



# WHAT IF ... NOT?

## The cost of inaction

Edited by  
Florence Gaub



## European Union Institute for Security Studies (EUISS)

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## The editor

Florence Gaub is the Deputy Director of the EUISS. She specialises in strategic foresight, as well as security and conflict in the Middle East and North Africa.

## The EUISS Chaillot Paper series

The *Chaillot Paper* series, launched in 1991, takes its name from the Chaillot hill in the Trocadéro area of Paris, where the Institute's first premises were located in the building occupied by the Western European Union (WEU). The hill is particularly known for the Palais de Chaillot which was the site of the signing of the UN Universal Declaration of Human Rights in 1948, and housed NATO's provisional headquarters from 1952 until 1959.



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# INTRODUCTION

# THE ROAD NOT TAKEN

by  
**FLORENCE GAUB**

Foresight is an *action*-oriented endeavour: it looks at events that could take place, their consequences, and what can be done to prevent or manage them. Only rarely does it look at events *not* taking place, actions *not* taken, or the consequences of doing *nothing*. After all, what would be the point of looking at inaction?

As this *Chaillot Paper* shows, more than one might at first assume. After all, policymaking is not just about devising and implementing policies, but also about decisions: those cross-roads where action and inaction may lead to divergent outcomes. Inaction is therefore just as much a policy choice as taking action – perhaps not always a conscious one, but still a choice. As such, non-decisions deserve as much scrutiny and testing as decisions leading to action, and indeed are increasingly getting the attention they deserve.

The ‘cost of inaction’ is originally a business term and the counterpart to the ‘return on investment’. Whereas the latter measures the efficiency of an investment in a certain context, the former calculates the concrete consequences of not taking any measures. While the term ‘cost’ might suggest primarily a financial price

to pay – as is often the case in business matters – it actually applies to *all* consequences deriving from a failure to act.

In the 1990s, the term (and approach) gained traction in policy circles, primarily with regard to environmental matters. It was first used prominently in the reports of the Intergovernmental Panel on Climate Change (IPCC), which has weighed the cost of inaction versus the cost of action in almost every report since its inception.<sup>1</sup> The ‘cost’ has been quantified in a myriad of ways: the impact unchecked climate change would have on the environment, on societies and economic systems, but also the actual financial cost. According to one study, inaction would cost the world economy \$7.9 trillion; for Europe, this would be the equivalent of a 1.7% loss in GDP.<sup>2</sup> But the cost of inaction has also been applied to other environmental domains, such as the depletion of the ozone layer, air pollution or loss of biodiversity.

While cost of inaction calculations had concrete policy effects in these areas, the very concept also helped to enshrine the precautionary principle in article 191 in the Treaty on the Functioning of the European Union (TFEU)

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1 Intergovernmental Panel on Climate Change (IPCC), “Climate Change: IPCC Response Strategies”, 1990, [https://www.ipcc.ch/site/assets/uploads/2018/03/ipcc\\_far\\_wg\\_III\\_full\\_report.pdf](https://www.ipcc.ch/site/assets/uploads/2018/03/ipcc_far_wg_III_full_report.pdf).

2 Phys.org, “Climate impacts ‘to cost world \$7.9 trillion’ by 2050”, November 20, 2019, <https://phys.org/news/2019-11-climate-impacts-world-trillion.html>; European Environment Agency (EEA), “Climate change: the cost of inaction and the cost of adaptation”, Technical Report 13/2007, [https://www.eea.europa.eu/publications/technical\\_report\\_2007\\_13](https://www.eea.europa.eu/publications/technical_report_2007_13); COACCH, “The Economic Cost of Climate Change in Europe: Synthesis Report on COACCH Interim Results”, 2019, <https://www.coacch.eu/wp-content/uploads/2019/11/COACCH-Sector-Impact-Economic-Cost-Results-22-Nov-2019-Web.pdf>.

in the year 2000; it is applied to environmental, health and food matters. The principle recognises the difficulty of decision-making in uncertain circumstances, and establishes three criteria for its invocation: (1) the fullest possible scientific evaluation of the degree of scientific uncertainty; (2) an evaluation of the potential consequences of inaction; (3) the participation of all interested parties in the study of precautionary measures.<sup>3</sup> Calculating the different consequences of action and inaction in the future would help policymakers take decisions ahead of time.

In social and political matters, too, the concept is gaining traction. Perhaps most famously, in a 1988 report the 'cost of non-Europe' outlined the benefits of the European Single Market.<sup>4</sup> A similar study calculated the cost of the non-Maghreb – the consequences of non-existent economic integration of the Northern African states.<sup>5</sup> Calculations on the cost of conflict are also popular tools showing that conflict prevention would be a much cheaper and effective approach.<sup>6</sup> But overall, the concept is yet to be fully used across all policy areas.

## THE PAIN OF SAME VS. THE PAIN OF CHANGE

There are several reasons why the cost of inaction approach is not yet routine in policymaking. The first is perhaps that neither social nor political matters are easily calculated – not that other sciences are, but numbers and data are not (yet) as available. Perhaps because of this, in neither field is there a tradition of looking far ahead, leaving the reflection on how things could evolve to the field of foresight. It is therefore no coincidence that works looking at how societies will evolve were written by futurists rather than social scientists – even without data. *Anticipations of the Reaction of Mechanical and Scientific Progress upon Human Life and Thought* by H.G. Wells (1901) or *Future Shock* by Alvin Toffler (1970) were remarkably accurate in predicting social and political change. Where decision-makers do want to calculate the cost of inaction in these fields, they will have to rely on research that merges scientific fact with foresight – as exemplified in the approach taken in this publication.

In addition, the very nature of decision-making is wired to be short to medium-term in scope. As has been noted by the European Environment Agency (EEA), "The costs of preventive actions are usually tangible, clearly allocated and often short term, whereas the costs of failing to act are less tangible, less clearly distributed and usually longer term, posing particular problems of governance."<sup>7</sup> But because the cost of inaction approach is especially suitable for decision-making in uncertainty, it is particularly useful now. It not only renders the choice

<sup>3</sup> EUR-Lex, "The precautionary principle", <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=LEGISSUM%3A132042>.

<sup>4</sup> Commission of the European Communities, "Europe 1992: The overall challenge", April 1988, <http://aei.pitt.edu/3813/1/3813.pdf>.

<sup>5</sup> Mohammed Hedi Bchir et al., "The Cost of Non-Maghreb: Achieving the Gains from Economic Integration", *Journal of Economic Integration*, vol. 22, no. 3 (September 2007), pp. 684–722.

<sup>6</sup> Debbie Hillier, "Africa's Missing Billions: International arms flows and the cost of conflict", Oxfam International, October 2007, <https://policy-practice.oxfam.org.uk/publications/africas-missing-billions-international-arms-flows-and-the-cost-of-conflict-123908>.

<sup>7</sup> EEA, "Late lessons from early warnings: the precautionary principle 1896–2000", p.xiv, 2002, [https://www.eea.europa.eu/publications/environmental\\_issue\\_report\\_2001\\_22](https://www.eea.europa.eu/publications/environmental_issue_report_2001_22).

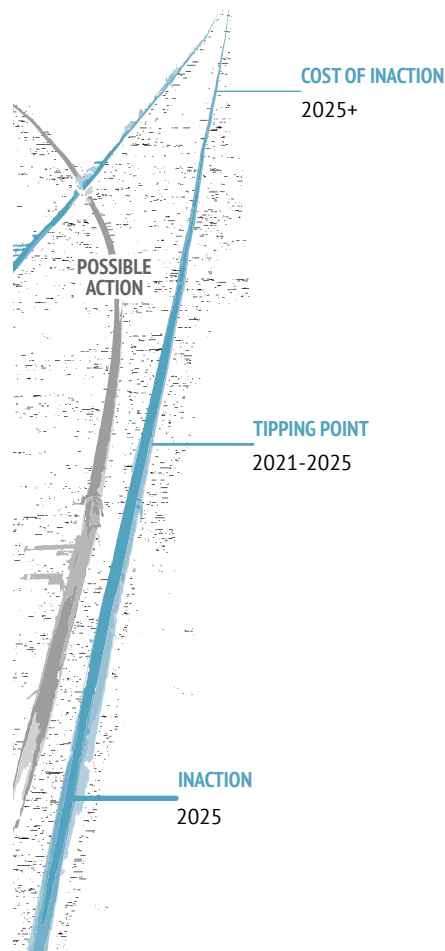
between action(s) and inaction more obvious, it also sheds light on previously unseen problems. After all, inaction is also often the result of lack of awareness of either the problem or the possible consequences. As one EEA study noted, inaction was often the result of misplaced certainty about the absence of harm.<sup>8</sup>

Of course, the human factor, too, plays a role in inaction: doing nothing, simply coping with a situation, avoiding or delaying certain measures is all too human, especially when the necessary action is costly, difficult and unpopular. All too often, doing nothing requires the least effort – in the short term.

The scenarios in this *Chaillot Paper* draw attention to the cost of inaction in a variety of areas, ranging from Russia to Africa, from cyberspace to environmental matters. They understand cost to be not solely financial, but (geo)political and economic, and also to extend to loss of opportunity. Together, they apply the precautionary principle to foreign and security policy.

This *Chaillot Paper* – the fourth in the “What if...?” series – is, as always, an EUISS team effort. Without the hard work of Gearóid Cronin, John-Joseph Wilkins, Christian Dietrich and Lotje Boswinkel, without the willingness of the entire analyst team to join a foresight endeavour, and without the constant support of the EUISS director, Gustav Lindstrom, it would not be possible. Warm thanks go to all of them.

## What if not?



<sup>8</sup> EEA, “Late lessons from early warnings: science, precaution, innovation”, EDA Report no. 1/2013, <https://www.eea.europa.eu/publications/late-lessons-2>.







# TECHNOLOGY AND INDOLENCE

## CHAPTER 1

# WHAT IF... EUROPEAN DELAYS IN 5G SHORTCHANGE THE PATH TOWARDS 6G?

by  
GUSTAV LINDSTROM

## 2025: THE TIPPING POINT

“Your turn madam”, the EU official said as he nodded in the journalist’s general direction. His brief on the state of play of 5G in Europe had gone well, and the initial questions from the packed pressroom in the Berlaymont had been straightforward.

“The writing is on the wall”, she began, speaking slowly yet firmly to get the room’s attention. After a short theatrical pause, she unleashed comments few had expected. “For over five years now, the rollout of 5G mobile networks in the EU has been consistently delayed” she noted. “Now that we are trying to catch up, it is all about 5G and its promises for a better Europe. However, as Europe tries to catch up with the 5G train, the 6G express has already left the station. We are falling behind, jeopardising our economic and societal well-being.”

She paused again before proceeding to her main question: “when we speak of smart cities,

smart grids, smart homes, smart transport, and cooperation with partners, we need to look beyond 5G. While 5G is a critical stepping stone, additional data rates, bandwidth and coverage is needed to fulfil the EU’s vision of a truly digital society. How can we achieve this when we are muddling through with 5G? We were supposed to reach comprehensive 5G coverage by this year.” The silence in the room gradually gave way to murmurs – what was the relationship between 5G and 6G? Would it not be premature to speak of 6G when we were still rolling out 5G? Also, wasn’t 5G going to be a quantitative leap forward from 4G that would solve our connectivity issues once and for all – making future generations of wireless technology pretty much irrelevant?

## 2021-2025: INACTION

While a long-time priority for the European Union, the rollout of 5G mobile networks across

EU member states was bumpy from the outset.<sup>1</sup> Among the initial obstacles were European telecommunications companies' concerns over the 5G business model: it was a costly and drawn-out process. An early European Commission communication estimated the need for a €500 billion investment to enable 5G connectivity and facilitating a competitive European digital single market by 2025.<sup>2</sup> Most of this cost would be borne by telecommunications companies, many of which were still recovering from the 2008–2009 financial crisis while trying to leverage their investments in 4G/4G Long-Term Evolution (LTE). According to one study, European telecoms saw a 24% decline in revenue from 2007–2018.<sup>3</sup> This and a host of other factors led to estimates that European telecommunications investment spending over the 2021–2022 period would actually fall by €6–9 billion.<sup>4</sup>

Accentuating the losses was the need to engage in expensive 5G spectrum auctions within the 5G frequency bands (26 GHz, 3.6 GHz, and 700 MHz). While such auctions boosted government coffers, they represented a large cost for operators who collectively would need to turn over billions to attain the desired spectrum access. Thus, it came as no surprise that as of June 2020, only 20.7% of the usable 5G spectrum was assigned throughout the EU–27 and the UK.<sup>5</sup>

Security concerns constituted another dimension slowing down the 5G rollout. A much-needed joint toolbox unveiled at the outset of 2020 outlined several requirements to enhance the security of 5G networks. These

included requirements to assess the risk profiles of suppliers, to apply relevant restrictions on vendors considered as high-risk, and to ensure the diversification of suppliers. Two principal factors were behind this and related pushes to 'secure' 5G.

First, there was a growing recognition that 5G would play a critical role in the development of the EU's digital economy and society. An estimated 5G revenue of €225 billion worldwide for 2025 (estimated to be €500 billion by 2030) was at stake as billions of additional objects and systems connected to the internet at high speeds.<sup>6</sup> Beneficiary sectors included agriculture, energy, transport and health. A secure system was paramount given the future extensive role of 5G within these and other sectors.

