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EU Strategy 2025-2029: We Have the Instruments, Now Set the Objectives

Sven Biscop

The EU is very creative at designing and putting to use instruments. Think of how the European Peace Facility (EPF) became the tool to support Ukraine's war effort. Other instruments with great potential are the Global Gateway, the European Defence Fund (EDF), and de-risking. But is the EU always sufficiently clear about the objectives these instruments are meant to achieve? An instrument is not a policy. At the start of a new European legislature, the EU should take the time for a strategic review: to update and reconfirm the assessment of the environment and the definition of the objectives. Then it should allocate resources, accelerate, and deploy its impressive array of instruments for good purpose.

This policy brief is not about Trump: one cannot “Trump-proof” the EU, let alone the world, just like one cannot “Putin-proof” or “Xi-proof” it. The only thing that could and should have been “Trump-proofed”, but wasn't, is the Republican Party. This brief is about what the EU and its Member States can do, proactively, to safeguard their interests.

THE ENVIRONMENT: NORMALLY NOT EASY

The starting point is an analysis of the environment. That must be sober rather than fashionable. Shouting that the new world order is upon us catches the headlines, but clarifies little. The reality is that the **structure** of world politics is not new: multipolarity is its natural state. It is only because the one exception in 2000 years of world politics, the bipolar Cold War, happened so recently, that we feel multipolarity, or great power politics, is new.

Within that multipolar structure, the **dynamics** of world politics is not new either. The great powers compete, for natural resources, export markets, and influence, but they also cooperate to pursue these, in ever changing constellations. Partnership and competition are two sides of the same coin. Some powers opt for rivalry, however, and pursue their interests through illegal means, by purposely undermining the sovereignty of other states, including, ultimately, through the threat and use of force. All the while, most other states, the “non-great powers”, hedge: they maintain working relations with all powers rather than tying their fate exclusively to one of them.

Not new either is the permanent aspiration to manage the tensions inherent in this dynamic by promoting jointly agreed **rules** to order interstate relations, through direct concertation between the great powers as well as through multilateralism in all its forms. What does constantly change, as a result of these dynamics, is the **balance of power** between the players.

FALLACIES ABOUT WORLD POLITICS

Looked at through this lens, a closer analysis reveals that some of the most often repeated statements on world politics are fallacies.

First, the fact that another power is rising is not problematic per se – it all depends on why and how they use their power. For now, China is increasing its influence within the existing rules and organisations rather than creating a parallel order. However, opportunism may drive it to increase its ambitions and step outside the order. Russia, of course, has already done so by invading Ukraine,

and all wars directly involving a nuclear great power carry a risk of deadly escalation.

Second, the world is not bipolar – neither the powers nor the other states are aligned in two mutually exclusive blocs. China notably wants to maintain complete freedom of action vis-à-vis Russia. Many states, including regional powers such as India, join seemingly competing groups, such as the BRICS and the Quad. Even Turkey, a NATO Ally and EU candidate, is courting the BRICS. Key is that states can freely join, or leave, any format, and that no format operates outside the rules of the UN Charter.

Third, world politics is not a confrontation between democracy and autocracy – when the national interest demands it, states (including EU Member States) cooperate with any other state. The narrative of “democrats versus autocrats” is counterproductive, for it pushes non-democratic states away from the EU, while many are in fact willing to pursue shared interests.

Fourth, the rules-based order is not defunct – powers are competing for positions in the UN rather than building a parallel system. Most powers, however, including the US, are inconsistent multilateralists at best, applying the rules only when it suits them.

Fifth, we are not in a permanent “grey zone” between war and peace – deterrence still works, so the great powers do not go to war against each other. Russia and China do act as rivals, however, and use illegal methods short of war to subvert the EU’s sovereignty.

