



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

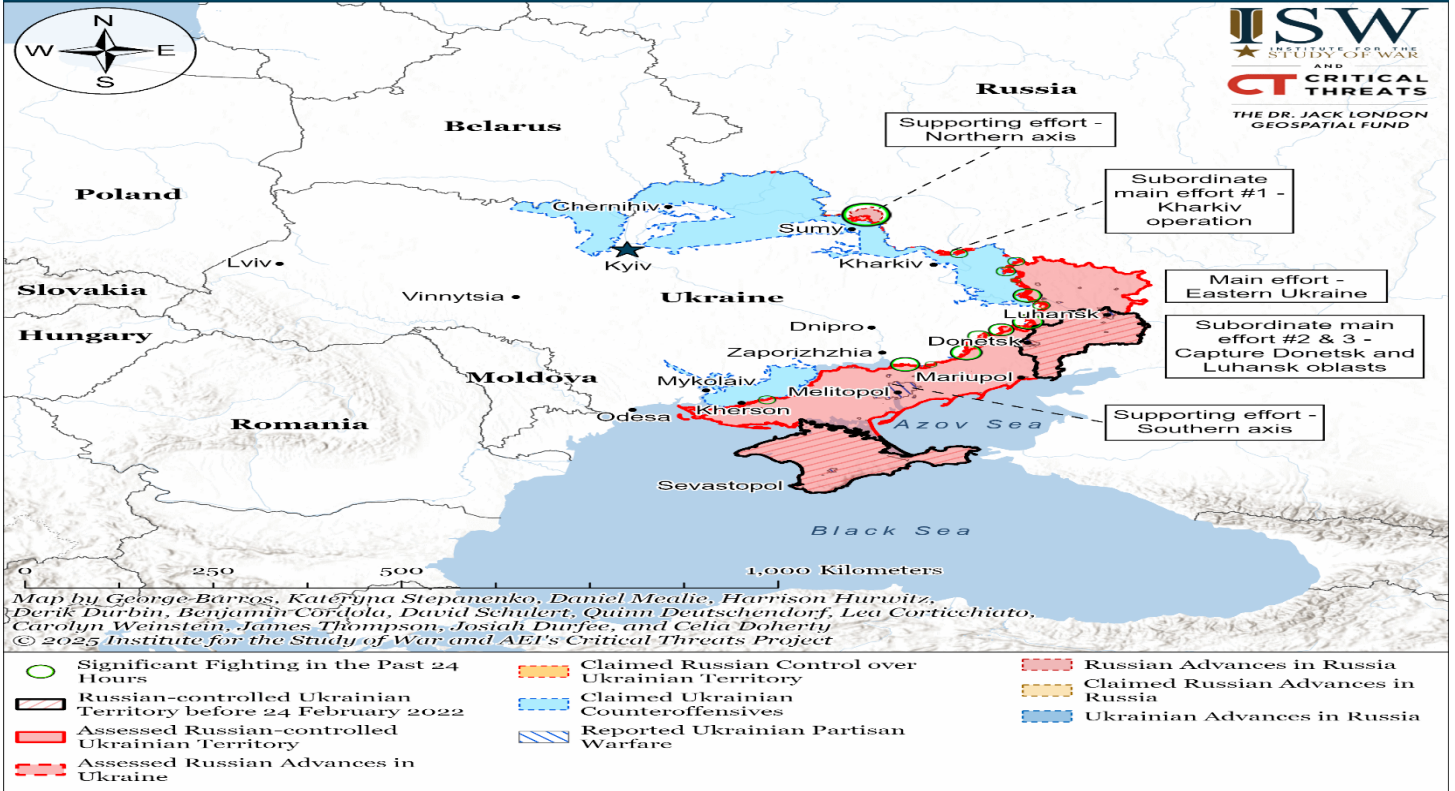
*By George Vlad NICULESCU, PhD, Head of Research, European Geopolitical Forum*

**Geopolitical Trends (Re-)Emerging from the return of Donald Trump at the White House:**

**Key points:**

1. US mediation in the Ukraine-Russia war deadlocked. Now what?
  2. Has the EU re-discovered the Wider Black Sea?
  3. How the 12-day Israel-Iran war reshaped the precarious balance of power in the Middle East.
-

**Assessed Control of Terrain in the Russo-Ukrainian War  
July 8, 2025 at 1:30 PM EST**



On November 5, 2024, Donald Trump was elected as the 47<sup>th</sup> President of the United States of America. On January 20<sup>th</sup>, 2025, he has returned to the White House shifting decades of US foreign and security policy in ways which have rapidly stunned the world. His policies centred on the “Make America Great Again- MAGA” mantra, toggled sharply between tough trade, hard military readiness, ideological realignments, and assertive unilateralism. He rejected traditional liberal world order norms, bolstered populist alliances, and placed US interests—both economic and geopolitical—above global cooperation. Against this backdrop and having in mind the ongoing structural changes of the world order, this issue will focus further on geopolitical trends (re-)emerging from D. Trump’s return to the White House.

**1) US mediation in the Ukraine-Russia war deadlocked. Now what?**

In his electoral campaign, president D. Trump famously promised he would “finish the war in Ukraine in 24 hours” by merely talking to presidents

V. Putin and V. Zelenski. Six months after his return to the White House, his mediation efforts, including multiple conversations with Russian and Ukrainian presidents, two negotiators shuttling between Moscow and Kyiv, and across Europe and the Middle East, and three Ukrainian- Russian ministerial meetings (Istanbul, 2025, May-July), went to little more than nothing. At the time of writing, the Russo-Ukrainian talks have practically stalled while president D. Trump has made public his deep frustration with the intransigence of the Russian president whom he lambasted for: “We get a lot of bull----- thrown at us by Putin, if you want to know the truth, [...] He’s very nice to us all the time, but it turns out to be meaningless.” (<https://nytimes.com>) Why has the US mediation failed so far? Most importantly, where could the war in Ukraine go from here?