Second, EU member states were cognisant that 5G equipment suppliers could jeopardise the integrity and confidentiality of data passing through 5G infrastructure. Such risks included possible espionage or the cyber targeting of weak 5G suppliers. This could in turn affect intelligence sharing arrangements between EU member states and the United States. As such, a secure system was needed. Deliberations across member states, including on whether or not specific suppliers should be barred from equipping sensitive parts of the 5G network – such as core network functions – would drag out over the 2020–2025 period. Overall, progress on “assessing the risk profile of suppliers and applying restrictions for suppliers considered to be high risk” (toolbox measure SM03)

1 For more on the EU's early interest in 5G, see: European Commission, “5G for Europe: An Action Plan”, COM(2016) 588 final, 2016, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52016DC0588&from=en>.

2 European Commission, “Connectivity for a Competitive Digital Single Market – Towards a European Gigabit Society”, Communication From the Commission to the European Parliament, the Council, the European Economic and Social Committee, and the Committee of the Regions, COM(2016) 587 final, September 14, 2016, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52016DC0587&from=en>.

3 Miguel Fonseca et al, “Telecom operators: Surviving and thriving through the next downturn”, McKinsey & Company, August 2019.

4 Steven Pattheuws, Kağan Karamanoğlu and Jens Niebuhr, “Countering the threat to Europe's 5G rollout”, Strategy&, 2020, <https://www.strategyand.pwc.com/de/de/studien/2020/countering-the-threat-to-europes-5g-rollout/countering-the-threat-to-europes-5g-rollout.pdf>.

5 Frederic Pujol et al., “5G Observatory Quarterly Report (up to June 2020)”, IDATE digiworld, July 2020.

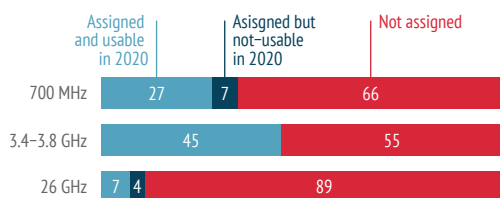
6 European Commission, “Secure 5G networks: Commission endorses EU toolbox and sets out next steps”, January 29, 2020, [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_20\\_123](https://ec.europa.eu/commission/presscorner/detail/en/ip_20_123); Estimate of the number of objects connected to the internet by 2030 by CISCO: “Cisco Edge-to-Enterprise IoT Analytics for Electric Utilities Solution Overview”, February 1, 2018, <https://www.cisco.com/c/en/us/solutions/collateral/data-center-virtualization/big-data/solution-overview-c22-740248.html>.



was slow, building on the ‘medium’ maturity reached by EU member states in July 2020.<sup>7</sup>

## Assigned 5G spectrum

Nearly 75% of the 5G spectrum was still unassigned throughout the EU-27 and the United Kingdom in September 2020



Data: IDATE DigiWorld, 2020

Lastly, the coronavirus pandemic had a significant effect on 5G progress. Rollouts were delayed, as were multiple spectrum auctions across Europe. While some estimated the delays would range along a 12-18 month continuum, it was not until reliable vaccine programmes were safely rolled out in 2021 that 5G deployment returned to normal.<sup>8</sup>

In spite of these delays, there were some advances during the 2021-2025 time horizon which enabled progress – examples included:

- > Substantial progress in the eleven Horizon 2020 projects launched under the 5G Public-Private Partnership focusing on hardware innovation and validation of 5G ecosystems;
- > A total of 22 EU member states with deployed 5G commercial launches (compared to 14 in 2020, including the UK);
- > A greater uptake in 5G spectrum assignments in 2022 and beyond, partially facilitated by the establishment of a European

Electronic Communications Code Spectrum in late 2018;

- > Over 40 cross-border corridors announced and established for live 5G tests from 2023-2025 (compared to 11 in June 2020).

Unfortunately, these and related advances in the 5G rollout came later than expected, with the result that this therefore indirectly crowded out 6G research and development efforts. Specific attempts by the EU and European governments to promote the ‘6G express’ did not yield the expected results. For example, several EU presidencies, starting with the Croatian EU presidency in 2020, highlighted the need to incentivise European companies to commence developing and building technology capacities in 6G to limited effect.<sup>9</sup> There was simply too much catch-up to do in 5G to get the strategic ball rolling for 6G.

## BEYOND 2025: THE COST OF INACTION

Around 2025, there is still limited emphasis on 6G, especially as the 5G rollout finally shifts into higher gear. A cursory analysis of the situation points to at least three different types of costs associated with limited 6G progress:

1. *Inability to leverage expected early benefits associated with ‘beyond 5G’/6G technology:* While 5G is the essential springboard to hyper connectivity, 6G delivers even greater data rates, bandwidth, and lower latency (the time required for a data set to travel between two points) to facilitate a more comprehensive transition towards smart cities, smart transport, smart health, holographic services, and pervasive XR (cross reality)

<sup>7</sup> NIS Cooperation Group, “Report on Member States’ Progress in Implementing the EU Toolbox on 5G Cybersecurity”, July 2020, [file:///C:/Users/gлиндstrom/Downloads/5GToolboxImplementationReportpdf%20\(2\).pdf](file:///C:/Users/gлиндstrom/Downloads/5GToolboxImplementationReportpdf%20(2).pdf).

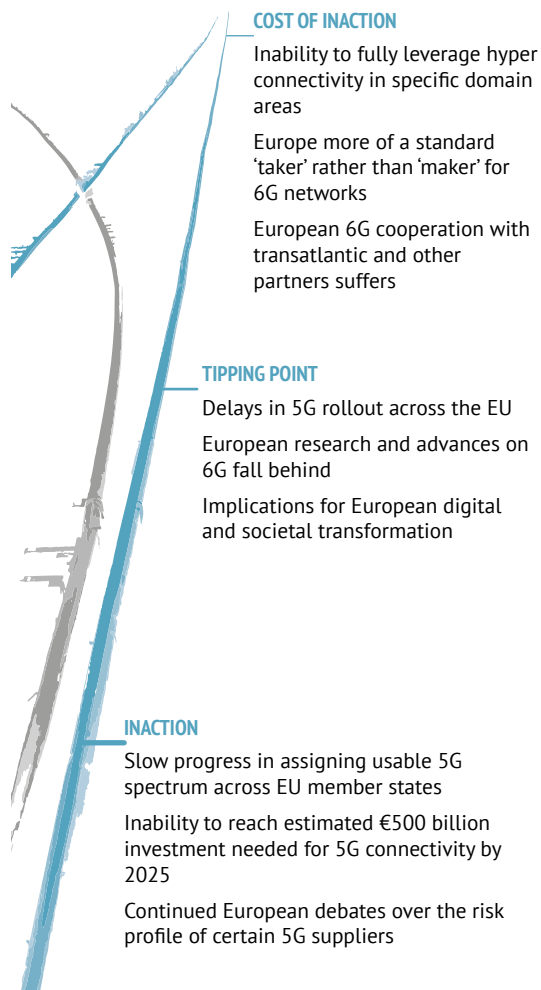
<sup>8</sup> Op. Cit., “Countering the threat to Europe’s 5G rollout”.

<sup>9</sup> Samuel Stolton, “Croatian Presidency pushes for new Commission 5G and 6G action plan”, *EurActiv*, April 30, 2020, <https://www.euractiv.com/section/digital/news/croatian-presidency-pushes-for-new-commission-5g-and-6g-action-plan/>.

among others. Compared to the theoretical 5G speeds of 20 gigabits per second, 6G theoretically reaches speeds of 1 terabyte per second.<sup>10</sup> It represents a tremendous leap with respect to interconnected systems and machines as the dominant users of connectivity. With regard to latency, 6G capabilities improve reliability by 100 times compared to 5G, impacting European latency-sensitive services such as industrial automation, emergency response, military operations (e.g. sensor fusion), and healthcare (e.g. remote surgery).<sup>11</sup>

2. *Slower progress towards the integration of disparate technologies:* Compared to 5G, 6G plays a pivotal role in the integration of disparate technologies. Specifically, several key evolving technologies achieve greater convergence through 6G. This applies in particular to developments in Artificial Intelligence (AI), big data analytics and computing.<sup>12</sup> For Europe, slower progress beyond 5G affects opportunities to sustain technological leadership across some areas. It also delays a necessary reflection on critical issues such as data privacy, data usage, and data storage – especially as multiple technologies converge and machine-to-machine communications expand.
3. *Limited cognition of the strategic consequences resulting from 5G and 6G delays:* Delays in the 5G rollout and slow progress on 6G research and development result in several strategic consequences. For example, while the International Telecommunications Union (ITU) sets the overall vision for IMT-2030/6G standards in the early 2020s, including through its Network 2030 Initiative, Europe's ability to support that process suffers due to limited advances in 6G research and development. Rather than acting as a possible standard setter, Europe is more

## Timeline



of a standard taker. From a different vantage point, cooperation levels across the Atlantic and with other advanced 5G/6G nations such as South Korea suffers as Europe's competitive edge starts to slip – dimming opportunities to build a future transatlantic+ digital space. At the geostrategic level, Europe watches as other nations move

10 Chris O'Brien, "Why 6G research is starting before we have 5G", *Venture Beat*, March 21, 2018, <https://venturebeat.com/2019/03/21/6g-research-starting-before-5g/>.

11 Samsung, "6G – The Next Hyper Connected Experience for All", 2020, <https://cdn.codeground.org/nsr/downloads/researchareas/6G%20Vision.pdf>.

12 Gerry Christensen, "What is Sixth Generation Wireless?", *ISE Magazine*, September 15, 2019, <https://www.isemag.com/2019/09/telecom-6g-network-deployment-operations/>.

forward to leverage the integrated benefits of hyper connectivity, AI, and colossal data – especially in the areas of trade and security. Lastly, as an unintended consequence, European efforts to boost the continent's digital autonomy fall behind schedule.

## CHAPTER 2

# WHAT IF... THERE IS NO DIALOGUE WITH 'ROGUE STATES' IN CYBERSPACE?

by  
**PATRYK PAWLAK**

## 2025: THE TIPPING POINT

Emotions in the UN Security Council Chamber that morning were running high. That day, it was not only the figures in the Per Lasson Krohg mural but also millions of viewers around the world that were waiting to hear what Russian minister of foreign affairs Anastasia Petrov had to say. Petrov had flown to New York to present the evidence in a case that had shocked the international community only two years earlier: the accident at the Zaporizhia nuclear power station in Ukraine – the largest nuclear power plant in Europe and among the top 10 largest in the world – that resulted in the deaths of 20 people and radioactive leaks of helium and heavy water into the Dnieper river. For the international community, 'Cyber Fukushima' – as the media dubbed the accident – broke yet another taboo: a cyberattack against nuclear infrastructure.

In her statement, Petrov said: "In the past years, my country has been the object of unfounded accusations and attacks from many governments sitting around this table. Our reputation and commitment to peace have been called into question. But I hope that the evidence I have presented today will expose the purely political motivation of our accusers and help us make significant progress towards a truly secure and stable cyberspace". The minister was referring to cyber sanctions imposed by the European Union against several Russian companies and individuals in the aftermath of the accident and the ongoing case against Russia in the International Court of Justice,<sup>1</sup> in which Russia has objected to the jurisdiction of the Court and the admissibility of the application. She then continued: "This is why together with a group of 25 other states we put forward a proposal for a new process aimed at improving trust and confidence in cyberspace. In March next year, India will host an international conference to launch this new initiative, which we hope will result in a set of concrete confidence- and transparency-building measures". Petrov's

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1 UN News, "Top UN court will consider Ukraine allegations against Russia of treaty violations", November 8, 2019, <https://news.un.org/en/story/2019/11/1051001>.

statement was a bitter commentary about mistrust and the worsening state of Russia's relationship with the West.

The EU was clearly one of the addressees of this message. Since the adoption of its Cybersecurity Strategy in 2020, it had privileged the policy of cyber deterrence in relations with 'rogue states in cyberspace' – a term used for countries like Russia, Iran and North Korea which were suspected of conducting malicious cyber activities against other countries. Given the significant differences of views and geopolitical tensions between the EU and Russia, a policy of dialogue was replaced by a policy of non-engagement with the language of sanctions and deterrence at its core.<sup>2</sup> Could this new evidence and the Russian initiative be a game changer? "As my old friend, Sergey Lavrov, used to say, 'a second opinion never hurts, not only in medicine but also in politics'", commented the EU High Representative.

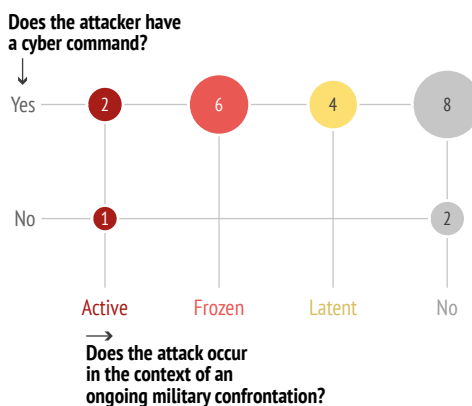
## 2021-2025: INACTION

The threat of cyberattacks against nuclear infrastructure was not new,<sup>3</sup> and called for developing a norm prohibiting cyberattacks against nuclear facilities. In fact, a number of high-profile cases in which this had happened had been recorded in the past: the computer worm which infected the networks of the David-Besse nuclear power station in 2003 and the Gundremmingen power plant in Germany in April 2016, a cyber-espionage campaign against South Korea's KHNP power plant

operator in December 2014, or the malware attack on the Kudankulam Nuclear Power Plant (KKNPP) in India in September 2019.