REAL THREATS AND CHALLENGES

The prevalence of rivalry shows that world politics does present real threats and challenges. Most importantly, the risk is real that the structure of world politics reverts to bipolarity, and the world falls apart again in two blocs that decouple from each other, notably if Sino-American rivalry escalates. The Russo-Ukrainian War has already resulted in decoupling between the West and Russia; it too could trigger a new global “cold war” if China tilted so far to the Russian side that it led to a rupture in its

relations with the EU and the US. Unilateral use of force by China to change the status quo in Taiwan or elsewhere in Asia would likely produce the same result.

For the EU as an export power dependent on the import of natural resources, a new “cold war” would spell economic catastrophe, for it would lose access to half of the world market. Or more, for more states than we expect may (feel forced to) choose to align with China. Moreover, a fractured world would not be able to address global challenges such as climate change that cannot be solved without the great powers. Certain shared rules may be maintained, as during the Cold War, but two parallel orders will evolve, and the universal multilateral organisations paralysed.

Even if the multipolar structure holds, the EU will have to guard against the balance of power tilting so far against it that its ability to preserve its vital interests is constrained. That applies to its economic, political as well as military power. The EU must prevent other powers from gaining undue control over the markets and resources of other states, for ultimately this could enable them to coerce those states into severing ties with Europe, and the world would be carved up into exclusive spheres of influence. Similarly, other powers must be prevented from dominating decision-making in the universal multilateral organisations.

Finally, ongoing and potentially future regional wars around Europe, in Ukraine, the Caucasus, the Middle East, the Gulf, and North Africa, have destroyed the stability of the European continent and disrupted the EU’s lines of communication. Russian military expansionism, if not halted in Ukraine, as far to the East as possible, will undoubtedly target other countries as well, starting with Moldova and Georgia. Russian penetration, if unchecked, will continue to undermine EU interests on the entire southern flank, which is very unstable in its own right. Without a consensual settlement of the Israeli-Palestinian conflict, and the broader geopolitical rivalry between the Middle Eastern and Gulf states, the region will remain prone to war.



GRAND STRATEGY: THE EU'S ROLE, ENDS, WAYS, AND MEANS

The intensity of the threats and challenges demands a focused strategy, agile decision-making, and decisive action in implementation.

First of all, the EU must be clear about its own *role* – that is the core of any Grand Strategy. The EU must understand itself as a sovereign pole of the multipolar world, closely allied but also on a par with the US. Otherwise, Europe will become a battleground where the other powers compete and rival with each other, above the EU's head. To a worrying extent, that is already the case.

Second, the EU needs a unifying *end*: Keeping the World Together. As long as there is a chance to prevent a new global “cold war” and maintain a global rules-based order, it must be attempted, as the least costly way of safeguarding the EU's vital interests. At the same time, it must be prepared for the failure of this strategy and be able to uphold its sovereignty in a world driven only by rivalry between the powers.

For now, the dynamic of partnership, competition, and rivalry still shapes relations between the powers (Russia excepted, of course). This dictates, thirdly, the overall *way* of achieving the EU's end: Cooperate When You Can, Push Back When You Must. An agile diplomacy must allow the EU to work with all those who give it something to work with, while pushing back or retaliating against those who threaten or attack its interests (and they may be one and the same, on different issues). Pushing back when necessary is a precondition for cooperation: without demonstrating the will to enforce one's red lines, a bid for cooperation will be interpreted as a sign of weakness, and ruthlessly exploited.

Fourth, when it comes to *resources*, the EU, to be able to act as a pole, must maintain its sovereignty and increase its economic, political, and military power. The EU must realise, moreover, that a strategy of engagement requires power as much as an aggressive strategy of military expansion. One cannot seek partnership from a position

of weakness, for one will simply be overwhelmed by the other powers.

The previous European Commission set the EU in the right direction. No great overhaul of existing policies is required, therefore. But this reminder of the principles of EU Grand Strategy clarifies how far the EU must proceed in this direction, and by which steps.

GEOECONOMICS: OPEN STRATEGIC AUTONOMY

Open Strategic Autonomy is one of the strategic choices that the EU has made. Rules-based global trade between as open economies as possible remains a vital interest of the EU. World politics has taken a geoeconomic turn, however: states prioritise security and intervene in the economy, including against other states, to reduce threats to their sovereignty, if necessary by accepting a reduction in profit and prosperity.

