



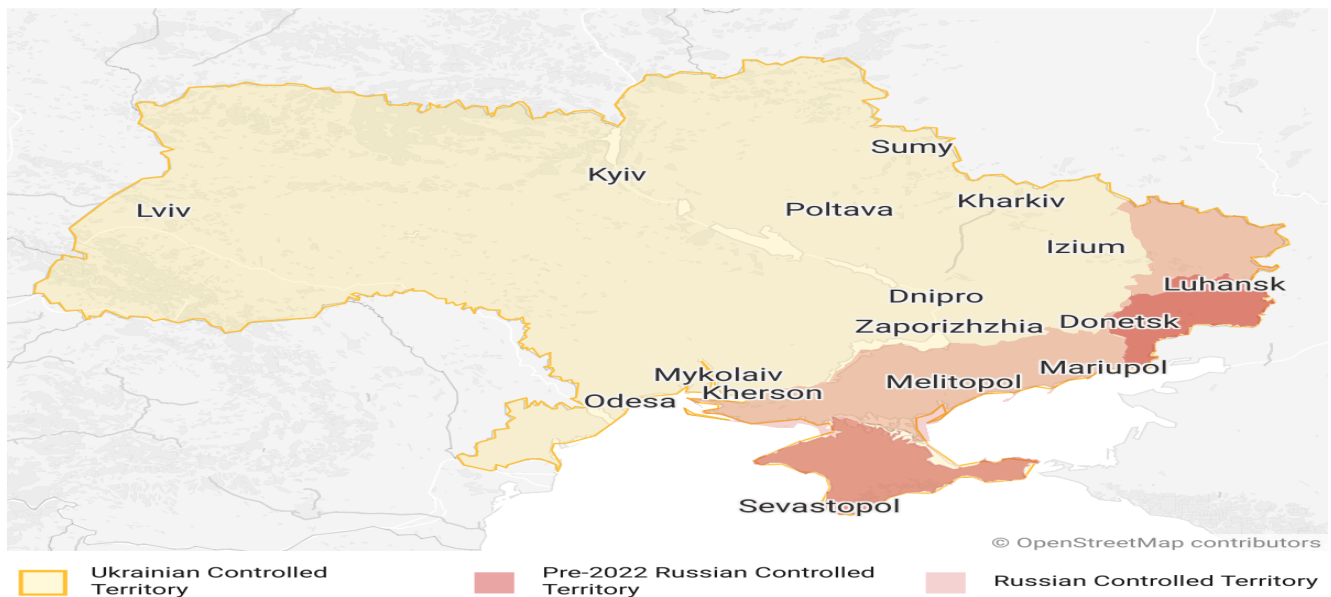
**Joining the dots and making sense of the key geopolitical developments in Europe,
Eurasia and MENA**

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Key points:

- 1) Possible Geopolitical Endgames of the War in Ukraine
 - 2) U.S. and China at Crossroads: New “Cold War” or Military Standoff?
 - 3) How Contested Corridors Have Blocked Armenia-Azerbaijan Peace Negotiations
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Territorial Control of Ukraine on February 8, 2023



Map: Center for European Policy Analysis • Source: liveUAMap

1) Possible Geopolitical Endgames of the War in Ukraine

In our previous [Issue 20, August-October 2022](#), we concluded that there might not be realistic solutions to stop the war in Ukraine in sight, and that the ensuing geopolitical conflict may only be solved on a medium to longer term, within a wider Euro-Atlantic context. We further argued that this war might be heading towards escalation/expansion if warfighting couldn't be contained. Indeed, over the last quarter, it has turned into an attrition war with Russian missiles massively destroying Ukrainian energy and other civilian infrastructure. According to military reports, the Russian and Ukrainian forces have dug themselves in their respective trenches, while the frontline has only marginally changed. The harsh wintertime on the battlefields might have had a significant influence on the current military situation, but observers reported preparations for a major Russian offensive with a focus on Donbas and Southern Ukraine. Its initial goal might be to push Ukrainian forces from the four oblasts annexed last autumn by the Russian Federation: Donetsk, Luhansk, Zaporozhe, and Kherson.