### Cyber operations in ongoing military conflicts

Number of operations



Data: EU Cyber Direct, Cyber Conflict Portal, 2020

The investigation undertaken by Russia revealed that the modernisation work on the nuclear reactor Unit 3 conducted in 2017 resulted in vulnerabilities that were subsequently exploited by a group known to security experts as 'The Castle', operating from Turkey. The group had been responsible, for instance, for a series of cyberattacks targeting governments and other organisations in Europe and the Middle East since the beginning of 2020.<sup>4</sup> The hackers used phishing e-mails to introduce malware into commercial networks – a method similar to the one used in the attack against the Korea Hydro and Nuclear Power Company.<sup>5</sup> At the same time, Russian intelligence demonstrated a clear link between the group and Turkey's National Intelligence Organisation (MİT).

<sup>2</sup> Patryk Pawlak, "Navigating the EU's cyber diplomacy. Interview with Josep Borrell Fontelles, High Representative and Vice President of the European Commission", *Directions*, September 25, 2020, <https://directionsblog.eu/navigating-the-eu-cyber-diplomacy/>.

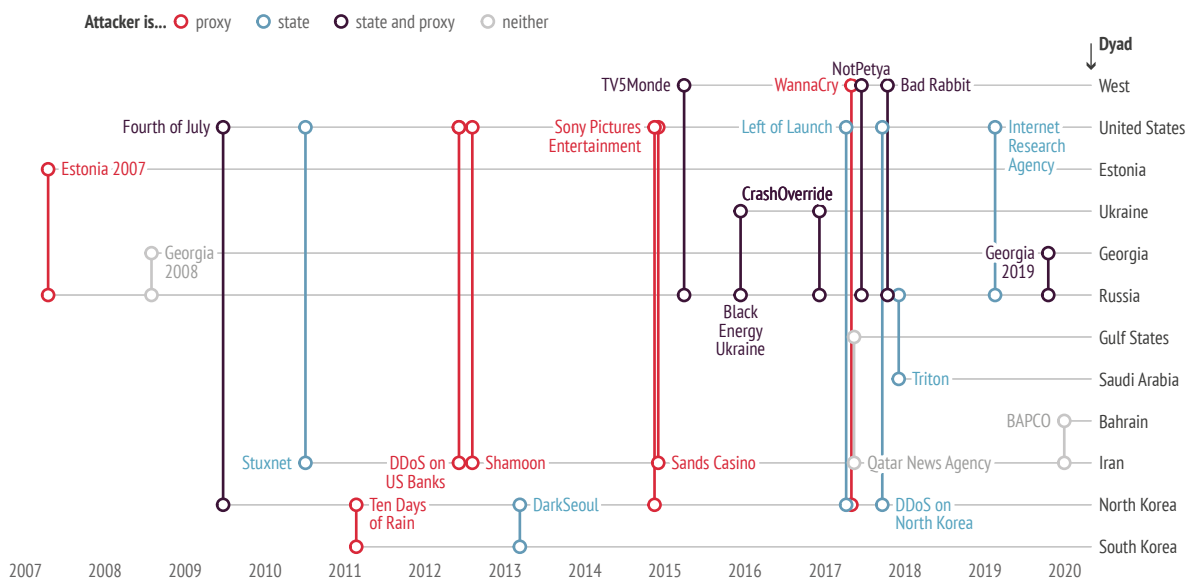
<sup>3</sup> Vladimir Orlov, "Our nuclear facilities are increasingly vulnerable to cyber threats. This is what policy-makers need to know", October 5, 2016, <https://www.weforum.org/agenda/2016/10/our-nuclear-facilities-are-increasingly-vulnerable-to-cyber-threats-this-is-what-policy-makers-need-to-know/>.

<sup>4</sup> Stephen Kurczy, "Japan nuclear crisis sparks calls for IAEA reform", *The Christian Science Monitor*, March 17, 2011, <https://www.csmonitor.com/World/Asia-Pacific/2011/0317/Japan-nuclear-crisis-sparks-calls-for-IAEA-reform>.

<sup>5</sup> Ju-min Park and Meeyoung Cho, "South Korea blames North Korea for December hack on nuclear operator", *Reuters*, March 17, 2015, <https://www.reuters.com/article/us-nuclear-southkorea-northkorea-idUSKBN0MD0GR20150317>.

## Who fights whom?

Cyber operations in interstate relations (selected effect-creating incidents)



Data: EU Cyber Direct, Cyber Conflict Portal, 2020

The political landscape ahead of the Zaporizhia accident was already tense. Turkey and Russia were engaged in a series of tit-for-tat moves following media reports that Ankara was providing mercenaries to support Ukrainian forces in the conflict over Crimea. Turkey had also halted the delivery of gas to Greece via the TurkStream pipeline as a consequence of the sanctions imposed by the EU in March 2022. Subsequently, a Kremlin-linked group was accused of conducting a secret cyberattack against Turkey, which resulted in the wiping out of a critical database used by Turkey for its illegal offshore drilling activities in the Eastern Mediterranean. It is not surprising, therefore, that when it happened, all eyes – and fingers – were immediately directed at Russia.

International organisations did not offer much hope for de-escalation and effective conflict management. The UN-led discussions about the cyberstability framework had not led to

any concrete outcomes, even though the Programme of Action launched at the UN General Assembly (UNGA) in 2021 was already underway. At the same time, the International Atomic Energy Agency (IAEA) had still not recovered its credibility since the 2011 Fukushima Daiichi nuclear disaster in which its response was judged to be particularly poor. After the election of Xi Wei as the Executive Director of the organisation, the IAEA was also struggling in the face of severe budget cuts implemented by the United States which sought to curb the 'Chinese takeover' of international organisations. Washington stipulated that it would not fund the organisation until the mandate of the IAEA was revised so that it could better police nuclear power plants worldwide<sup>6</sup> and was able to deliver frank and independent assessments of nuclear crises as they unfold.<sup>7</sup> Petrov's statement ended with a bitter conclusion: "The attack in Zaporizhia is a tragic reminder of what

<sup>6</sup> Stephen Kurczyk, "Japan nuclear crisis sparks calls for IAEA reform", *The Christian Science Monitor*, March 17, 2011, <https://www.csmonitor.com/World/Asia-Pacific/2011/0317/Japan-nuclear-crisis-sparks-calls-for-IAEA-reform>.

<sup>7</sup> "Turkey, Ukraine Sign Military Cooperation Agreements", *Associated Press*, October 16, 2020, <https://apnews.com/article/ukraine-turkey-black-sea-istanbul-recep-tayyip-erdogan-c209b362dc74db18f81801f4a4c73867>.

blind Russophobia propagated in the West can result in”.

## BEYOND 2025: THE COST OF INACTION

Despite the evidence presented by Petrov, most commentators remained unconvinced. But for the EU, it was a clear signal that something needed to be done when it comes to dialogue with countries like Russia or Iran about the governance of cyberspace. At the European Council in October 2025, member states called for the EU High Representative and the European Commission ‘to explore the ways through which a constructive dialogue on cyber issues could be established – both at the bilateral level and through the engagement in the Delhi Process to be launched in 2026’. This, of course, did not mean a complete reset of EU–Russia relations. Rather, it symbolised a recognition that there is a clear need for channels of communication with countries from outside of the EU’s group of like-minded countries. In November 2025, the EU and Russia established a Joint Commission to study the evidence presented in the Zaporizhzhia accident and propose mechanisms that would ensure more effective communication channels in the future in order to avoid an escalation similar to the one that followed the previous incident.

The Delhi Process was launched on the occasion of an international conference in March 2026, with over 65 countries participating in an attempt to improve trust and confidence in cyberspace, in particular between Russia and other members of the international community (neither the United States nor Turkey attended the conference). Building on earlier discussions at the UN and drawing from the experience of the Helsinki Process, India proposed to focus the deliberations on three main clusters of issues: (i) information exchange and communication

### Timeline



measures aimed at improving transparency; (ii) research and technological cooperation to facilitate exchanges between the technical community and operators in critical sectors; and (iii) monitoring of implementation.

However, the launch of this initiative did not resolve the underlying ideological conflict between Russia and other countries. The United States, which provided most of the intelligence in the Zaporizhzhia case, chose instead

to strengthen the Clean Network Initiative,<sup>8</sup> launched initially to target the Chinese Communist Party (CCP) and eventually extended to Russia. In preparation for this move, Russia and China began working more closely together, leading to the establishment in 2027 of a Sino-Russian Free Information Area (FIA) – with a domestic network at its core and a powerful firewall around it.<sup>9</sup> By 2030, FIA was expanded to several other countries along the Digital Silk Road.<sup>10</sup>

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<sup>8</sup> Brigitte Dekker, Maaïke Okano-Heijmans and Eric Siyi Zhang, “Unpacking China’s Digital Silk Road”, *Clingendael Report*, July 2020, <https://www.clingendael.org/publication/unpacking-chinas-digital-silk-road>.

<sup>9</sup> Jane Wakefield, “Russia ‘successfully tests’ its unplugged internet”, *BBC News*, December 24, 2019, <https://www.bbc.com/news/technology-50902496>.

<sup>10</sup> Op.Cit., “Unpacking China’s Digital Silk Road.”



## CHAPTER 3

# WHAT IF... THE MILITARY AI OF NATO AND EU STATES IS NOT INTEROPERABLE?

by  
SIMONA R. SOARE

## 2025: THE TIPPING POINT

Heavy smoke was rising from the Spanish frigate *Pokapu III*. The Bazan-class frigate had been attacked by a swarm of underwater drones on its way to participate in *Sea Breeze 2025*, the NATO joint maritime exercise.

At 5:17am on 5 July 2025, the ship's first-generation AI system, the Navigator, issued a low-priority alert: it had detected moving objects 2.6 miles out beneath the surface of the water. The Navigator analysed the shape, velocity and trajectory of the objects and classified them as a pod of dolphins, maritime sea life native to the Black Sea. *"No threat detected. Follow-up action: path-following activated. Notification: No alert sent to nearby ships"* flashed on Captain Morales' screen. *Pokapu III* was the first ship in the Spanish Navy to operationally test the Navigator.

Fifteen minutes later, the Navigator's dashboard flashed again: *"Unknown object approaching. Follow-up action: anomaly detection activated. No anomaly detected"* as 6 of the objects appeared to be rapidly advancing towards

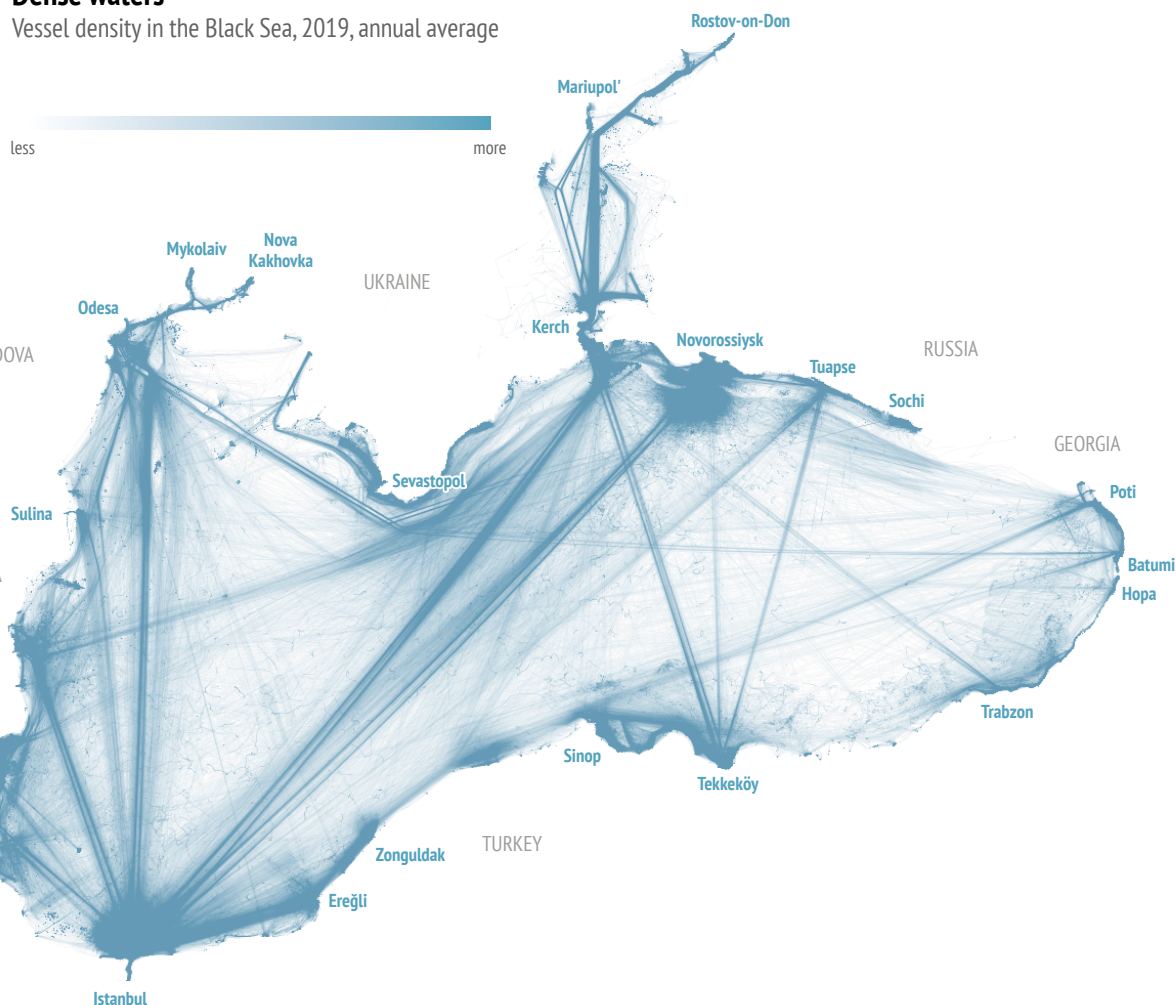
the ship in synchronised formation. There was no time for the crew to react. The captain's eyes flashed to the Navigator's screen one last time before three explosions ripped through the left side of the ship's hull: *"No threat detected. Follow-up action: path-following activated. Notification: No alert sent to nearby ships"*.