Therefore, the EU must adopt protective (but not protectionist) mechanisms that prevent other powers from exploiting its own openness: what the EU calls de-risking, as opposed to de-coupling. This is a fine balance, because it is a continuum: de-risking taken too far becomes de-coupling. The first aim of de-risking is to protect the EU's sovereignty and prosperity, for example by protecting critical infrastructure and strategic sectors, and by diversifying vital imports. Second, the EU must limit or avoid specific economic interactions that strengthen another state if that directly threatens the EU interest, such as the sale of weapons technology.

It is, a priori, not the aim to curb the overall economic and technological development of any other state, for that carries a great risk of creating a spiral of measures and countermeasures that may end in de-coupling. But the EU should prevent one power from dominating on its own an entire global industry. Furthermore, de-risking is not punishment because a state has a different political system or even because it violates human rights. Economic measures may induce changes in economic policy, but are rarely successful in changing a political system. Thus, linking de-risking to human rights and

democracy can only lead to de-coupling. The EU must ensure, though, that through its economic interaction it does not itself become complicit in any violations. E.g., the EU can outlaw the import of the products of forced labour, but cannot hope to end forced labour through its economic policies.

Clarity of purpose is a precondition to know how far to take de-risking. When its sovereignty and prosperity are at stake, the EU must act forcefully, as in the case of Chinese electric vehicles: a clear example of how pushing back convinces the other side of the need to negotiate. The EU will never achieve Open Strategic Autonomy without a full-fledged EU industrial policy, however. Towards China in particular, the EU ought to have come to the conclusion by now that its classic strategy of creating reciprocal market openness cannot work, as this would entail China abandoning its state capitalist economic system, which it will not. Hence reciprocity must be created in other ways, for example by obliging Chinese manufacturers to construct cars for the EU market in the EU (which is exactly what China forced Europe's car manufacturers to do).

GEOPOLITICS: THE EU'S ZONE OF RESPONSIBILITY

Geopolitics is an inherent part of strategy: the location of the natural resources that one imports, of one's export markets, one's partners and rivals, and the lines of communication that connect them, creates specific vulnerabilities as well as opportunities. Moreover, Russia has gone to war against Ukraine, and China aggressively pushes against its neighbours in the South China Sea, to create geopolitical depth: to put distance between their perceived rivals and their own centres of gravity. This reality must inform, but does not in itself determine, the EU's strategic choices. During the previous European Commission, geopolitics became a Brussels buzzword, but the EU did not in fact adopt a consistent geopolitical approach. That requires a better understanding of geopolitics.

The EU too needs geopolitical depth, but obviously will not revert to coercion to enlarge or to create a sphere of

influence. But the EU does have what could be called a Zone of Responsibility: a geographic area around the EU that must remain stable for the EU itself to enjoy stability. By implication, this is where the EU must draw a red line, making it clear that it will act against local or external powers, with military means if necessary, if they create instability that threatens vital EU interests. In this zone, the EU must take the lead to maintain or restore stability: it should not count on someone defending its interests for it.

The EU must decide how far its Zone of Responsibility extends, and which relations it is willing to offer to the states within it: membership, association, or partnership. In the full knowledge that the EU's offer will provoke counteroffers, or retaliation, by other powers. For the first time, a hostile power, Russia, is actively blocking EU enlargement and association policies. There is a link, therefore, between collective defence and enlargement and association: today, it is only because the majority of EU Member States are NATO Allies that they can confidently support EU candidate country Ukraine without fear of direct Russian retaliation against themselves. Without that NATO, and ultimately American, umbrella, most European states had probably done little or nothing for Ukraine. By themselves, Europeans do not feel capable of effective military deterrence.

The core of the EU's Zone of Responsibility is the European continent, where membership is on offer. In the Balkans, the challenge is to maintain the credibility of accession, which will take many years, in the face of active Russian subversion and growing Chinese influence. The same applies to Moldova: as Ukraine survives, the military threat is limited (the 1500 or so Russian troops in Transnistria notwithstanding), but as the recent referendum shows, accession cannot be taken for granted.

