



Two years of war in Ukraine: What impact on the EU geopolitical strategy?

EUROPE IN THE WORLD

POLICY BRIEF
FEBRUARY 2024

#Ukraine
#geopoliticalstrategy
#EuropeanUnion

© Freepik

• Europe as a great power at last?

Did two years of war in Ukraine radically transform the European Union's strategic posture? Faced with a large-scale, high-intensity conflict in its direct geographical area of interest, did the EU prove itself a geopolitical player?

Has the war in Ukraine finally given rise to a European power that is prepared to stand its ground, including militarily, over the long term? Is the sea serpent a phoenix in the making?

Introduction • Lessons learned from the war

Two years after the invasion of Ukraine, it is necessary to draw the provisional military lessons from the conflict for Ukraine and Russia. The continuation of the war depends on it. Moreover, it is essential to take stock of each Member State action on Ukraine. Continental security depends on it. But

understanding what this war has changed for the Union's strategic posture is essential: what is at stake is the ability of Europeans to collectively ensure their defence, as autonomously as possible and on all levels, including military.

Has Europe claimed, assumed and played the role of a full fledged regional power? Or has it fallen back into its bad habits: dispersion, division, procrastination? Has the EU achieved its "Ukrainian strategic revolution"? Or has it once again fallen victim to its "FRG syndrome" (economic giant, political dwarf), confined to the status of "brilliant deputy" to the United States, as some Russian observers have caricatured it?

Faced with the invasion of Ukraine, the EU was quick to take up the geopolitical challenge and forge new tools, while at the same time overcoming some of its traditional weaknesses (part 1). The provisional assessment of its geopolitical repositioning

Cyrille Bret
Associate Research Fellow, Russia & Eastern Europe

The author wishes to thank Florent Parmentier, Richard Robert and Sylvie Matelly for their advice on this text.

over the last two years means that it is up to the task of tackling the crises looming in the region in 2024 (part 2).

In the wake of the war in Ukraine, the EU has learnt a number of new lessons, but has not yet become one of the world's leading geopolitical powers.

I • Strategic aggiornamento and bad habits

For the European Union, the last two years have been historically intense. After months of military, migratory and economic crises, Europeans have collectively demonstrated their ability to protect their interests and principles even at the detriment of their comfort zone. But they have also shown that some bad habits persist.

I EXITING THE COMFORT ZONE

In several respects, the European Union has achieved a genuine “geopolitical revolution”. The Union quickly and resolutely rejected the posture of spectator to the conflict, as it did for the American intervention in Iraq in 2003: at the time, the Union as such did not commit itself because some of its Member States had taken part in the American coalition while others had abstained. On Ukraine, the Union also refused to take a back seat to NATO and to take up the role of donor of last resort, as it had been for the conflicts in the Balkans from 1995 onwards or the intervention in Afghanistan in 1991. It has explicitly supported the restoration of Ukraine's sovereignty, while refusing to become involved in the conflict as a belligerent. The United States, NATO and the United Kingdom have adopted the same stance. In other words, the EU has asserted itself as a real player in the crisis by developing and exercising its power.

From the 1990s onwards, the European Union placed its relations with the Russian Federation within the framework of a Partnership and Cooperation Agreement (PCA); then, in its 2016 Global Security Strategy, it described Russia as a “major strategic challenge”. Finally, after the invasion of

2022, the Strategic Compass for Security and Defence, which was drawn up to provide the EU's external action services with a programme of action, took a qualitative leap in Europe's approach to Russia by presenting Russia as “a direct and enduring threat to European security¹”. The year 2022 marks a real break in the EU's assessment of its Russian neighbor: tension and confrontation are now part of its foreign policy doctrine. From now on, the Union's “Russian policy” will be one of explicit and assertive power relations.