As the ship shook violently from the explosions, the captain's display was blinking with notifications of the state of different critical systems. Within 20 seconds, the Navigator determined the ship would tilt left and sink in 2 hours and 38 minutes, even if some of the affected compartments were sealed and rapidly spreading fires were extinguished. *"Critical systems failure! Follow-up action: SOS! Request urgent assistance! Notification: Notifying HQ! Alert all nearby ships!"* the Navigator screen flashes red.

Prompted by the captain's orders, the Navigator identified Turkey as the closest country to request assistance. *"Turkey! They can send a rescue mission and we can still keep her afloat,"* Captain Morales reflected in a brief moment of hope before his thoughts were stopped short by the Navigator's alert: *"HQ permission needed! This state is not on my information sharing list. Sending request to HQ. Authentication code request pending..."*

## Dense waters

Vessel density in the Black Sea, 2019, annual average



Data: EMODNET, 2019

The Navigator AI system was not interoperable with the similar Turkish AI system: the two AI-enabled capabilities were not deconflicted, they could not share information with each other, they could not collaborate on specific tasks, and they could not plan missions together. An exchange of authentication codes between the Spanish and Turkish authorities was required for direct data exchange, deconfliction and task-collaboration between the Navigator and the Turkish AI system. The procedure was fast, but even at an optimistic estimate it would take hours or days, more time than *Pokapu III* had. “Critical system failure! Weapons systems inoperable” another red alert flashed on the Navigator’s screen. “Great! I cannot talk to the closest

port for urgent assistance; I have no situational awareness and my weapon systems are down. We’re sitting ducks out here!” Captain Morales whispered to himself.

## 2021-2025: INACTION

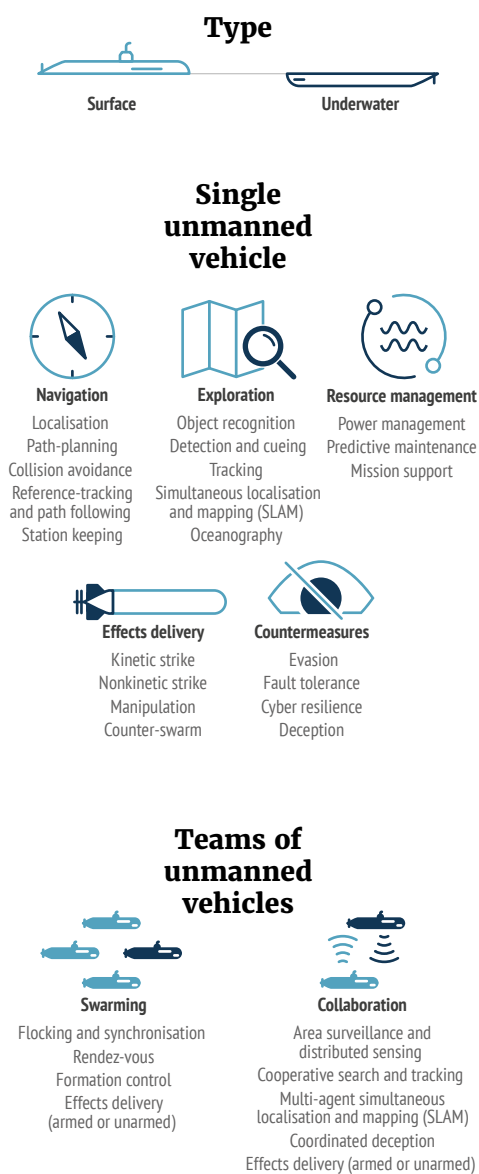
This attack and its negative consequences could have been easily avoided. After all, interoperability had been among the prime considerations in NATO and EU efforts to implement dedicated

strategies and action plans for the development of military AI applications, with an emphasis on situational awareness, command and control and maintenance and mission support. Interoperability and standardisation had been at the core of NATO's Emerging and Disruptive Technologies (EDTs) Roadmap and NATO's Artificial Intelligence Implementation Strategy.<sup>1</sup> The European Defence Agency's common military AI taxonomy, Action Plan on Artificial Intelligence<sup>2</sup> and Capability Development Plan's priorities<sup>3</sup> formed the bedrock for member states' joint pursuit of AI-enabled capabilities. Particularly, hardware interoperability, common data standards, data sharing, and data use protocols became critical components of interoperability.<sup>4</sup>

EU-NATO cooperation on these matters was fundamental, particularly as in 2021 the EU adopted strict AI regulation. However, outstanding structural and strategic issues in the EU-NATO framework,<sup>5</sup> increasingly tense Turkish-European relations and the protracted negotiation of a comprehensive Transatlantic AI Agreement<sup>6</sup> blocked the alignment of NATO and EU fundamental interoperability building-blocks, particularly in the maritime domain. Turkey and Spain were NATO allies. Though advanced in military AI applications, Ankara's full integration into NATO's newly launched automated information sharing network had been delayed due to political reasons. Spain was among the first EU and NATO countries to deploy maritime AI capabilities acquired through the Upgrade of Maritime Surveillance

## Maritime Unmanned Vehicles

A taxonomy



Data: RAND 2020; DARPA 2020

1 Mircea Geoana, "NATO: winning the implementation race", *NITECH: NATO Innovation and Technology*, Issue 3 (June 2020), pp. 14–16, [https://issuu.com/globalmediapartners/docs/nitech\\_issue\\_03\\_june\\_2020](https://issuu.com/globalmediapartners/docs/nitech_issue_03_june_2020).

2 European Defence Agency, "In the Spotlight: Artificial Intelligence. Joint quest for future defence applications" *European Defence Matters*, Issue 19 (June 2020), pp. 34–36, [https://eda.europa.eu/docs/default-source/eda-magazine/edm19\\_web.pdf](https://eda.europa.eu/docs/default-source/eda-magazine/edm19_web.pdf).

3 European Defence Agency, "2018 CDP Revision: The EU Capability Development Priorities" June 2018, p. 13.

4 Zoe Stanley-Lockman, "Futureproofing transatlantic relations: The case for stronger technology cooperation" in Simona R. Soare (ed.), *Turning the Tide: How to rescue transatlantic relations* (Paris: EUISS, 2020), pp. 170–188, <https://www.iss.europa.eu/sites/default/files/EUISSFiles/Transatlantic%20relations%20book.pdf>.

5 Simona R. Soare, "Partners in need or partners in deed? How EU-NATO cooperation shapes transatlantic relations" in *ibid.*, pp. 44–59; Gustav Lindstrom and Thierry Tardy (eds), *The EU and NATO: The essential partners* (Paris: EUISS, 2019), <https://www.iss.europa.eu/sites/default/files/EUISSFiles/EU%20and%20NATO.pdf>.

6 European Commission, "EU-US: A new transatlantic agenda for global change", Press Release, Brussels, December 2, 2020, [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_20\\_2279](https://ec.europa.eu/commission/presscorner/detail/en/ip_20_2279); European Council, Council of the European Union, "Council Conclusions on European Union–United States Relations", December 7, 2020, <https://www.consilium.europa.eu/en/press/press-releases/2020/12/07/council-conclusions-on-european-union-united-states-relations/>

(UMS)<sup>7</sup> PESCO project and a follow-on European Maritime AI Systems Standardisation project. However, different data standards, model programming and national policies meant the two systems were still not interoperable.

Meanwhile, Western technological superiority and its associated strategic advantage were rapidly eroding as China and Russia increasingly invested in and deployed AI in military applications: AI-enabled command and control, enhanced situational awareness, decision-making support, maintenance capabilities, autonomous land, air, maritime, cyber and space assets.<sup>8</sup> Since 2022, shrinking European defence budgets had narrowed the space for defence investment in conventional and emerging technologies. Transatlantic allies were at risk of a digital divide where only a few large and technologically capable allies possessed advanced AI-enabled capabilities while the rest did not.<sup>9</sup> Furthermore, the lack of a transatlantic and European common approach to the legal, ethical and operational aspects of the employment of battlefield military AI obstructed higher levels of NATO and EU interoperability of AI-enabled military capabilities.

Enhanced interoperability of AI-enabled maritime situational awareness and command and control was generally acknowledged as critical in NATO and the EU. However, achieving it with AI-enabled solutions deployed on multiple and fragmented legacy systems, operated by a wide range of allies and European states with very different technological capabilities, was costly, time-consuming and technically and politically challenging. In addition, there were also risks and costs associated with interoperability,

which altered the cost-benefit analysis in individual ally procurement processes. Adding interoperability features to military hardware or software packages and AI-enabled capabilities could increase the acquisition costs and time, add to the complexity of a specific system and, last but not least, create risks related to data- and network-safety, system overload or failure, insufficient computational power to process growing volumes of raw data, conflicting data or uncertainty.

## BEYOND 2025: THE COST OF INACTION

Turkish rescue ships arrived at the scene of the attack hours later, facilitated by direct radio communication approved by the Spanish authorities. The request for exchange of authentication codes between the two capitals was still pending, bogged down in bureaucracy. As the Turkish vessels approached the site of the attack, it was too late to save *Pokapu III*. The Turkish rescue ships could only retrieve the survivors and the casualties. The loss of *Pokapu III* wiped out one fifth of the Bazan class of Spanish frigates and disrupted NATO and EU maritime security operations.

OSIA, NATO's new Open-Source Intelligence situational awareness AI,<sup>10</sup> determined within 20 minutes of analysis of open-source data and military intelligence that *Pokapu III* had been attacked by an environmental anarchist group, The Green Razors, known to have close ties to Moscow and Beijing. American, British

7 European Defence Agency, "PESCO Projects Upgrade of Maritime Surveillance (UMS)", <https://pesco.europa.eu/project/upgrade-of-maritime-surveillance/>.

8 Department of Defense, "Annual Report to Congress: Military and Security Developments Involving the People's Republic of China 2020", May 2020, <https://media.defense.gov/2020/Sep/01/2002488689/-1/-1/1/2020-DOD-CHINA-MILITARY-POWER-REPORT-FINAL.PDF>; Katarzyna Zysk, "Defence innovation and the 4th industrial revolution in Russia" *Journal of Strategic Studies*, December 2020, <https://www.tandfonline.com/doi/epub/10.1080/01402390.2020.1856090?needAccess=true&>.

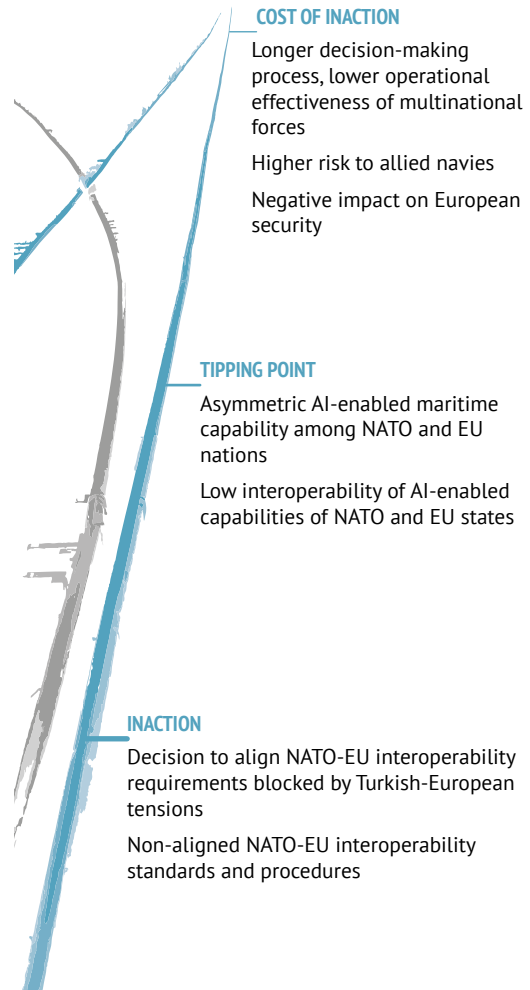
9 Simona R. Soare, "Digital Divide? Transatlantic Defence Cooperation on AI", *EUISS Brief* no. 3, March 2020, <https://www.iss.europa.eu/content/digital-divide-transatlantic-defence-cooperation-ai>.

10 NATO Innovation Hub, "Innovation Hub Warfighting 2040 Project Report: How will NATO have to compete in the future?", NATO Allied Command Transformation, March 2020, p. 21, <https://www.innovationhub-act.org/sites/default/files/2020-06/WF2040Report.pdf>.

and Dutch intelligence reports also confirmed that The Green Razors used a 3D-printed<sup>11</sup> reinforced version of a Chinese-made dolphin-shaped underwater drone. The modified drones had been fitted with Russian-made explosives and released in the water 24–120 hours before the attack.

Following the sinking of the *Pokapu III* – the first allied military vessel to be sunk by a hostile attack after the Cold War – a NATO special investigation commission was appointed. The commission's report, released in September 2025, found that the lack of interoperability and information sharing limitations among allied AI systems had significantly complicated and delayed allied response. The fragmentation of the allied military AI capabilities was great, and their interoperability remained limited. AI-enabled capabilities had been integrated into Alliance operations. However, transatlantic and European allies continued to differ on fundamental interoperability building blocks: the progressive alignment of data sharing standards, standard operating protocols, rules of employment<sup>12</sup> and equipment compatibility. Interoperability progress had developed in clusters of transatlantic and European partners, through a combination of technical and policy<sup>13</sup> solutions. Furthermore, the availability of the situational awareness data and the sharing of actionable information among allies in due course to form a comprehensive and common operating picture continued to be important challenges. A common operating picture, either in the maritime field or cross-domain, including air and land, continued to be fragmented across the use of different NATO and EU platforms and systems.