Making Ukraine a candidate country was a key strategic decision, which reflects the new geopolitical reality: Ukraine can no longer survive as a buffer state in between the EU and Russia – independence requires EU and NATO membership. However, the EU never closed the gap between its official position and its actions: while professing support until the liberation of all Ukrainian

territory, it only ever supplied enough weapons to hold the line, not to go onto the offensive. Now it is too late: Trump will act, and the EU will have to react. In light of a hypothetical deal between Trump and Putin, the EU must first of all help Ukraine ensure that between now and Trump's inauguration it doesn't lose even more territory, by delivering as many weapons as possible. Second, European governments have to prepare to provide Ukraine with a security guarantee, made hard by deploying their troops in Ukraine, so that whichever deal Trump might force upon the country, even if it excludes NATO membership, its future is guaranteed against a third Russian invasion.

Outside Europe, the Caucasus definitely falls within the Zone of Responsibility. When making Georgia a candidate, the EU seemingly was unprepared for the intensity of the Russian pushback. Apart from the long-term prospect of membership itself, the EU had too little immediate assistance against Russian interference to offer, and too few short-term advantages. Moreover, if ever Russia would use force against Georgia, the EU is totally unprepared to support it the way it supports Ukraine – but that is the responsibility the EU assumes the moment it accords candidate status. The EU should also think carefully, therefore, about which partnership to offer to Armenia, which is seeking a rapprochement, while maintaining partnership with Azerbaijan at the same time.

The Middle East and the Gulf, plus the Western Indian Ocean, also are part of the EU's Zone of Responsibility. The EU has lost most of its influence, however, having attached too little priority to the region in recent years, and having proven that all too often it does not have the hard economic and military power to underpin its diplomacy. Even the cutting of the vital sea lane of communication to Asia by the Houthis met with a half-hearted military response. Fortunately, the added cost of diverting shipping around Africa has proved negligible – but only because the Gulf of Guinea remains stable enough. The same lack of power, combined with its utter dividedness, have made the EU into a bystander in the wars in Palestine and Lebanon. Only a major overhaul of strategy can make the EU relevant again.

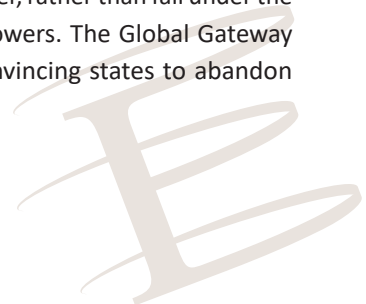
North Africa, including the Mediterranean, the Horn, and the Sahel, is a part of the Zone of Responsibility where the EU is hard at risk of losing all leverage as well. Russia adeptly played into local conflicts and animosities against Europeans and inserted itself as a permanent spoiler, even though here the EU and its Member States had a military presence on the ground. Here too, strategy must make a new start.

Finally, the North Atlantic and the Arctic are the EU's Zone of Responsibility too. While both regions are stable enough today, ever more intense rivalry will play out there as well, especially as climate change opens up access to Arctic waterways and resources.

Delineating a Zone of Responsibility implies that other regions fall outside it. The EU should notably not seek a similar role in the entire "Indo-Pacific". This denomination covers half of the globe and is thus difficult to operationalise anyway. What matters to the EU is the sea lane of communication to Asia, the Western half of which falls within its Zone of Responsibility. The Eastern half is equally vital, but unlike in the Red Sea, for example, there is no direct military threat – the threat is indirect, if Sino-American rivalry or Chinese aggression in pursuit of its territorial claims provokes escalation. The EU has a diplomatic and economic role to play, but here it cannot take the military lead, as its deployable military power is too limited to have more than a symbolic part.

