should be led by the President of the European Commission, therefore, rather than by the High Representative.[18] Especially now that competition and rivalry between the great powers increasingly plays out in the area of geo-economics, in which most competences are with the Commission.

A "Global Strategy 2025" can be based on four building-blocks: Enlargement and Engagement, Open Strategic Autonomy, the Global Gateway and, still, Effective Multilateralism.

1. First, the EU must step up investment in enlargement. Once accepted as a candidate for EU membership, it should be obvious that hedging is neither necessary nor acceptable. Candidates need not cut relations with Russia and China, of course, but ought to be held to the same standards in terms of safeguarding EU sovereignty as current Member States. Engagement, through the European Political Community (EPC), should be stepped up with states that do not seek membership, or whose membership would weaken rather than strengthen the Union (notably because their geopolitical position would expose the Union to too many additional threats and challenges).

2. Open Strategic Autonomy, or de-risking as von der Leyen now calls it, means creating the protective (but not protectionist) mechanisms, such as inward and outward investment screening and banning the products of forced labour, that precisely allow the European economy to remain open. Second, managing dependencies and diversifying supplies, including by re-shoring and "friend-shoring" production in specific areas. Third, establishing real reciprocity and obliging China in particular to be as open to the EU as we are to them, if necessary, by suspending future or even existing access so that not reciprocating bears a cost for China (unlike the non-ratification of the 2020 Comprehensive Agreement on Investment, which has no consequences for China).

3. The Global Gateway is the EU's Open Door Policy for the 21st century. The original 19th century Open Door Policy of the US aimed to preserve the territorial integrity of China from the appetites of the great powers that were carving out extraterritorial concessions,[19] and to keep China open for trade with all on an equal basis. Today's Global Gateway must do the same for third countries vis à-vis China itself this time, making them an offer enticing enough to convince them, not to push China out, but to diversify and build deep relations with various powers simultaneously. The aim is to avoid a scramble for exclusive spheres of influence. This demands that the Global Gateway, climate policy, Africa policy etc. are all aligned and pursue a single strategic agenda. That includes the security and defence dimension: surely, there must be a clear link between where the EU and the Member States deploy their militaries, and where they invest in infrastructure and connectivity.

4. Effective multilateralism, finally, means to maintain "one world": one world order, with a core set of rules, to which all states subscribe, because they need a stable political and financial-economic framework to pursue their interests. Multilateralism comes naturally to the EU, but it must play a much more proactive role, both in the existing international organisations and in new, ad hoc coalitions, convening democracies and non-democracies that share an interest in concrete solutions for specific problems. Keeping all states in the system will mean compromise, but that is preferable by far to major powers leaving the system and undermining it from the outside. Compromise with other powers only makes sense, of course, if they abide by the rules of the system, both old and new. Which is a challenge, notable as regards China.

The precondition for pursuing this grand strategy is that the EU understands its geopolitical position and its strategic role. Its position is that of a great power, one of the poles of the multipolar world. Its role is to keep the world together. Predicting, or even launching war, is easy enough. Building peace is much more difficult. But as long as there is the slightest chance of success, despair is not warranted, and the effort must continue.

Endnotes

1 Sir Winston S. Churchill, *The World Crisis 1911-1918*. London, Penguin, 2007 (first published 1931), pp. 297-298.

2 Bernard Siman, EU Ukraine Strategy Should Include the Eurasian Spine. Egmont Commentary, 4 April 2023.

3 The geopolitical location of the UK, for example, as an island off Europe, throughout its history has led it to alternately engage with and turn away from the continent, with Brexit as the latest iteration. See: Ian Morris, Geography Is Destiny. Britain and the World, a 10,000-Year History. London, Profile Books, 2022.

4 As seen from Brussels anyway, for the war never really ended; the number of casualties just stayed below the threshold that would have made headlines in Western Europe.

5 Just like during World War Two, the US was a non-belligerent supporter of the UK, until the attack on Pearl Harbor on 7 December 1941 brought America into the war.

6 Sven Biscop, The New Force Model: NATO's European Army?. Egmont Policy Brief No. 285, September 2022.

7 Nina Wilén, Times They Are A-changin': Africa at the Centre Stage of the New (Il-) Liberal World Order. Egmont Policy Brief No. 293, November 2022.

8 Robby Gramer & Amy MackInnon, Iran and Russia Are Closer Allies Than Ever Before. Foreign Policy Report, 5 January 2023.

9 Similarly, in the 1922 Treaty of Rapallo, Germany, still excluded from the emerging multilateral system by the victors of World War One, was the first state to recognise the Soviet Union, which the other powers shunted.

10 Just like during World War Two, when the major route for American supplies to the Soviet Union went through Iran. See: Ashley Jackson, Persian Gulf Command: A History of the Second World War in Iran and Iraq. New Haven, Yale University Press, 2018.

11 Andrew S. Weiss & Jasmine Alexander-Greene, What's Driving Russia's Opportunistic Inroads With Saudi Arabia and the Gulf Arabs. Carnegie Commentary, 5 October 2022.

12 Timothy Snyder, The Road to Unfreedom. Russia, Europe, America. London, Penguin, 2018.

13 France and China also agreed to deepen their military dialogue, notably between the PLA's Southern Theatre and the *Commandement des forces françaises en Zone Asie-Pacifique* (ALPACI).

14 In his classic work, Kennedy traces the beginning of the current multipolarity back to the 1970s even. See: Paul Kennedy, *The Rise and Fall of the Great Powers. Economic Change and Military Conflict from 1500 to 2000*. London, Unwin Hyman, 1988, p. xxi & p. 413.

15 Rik Coolsaet, *Macht en waarden in de wereldpolitiek*. Ghent, Academia Press, 2015, pp. 116-119.

16 Spoken in the House of Commons in 1848 when Palmerston was Britain's foreign secretary.

17 Sven Biscop, Grand Strategy in 10 Words. A Guide to Great Power Politics in the 21st Century. Bristol, Bristol University Press, 2021.

18 Just as the *National Security Strategy of the US* is promulgated by the President and not the Secretary of State.

19 From 1902 to 1931 even Belgium had a concession, in Tianjin.

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