## Timeline



These challenges of a political, technical and technological nature nevertheless posed serious interoperability problems that on the morning of July 5, 2025 cost Captain Morales his ship and the lives of 18 of his sailors.

11 Pete Cook, "The International Security Implications of 3D Printed Firearms" in Reuben Steff, Joe Burton and Simona R. Soare (eds), *Emerging Technologies and International Security: Machines, the State, and War* (London: Routledge, 2020).

12 NATO Science and Technology, "Science & Technology Trends 2020–2040: Exploring the S&T Edge", March 2020, p. 66, [https://www.nato.int/nato\\_static\\_fl2014/assets/pdf/2020/4/pdf/190422-ST\\_Tech\\_Trends\\_Report\\_2020-2040.pdf](https://www.nato.int/nato_static_fl2014/assets/pdf/2020/4/pdf/190422-ST_Tech_Trends_Report_2020-2040.pdf).

13 Erik Lin-Greenberg, "Allies and Artificial Intelligence: Obstacles to Operations and Decision-Making" *Texas National Security Review*, vol. 3, no. 2 (Spring 2020), p. 75.

## CHAPTER 4

# WHAT IF... THE INTERNET IS NO LONGER OPEN?

by

**NATHALIE VAN RAEMDONCK**

## 2025: THE TIPPING POINT

The European Special Rapporteur on Human Rights Bernt Stekelhorn checks his to-do list before his mission to Thailand. He opens the drawer where he keeps his mobile phones. It contains a phone for when he goes to America and countries behind the 'American firewall', a phone for when he travels to China, a phone for countries that are part of the Belt and Road Initiative (BRI), a phone for India, one for Russia and one for Iran. He checks the latest update on Thailand and brings his 'Belt & Road' phone along with his European phone.

He stares at his six phones and sighs. But his IT department suggested this as the best solution. Even though most Europeans have the strongest 'digital passport' with access to most of the internet and interoperability with most service providers, all the different VPNs<sup>1</sup> the diplomat needed to have on his European phone when travelling were confusing him too much. The rapidly changing geopolitical situation left him too unsure of a reliable connection abroad.

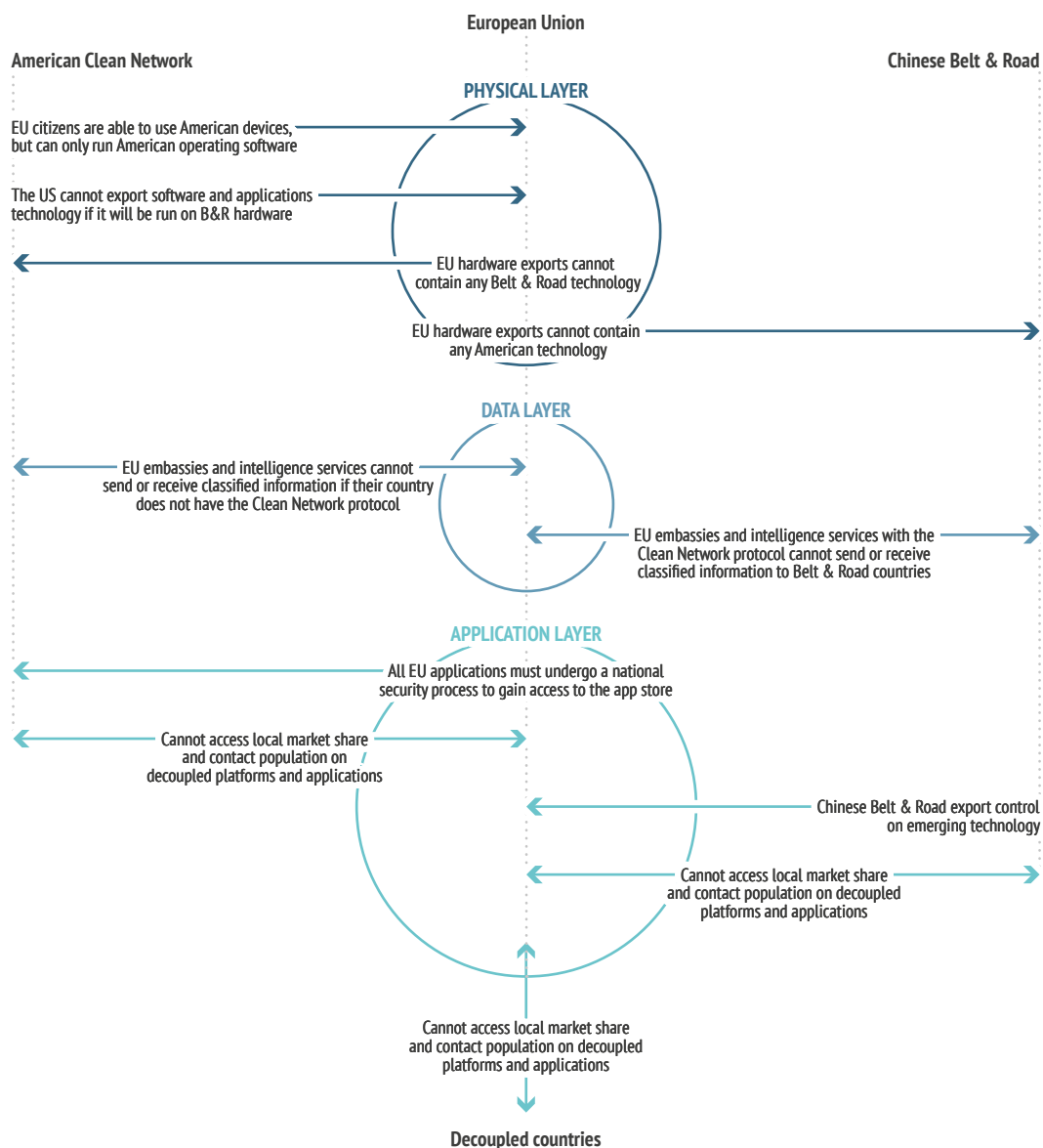
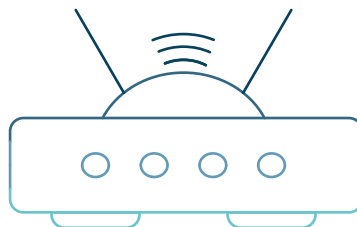
Stekelhorn therefore acquiesced to a solution of having several devices when he travelled. The phones also have the right Operating System (OS) installed so he can use the local messaging apps to contact his local counterparts. Android and Apple OS are no longer compatible with most devices used in Belt and Road countries due to the American sanctions on Chinese tech manufacturers. Local app ecosystems are therefore not interoperable with his European phone that still runs Android.

Countries like India have developed national digital applications ecosystems. After banning all Chinese applications in 2020, India promoted the use of locally developed software, mobile applications and social media platforms. The Roposo scandal that has erupted in 2025 however has demonstrated the dangers for society of such a nationalised approach. It has been revealed that the manufacturers of Roposo, the Indian app that became very popular after the TikTok ban, had been forced to cooperate with the national security agency. The EU's digital applications ecosystem is by contrast not very well developed, as European companies had not been incentivised to develop an ecosystem specifically for a European market. It is still

<sup>1</sup> Virtual Private Networks (VPNs) create a tunnel to a different network and thereby often circumvent certain georestrictions like filtering and firewalls.

## Layers of internet fragmentation

The internet is composed of several conceptual layers that facilitate the flow of data in the global communication system. 'Fragmentation' of the internet can take many shapes depending on which layer of functionality is affected. Loosely based on the OSI model and the TCP/IP model, fragmentation on 3 layers is explored in this case; the **PHYSICAL LAYER** (connection to hardware) the **DATA LAYER** (where encryption protocols function) and the **APPLICATION LAYER** (interactions with software applications).



Data: Open Systems Interconnection model (OSI model) – TCP/IP model



dominated by the Silicon Valley companies. The EU instead focused all its efforts on developing anti-trust and privacy regulations, and counterterrorism and disinformation rules. This led the Silicon Valley companies to set up European branches, with the perverse effect of segregating European users from non-European users on their applications. The profits also largely flowed back to the American companies, thanks to loopholes in European anti-trust regulations.

Stekelhorn's drawer full of mobiles is symptomatic of the difficulties in travelling and having cultural exchanges in 2025. Application and software interoperability is split between different coalitions in the world. Below the application layer of the internet, communication pathways are also disrupted. A hierarchy of classified communication was created with the Clean Network and Clean Path policy, which was instigated in 2020.<sup>2</sup> In NATO cooperation, countries which are not part of the Clean Network initiative are denied access or have reduced privileges in classified networks such as NATO's Battlefield and Information Collection and Exploitation Systems (BICES). Since the EU had not explicitly banned the use of Chinese hardware to build their 5G infrastructure, several countries in Europe have Chinese hardware components built into their 5G infrastructure. The US has identified some trusted partners, which include some but not all EU countries,<sup>3</sup> which developed safe 'paths' for communication and adopted the US Clean Network protocol. This aim of this protocol is to make sure no classified data can be transmitted over 5G networks that are built with any involvement of Chinese companies or Chinese hardware. The Clean Networks countries are extending this protocol also to diplomatic communication and certain business-related

communication. The global scramble for innovation is causing a surge in cyberespionage to steal intellectual property, making such communication a matter of national security.

In 2025 the World Wide Web still exists and the core of the internet remains intact, but several layers of the internet seem to be on the point of fragmenting.

## 2021-2025: INACTION

2020 had been the year when US-China trade rivalry reached its tipping point. The focus on tech protectionism had been one of the policy planks of 'America First' President Donald Trump. Even if his successor President Biden was milder in tone, key points of the policy were maintained. The American strategy boiled down to blocking the flow of Western technology to China, reshoring some high-tech supply chains for emerging technologies, and reinvigorating US innovation. This became tangible in 2020, when the US tightened its export controls on emerging technology to prevent the Chinese companies Huawei and ZTE from developing semiconductors that use US software and technology.<sup>4</sup> These export controls not only targeted these Chinese companies, but also major semiconductor manufacturers in South Korea or Taiwan that use American technology to sell products to these Chinese companies. The export controls had a serious impact on the semiconductor market, whose value chain is intrinsically global in nature.<sup>5</sup>

2 The American 'Clean Network' initiative started building a coalition of trusted partners in 2020: <https://www.state.gov/the-clean-network/>

3 Czech Republic, Denmark, Estonia, Latvia, Poland, Romania and Sweden publicly declared in 2020 that they would only allow trusted 5G vendors in their networks, but there is no EU-wide policy to ban vendors like Huawei. The EU only created a coordinated risk assessment with recommendations for countries on how to assess risks related to 5G network security, leaving the choice up to the countries themselves: <https://ec.europa.eu/digital-single-market/en/news/eu-wide-coordinated-risk-assessment-5g-networks-security>.

4 US Department of Commerce, "Commerce Addresses Huawei's Efforts to Undermine Entity List, Restricts Products Designed and Produced with U.S. Technologies", 2020, <https://www.commerce.gov/news/press-releases/2020/05/commerce-addresses-huaweis-efforts-undermine-entity-list-restricts>.

5 OECD, "Measuring distortions in international markets: The semiconductor value chain", OECD Trade Policy Papers, 2019, [https://www.oecd-ilibrary.org/trade/measuring-distortions-in-international-markets\\_8fe4491d-en](https://www.oecd-ilibrary.org/trade/measuring-distortions-in-international-markets_8fe4491d-en).



The EU did not pick sides in this matter, but resorted to a strategy of ‘diversification’. It remained open to collaborating with all global partners, but it failed to reach a common position on safeguarding interoperability of the components of the semiconductor value chain. EU policymakers did not pay sufficient attention to the threats to interoperability. Without interoperable components, diversification of the industry was difficult, and would surely lead to fragmentation. The EU had focused mostly on developing European capabilities, as the EU member states could agree on the importance of owning critical chip technologies.<sup>6</sup> They thereby lost the momentum to raise an international ‘middleground’ coalition. By early 2024, every ‘internet region’ seemed to be ‘going it alone’ in developing emerging technology. The cost of this fragmented innovation landscape amounted to \$3.5 trillion globally in 5 years.<sup>7</sup> While Chinese industries took a hit from the 2020 American export controls, Beijing invested heavily in national capabilities to reduce China’s reliance on US tech.<sup>8</sup> These efforts were accompanied by investments in espionage operations to steal American intellectual property, and efforts to induce a brain drain of American and European experts. Chinese technology emerged as the cheaper option to build digital infrastructure, an option that was all the more enticing for developing countries whose alliance was sealed in the Belt and Road initiative.

The American focus on national security also fragmented the digital market on the

application layer. When the American ban against TikTok forced the Chinese company to sell the platform to an American company, it set a precedent for social media businesses to decouple their applications along regional lines.<sup>9</sup> Export controls on emerging technology often meant that not all functions of the platforms were sold in such transactions.<sup>10</sup> Europeans were stuck between using Chinese apps that would potentially jeopardise security and human rights, using American apps that would hardly comply with European efforts to protect democracy, and creating their own apps with decreased machine learning functionality. In a similar vein to the semiconductor value chain, the EU’s failure to take action to maintain application interoperability did not create the desired diversification, but fragmentation.