As noted in our [Issue 26/July-November 2024](#), “Moscow and Kyiv have been hanging on to conflicting positions over the geopolitical endgames of the war in Ukraine, that had made reaching a ceasefire, let aside a full-fledged peace treaty, a

*Sisyphian task.*” This huge gap between Russian and Ukrainian views on the outcomes of war and the ensuing conditions for peace had probably been best underscored in their respective “*memorandums for a peace accord*” presented at the second ministerial-level meeting, convened in Istanbul (Turkiye) on June 2-3, 2025.

The Ukrainian side arrived at that meeting with a long list of demands, and complained that Russia rejected their top priority, an unconditional 30-day ceasefire. Instead, the Ukrainian delegation handed over a list of illegally deported or forcibly detained Ukrainian children who needed to be returned. Well in advance of the meeting, Ukraine made public its conditions which denied the possibility of any international recognition of the territories annexed by Russia, did not agree with post-war restrictions on the Ukrainian Armed Forces and the deployment of foreign/ European contingents on Ukrainian territory, and *de facto* joining NATO. Moreover, the talks were held in the next day after “*Operation Spiderweb*”, an audacious Ukrainian drone attack deep inside Russian territory which destroyed 41 strategic, nuclear-capable bombers, while provoking furious reactions in Moscow.

<https://intellinews.com>

Notably, last April, Ukrainian president V. Zelenski had rejected a seven-points peace plan suggested by the Trump administration including: an immediate ceasefire; direct negotiations between Ukraine and Russia; a ban on Ukraine joining Nato; official US recognition of Crimea as “Russian territory”; *de facto* recognition of Russia’s occupation of four Ukrainian regions along the front line; a resource agreement providing that Ukraine should transfer part of its profits from natural resources to American companies; and the removal of all sanctions on Russia and US-Russia energy cooperation. Reportedly, the most problematic points had been the formal recognition of Crimea as Russian and the removal of sanctions on Russia.

<https://intellinews.com>

The Russian delegation presented its “*memorandum for a peace accord*” just before the start of the second Istanbul meeting leading to Ukrainian complaints that they hadn’t had the time to come up with a coordinated response to it. Russian delegation offered a 2–3-day ceasefire on certain parts of the frontline to collect the dead. The Russian memorandum demanded Ukraine to give up sovereignty over the Russian occupied regions, abandon NATO ambitions and return to neutrality, drastically reduce its military capabilities, halt Western military support, and reorient its internal laws to make Russian an official language again and ensure the rights of ethnic Russians living in Ukraine. It had also required for Ukrainian forces to withdraw from the territory of the four occupied regions to a mutually agreed distance from the “*Russian borders*”. A second Russian “*Package Proposal*” requested: a cessation of movement and mobilization of Ukrainian troops; cessation of supplies of foreign weapons and of provision of intelligence to the Armed Forces of Ukraine; exclusion of foreign military presence on the territory of Ukraine; guarantees on Ukraine’s renunciation of sabotages on the territory of Russia; mutual amnesty for political prisoners; lifting martial law in Ukraine and calling presidential elections no later than 100 days from the time of the agreement. As a sequence of actions, the Russian side proposed that first, negotiations on a final peace treaty should begin. Then, a memorandum on a ceasefire should be signed with specific dates for the implementation of all actions and the signing of a peace treaty. Within 30 days after the withdrawal of Ukrainian troops and the ceasefire, Ukraine should fulfil all the points in the “*Package Agreement*”. After that, elections should be held in the country, and the new government would sign the final peace treaty. Most experts equated the Russian peace proposals with a demand for *de facto* capitulation, which had not been acceptable to either Ukraine or its European backers.

Given the inability of the parties to agree on going forward with negotiating either a ceasefire or a peace agreement, the Istanbul ministerial meetings ended quickly with agreements to exchange prisoners of war (POW).

### ***Why hasn't the US mediation worked so far?***

First, the positions of the warring parties have been irreconcilable and their willingness to compromise has been very low to zero.

For example, A. Baunov argued that *"The 'show' Russia staged in Istanbul needed not only to please Trump and Putin, but also to bolster Putin's reputation. For those Russians who are tired of war, the Kremlin wants to conjure an image of a genuine peace effort (not peace at any price, but peace on Russian terms—which is what most Russians would like to see)." (<https://carnegieendowment.org>)*. On the other hand, executing a large-scale drones attack against strategic bombers deep inside Russian territory just on the eve of scheduled peace negotiations in Istanbul was not really a peace statement. Ironically, as T. Stanovaya, senior fellow at the Carnegie Russia Eurasia Center, has wisely put it on X (June 4, 2025): *"Many view Ukraine's attacks on Russian strategic forces as a move that strengthens Kyiv's negotiating position. [...] However, in my assessment, the effect will likely be the opposite. [...] such attacks will only reinforce his (i.e. Putin's) determination to dismantle the Ukrainian state in its current form."* She went on to concede: *"The current policies reinforce anti-Western, anti-Ukrainian, and pro-state sentiment in Russia. [...] Putin's Russia is now even more prepared to fight indefinitely and increasingly convinced that it is winning and possesses the necessary resources to continue not only through 2025 but well into 2026 and beyond."* Her views question the wisdom, if not the rationality, of president V. Zelenski's *"peace through strength"* war strategy (<https://reuters.com>). Moreover, taking seriously the sombre, but well-informed assessments of Stanovaya has made the difference between

president D. Trump's stance on Ukraine so far, and that of the European backers of Ukraine. It's imperative for the Europeans to abandon imaginary solutions for this egregious war and seek common ground with president D. Trump on how to bring back peace to Europe.