Meanwhile, Ukrainian president V. Zelensky has persuaded his Western counterparts to deliver

longer-range missiles, heavy battle tanks, and is arguing in favour of receiving F-16 fighter jets. He is hoping that this kind of Western weaponry might help Ukrainian forces repel the Russians from Ukrainian territory later this year.

Western officials, while recognizing that the war should eventually end diplomatically, are contemplating exclusively military endgames: *"It's up to Ukraine to determine the conditions of the peace; Russia is not interested in good faith negotiations; and the important task now is to arm Ukraine sufficiently so that its hand at a theoretical future negotiating table is as strong as it can be."* (<https://washingtonpost.com>)

All these developments are actually indicating that further escalation/expansion of the war might be imminent. In such dangerous times, proposals for negotiated endgames and how they could be reached have become most relevant.

There has been a lot of Western hype on Russia's total defeat/capitulation, and how it would lead to further democratization of Ukraine, Eastern Europe, and ultimately of Russia itself. However, facts and figures aren't supportive of such optimistic scenarios. On the contrary, Tatiana Stanovaya, a seasoned Russian political expert, called on the

factual reality that: *“There is no one in the Russian elite who will support a Russian withdrawal to the country's February 24 positions. It is possible, however, that the realists could publicly push for freezing the conflict in a temporary agreement with the West (sealed with Ukraine).”* (<https://www.foreignaffairs.com>).

In the same vein, Vladislav Zubok conceded: *“Russia is stronger than many would have predicted. Its army, economy, and leader all seem stable. [...] A majority of Russians continue to support the Russian government and are not ready to accept defeat.”* And concluded that: *“What is missing, then, is a coherent political plan to bring an end to the suffering, and to reassure Ukrainians that Russia will not begin a new war at the earliest opportunity, even if Putin remains in power.”* His last point basically echoed the statement of November 2022 of the Chairman of the U.S. Joint Chiefs of Staff, General Mark Milley: *“the war in Ukraine is unwinnable by purely military means”*, further suggesting that Ukraine, which was at the time in a position of strength, should consider peace talks with Russia. (<https://www.foreignaffairs.com>)

What possible geopolitical endgames of the war in Ukraine, short of Russia's complete defeat, have been recently put forward?

Former NATO Secretary General Anders Fogh Rasmussen has co-chaired with Andriy Yermak, the chief of staff to Ukraine's president, a group of international experts who suggested last autumn “The Kyiv Security Compact”. This would aim to provide a security solution for Ukraine, short of NATO and EU membership, envisaging a system of international security guarantees against Russia provided by willing NATO member countries. It would be meant to enable Ukraine to deter Russian aggression and defend itself with its own forces. To that end, the Compact would guarantee comprehensive support to Ukraine to deter aggression and an immediate mobilization of

participant countries' resources for Kyiv to defend itself in the event of future aggression. The proposal wouldn't preclude future NATO membership for Ukraine, and it should cover its internationally recognized territory. (<https://www.jamestown.org>). It might be likely applicable after the end of the ongoing war, as a possible pillar of the new European security system.

Other possible geopolitical endgames of the war would prioritize peace (or at least a ceasefire) against restoring the territorial integrity of Ukraine. For example, at the January 2023 World Economic Forum in Davos, Henry Kissinger surprised everyone with his new assessment that Ukraine's NATO membership would be an *“appropriate outcome”*. He said that Russian invasion showed that *“The idea of a neutral Ukraine under these conditions was no longer meaningful.”* Sergey Radchenko, a professor with the Kissinger Centre in Washington, has also acknowledged the possibility of Ukraine's NATO membership since: fears of not provoking Russia were not valid anymore, as Russia has already become radicalized against the West; Ukraine is *de facto* member of NATO, as it's receiving military equipment and training from Allies; it would help anchor Ukraine to the West, and would institutionalize trust, which would be essential for rebuilding the country after the war; it would offer credible deterrence against Russia's nuclear threat. (<https://www.intellinews.com>) However, NATO membership could only be either materialized after the end of the ongoing war or applied to the territory currently under the control of the Ukrainian government, as a way to turn the war into a protracted conflict. Otherwise, it was unlikely that 30 Allied governments and Parliaments would concede to joining this endgame. Radchenko had proposed in the past a *“Berlin Wall-like ending of the war in Ukraine”*. In that reading, greenlighting Ukraine's NATO membership might actually imply a tacitly agreed split of pro-Western parts of Ukraine from its Russian-controlled parts, following that it