The EU member states could also not agree on a common position on where to take the Osaka Track on ‘Data Free Flow with Trust’ (DFFT) which was launched by Japan. After India, Indonesia and South Africa boycotted the Osaka negotiations in 2019, the project had been put on the back burner.<sup>11</sup> Most countries turned inwards to develop their own digital sovereignty policies. Trust between nations declined steadily over the years, making it unappealing for businesses to expand globally and potentially having to localise data. This lack of trust was cemented in EU initiatives such as Gaia X, which contributed to the creation of closed information ecosystems.

6 President of the European Commission Ursula Von der Leyen recognised this in her first speech in the European Parliament: [https://ec.europa.eu/commission/presscorner/detail/en/speech\\_19\\_6408](https://ec.europa.eu/commission/presscorner/detail/en/speech_19_6408).

7 This is an estimate made in a Deutsche Bank report: Apjit Walia, “The coming Tech Wall and the Covid dilemma”, 2020, [https://www.dbresearch.com/PROD/RPS\\_EN-PROD/PROD000000000507995/The\\_coming\\_Tech\\_Wall\\_and\\_the\\_covid\\_dilemma.pdf](https://www.dbresearch.com/PROD/RPS_EN-PROD/PROD000000000507995/The_coming_Tech_Wall_and_the_covid_dilemma.pdf).

8 Cheng Ting-Fang and Lauly Li, “China chipmakers speed up effort to cut reliance on US supplies”, *Nikkei Asia*, September 9, 2020, <https://asia.nikkei.com/Politics/International-relations/US-China-tensions/China-chipmakers-speed-up-effort-to-cut-reliance-on-US-supplies>.

9 Ana Swanson, Paul Mozur and Raymond Zhong, “Trump’s Attacks on TikTok and WeChat Could Further Fracture the Internet”, *New York Times*, August 17, 2020, <https://www.nytimes.com/2020/08/17/technology/trump-tiktok-wechat-ban.html>.

10 China updated its export controls to include Artificial Intelligence Technologies when it became clear that TikTok would be sold to an American company. See: Rita Liao, “TikTok parent ByteDance says it will ‘strictly follow’ China export controls”, *Techcrunch*, August 31, 2020, <https://techcrunch.com/2020/08/31/china-export-rules-complicate-tiktok-sale/>

11 Trisha Jalan, “India boycotts Osaka Track, says global talks on digital economy should be held within WTO”, *Medianama*, July 1, 2019, <https://www.medianama.com/2019/07/223-india-boycotts-osaka-track/>

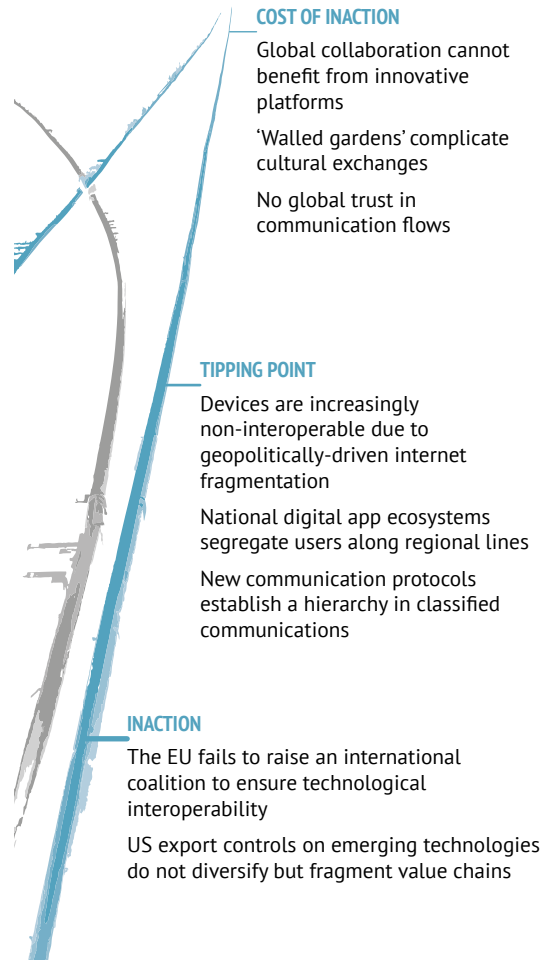
# BEYOND 2025: THE COST OF INACTION

While the internet's core infrastructure had not entirely fragmented, global communications had encountered several restrictions and barriers. The decoupling of apps and services along regional lines to comply with national regulations led to software interoperability issues, reducing effective collaboration in the globalised world. The Europeanised American apps created 'walled gardens' for European citizens, shutting them out of global conversations. The promise of innovative collaboration platforms was not fulfilled due to the myriad of national regulations on information flows, making them inoperable on a global scale. The era of global conversations on the World Wide Web had run up against severe obstacles.

The restrictions on American or Chinese social platforms did leave some space for decentralised communication platforms around the world. In many countries local culture that had been heavily influenced by globalisation blossomed anew and the 'walled gardens' had a significant impact on culture and society. In Europe the innovative pan-European Novaweb platform became dominant for European news distribution and community building.<sup>12</sup> EU activists and civil society organisations started organising 'cultural visits' to platforms around the world, sometimes through VPNs, encouraging cultural exchanges.

The EU also started to realise that it could not reduce internet fragmentation by relying on policy tools like EU regulation and 'soft' international collaboration. It needed to focus on solutions to restore trust in the global flow of data. The EU invested in academic research to develop an efficient encryption protocol that would withstand quantum cracking, of which the Chinese had become capable. This protocol would remove the security argument for American firewalled countries to let traffic pass through Chinese 5G equipment. It convinced several countries to

## Timeline



abandon the Clean Networks hierarchy which had not yielded the benefits they had hoped, and return to uniform communication protocols.

The internet has been a network of networks since its inception. The trend towards more decentralisation had not broken the internet, and a return to centralisation would surely have positive repercussions as the network effects from a global connected internet would prove to be invaluable in tackling global challenges such as climate change.

<sup>12</sup> Nathalie Van Raemdonck, "What if ... Europe created an international social/news platform?", in Florence Gaub, (ed.), "What if...? 14 Futures for 2024", *Chaillot Paper* no. 157, EUISS, January 2020, <https://www.iss.europa.eu/content/what-if-14-futures-2024>.

# DIPLOMATIC LETHARGY

## CHAPTER 5

# WHAT IF... THE EU DOES TOO LITTLE AGAINST CHINA'S DETENTION OF FOREIGN CITIZENS?

by

**ALICE EKMAN**

The author wishes to thank Cristina de Esperanza Picardo for the valuable brainstorming sessions and Sophie Reiss for her assistance in collecting data on Hong Kong.

## 2025: THE TIPPING POINT

In May 2025, the number of foreign nationals detained in China reached a record high of 746 individuals, among which 157 EU citizens. “How did we get to this stage?!” the High Representative of the Union for Foreign Affairs and Security Policy (HR/VP) laments to one of his advisers, throwing the list of names on his desk. On the eve of the 27th EU-China summit, EU representatives are confronted with the difficult choice of picking the most urgent cases to address in their consultations with their counterparts.

This long list is an illustration of the swift increase in the number of arrests of foreign nationals on Chinese territory – a trend that had been accelerating since Xi Jinping’s arrival to power in 2012 and that had further

consolidated following the 20<sup>th</sup> Party Congress held in 2022, which was marked by the extension of Xi’s presidency. The increase observed in 2022–2025 resulted from at least three main factors, which had started to emerge during Xi’s first decade in power.

## 2021-2025: INACTION

First of all, the introduction of new legislation, in the context of a hardening of the domestic political climate, had direct and far-reaching consequences: the Counter-Espionage Law and the National Security Law (2014 and 2015) had been followed by a surge in arbitrary detentions – Chinese citizens accounted for the majority of the arrests, but a small but increasing number of foreigners were also targeted. In 2015 alone,

China arrested more than 250 lawyers and activists, including EU nationals,<sup>1</sup> in a government campaign to crack down on human rights activism. Similar waves of arrests took place in the following years.<sup>2</sup> In broader terms, lawyers, but also academics, journalists, clergy and NGO workers had become constant targets of the Chinese authorities since 2022, even more so than before the 20<sup>th</sup> Party Congress. A general atmosphere of hostility towards foreigners had emerged among part of the Chinese Communist Party (CCP) membership (more than 100 million members in 2025)<sup>3</sup>, fuelled by Xi Jinping's calls to reinforce "mutual surveillance" at all levels of society, and to report suspicious foreigners.<sup>4</sup> As a result, more foreign citizens had been arrested on charges of espionage.

The legal context evolved significantly in mainland China but also in Hong Kong: the passing of the National Security Law in Hong Kong in June 2020 led to a marked increase in arrests of both locals and foreign nationals, and the issuance of arrest warrants for democracy activists based abroad, some with foreign/dual citizenship.<sup>5</sup> As street protests continued in Hong Kong for a record three full years (intensifying in 2021, the year of the Legislative Council election, and up to 2023), several dozen European citizens had been arrested in the city as of February 2025, many of whom had been subsequently

## Arrested!

Timeline of arrests and arrest warrants in Hong Kong (non-exhaustive list)

- Arrests and arrest warrants against local/foreign citizens
- Political calendar

- 06 Jan 2021
- 53 former lawmakers and democracy activists arrested under NSL
- 11 Dec 2020
- Jimmy Lai, pro-democracy media tycoon and UK citizenship holder, charged under NSL for 'conspiring with foreign forces to endanger national security', after being arrested in August
- 08 Dec 2020
- Hong Kong police arrest 8 more opposition figures, inc. Eddie Chu, Figo Chan, Wu Chi-wai
- 02 Dec 2020
- Joshua Wong, Agnes Chow and Ivan Lam jailed
- 18 Nov 2020
- Former pro-democracy lawmakers arrested
- 11 Nov 2020
- Pro-democracy lawmakers announce mass-resignation
- 01 Nov 2020
- Eight pro-democracy politicians arrested over heated meeting
- 16 Oct 2020
- Arrest warrants issued for Nathan Law and Sunny Cheung (located in the UK) and Samuel Chu (US citizen and resident) and 23 other opposition figures over 'unauthorised assembly'
- 24 Sep 2020
- Activist and politician Joshua Wong arrested for 2019 'illegal assembly'
- 15 Sep 2020
- Twelve Hong Kong activists who fled by boat for Taiwan held in 'criminal detention' by China (10 of them will be sentenced to prison by a Shenzhen court in Dec.)
- 06 Sep 2020
- Original date of Legislative Council elections (postponed to 5 Sep 2021)
- 01 Aug 2020
- Hong Kong issues arrest warrants for six overseas-based democracy activists, alleged to have breached the NSL
- 31 Jul 2020
- Announcement to postpone Legislative Council elections, justified with Covid-19 restrictions
- 29 Jul 2020
- Four students arrested for 'inciting secession'
- 08 Jul 2020
- Beijing security office opens in Hong Kong
- 01 Jul 2020
- Hundreds arrested during protests
- 30 Jun 2020
- National Security Law comes into effect
- 28 May 2020
- National Security Law (NSL) adopted by China's National People's Congress
- 24 Apr 2020
- China prosecutes first foreign national over Hong Kong protests (Belizean national and Taiwan resident Lee Henley Hu Xiang)
- 18 Apr 2020
- High-profile pro-democracy activists arrested
- 25 Feb 2020
- Hong Kong bookseller and Swedish citizen Gui Minhai sentenced to ten years in prison
- 24 Nov 2019
- District Council Elections

Data: Hong Kong government websites, BBC, The Guardian, Hong Kong Free Press, South China Morning Post, Xinhua News Agency, New York Times, Süddeutsche Zeitung

- 1 The Swedish activist Peter Dahlin was then detained in China on charges of damaging national security. See "China releases Swedish activist Peter Dahlin", BBC News, January 26, 2016, <https://www.bbc.com/news/world-asia-china-35406911>.
- 2 For instance, the UN Working Group on Enforced or Involuntary Disappearances sought information on 20 new cases of enforced disappearances in China that occurred in the space of a few months, from February to May 2019.
- 3 Estimation based on the fact that the Party had nearly 92 million members as of June 2020, according to official figures (Xinhua, 30 June 2020), and continues to recruit extensively (more than 2 million per year).
- 4 For instance, an awareness campaign was launched in 2017, with cash (\$72,000) rewards for information on foreign spies. "Beijing offers hefty cash reward for spy tip-offs", BBC News, April 10, 2017, <https://www.bbc.com/news/world-asia-china-39550673>; [https://www.chinadaily.com.cn/china/2017-04/10/content\\_28859090.htm](https://www.chinadaily.com.cn/china/2017-04/10/content_28859090.htm).
- 5 From July 2020, arrest warrants started to be issued for Hong Kong democracy activists. "Arrest warrants issued for six Hong Kong democracy activists: CCTV", Reuters, July 31, 2020, <https://www.reuters.com/article/us-hongkong-security-exiles/arrest-warrants-issued-for-six-hong-kong-democracy-activists-cctv-idUSKCN24W2FB>.

extradited to mainland China and jailed in Beijing. Waves of crackdowns on “western hostile forces” became more frequent, fuelled by CPC suspicion of foreigners’ intentions to “manipulate” the local Hong Kong population.