Second, for a few years now, the Russia-Ukraine war has largely become an attrition war. As it is well known from war studies, such wars are quite difficult to stop/end through negotiations. They would rather end up in the wake of exhaustion of one or both belligerents. In that vein, a NYT editorial noted: *"In wars of attrition, incremental gains can presage a breakthrough, if the losing side runs out of troops and ammunition and its defensive lines finally collapse. This may be what Russia is counting on: Ukraine, whose wartime population is a less than quarter of Russia's, has lost many soldiers holding the line."* According to the same source, Tatiana Stanovaya thought that president V. Putin expected a collapse of Ukraine's defensive lines after a gradual weakening. But he might also want to protect his relations with president D. Trump, the most Russia-friendly US president in years. *"As a result, whatever happens on Thursday, (i.e. on May 16, 2025, at the first Russo-Ukrainian ministerial meeting in Istanbul) will be "a show". Each side will try to play its part. But in reality, the conditions aren't there for a real serious discussion of any truce or peace."* (<https://nytimes.com>) Sadly, "negotiations" have been built upon misperceptions and plaid out for scoring points in futile media fights rather than to genuinely bid for peace. As such, they are strongly undermining president D. Trump's mediation efforts in the Russia-Ukraine war.

Third, and probably the core reason for the currently deadlocked mediation efforts, there hasn't been any serious discussion between Russia, Ukraine, and other international (Western and non-Western) actors about post-war security guarantees. In past issues, we have discussed extensively this topic which so far has been addressed exclusively in

irreconcilable terms: Russians would like to see a weak, insecure Ukraine, geopolitically subordinated to Moscow, which has been a non-starter for Ukraine and its European backers. Meanwhile, Ukraine and the Europeans (in particular those in the “coalition of the willing”) have considered a post-war deployment on Ukrainian territory and expanding defence cooperation to strengthen Ukrainian defence resilience as security guarantees. Those are both non-starters for Moscow. From a US perspective, any security guarantees which would not involve them directly, except for weapons’ sales, would be fine. That flaw of the current US-led mediation process should shift to add a substantive negotiation on post-war security guarantees, if it was that the war wouldn’t continue to escalate, while peace became contingent to the full capitulation of the first exhausted party. This is why agreeing on a wider European security framework underpinning the terms of a future peace plan should precede concluding any Russia-Ukraine peace deal able to accommodate the new post-war geopolitical realities. (more details in [Issue 27/ Winter 2025](#))

The bottom line is that so far, *“Kyiv and Moscow have been engaged in an elaborate diplomatic dance of semi-proposals and hints to try to ensure that if Trump does walk away, he will blame the other side for the talks’ failure.”* (A. Lieven on <https://responsiblestatecraft.org>) Fortunately, president Trump hasn’t abandoned the mediation in Russia-Ukraine war yet. And he might not afford to do so as long as he remained committed to ensuring a functional, if minimalist NATO.

### ***Where could we go from here?***

In the wake of the failure of Russia-Ukraine talks, it appears that Moscow and Kyiv are *de facto* not ready for agreeing on a ceasefire/peace deal. Instead, they have plaid blame games aimed at winning favours from president D. Trump and have continued to escalate the war. In particular, Russia has dramatically escalated its air attacks against Ukrainian civilian targets across Ukraine, including in

Kyiv. The wavering US military support under the Trump administration has basically favoured that course of action. That might have likely been some kind of negotiation tactics rather than a full turn of tables. By cancelling, and then resuming weapons deliveries to Ukraine, in early July, the US mediation team might have aimed to show its leverage and readiness to use it for reviving the stalled peace talks. If that move will change anything in the strategic calculations of presidents V. Putin and V. Zelenski is still to be seen. The likeliest scenario ahead is that the attrition war would continue to escalate until one of the belligerents would fall flat, and its capitulation would become imminent. For now, they both seem to believe that the other would fall first and that they could continue their current war strategies. However, some sort of US-led (token?) negotiations might resume over the next weeks/months, whereas the front line would also shift and the warfighting season would get closer to its end.

On the other hand, the time for Ukraine becoming a Russia-Europe almost exclusive affair might have come. Even if president D. Trump might not completely abandon US mediation efforts, given the US larger strategic leverage on Russia, he might see paying for the Ukraine war as Europe’s problem, not America’s. During their meeting in the Hague, Ukrainian president V. Zelensky asked president D. Trump about the possibility of purchasing additional Patriot interceptor-missiles. While Trump, at the time (end June 2025), was non-committal on that point, it appeared that any future Ukrainian purchases of American military materiel, if they happened, would in any case be made with European money. (I. Proud on <https://responsiblestatecraft.org>) On July 14, 2025, at his meeting with NATO’s secretary general M. Rutte, president D. Trump announced a deal whereby NATO would pay and immediately ship to Ukraine US-made weapons. Europeans should get ready for those developments and should strategize for taking

over that burden by combining diplomacy, building up military strength and rethinking European integration beyond EU enlargement.

For now, it is conspicuous that, in the European academic debate, more realistic approaches to handling the Russia-Ukraine war have started to emerge. They hinted towards the EU (together with the UK, other European countries, as well as Canada) should develop their own ideas for a cease-fire and a peace deal and take this to the various parties. In doing so, coordination with the US should be sought and the support and possible involvement of other global and regional players in the implementation should be pursued. There is also a growing understanding that any ceasefire or peace deal needed to be embedded into a longer-term European security strategy. That would require more realistically discussing security guarantees for Ukraine, and a future European security architecture, including Russia. (Egmont Policy Brief 376, May 2025, from <https://egmontinstitute.be>)

In Ukraine, the time of tough national decisions is also approaching. Against a dwindling, mercurial delivery of US critical military support, the odds for Ukraine's intact survival are fading. Starting a meaningful peace process has been long overdue. Europeans should help Kyiv recover its realistic geopolitical place in Eastern Europe rather than having it merely set up as a bulwark of forward defence.

In essence, Europeans must address changing the grim geopolitical realities on the continent triggered by ignoring/underestimating for years the breakdown of the old (OSCE-based) European security system. They must think strategically on how to build a new system where NATO, EU, UK, Turkiye, US, Russia, and other European nations should accept new roles, responsibilities, as well as

new geopolitical and legal commitments. Otherwise, a major European war with Russia over Eastern Europe might become imminent.

## 2) Has the EU re-discovered the Wider Black Sea?

Historically, the Black Sea has played an important economic and political role across the neighbouring territories, and into a broader region. “[...] *it is still, just as in the Nineteenth Century, the door to the heartland of Eurasia, the domination of which has eternally played a role in the struggle for global hegemony [...] while the status of the Black Sea Straits (the Bosphorus and the Dardanelles) was tightly linked to the balance of power in Europe*”<sup>1</sup>.