should be then upon NATO and Russia to hold a stable dividing line, just as NATO and the former Soviet Union had done in Germany (and in Berlin) during the Cold War (1949-1990).

The “Korean Scenario” could offer another possible geopolitical endgame. Lyle Goldstein suggested that it “would allow both sides to stop fighting with an immediate armistice along the present line of contact, while putting aside most of the complexities of peace making”. He argued that “In fact, Russian strategists have already put aside their extremist original war aims and are now actively discussing the “Korean Scenario” for Ukraine.” According to Goldstein, the virtue of a Korean-War-style armistice would be that “it puts a premium on an immediate halt to the fighting, while solidifying the line of contact as the new border for the foreseeable future.” (<https://responsiblestatecraft.org>)

In another possible endgame, Vladimir Frolov suggested that international peacekeepers should be deployed to Ukraine beyond the reach of Russian artillery. This peacekeeping contingent could consist primarily of troops from NATO countries equipped with heavy weaponry. “Well-armed peacekeepers would make it possible to achieve deterrence by denial without the excessive militarization of Ukraine, and without the country formally joining NATO. The alliance’s nuclear umbrella would cover NATO peacekeepers, and by extension Ukraine.” Frolov thought that Russian expected opposition to the deployment of NATO troops in Ukraine could be overcome by an explicit agreement stating that “UN/NATO troops would only be brought in after the end of hostilities to guarantee the new borders of Ukraine and Russia (with a Russian corridor to Crimea), which Kyiv could recognize as part of a definitive resolution.” (<https://carnegieendowment.org>)

Also privileging a halt of warfighting over Ukraine’s territorial integrity, Samuel Charap and Miranda Priebe concluded in a recently published Rand Corporation report (<https://www.rand.org>):

“Territorial control, although immensely important to Ukraine, is not the most important dimension of the war’s future for the United States.[...] in addition to averting possible escalation to a Russia-NATO war or Russian nuclear use, avoiding a long war is also a higher priority for the United States than facilitating significantly more Ukrainian territorial control.” They have also suggested ways to shift Russia’s and Ukraine’s current pessimism over compromising on peace: “clarifying plans for future support to Ukraine, making commitments to Ukraine’s security, issuing assurances regarding the country’s neutrality, and setting conditions for sanctions relief for Russia.” While Charap and Priebe expressed awareness that policy could not change over-night, they argued that developing appropriate instruments and socializing them with Ukraine and NATO allies might help catalyse the eventual start of a process that could bring the war to a negotiated end in a reasonable timeframe.

Nobody could guess the geopolitical outcomes of the war in Ukraine as they would largely depend on the political, socio-economic, and military resilience of the belligerents, as well as on various random events. Moreover, a possible escalation/expansion of the war would make such a guess look rather intuitive if not purely aspirational.

The downside of the geopolitical endgames proposed so far is that they might be only applied either after the end of the ongoing war (which is itself fraught with uncertainty) or to the Kyiv-controlled territory at the time of a possibly agreed truce. The latter possibility engenders the risk for Ukraine and its Western supporters to eventually have to choose, as Charap and Priebe suggested, between restoring Ukraine’s full territorial integrity and Western interests to avoid joining the war, turning it into nuclear war, or being engulfed into a long war.

This is why the West should better stop playing as a mere prop-up of the failed OSCE security system

against Russian revisionism. It needs a comprehensive vision and a calibrated strategy aiming to build a new European security system which would put Ukraine and other post-Soviet states' sovereignty, independence, and stability at its core.