Secondly, 2025 marked 11 years since the beginning of the ‘Fox Hunt’ campaign that aimed at repatriating senior Party cadres and officials who had left the country – many fearing the Central Commission for Discipline Inspection and its strict investigations. As the Chinese leadership constantly launched new political and disciplinary campaigns under the broad ‘anti-corruption’ label, the Fox Hunt intensified and became more widespread globally. By 2025, the CPC had *captured* abroad, in various ways, both legal (such as extradition) and illegal (such as forced repatriation by undercover police officers), over 15,000 fugitives living in 122 countries.<sup>6</sup> Some of these fugitives or their relatives, originally Chinese nationals, were foreign passport holders.<sup>7</sup> The practice of detaining relatives increased: several wives and children of fugitive officials were arrested in China in an attempt to put pressure on the targeted individuals – while relatives who were released were often banned from exiting Chinese territory, even if they were foreign passport holders.<sup>8</sup>

Thirdly, the acute trade and technological tensions between Beijing and Washington impacted the situation of citizens from both countries, but also from third countries. Already in 2018, two Canadian citizens, Michael Kovrig and Michael Spavor, were arrested in retaliation for the arrest of Meng Wanzhou – nine days after the Huawei executive had been detained and after the Chinese Embassy in Canada threatened Ottawa with serious consequences as

a result. Since then, tit-for-tat arrests became more frequent, not only in retaliation for the detention of Chinese citizens, but also for positions taken by foreign governments considered hostile by the Chinese authorities. In general terms, China-based citizens and businesses from countries who were currently experiencing diplomatic tensions with China were all likely to be targeted and considered as potential bargaining chips. In 2020–2022, arrests of Australian<sup>9</sup> as well as Swedish citizens had increased as diplomatic relations between China and the two countries had worsened. In addition to Sweden, an increasing number of EU member states started experiencing strained relations with China (due to frictions over Hong Kong, Xinjiang or the South China Sea) and new cases of arrests of European citizens emerged in this context.

Overall, the evolving legal context coupled with a tightening of Party discipline and an increasingly tense geopolitical climate meant that EU citizens felt more and more vulnerable on Chinese territory – and on EU territory in some instances (e.g. members of the Uighur community, EU citizens of Chinese origin targeted as part of the ‘Fox Hunt’, etc). These developments took many governments by surprise, and very few were able to design a coordinated defensive strategy in time.

The EU itself did not remain inactive with regard to the issue. Since 2019, Brussels had launched preparatory work for a global sanctions regime to address human rights violations. This regime was adopted in December 2020<sup>10</sup> and provided for the first time a framework allowing the EU to target in various ways (imposing travel bans, freezing of funds) individuals and entities responsible for, or associated with, serious

<sup>6</sup> In 2015, 738 fugitive suspects were captured overseas in the framework of the “fox hunt”, and as of October 2017, “the Sky Net operation has tracked down over 3,000 fugitives from 90 countries”, according to the state-owned media *Global Times*: <http://www.globaltimes.cn/content/962324.shtml>; <https://www.globaltimes.cn/content/1070724.shtml>.

<sup>7</sup> They had renounced their Chinese citizenship – dual citizenship being forbidden by the PRC.

<sup>8</sup> The practice of detaining relatives already emerged in the years 2012–2020: for instance, Sandra Han (a US citizen) – the wife of a former executive of a state-owned bank – was detained during a trip to China and her children (also US citizens) were prevented from leaving China.

<sup>9</sup> For instance, Cheng Lei, an Australian citizen working for Chinese state-owned media CCTV, was detained in September 2020.

<sup>10</sup> Council of the EU, “EU adopts a global human rights sanctions regime”, December 7, 2020, <https://www.consilium.europa.eu/en/press/press-releases/2020/12/07/eu-adopts-a-global-human-rights-sanctions-regime/#>

human rights violations, no matter where they occurred. Although the adoption of this regime led to the issuance of sanctions against certain Chinese individuals and entities, it did not lead in concrete terms to the release of EU citizens arbitrarily detained in China.

Since 2019, the EU had also voiced its concerns about the detention of foreign nationals by China,<sup>11</sup> sometimes issuing joint statements with other (both EU and non-EU) countries.<sup>12</sup> Although these communication efforts had an impact, they alone were not sufficient to lead to the release of the detained individuals.

Some EU member states proposed imposing sanctions on China as long as arbitrarily detained citizens were not released, but this proposal did not meet with consensus and was therefore not adopted at EU level before 2025. A minority of EU member states nevertheless decided to push ahead with the implementation of sanctions, but with overall limited impact given the lack of coordination.

## BEYOND 2025: THE COST OF INACTION

By 2025, afraid of being detained or subjected to intimidation, a large number of European citizens, businesses and institutions previously based in China had left the country.<sup>13</sup> This trend had accelerated in the wake of the coronavirus crisis, which had revealed to many European business actors their dependency on Chinese markets, and the constraints on their access to Chinese territory in times of crisis. In addition

to the decrease in the number of foreign citizens living in China, the number of foreign visitors to China also fell significantly – after the UK and the US in 2020,<sup>14</sup> many EU member states updated their travel recommendations to warn their citizens of the risk of arbitrary arrest in China. This situation led to costly consequences for Europe. First of all, access to information in China became more difficult, as the number of European journalists, researchers, NGO and business representatives present in mainland China and Hong Kong dropped sharply. Secondly, on the diplomatic front, negotiation attempts for the release of European citizens became more pressing and urgent, and started to monopolise EU–China official exchanges and in some instances weaken the EU's negotiating leverage with China on other issues, including trade and investment.

Since 2025, a series of actions had been taken at EU level to reverse this trend as much as possible. A first move was to adopt a 'Solidarity Action Plan' among EU member states in the event of arbitrary detention of its citizens abroad: it stipulates that EU member states do not only raise the case of their own citizens when exchanging with the Chinese authorities, but also the cases of citizens from other EU member states. Transmission of real-time information was progressively facilitated by the constant update and dispatch by Brussels to member states' capitals of the comprehensive list of EU citizens concerned, and information on the latest state of play. At the same time, an even stronger role was attributed to the EU delegation in Beijing in coordinating joint solidarity actions and joint contingency planning on this matter among member states' embassies and consulates based on Chinese territory. This move was prompted by shared observations

11 "Remarks by President Charles Michel after the EU–China's meeting via video conference", September 14, 2020, <https://www.consilium.europa.eu/es/press/press-releases/2020/09/14/remarks-by-president-charles-michel-after-the-eu-china-leaders-meeting-via-video-conference/>

12 Joint press release by the EU and Canada on 10 September 2020: [https://eeas.europa.eu/headquarters/headquarters-homepage\\_en/84921/joint%20press%20release%20following%20the%20European%20Union-Canada%20Ministerial%20Meeting](https://eeas.europa.eu/headquarters/headquarters-homepage_en/84921/joint%20press%20release%20following%20the%20European%20Union-Canada%20Ministerial%20Meeting).

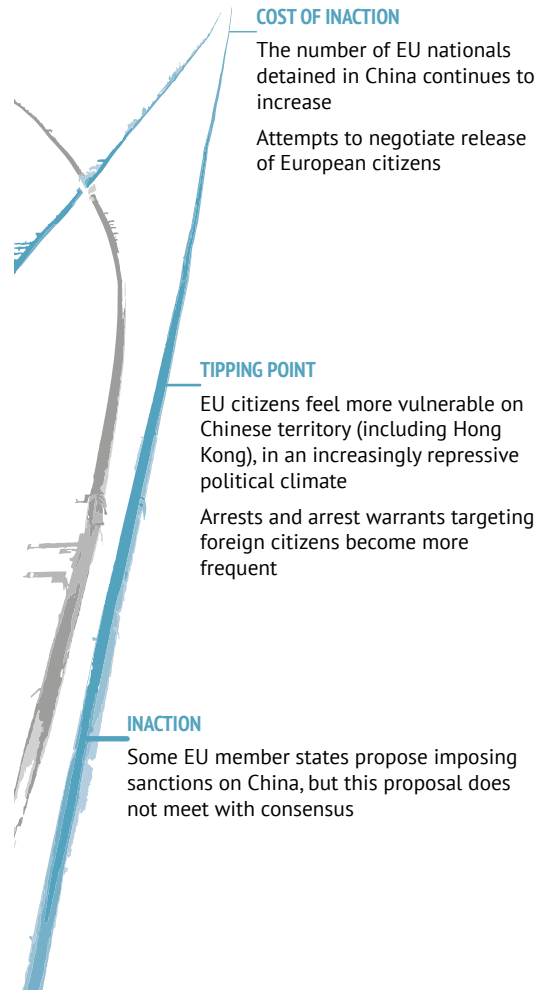
13 In 2020, *The New York Times* moved part of its Hong Kong Bureau to Korea. See: <https://www.theguardian.com/world/2020/jul/15/new-york-times-moves-staff-out-of-hong-kong-amid-press-freedom-fears>.

14 "US and UK warn travellers of risk of arbitrary arrest in China and Hong Kong", *The Guardian*, September 15, 2020, [https://www.theguardian.com/uk-news/2020/sep/15/us-and-uk-update-travel-advice-to-china-and-hong-kong?CMP=Share\\_AndroidApp\\_Other](https://www.theguardian.com/uk-news/2020/sep/15/us-and-uk-update-travel-advice-to-china-and-hong-kong?CMP=Share_AndroidApp_Other).



among member states that explicitly addressing specific cases at the highest official level often had an impact (improvement in the detention conditions of the citizen, or even release from custody), but that coordinated communication was often more efficient, in particular if timed strategically (prior key visits, negotiations, etc.). Most importantly, a second initiative was to jointly identify red lines and modalities for the strict implementation of EU sanctions in retaliation for arbitrary cases of detention. This process led to a more comprehensive and coordinated set of EU actions to defend the rights and security of EU citizens in third countries.

## Timeline





## CHAPTER 6

# WHAT IF... THE EU DOES NOT MAKE USE OF FOREST PROTECTION CONDITIONALITY?

by  
**CLARA PORTELA**

The author wishes to thank Dr. Carola Kloeck for comments on an earlier version of this text.  
NB: Characters and situations described are fictional. Deforestation is real.

## 2025: THE TIPPING POINT

*Even the European Union could do it.* These words had haunted Raoul since he listened to the news that morning. He had the feeling that the coffee he had just grabbed at the cafeteria was causing him indigestion. In fact, he was unable to distinguish whether his malaise was caused by the dark liquid or if it was the phrase that was haunting him. *Even the European Union could do it. Even the European Union could do it.* These words uncomfortably reappeared in his mind like a strobe light in a night club from the old days. The phone rang at that very moment:

“The Director General would like to see you” – Arnoud’s familiar, secretarial voice said. “He is summoning a few heads of unit.”

“Is the meeting about the deforestation crisis?” – Raoul inquired.

“What do you think, Raoul?” – Arnoud answered. “I take it you listened to the news this morning? Please report at noon.”

“That is, if I manage to cross Rue de la Loi in spite of the Youth against Drought demonstration. I think I’ll pop over via the secret tunnel. Please email me the code.”

“No wonder the director called an emergency meeting”, Raoul thought to himself. The radio had announced today that one quarter of the rainforests in Indonesia, Brazil and the Democratic Republic of Congo had turned into scrubland due to deforestation. Citing an authoritative report by the UN Environmental Programme, the presenter had referred to it as the “tipping point” for forest conservation, because the declining vegetation had changed the climate, making it unsuitable for the formerly

prevailing tree species. Now that about half of the forest was gone, the rest was bound to disappear comparatively quickly.<sup>1</sup>

After hanging up the phone, Raoul looked at his empty coffee cup. The *Rainforest Alliance* logo was printed on its surface. Raoul half-smiled, bitterly. “Rainforest? *What* rainforest?”, he thought to himself. The draft report had landed on his desk two weeks before, but he was hoping that the Director General would not remember his involvement in making that decision, just a few years back. He buried his head in his hands in despair. As soon as he closed his eyes, the figures of Audrone and Theodosia, members of the team he used to lead, reappeared in front of him, as if their ghosts had just entered the room.

## 2021-2025: INACTION

“I have reservations about this proposal for the introduction of forest protection conditionality, Theodosia”, claimed Raoul.

For most of their meeting, Theodosia had been insisting that a conditionality clause requiring a freeze on deforestation had to be inserted in all external agreements to be concluded by the EU.

“We already have plenty of conditionality provisions in our external agreements: human rights and democracy, terrorism, weapons of mass destruction ... Do we need really one

more? Forest management is already part of the Forest Law Enforcement Governance and Trade (FLEGT) scheme.<sup>2</sup> Plus trade preferences under the Generalised Scheme of Preferences (GSP)<sup>3</sup> features environmental conditionality”, argued Audrone.

“Certainly”, conceded Theodosia, “but we do not have more than sixteen FLEGT partners. And FLEGT addresses illegal logging, not deforestation. Where state authorities allow deforestation legally, FLEGT does not suffice.”<sup>4</sup> “As for the GSP”, she continued, “there are only nine GSP+ beneficiaries which have an obligation to implement environmental conventions.<sup>5</sup> In order to halt deforestation, we need to condition trade and cooperation on effective action by all possible partners.”

“What about the trade and sustainable development chapters (TSD) in new-generation free trade agreements?” Audrone asked.

“They are not enforceable”, Theodosia replied. “And again, they only concern a handful of partners”.

“But is conditionality going to help? Foreign governments do not like it. You saw what happened with the WMD clause – it merely requires partners to implement commitments already entered into.<sup>6</sup> Is it worth risking tensions over such a requirement?”, asked Audrone.

“To support Audrone’s point”, interrupted Jarmila, “such conditionality could create a problem of inconsistency. Some partners have forests and suffer deforestation, others do not. And when it comes to activating the clause, will we be ready to suspend important partners? We

1 Jakub Nowosad and Tomasz Stepinski, “Stochastic empirically informed model of landscape dynamics and its application to deforestation dynamics”, *Geophysical Research Letters*, vol. 46, no. 23, 2019.

2 EU FLEGT Facility, <http://www.euflegt.efi.int/vpa>

3 Regulation (EU) No 978/2012 of the European Parliament and of the Council of 25 October 2012 applying a scheme of generalised tariff preferences and repealing Council Regulation (EC) No 732/2008, *OJ L* 303, October 31, 2012, pp. 1–82.