Securing access to energy deposits from the Caspian Sea, the Eastern Mediterranean and potential links to the complex geopolitical games in the Middle East have increased the strategic significance of the Wider Black Sea (WBS)<sup>2</sup> in international policy thinking. Since the early 1990s, the region has been marred by residual instability sustained by the failure of the OSCE system to resolve a range of post-Soviet protracted conflicts in Ukraine, Moldova and the South Caucasus. The *de facto* collapse of the European security system in the early 2020's has left the Europeans struggling to cope with hot wars and renewed geopolitical confrontation with Russia.

At present, the regional balance of power in the WBS remains in flux, largely because of the war in Ukraine. As explained in our [Issue 26/July-November 2024](#), the key risks affecting regional stability in the WBS region in the years ahead would be: the outcomes of the Russia- Ukraine war, and the ensuing recast of regional countries' standings into the WBS; a largely reduced Trump Administration interest and expected engagement in the WBS, apart from continuing to facilitate a negotiated end to the

<sup>1</sup> M. Terterov, A. Kreutz and G. Niculescu, "The Changing Dynamics of the Wider Black Sea in Regional Security and External Relations", EGF Working Paper, Brussels, 2011, <http://gpf-europe.com/>

<sup>2</sup> The Wider Black Sea covers the territories of the six Littoral states: Bulgaria, Georgia, Romania, Russia, Turkiye, and Ukraine, as well as those of neighbouring Armenia, Azerbaijan and Moldova, which are strategically connected to this area.

Russia-Ukraine war; potential shifts of Türkiye's multi-vector foreign policy and their impact on the Russia-Türkiye-Europe strategic relations and the balance of power in the South-Caucasus (Eastern WBS); developments in domestic politics of regional countries (Armenia, Azerbaijan, Bulgaria, Georgia, Moldova, and Romania) possibly shifting their current geopolitical choices. Finally, external actors' (such as NATO, EU, Iran, and China) dynamic levels of engagement with the region might also result in geopolitical shifts (and rifts?).

From a European Union (EU) perspective, the WBS is a pivotal gateway linking Europe, the South Caucasus, Central Asia, and the Mediterranean. Regional stability is crucial for international trade, food security, and broader European geopolitical stability, as well as for energy security. The region's sustainable and inclusive development is vital not only for its immediate neighbours but also for the EU as a whole and globally. (<https://ec.europa.eu>)

### Seizing new opportunities?

On May 28, 2025, the EU Commission and the High Representative for Foreign and Security Policy (HR-FSP) issued a Joint Communication to the European Parliament and the European Council on "*The European Union's strategic approach to the Black Sea region*" outlining a comprehensive strategy in the Black Sea<sup>3</sup>. This document has stated EU's commitment to step up its regional engagement with the aim of supporting the democratic resilience of regional countries, and to assert its own interests in the region. To that end, the EU enlargement process, the gradual integration of candidate countries into the internal market and building up integrated partnerships with regional countries were expected to unlock economic potential, strengthen the rule of law, and accelerate reforms. The

underlying premise was that peace and security (currently missing, A/N) are at the foundations of this renewed approach. It recognised the Black Sea as a pivotal gateway to the South Caucasus, Central Asia, and beyond – underpinned by targeted investments in transport, energy and digital infrastructure, to increase connectivity and trade.

The scope of EU's future regional engagement would potentially open up a wide range of opportunities for: deepening intra- and inter-regional partnerships; security and conflict resolution; upholding the rule of law and democracy; energy market integration; energy efficiency and decarbonisation; infrastructure development; trade; preparedness and resilience; environmental protection and climate change; education and research; defence industries; culture.

Notably in geopolitical and geo-economic terms, EU's "*Global Gateway*" strategy would be the primary framework for mobilising investments in connectivity and for fostering stronger business ties between the EU and the Black Sea region. The "*Global Gateway*" strategy has already been actively implemented in Ukraine, Moldova, South Caucasus and Central Asia. This means that significant investments are underway to strengthen transport, energy and digital infrastructure to further improve trans-continental links between Europe and Asia and the security of global supply chains. (<https://enlargement.ec.europa.eu>)

A geopolitical (and geoeconomic) opportunity for the EU in the Black Sea would consist of developing structured regional coordination with Türkiye, a key stakeholder in the WBS. The war in Ukraine coupled with the gradual retrenchment of US role in European security promoted by president D. Trump have turned Russia into a geopolitical adversary of

<sup>3</sup> EU sees as "Black Sea region" almost the whole WBS, including non-riparian states of Moldova, Armenia and Azerbaijan, but excluding (for political reasons) Russia.

the EU while shifting a latent geopolitical competition (dating back to the 2000's) into outright confrontation. That, in turn, required a fresh approach to European security bridging the gap between EU and non-EU European NATO member states. That shift underscored the need for the EU to expand its foreign and security ties with Türkiye (among others) as *“Russia remains the most immediate threat, and Europe cannot afford to have a security order that is set against Moscow and excludes Türkiye simultaneously. The Black Sea, Eastern Mediterranean, and Middle East are not separate zones in Russian- Western confrontation. Rather, they are largely a single space. And Turkey straddles all these regions.”* (G. Dalay on <https://chathamhouse.org>) Over the past decades, Ankara's Russia policy was largely competitive in various regions, but it didn't exclude cooperation with Moscow when needed. Neither did Türkiye follow EU's broader foreign and security policy lines in their shared neighbourhood (for example, in Ukraine, South Caucasus, Gaza, Syria or in Libya).

In the WBS, Türkiye has been a key player for years given its prominent naval power strengthened by the ability to control the traffic through the Black Sea Straits, its growing influence in the South Caucasus, and Central Asia, and its crucial role in ensuring energy, trade, and transport infrastructure connectivity between Europe and Asia. In fact, strategic connectivity would offer a clear opportunity for EU-Türkiye alignment, particularly through the so-called *Middle Corridor*, a trade and transportation route that would link Central Asia and the South Caucasus to Europe via the Caspian Sea and Türkiye. Both Brussels and Ankara viewed this East–West corridor as a critical alternative to Russia-controlled infrastructure, especially in the wake of the war in Ukraine.