Turning the war in Ukraine into a protracted conflict might be the likeliest geopolitical endgame, at least until there was broad agreement on the framework and main rules of interaction into a new European security system. However, to reach such an endgame the Ukrainian army must dig in to resist against the upcoming Russian offensive.

2) U.S. and China at Crossroads: New "Cold War" or Military Standoff?

The shooting down of an allegedly Chinese spying balloon by an U.S. fighter jet on February 4, 2023, as it floated off the South Carolina coast, and the ensuing war of words culminating with the postponement of the carefully planned visit to Beijing of state secretary A. Blinken has highlighted once more the precarious state of the U.S.- China relationship.

However, this event wasn't unique, and it didn't come out of the blue. Washington and Beijing are engaged for several years in what U.S. strategic documents call "great power competition" while many experts are seeing it as a new "Cold War". That is a giant economic, technological, and military race for global primacy garnered with coalitions building, and sometimes with shows of military force. Cyberattacks, ideological disputes casted under the mantra "democracies vs. autocracies", and disinformation campaigns are hinting at the global competition for power of the 21st century.

In addition, a thinly veiled dispute over the status, and influence over the government, of Taiwan might trigger a military confrontation. This older dispute has grown up from repeated promises of president J. Biden that he would authorize U.S. military support to the Taiwanese in case they were

attacked by the Chinese armed forces, which were deemed in Beijing as breaches by the U.S. of its formal "One China" policy. *"While "peaceful reunification" remains the Communist Party's preferred solution to disagreements with Taipei, it will never abandon the right to use of force, if necessary, Xi said at a recent meeting of top party officials. By keeping that option open, he added, China wants to deter "Taiwan independence forces" and "foreign interference" — meaning the United States."* (<https://washingtonpost.com>).

The visit of the former House Speaker N. Pelosi to Taipei last August was seen in Beijing as a dangerous provocation and evidence that Washington was hollowing out its formal position on the island, and it has risen the risk of a military clash over Taiwan. *"Pelosi's visit was followed by four days of scheduled Chinese live-fire naval exercises, ballistic missile launches and aircraft manoeuvres over and around Taiwan. Chinese naval forces took up positions that effectively encircled Taiwan and simulated what analysts suggested could be a future naval blockade of the island."* (<https://washingtonpost.com>).

Moreover, in January 2023, Gen. M. A. Minihan, a top U.S. Air Force commander, leaked a memo warning that the expected presidential elections in Taiwan and in the U.S. in 2024 might be rising, in 2025, the risk of a direct military stand-off with China over Taiwan. M. McCaul, the chairman of the U.S. House Foreign Affairs Committee, endorsed that warning meant to advocate an increased preparedness of U.S. forces. However, the well-known geopolitical strategist G. Friedman commented on those warnings: *"I have been on record as saying China's economic and political vulnerabilities make such a conflict unlikely. I remain sceptical. [since] I find it hard to believe that China would plan a war so carelessly. Given the leak, a war could still be in the offing, but for China it would likely be short."* (<https://geopoliticalfutures.com>)

Both the spying balloons saga, and the warnings on the possibility of a military clash in 2025 are hardly meaningful outside the context of the growing U.S.-China strategic competition, potentially leading into a new hegemonic war. As such, they could be seen as dots outlining a new geopolitical trend implying that the current global, and regional alignments will be following this new global power dyad. We have first noted this trend in our [issue 13/February-March 2021](#). At the time, we concluded: *“The biggest challenge stemming from the geopolitical trend (be it Cold War 2.0, Concert of Powers, World War III, or anything else) highlighted by the stormy U.S.-China high level meeting in Anchorage [Alaska] might focus on whether or not the 21st century multipolar world order would be still manageable at the global level. Otherwise, the world might need to be split into smaller pieces (in most likely disruptive and divisive “spheres of influence”) designed either upon geopolitical and ideological criteria or by the fortunes of the Roman god Mars.”* This conclusion stands and it has been reinforced by many experts studying the current global trends afterwards.