In addition, the Europeans have also changed their sanctions strategy. Of course, twelve waves of sanctions adopted by the European Union against the Russian Federation since the 2022 invasion have not forged the European sanctions tool. This has existed since the 2000s and applies to more than 30 States. What is new is the speed, unanimity and intensity of the sanctions: they are no longer intended to symbolically mark the Union's rejection of an internal or external policy; the waves of sanctions against Russia, launched in 2013, are now intended to change the course of the war. The sanctions strategy is no longer a token gesture; it is a tool - a costly and courageous one - of the international balance of power.

Depriving Russia of financial and technological resources for its war effort, weakening its chains of command, cutting off state-owned companies from markets, etc. all these objectives assigned to sanctions are real levers of power designed to change the continental balance of power. Unlike the United States, which did little trade with Russia, the EU has agreed to sacrifice part of its economic prosperity in order to take up a strategic position: it has rapidly reduced its dependence on Russian hydrocarbons and has therefore given up inexpensive energy sources. This effort is to be welcomed, as it has undoubtedly led the EU into a period of considerable internal macro-economic and social turbulence.

Far from wanting to reap the peace dividend indefinitely and preserve its internal tranquility at all costs, the Union has given priority to its security over its prosperity.

1 https://www.eeas.europa.eu/eeas/strategic-compass-security-and-defence-0_en

I SAVING THE TOTEMS AND BREAKING THE TABOOS

In its support for Ukraine, the European Union has not hesitated to break a few taboos. For example, it granted Ukraine official candidate country status less than two years after the start of the conflict, even though the country is at war indefinitely and progress on the “acquis communautaire” is likely to be very complicated. As with Georgia and Moldova, which were declared official candidates on 14 December last year, the European Union has evolved in the way it uses the prospect of enlargement: it intends to protect its interests in the region, challenge Russian influence in three former Soviet Socialist Republics and create an irreversible rapprochement with them. This has changed the general structure of the accession process: enlargements are geopolitical facts and no longer primarily legal procedures. The EU is returning to an approach that dates back to the early 1990s, when its aim was to bring together a fragmented continent, at a time when public opinion is little engaged in the debate between enlargement and deepening.

The other taboo broken by the European Union was the sending of war material to a conflict zone, directly financed by the Union through the European Peace Facility. However, this scheme was not at all designed for this mission. It had been set up by the Europeans to finance the equipment of police and peacekeeping forces. Finally, it has ensured the constant support of its public opinion for these exports, which must be emphasised. This has led to a slow acceleration in the industrial production of war materiel. For example, with regard to the plan to produce one million shells for Ukraine by 2024, investment has been slow to materialise but the pace will be maintained, despite a very slow start.

Two years after the start of the war, the Union, born of pacifism and striving for peace, has embarked on a long-term power dynamic. It has grasped and integrated all the dimensions of the conflict (financial, energy, media, military, industrial) to aggregate them in a strategy of long-term global power relations with Russia. It has definitively left its historical “comfort zone”: peace through law and economics. But it has preserved its

fundamental totem: the collective security of the continent. What is most remarkable is that it has done so on its own path, distinct from that of NATO. During the Trump presidency, Germany became aware of certain weaknesses in the United States’ European commitment. This has tempered its determination to act relatively autonomously.

I BAD HABITS AND OLD COMPLEXES

For all that, have the Europeans turned their Union into a real power? Despite quantitative and qualitative advances, they have not escaped some of their usual shortcomings.

Although they have unanimously adopted, renewed and extended the sanctions regime, the Europeans have expressed divergent views on their relations with Russia. Hungary’s rhetorical, ideological and energetic pseudo-Russophilia deserves special mention. But it is also worth noting that France defended, ab initio, a moderate approach to military aid, while Poland and the Baltic States advocated more energetic action, in particular the sending of missiles and air assets to Ukraine. Similarly, Germany was publicly reluctant for some time to send armoured vehicles to Ukraine. It is still reluctant to send Taurus missiles for in-depth strikes. The positions of Paris and Berlin have recently changed, with the signing on 16 February of bilateral agreements between Ukraine-France and Ukraine-Germany involving commitments to provide military aid worth €3 billion and €9 billion respectively by 2024.