GEOECONOMICS AND GEOPOLITICS COMBINED: THE GLOBAL GATEWAY

A crucial new instrument in stabilising the Zone of Responsibility and safeguarding geoeconomic interests, is the already established Global Gateway, a programme for investment in the infrastructure of connectivity. The Global Gateway still misses a clear definition of its strategic rationale, however. Its aim must be understood as preventing exclusive spheres of influence and maintaining instead a global Open Door Policy: all states should remain free to interact with each other, rather than fall under the dominance of one of the powers. The Global Gateway will achieve that not by convincing states to abandon



relations with other powers, but by enticing them to also work with the EU. Defining the aim also clarifies what the Global Gateway is not: a vehicle to promote democracy and human rights. The EU must play an exemplary role through the projects that it finances, but as it is competing with other powers that do not practice conditionality, the Global Gateway cannot include too many conditions linked to the domestic political system.

The first step is to prioritise, on a geopolitical and geoeconomic basis: the Global Gateway must be a major part of the EU's offer to countries in its Zone of Responsibility, and to countries outside it that possess the resources that the EU needs. A second group of priority countries could be those where the Open Door Policy is particularly threatened, such as the Central Asian states, wedged in between Russia and China, or certain neighbours of China, such as Vietnam. The second step is to define an attractive offer; if possible, a "unique selling proposition". The Belt and Road Initiative (BRI) mostly focuses on extraction of resources and their export to China. The Global Gateway could aspire to add a focus on processing and production in-country, though this is very challenging.

Investment in infrastructure is the core of the Global Gateway, but strategy is comprehensive: the EU must pair its economic offer with a political and security offer as and when appropriate. Indeed, part of the EU's "unique selling proposition", as compared to China, is that certainly within its Zone of Responsibility it can offer security assistance, including combat forces. China may sell arms and offer training, but will not engage in combat; Russia, of course, has mercenaries for hire; while the US is unlikely to deploy large formations in Africa. Obviously, military assistance is a very sensitive instrument, but it must be part of the package on offer. The EU should not only think in terms of operations (with a specific objective and time horizon), but also of bases (a semi-permanent presence).

A major part of the Global Gateway is communication. In many countries, the various EU and Member State players combined are by far the largest provider of investment (and not only of development assistance). But because

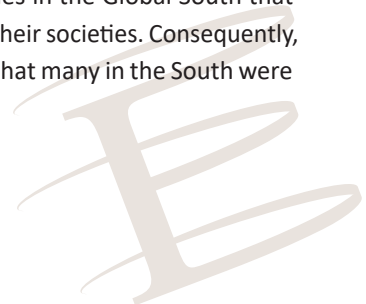
nobody ever does the maths, the EU itself usually is not aware – and so the partner country obviously is not either. If the EU wants to have impact, it should put all EU and Member State efforts under a single label. (Rather than adding to the confusion by launching another label in addition to the Global Gateway: Team Europe). Finally, the EU must accelerate. The Global Gateway was, in fact, launched in 2019 already (initially as the EU-Asia Connectivity Strategy). Five years later, still only experts are aware of its existence.

UNIVERSAL MULTILATERALISM

In a multipolar world, embedding states in a dense network of multilateral ties serves to contain tensions and prevent natural competition from sliding into hostile rivalry. Multilateralism comes naturally to the EU, but it must play a much more proactive role. The dynamic format today is the BRICS; the West has continued to focus on the G7, whose legitimacy and effectiveness are doubted by many outside it. The BRICS is a self-coopted format too, so it is neither more nor less legitimate than the G7, and may not be much more effective. But it clearly is an attractive platform for those who want to signal their dissatisfaction with the current set-up.

The EU should be more creative and take the lead, 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. This was the idea of the Alliance for Multilateralism, which seems to have already withered away, however. Success in this sense will strengthen confidence in multilateralism, and create a basis for more ambitious initiatives. For several of the key multilateral organisations need major reform, notably in the financial and economic sphere.