For example, in the article on “Nobody Wants the Current World Order” published in Foreign Affairs, summer 2022, Shivashankar Menon argued that: *“It is misguided to see today another Cold War defined by the sharp bipolarity of two blocs: a “free world” and a realm of “autocracies”. [...] Instead, geopolitics grows more fractured and less cohesive. The globalized world economy is fragmenting into regional trading blocs, with partial decoupling attempted in the areas of high technology and finance and ever fiercer contention between the powers for economic and political primacy.”* His conclusions are leading to the emergence of a world *in limbo* where none of the revisionist powers, notably the U.S., China, and Russia, has a compelling vision on how a revised international system should look like. This would lead into growing global and regional instability, insufficient attention to the global challenges, and mostly

reactive behaviours favouring poorly thought responses to the emerging crises. He thought that every “revisionist” power would pursue narrow interests through economic protectionism, and sometimes by practicing contentious diplomacy and even limited use of force. Unsurprisingly, they would be often privileging their own economic interests to the detriment of defending the basic principles of the international law, such as condemning the state-to-state aggression or respecting international borders. They might also struggle to contain perceived adversaries mainly by building coalitions or by applying security-motivated trade restrictions and economic sanctions. (<https://www.foreignaffairs.com>)

Another example has been a recent CEPS in-depth analysis on “The Rise of Mega-Regions: Eurasia, the Indo-Pacific, and the Transatlantic Alliance in a Reshaped World Order” focused on three mega-regions shaping the future rules and norms of the international order. Notably, the term “Indo-Pacific” was tightly connected to the efforts of the U.S., Japan, Australia, and India to contain the Chinese efforts to assert itself as a mega-power. The authors of this study argued that: *“the reinforcement of existing geopolitical trends – dividing the world into blocs in some cases and reinforcing the non-alignment of states in others – leaves the EU and wider transatlantic alliance with less horizontal room for manoeuvre. In other words, we are witnessing a form of Western ‘strategic shrinkage’.”* (www.ceps.eu) Meaning that the West should be struggling to maintain its strategic role in both Eurasia and the Indo-Pacific mega-regions.

The U.S.-China relations seem approaching a crossroads. The following years would be decisive for the outcome of their strategic competition. With the Russia-West confrontation still raging, a U.S.-China new “Cold War” would seem likelier, although a military standoff can't be excluded. Apparently, Washington thought the latter wouldn't

be among Beijing's winning cards, as it has been waging an increasingly disruptive and multi-pronged assault against China's hi-tech sector, with the help of its allies, and it is defying the Chinese muscle-flexing around Taiwan in the aftermath of the Pelosi visit, by planning, for later this year, the visit to Taipei of the new House Speaker, K. McCarthy. In the face of that, president J. Biden's reassurances after his first in-person meeting with president Xi Jinping of China in Bali, last November, that he believed there need not be a new "Cold War" might sound as merely a statement of good intentions without sound policy support.

For now, the US-China tense relationship seems still manageable. But so seemed the U.S.-Russia relationship in mid-June 2021 when presidents Biden and Putin met in Geneva. Less than one year later the Russian invasion of Ukraine turned everything upside down. Hopefully, the tragic lesson from Ukraine has been learned both in Washington and Beijing, and it wouldn't need to be tested in Taiwan as well.

3) How Contested Corridors Have Blocked Armenia-Azerbaijan Peace Negotiations

More than two years after the Russian-mediated ceasefire of the 44-days Karabakh war, Armenia and Azerbaijan are apparently stuck on their way towards peace. A peace agreement has still to be negotiated, while periodic disputes and military clashes have shattered their efforts so far. That is mainly because their November 2020 Trilateral Statement jointly with Russia left open a wide range of key issues for stabilizing their relations, some of which have become bones of contention, such as the contested Lachin and Zangezur "corridors".