Finally, the EU and Türkiye shared an interest in supporting greater regional integration among the three South Caucasus (Eastern WBS) states. There,

Ankara and Brussels could jointly propose and support confidence-building measures and regional dialogue, combining Türkiye's regional clout with EU's political and financial resources. (Z. Shiryev on <https://carnegieendowment.org>)

### **What geopolitical risks could endanger EU's future engagement with the WBS?**

The most obvious geopolitical risks would emerge from the uncertain outcomes of the Russia-Ukraine war. As long as this war would go on, EU's engagement with the WBS would be limited and carefully scoped to avoid interferences with military and geopolitical constraints stemming from the region. The key questions would be: how to end the war in Ukraine and re-start Black Sea regional cooperation? Could the EU ignore Russia's presence in the Black Sea over the medium and longer term? In past issues we had extensively discussed the possible outcomes of the war in Ukraine.

Other geopolitical risks could result from the increasing volatility of the South Caucasus (Eastern WBS) stemming from Russia's focus on the war in Ukraine, Iran's recent setbacks in the war with Israel, and Türkiye's deeper engagement in the Middle East (Syria, Iraq).

We had discussed before Georgia's ongoing geopolitical shifts away from its European and Euro-Atlantic priorities ([Issue 25, March-June 2024](#)). In short, Georgia is going through a chronic, deep-rooted, and highly consequential political crisis which seems to be shifting its foreign and security policy away from the West and closer to Türkiye, Azerbaijan, China, and, indirectly, to Russia. The Georgian Dream government has sought to expand its economic options through increased trade and investment ties with Türkiye, in addition to a newly established strategic partnership with China since 2023. At the end of May 2024, a decision was made to hand over the construction and management of the Anaklia deep-sea Port to a Chinese- Singaporean

consortium, despite the long-standing US opposition to it. That new deep-sea port will reportedly be constructed based on Chinese cargo needs and it might become a critical node in Beijing's Belt and Road Initiative. A former president of the Georgian National Bank, R. Gotsiridze thought that *"China's dominance at the Port of Anaklia will have economic and political consequences for the security of the entire Black Sea region in the context of a real alliance between China and Russia"*. (<https://jamestownfoundation.org>)

On the other hand, the Russian Black Sea Fleet is reportedly planning to build a new naval base on the Black Sea coast, in the Port of Ochamchire, just about 70 kilometres from Anaklia. On June 6, 2025, after a meeting with S. Lavrov, O. Bartsits, the *"foreign minister of Abkhazia"* stated: *"We touched upon almost the entire spectrum of issues that exist in our strategic alliance ... First of all, these are issues of security, the formation of a common space, a common security contour in the region of the South Caucasus, the Eastern Black Sea region."* [...] He referred the upcoming Ochamchire naval base as *"an additional factor of stability and an opportunity to ensure high standards of security in the region"*. In turn, Moscow might hope that with the creation of an additional Black Sea Fleet base in Abkhazia, the fleet would be able to effectively regroup while still projecting power across the Black Sea and throughout the Caucasus. (<https://jamestownfoundation.org>)

The Anaklia- Ochamchire ports infrastructure projects might pose serious geopolitical risks for the EU by potentially turning an infrastructure investment competition with China and a geopolitical rift with Russia in the Black Sea into a future confrontation with the Russia-China duo over the Black Sea.

On March 13, 2025, in separate statements, Azerbaijan and Armenia said they had finally settled

their differences on the text of a draft peace agreement, which would include mutual recognition of territorial integrity, non-use of force, and non-interference in domestic affairs (for background information on the peace process, see also [Issue 23/July-October 2023](#)). The parties would have also agreed not to deploy *"third-party forces"* on their common border. That would preclude a Russian presence on the border, but it would also threaten the future of the European Union Mission in Armenia (EUMA). The unresolved issue of connectivity and modalities for the restoration of road and rail links, especially the route that connects mainland Azerbaijan with the Azerbaijani exclave of Nakhichevan across Armenia's Syunik region, remained geopolitically sensitive, and politically tense, in particular in Armenia. Baku has also set a precondition on the final signature of the peace agreement by insisting that Armenia should make changes to its Constitution, which, Azerbaijan said, would refer a territorial claim that needed to be removed. (<https://carnegieendowment.org>)

The current positive trend in Armenia-Azerbaijan relations was further reinforced by the July 10, 2025, meeting of the Armenian Prime-minister N. Pashinyan and Azerbaijani President I. Aliyev in Abu Dhabi (UAE). That was the first bilateral summit in recent decades without the mediation of a major power. Although few details about the content of the discussions have been disclosed by the time of writing, experts from both sides deemed it as both a historical and significant step forward in the peace process.

Recent progress towards signing the peace agreement came up against the backdrop of Azerbaijan's deteriorating relations with Russia since December 2024, following the crash of an Azerbaijani Airlines plane by Russian air defences, and violent raids, last June, by Russian police against ethnic Azerbaijanis in Yekaterinburg, which would

have prompted Baku to seek greater autonomy in its foreign policy.

On the other hand, Armenia's relations with Russia have also weakened (culminating with Prime-minister N. Pashinyan freezing his country's participation in the Russia-led CSTO since February 2024) while relations with Türkiye have improved. On June 20, 2025, Armenian Prime-minister N. Pashinyan met Turkish president R.T. Erdogan in Istanbul. Although those apparent geopolitical shifts are still to be potentially turned into tectonic moves of the regional balance of power in the Eastern WBS, experts believe that *"Türkiye may now be the only regional actor capable of restraining Azerbaijan, while Russia's influence has waned with its Ukraine war, and Iran is distracted by its crisis with Israel and the United States. For Armenia, Türkiye—once seen purely as a threat—is increasingly viewed as the last line of regional deterrence."* (O. Vartanyan- on <https://carnegieendowment.org>) T. De Waal had also reported that *"Turkish interlocutors say they know that normalization with Armenia makes Türkiye a stronger player in the South Caucasus, loosens Russia's historical hold over Armenia, and is good for impoverished Eastern Turkish border regions. They say Pashinyan is an ideal partner for them."* (<https://carnegieendowment.org>).