In the World Bank and the International Monetary Fund, for example, the West is still very much over-represented. Worse, for decades, the West has imposed financial and economic policies on countries in the Global South that went against the interests of their societies. Consequently, one should not be surprised that many in the South were



predisposed to work with China when the latter re-established itself as a great power. A stronger say in global governance is one of the main demands that unites the Global South (which otherwise is a very disparate group of countries). By demonstrating the will to share power, the EU can forge strong partnerships with key Southern states that share an interest in maintaining a rules-based order and in avoiding a new bipolarity. The existing rules were indeed largely written by the West. The EU message to the Global South must be that allowing China to rewrite the rules alone will not be in their interest either. Instead, the great powers and the Global South ought to reform the current order together, and keep it inclusive – that promises the greatest chance of stability.

EUROPEAN DEFENCE OF EUROPE

The concept of a Zone of Responsibility makes sense only if the EU Member States possess a pool of expeditionary forces in a high state of readiness, both as a deterrent against spoilers in Europe's neighbourhood and to actively engage in operations. That is not now the case: the Rapid Deployment Capacity announced in the 2022 Strategic Compass is an empty box, because its core remains two "Battlegroups", i.e. two reinforced battalions. That is completely inadequate to have any impact at all on Europe's highly volatile neighbourhood. On paper, the EU does continue the Headline Goal Process, aimed at creating an expeditionary corps of 60,000 troops – but this is a paper exercise without any impact on the national defence planning of the Member States. As NATO is focusing on territorial defence, it really is up to the EU, or a subset of Member States, to establish a pool of expeditionary forces that must not be on standby, but that train together on a systematic basis, with pre-identified enablers and command & control arrangements. From such a pool, a tailor-made force can be generated to deal with any particular non-Article 5 crisis.

At the same time, the EU should stop efforts that merely duplicate the NATO Defence Planning Process (NDPP) without actually influencing national defence planning, such as the Capability Development Plan. The better solution is to create a European layer within the NDPP,

in between the national layer and NATO as a whole, that ensures that the forces of all European Allies (both EU and non-EU) combined constitute a complete force package, with its own enablers, that is capable of conventional deterrence and defence without requiring any US assets – except the person of SACEUR, who will remain an American general or admiral. Ideally, the NDPP would formally become the guidance for the European Defence Fund, ensuring that the EU instruments that do work focus on the force goals that European states have set themselves (and not only on industrial objectives). It is absolutely silly that there is no connection between the NDPP and the defence industrial policies of the Commission. Worse, there is not even a channel for communication between the EU Military Committee and the Commission.

Beyond deterring classic military aggression against Europe and deterring spoilers from creating instability in the areas around Europe, the EU should also focus on deterring hybrid actions. NATO has already stated that it may consider certain hybrid attacks as acts of war that trigger Article 5. That seeks to deter the most large-scale hybrid actions, but it does not deter the daily illegal actions against European sovereignty. The EU has created a wide range of instruments, but these focus mostly on assisting the Member State that is the victim of a hybrid attack. That is deterrence by denial, by building up defences. What is missing is a doctrine for deterrence by retaliation. As the EU's rivals revert to illegal hybrid actions against it, must the EU (and NATO) not consider extending their toolbox and move into this domain too? For until now, the perception of its rivals likely is that as long as one stays below the threshold of military action, one gets away with it.



CONCLUSION: A STRATEGIC REVIEW

The start of the European Commission calls for a strategic review. This could take the form of producing a new Global Strategy (which could be entitled *The Global Strategy 2025* – one doesn't need to invent a new name for every iteration). Or it could take the form of a Joint Communication by the Commission and the High Representative. Or it could even be a short internal memo. The important thing is not the form, and certainly not the length, but the substance: to know for ourselves what we are doing and why. Crucially, the President of the Commission must take ownership of Grand Strategy (rather than only the High Representative). Only if it is understood as the agenda of the Commission as a whole, including the HR, will a new strategy carry any weight.

Sven Biscop, director of Egmont's Europe in the World programme and professor at Ghent University, is the author of [This Is Not a New World Order - Europe Rediscovered Geopolitics, From Ukraine to Taiwan](#). He warmly thanks the participants in the Ghent Grand Strategy Seminars, organised by Ghent University in Brussels in November 2024: these discussions greatly inspired this policy brief.





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