At the geopolitical level, the OSCE Minsk Group and its Russian, U.S. and French co-chairs have been *de facto* side-lined by the Russian-Turkish strategic partnership over the South Caucasus. Meanwhile, the EU has become actively involved in the mediation of the peace negotiations, besides its

continued support to peace building. The U.S. has also become involved in mediating the peace negotiations, most likely as a way to building leverage to undermine Russian authority in the region, and to strengthen the role of Azerbaijan in containing Iranian influence in the South Caucasus. Consequently, at present, there are three negotiation frameworks (led by Russia, the EU, and the U.S., respectively), but the actual talks have stalled. However, in February 2023, signs of a possible revival of negotiations in the U.S.-led framework have emerged.



In the meantime, an ongoing "*blockade*" of the Lachin Corridor (since December 12, 2022) by Azerbaijani environmental activists has once again raised tensions. The consequences of this protest have been dire, with Armenians claiming a looming humanitarian crisis due to sharp shortages of food, fuels, and medicines, blaming Baku for attempting a covert expatriation of Armenian population living in Karabakh. Conversely, the Azerbaijani protesters have claimed to oppose illegal mining operations in the area. Azerbaijan's government has endorsed the protest, denying it was a "*blockade*" since humanitarian, medical, and Russian peacekeepers' traffic has been allowed to pass thru. It has also claimed that the Armenians would have abused free passage through that corridor to supply

landmines which would have subsequently been deployed in the field. Consequently, it requested to establish checkpoints to control the traffic of goods and people through the Lachin corridor. Both Armenians and Azerbaijanis heavily criticized Russian peacekeepers for not doing their job according to the Trilateral Statement. (<https://nytimes.com>)

Armenian experts argued that Azerbaijan might view this protest as a way to building leverage on Armenians from Karabakh and to forcing out as many of them as possible. Others believed that the core target of the “blockade” was to force Yerevan to sign a peace agreement on Azerbaijani terms and to grant the “Zangezur corridor” to Azerbaijan. Others linked it to Azerbaijani growing concerns about plans to expand the mandate of the Russian peacekeeping mission beyond November 2025. *“According to this argument, Baku believes Russia sent Ruben Vardanyan to Nagorno-Karabakh [NB: an Armenian billionaire who made his fortunes in Russia and who has been appointed State Minister in November 2022] to increase its influence there, and that the blockade signals to the Kremlin that Azerbaijan will not tolerate political control of Russia over Nagorno-Karabakh.”* (<https://www.commonspace.eu>)

The latter view was partly confirmed by a senior Azerbaijani scholar who blamed R. Vardanyan (though not allegedly his instrumental relationship with Moscow) for “trying to prevent the continuation of dialogue between Karabakh Armenians and Azerbaijan whilst presenting himself as the only “saviour” of the Karabakh Armenians”. Moreover, she further suggested that “establishing standards regarding the entrance and exit into that part of Karabakh where the Russian peacekeeping contingent has been temporarily deployed should be further investigated”; and that “more consistent contacts and interaction should be set up between the Azerbaijani state structures, the Russian peacekeeping contingent, and local Karabakh

Armenians enabling the Azerbaijani government to conduct various post-conflict recovery and reconstruction activities without any preconditions.” (<https://bakudialogues.ada.edu.az/>)

How have the contested Lachin and Zangezur “corridors” affected the prospects of the Armenia-Azerbaijan peace process? What geopolitical trends are currently being reinforced in the South Caucasus?

The greatest challenge currently facing Armenia and Azerbaijan is the resumption of their peace negotiations. To that end, Baku and Yerevan need to effectively deal with the inherent political, socio-economic, administrative, security, and other obstacles ahead, and strive to keep a prudent geopolitical balance in their deals with Russian, EU, and U.S. mediators. This is particularly valid in the case of the current Lachin crisis since, as a seasoned Armenian expert has recently concluded: “No peace is possible with zero trust.” Meanwhile, “Azerbaijan, Armenia, Russia, and the West, in one way or another, all suffer from the blockade. [...and] should take steps to end it.” (<https://www.commonspace.eu>)