Even though many believed a resolution to the Armenia-Azerbaijan conflict was closer than ever, including on unblocking and restoring regional transportation, the ongoing peace process might also be more vulnerable to disruption. (<https://jamestownfoundation.org>)

In conclusion, the good news is that the EU has rediscovered the WBS and has developed strategic thinking on how to deal with the Russian threat, the Turkish rise, and how to pursue its own regional interests. The bad news is that EU's ability to ripe concrete benefits from the opportunities and effectively tackle the geopolitical risks from the

region is uncertain, unless it succeeded to resolve the current crisis in European affairs and restructure the European security system in a way that would sustain peace and security in the Black Sea region.

The Black Sea- European security inter-connection was best outlined by D. Bechev in an article published recently by Carnegie: *"The Black Sea has become the fulcrum of Europe's security order in three ways. First, it is one of the key geographic arenas where the West is pulling its collective weight to check Russia. [...] Second, this standoff in turn highlights Turkey's role as a swing actor. [...] Third, the Black Sea illustrates the uncertainty about US involvement in European security affairs."* (<https://carnegieendowment.org>)

The resources and tools/instruments needed for the implementation of the new EU Black Sea strategy might be there. The methods and the roadmap to move the WBS from today's grim geopolitical realities to EU's strategic vision on the Black Sea are still blurry though.

### **3) How the 12-day Israel-Iran war reshaped the precarious balance of power in the Middle East.**

In past issues ([Issue 24/November 2023-February 2024](#), [Issue 26/July-November 2024](#)), we predicted that a regional war in the Middle East was not imminent, at least not in the short-term, mainly since none of the key players had been interested or capable to fill in the *"power vacuum"* left by US *"pivot to Asia"* since 2011. President D. Trump's return to the White House in January 2025, while bringing back the Middle East much closer to the top of the US foreign and security priorities list, has basically reinforced our assumptions on regional stability. The 12-day Israel-Iran war (June 13-24, 2025) has been a major resilience test for the precarious balance of power in the Middle East. In spite of some doubts that it would hold, it has eventually made it through the day of this writing.

And it would likely continue to hold in the near future.

Since last January, President D. Trump has plaid out mostly the cards of diplomacy in the region: he resumed negotiations with Iran on the nuclear file; struggled to facilitate ceasefires in Gaza; made a ceasefire deal with the Houthis in Yemen; expanded economic, technology, defence and security cooperation with key Arab nations; reached out to the new Syrian leaders. Meanwhile, he has also continued to leverage US overwhelming military power. How has president D. Trump shifted US strategy in the Middle East in 2025? What implications would be there for the precarious regional balance of power?

### US “indirect warfare strategy”

On May 13-16, 2025, president D. Trump made his first trip abroad, in his second term in office, to the Middle East (Saudi Arabia, Qatar, the UAE). This demonstrated that he has been seeing the Middle East as a pivotal arena for geopolitical competition, rather than a region from which America should “pivot” or “rebalance” away to other priorities in the world. Four key issues are likely to continue to dominate his agenda: signing a new nuclear deal with Iran; ending/ stopping the war in Gaza in terms largely favourable to Israel; dealing with persistent terrorist threats, such as the Islamic State and al-Qaeda affiliates; boosting economic, technology, and energy ties with US Middle East allies like Saudi Arabia, Qatar and the United Arab Emirates (UAE). (<https://ispionline.it>)

As predicted in an older [EGF op-ed](#), president D. Trump has applied an *indirect warfare strategy*<sup>4</sup> to the Middle East. Originally, this strategy had been applied by president B. Obama in fall 2015 when he had tacitly acquiesced to Russian military

involvement in Syria. At the time, it was meant to help give up America’s traditional post-Cold War role as the regional hegemon in the Middle East, in exchange for a perpetual balancing role of one or more regional powers. This implied for the US to share the task of counterbalancing the growing Iranian influence in the Middle East with its key regional allies: Saudi Arabia, Turkiye and Israel. At present, the *indirect warfare strategy* is most convenient to president D. Trump’s priorities in the Middle East, as it combines economy of force and finance, and it downgrades the regional influence of Iran, Russia and China, while exposing the US to limited and controlled risk. It has been fully on show during the 12-day Israel-Iran war, where Israel has in fact done (with US military support) the heavy lifting in damaging Teheran’s military and nuclear capabilities, while the US executed, at minimum costs for itself, a few strikes against three Iranian nuclear sites, including the deeply buried facility at Fordow. The US strikes and the precarious regional balance of power have eventually compelled Iran to accept the terms of a US-proposed ceasefire, largely favourable to Israel and the US, to quickly end the hostilities.

### Israel vs. Iran

In an interview on June 17, 2025, Prime-minister B. Netanyahu claimed that Israel’s military actions were paving the way for “*a different Middle East*” where Israel, buoyed by ironclad US support, had emerged as the paramount hegemon.

Experts would agree with that. For example, V. Nasr wrote recently: “*The war in Gaza has altered the geopolitical landscape of the Middle East. In the years before the October 7 attack, Saudi Arabia, the United Arab Emirates (UAE), and other Gulf states shared with Israel the perception that Iran and its alliance of proxy forces were the region’s overriding*

<sup>4</sup> George Friedman- “Coming to terms with the American Empire”, April 14, 2015, from <http://www.stratfor.com>.