Aid to Ukraine even found itself caught up in a kind of “beauty contest”, with some leaders pointing out that others were lagging behind in the delivery of military equipment. The “shame and blame” strategy of some European leaders undermined the European credibility at large. And in some countries during the election campaign, the pro-Ukrainian unanimity of opinion showed some cracks. In Poland, for example, the outgoing PiS government blocked Ukrainian agricultural exports to the EU in an attempt to mobilise a farming electorate loyal to PiS. Similarly, in Romania, voices were raised against agricultural imports from Ukraine. The “rally round the flag reflex” had not been broken but it was diminished by national egoisms.

Sticking to the principles (financial and military support for Ukraine), the Europeans have allowed themselves public divergences and uncoordinated political initiatives that have weakened their overall stance.

Nor did they shy away from a certain inferiority complex regarding the American commitment to supporting Ukraine. Often giving in to self-criticism, again at least at the start of the conflict, they were happy to compare the €144 billion ² in American aid with the €77 billion in European aid, ignoring the aid over more than ten years provided by European donors to the Ukrainian state to enable it to function.

At the end of these two years of war in Ukraine and on the threshold of an uncertain European electoral sequence, it is worth emphasizing that the European Union has made giant strides in asserting its power. Can 2024 confirm these changes?

II • 2024, a test year for the European Union's strategic posture in Ukraine... and elsewhere

On the European geopolitical scene, 2024 promises to be a busy and uncertain year. At least three major elections are on the horizon:

- The Russian presidential election, the results of which will come as no surprise but not without consequences for the resumption of hostilities;
- the European elections, which could confirm a sovereigntist success in the European Parliament without jeopardising the €51 billion aid plan for Ukraine agreed this year;
- the American elections, which are expected to be won by Donald Trump, who is already putting very effective pressure on his troops to block funding for Ukraine.

On the threshold of 2024 and on the eve of a third year of war in Ukraine, is the European Union ready to maintain the balance of power and therefore its position on the continent, which could also mean compensating for the American desertion of Europe?

I STAYING THE COURSE

In 2024, Vladimir Putin's re-election as President of the Russian Federation will take place in the midst of an election campaign in the United States, a campaign which, if it is anything like previous ones, will inevitably focus on domestic issues, a far cry from the war in Ukraine and European security issues. This will create new risks for Europeans because Russia could be tempted to continue destabilising the continent in two main ways: on the one hand, it could use the wear and tear on the Ukrainian population and army to launch new conventional offensives in order to take advantage of its superiority in terms of artillery and missiles. This already seems to be the case with the capture of Avdiivka; but, on the other hand, it could also use the relative stabilisation of the front to launch new destabilising actions in the Baltic and the Arctic as well as in the Caucasus and Africa to catch the Europeans off guard. The information and cyber front will no doubt be exploited in the same way as it was for the 2016 and 2017 elections in the United States and Europe.

Europeans must therefore keep their guard up in order to get through a fragile period for Ukraine, for the United States and for European opinion. For the moment, there is broad and sustained support for European policy in this area. But to relax the financial, industrial and political effort would be fatal to the progress made over the last two years. Nothing would be more absurd than to ruin two years of effort through lack of vigilance. The constitution of the new European Commission will be critical because of the risk of sovereignty and isolationism. The question is whether it will take account of the strategic feedback from the two years of war: the Europeans were able to preserve their unity in establishing sanctions, reducing dependence on Russian hydrocarbons and providing mili-

2 <https://www.ifw-kiel.de/publications/news/europe-has-a-long-way-to-go-to-replace-us-aid-large-gap-between-commitments-and-allocations/>

tary support. The new key posts will have to be filled in such a way as to take account of this and build on the strategic capital accumulated at the cost of considerable sacrifice.

I HOLDING THE GROUND

Ukraine has entered into a war of attrition with Russia; similarly, Europe is engaged in a long and multi-faceted tug-of-war with Russia. 2024 will therefore be a test year for confirming the Union's determination to build its nascent power strategy over the long term. It will be judged on its ability to deliver on its promises in terms of industrial deliveries, in particular the million shells promised by Thierry Breton.