The linkage of this crisis with what Azerbaijanis call the “Zangezur Corridor” is undeniable. Since early 2021, Baku has called for the opening of a direct transport corridor through Southern Armenia citing a disputed interpretation of the Trilateral Statement committing Armenia to “guarantee the security of transport connections between the Western regions of the Republic of Azerbaijan and the Nakhichevan Autonomous Republic in order to arrange unobstructed movement of persons, vehicles and cargo in both directions.” (<https://en.wikipedia.org>) Baku interpreted this text in conjunction with another paragraph of the Trilateral Statement referring to its own commitment to guarantee the security of passage of persons, vehicles and cargo along the Lachin Corridor, while it would remain under the control of the Russian peacekeeping forces. Meanwhile, Yerevan denied any connections between the

provisions of the Trilateral Statement on the Lachin and Zangezur “corridors” and claimed that, in fact, Azerbaijan was attempting to seize territory from its Syunik province by invoking its extra-territoriality from the Armenian legislation. Some Armenian commentators even suspected that Baku would have military plans to capture that territory if a peaceful agreement wasn’t concluded. The fact that Azerbaijanis call the neighbouring area of their territory Eastern Zangezur has undoubtedly fuelled such fears.

Furthermore, according to a seasoned Azerbaijani analyst: *“Iran’s elites are worried that the development of the Zangezur Corridor will decrease the country’s geo-economic value.”* (<https://jamestown.org>) This issue, and the threat perceived by Iran due to surging nationalist feelings in its North-Western provinces where Iranian Azerbaijanis mostly reside have repeatedly raised tensions between Baku and Teheran.

The war in Ukraine has worsened the geopolitical context within the South Caucasus region, which has significantly contributed to the current state of play in the Armenia-Azerbaijan peace negotiations. In our [issue No11/October-November 2020](#) we have noted that *“the largest geopolitical risk stemming from the new pattern of “balance of power” conflict management is that it might end up entangled with the ongoing Russia-West geopolitical confrontation”*. Unfortunately, this is where we are today. For example, the recent decision of the EU to deploy a civilian monitoring mission in Armenia has annoyed Moscow whose own proposal to deploy a CSTO observer mission on its border with Azerbaijan had been rejected by Yerevan, last end November. That was the case since the CSTO (of which Armenia is a member) stopped short of condemning repeated Azerbaijani incursions into Armenia over the last two years. Russian concerns have originated in Moscow’s perception that by sending a CSDP mission in Armenia the EU might be gradually encroaching on

its sphere of influence in the South Caucasus, given Armenia’s status as Russian strategic ally. In fact, the most recent tensions within the Russian-Armenian alliance have emerged from the complex equilibrium Moscow had struggled to maintain between Baku and Yerevan, obviously at the expense of the latter. Russia’s apparently reduced attention to the management of the Armenia-Azerbaijan conflict might have also been caused by its current focus on the war in Ukraine. Which has obviously raised serious concerns in Yerevan, while it might have created new opportunities for Baku to restore sovereignty over its territory.

In this highly divisive geopolitical context, the current Lachin Corridor crisis might be the prelude, and the Zangezur Corridor issue the pretext, to resuming the military clashes halted in November 2020. In fact, in his interview with the local broadcasting service on January 12, 2023, President I. Aliyev *“emphasized that this was the last chance for the peace negotiations: “If they [the Armenians] are not interested, we do not need [negotiations] either”*. *Such statements might indicate that if the negotiations failed, another round of armed clashes in Karabakh could be inevitable in 2023”*. (<https://jamestown.org>)

In the South Caucasus, local and regional players are being engaged in a geopolitical chess game. At tactical level, positions and policies might look messy. At strategic level, Russia is struggling to hold on its “game maker” role, whereas the U.S. and the regional powers are challenging its dwindling regional dominance. Unresolved disputes over contested corridors, garnered with coercive and “feet-dragging” diplomacy, are threatening to shatter the Armenia-Azerbaijan peace process. Ultimately, they might lead to splitting the South Caucasus along two main geopolitical axes: Russia-Iran-Armenia versus Turkey/West-Azerbaijan-Georgia. The jury is still out on the new regional balance of power, but the clock is ticking, and the bomb might explode at any time.



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