*threat. [...] Today, the situation has dramatically shifted. Twenty months into the war, Tehran appears far less of a threat to the Arab world. Meanwhile, Israel looks increasingly like a regional hegemon.*" (<https://foreignaffairs.com>)

However, given a considerable public disapproval in the US for further military entanglements in the Middle East, it was unclear how sustained US support for Israel's campaign against Iran might be maintained by the Trump administration. That uncertainty underscored the implicit vulnerability of Israel's position. *"Israel remains critically dependent on its American patron, which supplies most of the aircraft, bombs, and missiles it needs to attack its neighbours along with constant diplomatic protection,"* wrote S. Walt, a professor of international relations at Harvard University. *"A true regional hegemon doesn't have to rely on others to dominate its neighbourhood, but Israel does."* (I. Tharoor: *"With Trump on side, Israel becomes the Middle East's clear hegemon"* <https://washingtonpost.com>)

Over the last 20 months, Iran has been seriously weakened by Israel's military heavy blows to its proxies, Hamas and Hezbollah, as well as by the fall of B. Al-Assad in Syria. The assassination by Israeli armed forces of a large number of prominent Iranian military leaders and nuclear scientists has further highlighted Iran's weakness while seriously degrading its regional status in the Middle East. Nevertheless, in the wake of the 12-day war, both current and former Iranian officials have reaffirmed their resolve to continue Iran's nuclear program. For example, Ali Shamkhani, the former secretary of Iran's Supreme National Security Council, declared that Iran's *"enriched material, indigenous knowledge, and political will"* remain untouched. [...] *Even assuming total destruction of the sites, the game is not over.*" And Iran's ambassador to Geneva emphasized that Iran would *"resolutely defend its inherent right to defend itself against any*

*aggression"* and *"never give up its inalienable right to the peaceful use of nuclear knowledge and energy."* These declarations reflect a broader strategic consensus: its infrastructure might be vulnerable, but Iran's intent to preserve and, if necessary, rebuild its nuclear program was undiminished. Iranian elites have increasingly seen Teheran's *"threshold strategy"*-maintaining weapons proximity without crossing the line- as a miscalculation, while internal pressure to consider the development of an actual nuclear deterrent has considerably grown. Iran's further alignment with Russia, China, and North Korea might create new opportunities for moving forward in that direction. (N. Grajewski on <https://carnegieeurope.org>)

### **Adjusting a precarious balance of power**

The main Middle Eastern power brokers, including the Arab states, Iran, Israel, and Turkiye, have historically resisted domination by one regional actor. Now that Israel, with US military support, might become a potential regional hegemon, it has become conceivable that the Arab states, Iran and Turkiye could aim at adjusting the regional balance of power to prevent Israeli regional domination. The Arab states wanted a regional order that would restrain both Iran and Israel while empowering their own governments. Consequently, Iran and the Gulf states now need each other, and both sides need a US-Iran nuclear deal. That would explain why since the advent of the Trump 2.0 administration, the Arab monarchies (Oman, Qatar, Saudi Arabia, and the UAE) have acted as intermediaries and mediators between Teheran and Washington with the aim to avoid the outbreak of regional war. They feared the harsh socio-economic and geopolitical consequences a war in the Gulf might have on themselves. In addition, they would see a nuclear deal between US and Iran as central to achieving a new balance of power in the Middle East. As V. Nasr has put in a recent article: *"If a deal can be reached, the Gulf states have an opportunity to become the*

*pivot of a new regional order, with axes running through them to Iran, Israel, and the United States. That might finally offer a real chance to bring stability to the region". (<https://foreignaffairs.com>)*

Integrating Saudi Arabia into the Abraham Accords would be a cornerstone of this regional rebalancing. However, Saudi Arabia could not move forward while the war in Gaza continued, as it needed to position its actions as steps toward resolving the Palestinian issue. Israel, for its part, could not end the war and leave Gaza in Hamas' hands. This has created a geopolitical deadlock that could potentially destabilize the whole region. (K. Bokhari on <https://geopoliticalfutures.com>)

Furthermore, Syria might turn into the fulcrum of President D. Trump's *indirect warfare strategy* in the Middle East. Preventing Israel and Turkiye clash over Syria is key to maintaining the precarious regional balance of power while Iran is weakened, Russia distracted, and China unprepared to project power in the region. From that perspective, president D. Trump's meeting with Syria's new president, Ahmed al-Sharaa, held in the presence of prince M. bin Salman (MBS), with Turkish President R.T. Erdogan attending virtually, might have been a most significant moment of his May 2025 trip to Saudi Arabia. It might have signalled that Washington sought to balance power among Turkiye, Saudi Arabia and Israel, and that Syria was a potential flashpoint which the US needed to keep under control. From Israel's perspective, having a Turkiye-backed Sunni Islamist regime in Syria might be equally problematic to having an Iran-backed regime there. Israel has already created a buffer zone in Southern Syria, and it has engaged in deconfliction talks with Turkiye. As K. Bokhari has recently put it: *"Turkey and Saudi Arabia are the two pillars of the Trump administration's strategy for managing the Arab world. The first step in this management is to steer Syria away from conflict and toward economic development. For the U.S., adding Israel to this mix*

*will be critical to ensure that Syria does not descend into civil war as Libya and Yemen did. That outcome would have dire security repercussions for the entire region". (<https://geopoliticalfutures.com>)*

### **Russia and China "Ante-Portas"**

As it became apparent from the 12-day war, Russia and China currently have largely marginal roles in maintaining the precarious balance of power in the Middle East. Nevertheless, this might change over the medium and longer term, as Russia might succeed in wrapping up, one way or another, its war in Ukraine, and China might boost its ability to project military power in the Middle East and diminish its energy dependence from the Middle Eastern producers.