It will also be examined in terms of its ability to properly manage the financial support to Ukraine that it has just decided on, in the form of loans and grants. The management of these funds will be decisive in avoiding any usury: releasing credits at the necessary speed, for the most solid projects possible, will be a condition for the effectiveness of Europe's posture in Ukraine. Similarly, the regular adjustment of the sanctions strategy must demonstrate to Russia and its allies alike the determination of Europeans to achieve the strategic result they are aiming for: the establishment of solid collective security that complies with international law.

In a war of attrition, the challenge is to hold out over the long term. The EU is better prepared to meet this challenge today than it was two years ago. It was already structurally less fragile than the United States, which is subject to short and sometimes chaotic political cycles. But in the Ukrainian (and Russian) school of thought, it has learnt how continuity and the continuous improvement of its levers of power enable it to gradually increase its weight. Russia is now clearly engaged in a strategy of wearing down Ukrainian forces, the European population and Western resources. The EU should use its Defence Technological and Industrial Base and its sanctions strategy to "wear down" the Russian authorities in return and blunt its interventions.

I THE LONG JOURNEY OF EUROPE

It is now beyond dispute that the diplomatic and economic tools are in place; there is not doubt that the political will has shown itself to be solid, after two years of constant support from voters and political leaders; but it remains to be proved that the Union has strengthened its image on the international stage through its support for Ukraine.

It has often appeared to lag behind the United States, NATO and the Baltic-Polish vanguard; too often it has struggled to make itself heard in the Global South and to win over international heavyweights such as Brazil and India; even in the Balkans, Serbia in particular, it has failed to win over anyone to its cause. The "European narrative" on this conflict is not being universally disseminated.

It is therefore high time that the Union gave itself a public stature commensurate with the efforts it has been making for over a decade to ensure stability in areas where Russia is acting against the sovereignty of former SSRs, in the Caucasus, the Baltic and the Black Sea. While Europe has made substantial geopolitical progress in the wake of the war in Ukraine, it has yet to make any headway in terms of visibility and attractiveness.

An ambitious communications policy is needed to disseminate the European narrative to people outside the EU. Holding one's own in international forums is not just a matter of prestige or pride. It is also a prerequisite for effectiveness. From now on, Europe must also make known what it has done, is doing and will do to preserve peace on its own territory.

• Conclusion

Two years of Ukrainian war have not radically shifted the Union's geopolitical position: it has not yet entered a "war economy", it does not have a continental army, nor is it backed by a substantial defence budget, nor has it established itself in the role of continental policeman.

European power is still developing and in the making in terms of diplomacy, military affairs and strategic posture.

But the Union has overcome several of its demons: breaking with irenicism and legalism, it has adopted a defence industrial policy; emerging from the shadow of the United States and NATO, it has deployed an autonomous sanctions strategy; avoiding the pitfall of dissension, it has created real unity around its objective: preserving Ukraine's sovereignty.

The strategic results of the war remain to be assessed. But if power is anything to go by in times of crisis, Europeans have undoubtedly embarked on the road to strategic autonomy... without, however, claiming it.

Managing Editor: Sylvie Matelly • The document may be reproduced in part or in full on the dual condition that its meaning is not distorted and that the source is mentioned • The views expressed are those of the author(s) and do not necessarily reflect those of the publisher • The Jacques Delors Institute cannot be held responsible for the use which any third party may make of the document • Original version • Edited by Marjolaine Bergonnier • © JNotre Europe - Jacques Delors Institute

Notre Europe - Institut Jacques Delors

Penser l'Europe • Thinking Europe • Europa Denken
18 rue de Londres 75009 Paris, France • www.delorsinstitute.eu
T +33 (0)1 44 58 97 97 • info@delorsinstitute.eu



This project is funded by the European Commission's Citizens, Equality, Rights and Values Programme (CERV) under project number 101104850 – IJD 2024.