As long as Russia is focussed on winning its war in Ukraine, its ability to play a significant role in the balance of power in the Middle East would be quite limited. At the first glance, a potential US war against Iran could be favourable for Moscow, as it would divert Washington's attention and critical weapons' delivery away from Ukraine. However, over the medium and longer term, a possible fall of the current regime in Iran, in the wake of a major war, could lead to Moscow losing regional influence and important economic projects in Iran in which it has invested a lot. What was most interesting was that Russia did not feel obliged to intervene militarily in support of Teheran when the US got directly involved in the Israel-Iran war, but it limited itself to a coordinated diplomatic rhetoric with Beijing apparently much more concerned than Moscow about the fate of the Iranian Islamic regime. According to N. Smagin: *"Despite all the costs that an end to sanctions against Iran would entail for Russia, making Moscow into an indispensable mediator between Tehran and Washington would give it a sense that it had escaped its isolation. It would also give the Russian side real leverage over US-Iranian relations. Ultimately, however, endless and fruitless*

*negotiations would still be preferable for Russia, avoiding both the prospect of a military attack on Iran and of sanctions being lifted.”* (<https://carnegieendowment.org>)

Despite China's mediation of the Saudi Arabia- Iran deal in 2023, Beijing has also remained largely marginal to the evolving Middle Eastern balance of power. Its constraints became apparent during the 12-day war when its role couldn't go much beyond calling for de-escalation. While Chinese president Xi Jinping condemned Israel's attacks on Iran during a phone call with his Iranian counterpart, he merely offered to play a 'constructive role' in de-escalation, without explicitly suggesting mediation. Moreover, his four-point proposal for principles to de-escalate tensions avoided direct condemnation of Israel, proving that Beijing was not ready yet to challenge key US allies from the region. According to A. Abouduh, China's reluctance to fully support Teheran stemmed from concerns over Iran's military feebleness. Israel successfully launched strikes on nuclear sites, missile launchers, and military manufacturing facilities with minimal loss, making it unrealistic for China to invest in an Iranian victory. In addition, Teheran's repeated threats to close the Hormuz Strait created a strategic dilemma for China holding its energy security hostage to the Iran-Israel standoff<sup>5</sup>. (<https://chathamhouse.org>) Theoretically, one could assume that China wouldn't mind seeing the US bogged down in the Middle East while leaving to Beijing a larger space for manoeuvre in the South and East China seas to gain the upper hand in the Indo-Pacific. However, the 12-day war showed that the current optimal scenario for China would rather see the US and Iran achieving a nuclear deal that would diminish the likelihood of regional conflict.

In **conclusion**, the 12-day war might have strengthened Iran's conviction that it must acquire

nuclear weapons against the realities of its weaknesses, and the inability of its strategic partners, Russia and China, to provide it with meaningful military support. The latter was due to Moscow's and Beijing's own vulnerability to the current regional strategic dominance of the Middle East by Israel with military support from the US.

In essence, Iran might not have meaningful alternatives to resuming negotiations with the US on its nuclear program. That would be the only way to avoid further destruction of what has left from its nuclear capabilities, and to effectively respond the ongoing socio-economic crisis, while buying time and hopes for sanctions' relief. Absent a deal on the continuation of the international control of the Iranian nuclear program in exchange for lifting economic sanctions, the resumption of war at a later date is not only possible, but likely. The only other way to avoid a new escalation in the future would be for Teheran to demonstrate a nuclear capability. However, that would most likely generate a nuclear arms race throughout the Middle East given the natural concerns stemming from the security dilemmas of Iran's Arab neighbours. Alternatively, in case the current deadlocks in Gaza (and more broadly on the Palestinian question) and Syria could be somehow overcome, strengthening the currently precarious regional balance of power among the Arab states, Iran, Israel, and Turkiye under some sort of international/Great Powers' supervision could trump the nuclearization of the Middle East. How could China and Russia be integrated, over the medium and longer term, into this regional security scheme is still to be seen.

---

<sup>5</sup> China sources about 35 percent of its crude oil from Middle Eastern countries, especially Saudi Arabia, Qatar, the UAE and Iran.



### About EGF

The European Geopolitical Forum (EGF) was established in early 2010 by several independently minded practitioners of European geopolitics, who saw a certain vacuum in the information flow leading into the European geopolitical discussion. EGF is dedicated, therefore, towards the promotion of an objective, Pan-European geopolitical debate incorporating the views of Wider-European opinion shapers rather than simply those from the mainstream European Union (EU) member states. EGF seeks to elaborate upon European decision makers' and other relevant stakeholders' appreciation of European geopolitics by encouraging and effectively expanding the information flow from east to west, from south to north. In order to achieve these objectives, the European Geopolitical Forum was established as an independent internet-based resource, a web-portal which aims to serve as a knowledge hub on Pan-European geopolitics. EGF's strength is in its unique ability to gather a wide range of affiliated experts, the majority of whom originate from the countries in the EU's external neighbourhood, to examine and debate core issues in the Wider-European geopolitical context. Exchange of positions and interactivity between east and west, south and north, is at the heart of the EGF project. Please visit our website for further information at [www.gpf-europe.com](http://www.gpf-europe.com).

### About the Author

Dr George Vlad Niculescu is originally from Bucharest, Romania, and is currently the Head of Research of the European Geopolitical Forum. He is also a co-Chair of the Regional Stability in the South Caucasus Study Group of the PfP Consortium of Defence Academies and Security Studies Institutes (PfPC). In October 2019, he has successfully defended his PhD thesis on "SECURITY SCENARIOS PLANNING IN THE GEOPOLITICAL AREA FROM THE BALTIC SEA TO THE WIDER BLACK SEA (INTER-MARIUM)" at the National School of Political Studies and Public Administration (NSPSPA) Bucharest and received his PhD degree in June 2021. He has also academic experience as a member of several other PfPC working groups, as well as assistant professor and/or visiting lecturer at the NSPSPA, "Dimitrie Cantemir" University, NATO Studies Centre, and the PfP Training Centre from Bucharest (1997-2004). Dr Niculescu has been involved in several international research projects sponsored by the German Marshall Fund of the United States (Black Sea Trust for Regional Cooperation), the European Commission (HiQSTEP Project), and the Friedrich Ebert Stiftung. His full CV and list of publications could be found [here](#).

---

#### Disclaimer

The information presented in this report is believed to be correct at the time of publication. Please note that the contents of the report are based on materials gathered in good faith from both primary and secondary sources, the accuracy of which we are not always in a position to guarantee. EGF does not accept any liability for subsequent actions taken by third parties based on any of the information provided in our reports, if such information may subsequently be proven to be inaccurate.