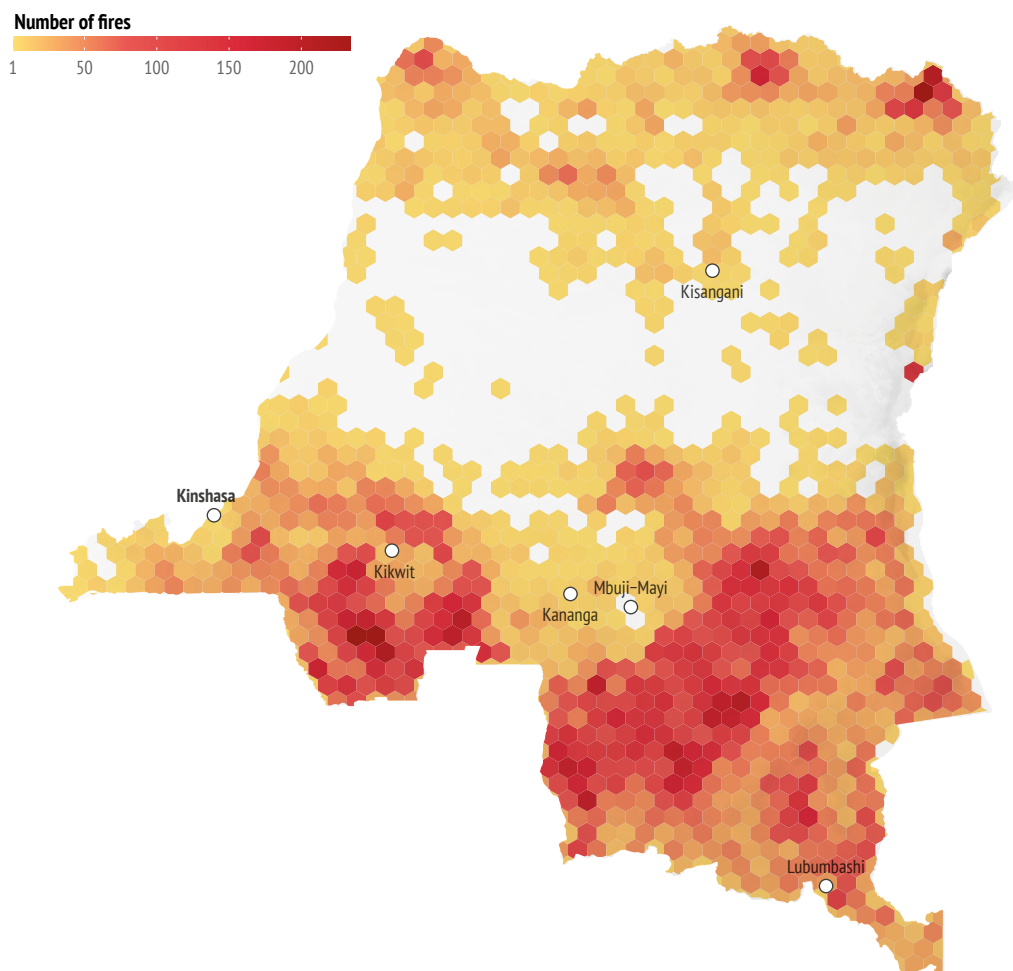
4 Marjolein Derous, “The EU and the ‘problem’ of Illegal Logging : The Case of the EU–Malaysia VPA”, *European Foreign Affairs Review*, vol. 24, no. 3, 2019, pp. 327–48.

5 Clara Portela, “Trade preference suspensions as economic sanctions”, in Peter Van Bergeijk and Gina Ledda (eds.), *Research Handbook on Economic Sanctions* (Cheltenham: Edward Elgar, forthcoming).

6 Lina Grip, “The Performance of the EU in External Nuclear Non-proliferation Assistance”, in S. Blavoukos et al., (eds.) *The EU and the Non-Proliferation of Nuclear Weapons* (Basingstoke: Palgrave MacMillan, 2015), pp. 117–40.

## Forest fires in the Congo

Jan-Dec 2019



Data: NASA MODIS, 2019; Natural Earth, 2020; GADM, 2020

would face accusations of inconsistency, to the detriment of our reputation.”

“But we happen to have a global reputation for being environmental champions. Parliament would be supportive, I am sure”, countered Theodosia. “And if you look at what experts have been saying about stopping environmental deterioration, the EU is explicitly identified as a candidate for leadership. Look at this”, she said while pointing to one of the articles

she carried in her folder: “it literally says that this ‘is something *even the European Union could do*’.”<sup>7</sup>

As Theodosia observed the impassive faces of her colleagues looking at her coldly, some of them with a clear expression of displeasure, she rushed to add: “You guys are talking about the sanctions of the past. But we are *beyond* country suspensions. The trend is towards black-listing companies – haven’t you heard about

<sup>7</sup> Edoardo Saravalle, “Why world leaders should impose green sanctions”, *Financial Times*, August 8, 2019. Emphasis added by author.

our sanctions regime against drilling in the Mediterranean? It designates chief executives, not states.<sup>8</sup> Our targets need not be country economies or governments. Instead, we ought to target companies, as they are the ones making decisions that affect the environment.<sup>9</sup> We can follow a two-pronged strategy: we bring governments on board by conditioning trade and co-operation to compliance with the Paris Agreement. Concurrently, we can threaten to ban transactions with companies responsible for serious environmental damage. Expert opinions will be on our side!”

“We have had enough of expert opinions”, Jaroslav complained when Raoul solicited views from the team. “Above all”, added Laif, “is the fact that member states will not agree to strengthen conditionality.”

“We are a political institution facing a geopolitical era”, added Jarmila, “environmental norms cannot take centre-stage.”

“I hear you, Theodosia,” Raoul concluded, “but this is not an issue where we can invest our political capital in the present climate.”

“Up to you, Raoul – but the climate is only going to worsen if we do not act now”, Theodosia replied with unconcealed disappointment.

## BEYOND 2025: THE COST OF INACTION

When Raoul reached the meeting room, participants were seated. The Director General started the meeting in the midst of a gloomy atmosphere. Everybody knew what was coming. She reported the news that had broken that morning regarding the destruction of one quarter of the world’s rainforests, which she described as

a “figure that should have never been reached”. With a severe expression on her face, Amandine went on to announce: “We are now moving to an extremely serious situation in which the most robust measures are required. We are going to condition our cooperation and preferential trade relations on the effective combating of deforestation. This will be coupled with the setting up of a CFSP horizontal sanctions regime for serious violations of environmental standards. This will be accompanied by a massive reforestation programme, which hopefully will bring back the tree population level we had in 2020. I want you to prepare the inclusion of ‘green conditionality clauses’ in our external agreements. Also, start working on identifying companies responsible for the most severe instances of global deforestation.”

“Shall we not discuss the pertinence of these measures first, Amandine?” – inquired one, timidly.

“It is too late for that, Radek. The next European Council will announce the package next week. Our leaders are unhappy about us having allowed the deforestation rate to peak like this – and about civil society and the European Parliament being up in arms, not to speak about their parliaments back home. They wonder why we did not take more drastic action earlier”. After a pause, she looked at Raoul. “Honestly, Raoul, I also keep wondering why your unit did not table any proposal to address this”. Images of the 2019 fires in Amazonia a few years back, and of hundreds of hectares of Cambodian forests that had fallen prey to speculators in 2020, returned to her mind.

Raoul shrugged uncomfortably, muttering:

“Oh, I actually intended to. I did propose a package along these lines...but the team was not really supportive. We ... well, they worried about the possible impact on our relations with partners ... plus we already had other instruments

<sup>8</sup> Council of the European Union, *Council Decision (CFSP) 2019/1894 concerning restrictive measures in view of Turkey’s unauthorised drilling activities in the Eastern Mediterranean*, Brussels, November 11, 2019.

<sup>9</sup> Nicholas Mulder, “Can ‘climate sanctions’ save the planet?”, *The Nation*, November 18, 2019.

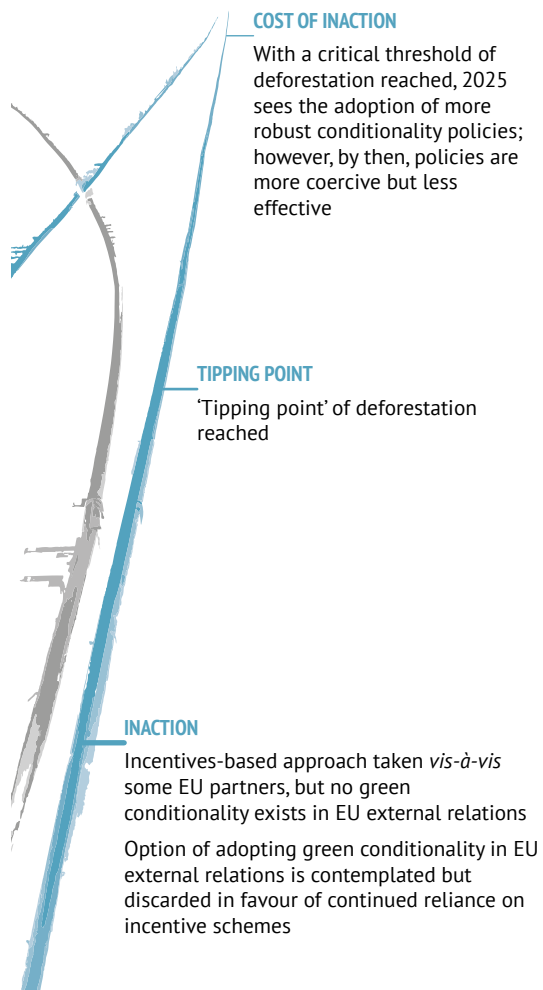
in place, like FLEGT and GSP+ conditionality ... and there is the question of actually suspending partners, which is always a difficult decision to make ... In short, they worried about political costs. So I could not really bring the team on board”, he concluded, frightened.

“You could not bring the team on board because they worried about costs, Raoul?”, Amandine exclaimed in awe. “With deforestation rates approaching 20%, you worried about costs? Now that the 20% has been overstepped, we do not even know if reforestation is going to work. When rain falls on the rainforest, most of the moisture returns to the atmosphere. But when the forest is destroyed, more than half of the rainwater runs off. With declining moisture and warming climate, it swiftly turns into scrubland, basically the ‘savannisation’ of the rainforest.<sup>10</sup> What we have to do is nothing less than reverse that process. Do you have an *idea* of the costs that adopting this package is going to have now?”

“Certainly...That is why I kept telling them that this was something *even the European Union could do*”, replied Raoul.

“That is wrong, Raoul. This was something *only the European Union could have done*.”

## Timeline



<sup>10</sup> Thomas Lovejoy and Carlos Nobre, “Amazon tipping point”, *Science Advances*, vol. 4, no. 2, 2018.

## CHAPTER 7

# WHAT IF... THE EU FAILS TO PROMOTE DEMOCRACY IN GEORGIA?

by  
**SINIKUKKA SAARI**

## 2025: THE TIPPING POINT

In the first week of July 2025, the body of a well-known Georgian democracy activist and journalist, Davit Gogoladze,<sup>1</sup> was found in the Mtatsminda forest in Tbilisi. He had been shot four times and all evidence at the scene suggested that this had been a brutal, politically motivated killing. Gogoladze's reports on the ruling elite's abuse of power and the widespread fraud during the 2024 parliamentary elections had attracted much attention both in Georgia and abroad. Following the murder of Gogoladze, a sea of candles and flowers was laid at the entrance of the Parliament on Rustaveli Avenue.

A foreign TV network interviewed a 26-year woman lighting a candle in front of the building: "I am so tired of this corrupt and undemocratic country. They keep on criticising and hounding Misha (Saakashvili) but they do much worse things than him. And, come on, Misha hasn't even been around for ages. I was only

a kid when he left Georgia so I really don't care about him and his past sins."

She continued: "I remember how we all protested together against policy brutality when they raided the Bassiani club in 2018, and then in 2019 to ensure a fair electoral process in this country. Looking back, we were all so full of hope back then. We really believed that we could change the system. I feel like the EU has abandoned civil society here and Brussels hasn't really defended us against our corrupt government. Now there is hardly anyone left; most of my friends have left the country. If it were not for my sick grandmother, I would have left Georgia, too. It's all going downhill and I feel like I'm wasting my life here."

Three months later, an independent investigation concluded that Gogoladze had been murdered by a hitman from Pankisi. Before the killing, he had been in contact with a Georgian businessman, who was known to be close to several government ministers. It turned out that the suspected assassin had been allowed to leave the country and travel to Russia after

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<sup>1</sup> Davit Gogoladze is a fictional character created for this scenario.

the personal intervention of the interior minister – pointing to his involvement in (or at least a cover-up of) the assassination. After the news broke on a popular internet media outlet, protesters took to the streets of Tbilisi once again. Soon enough, a gang of *zonderebi*-style thugs appeared and began to assault the demonstrators.

It seemed that undemocratic elements that had been gaining strength over the past five years in Georgia were now turning increasingly violent. As a response to the violence, there was also growing support within EU member states to apply the EU Magnitsky Act – that had been adopted in 2021 – and impose sanctions on the individuals responsible. Despite this – or perhaps of because of it – many activists and members of the public both in Georgia and the EU expressed unhappiness with the Union's overall strategy of democracy promotion in the Eastern Partnership (EaP) states: why did the EU always need to wait until things had gotten out of hand before it started to defend democratic rights?

More and more civil society activists argued that, while the EU was naturally not to be blamed for the establishment of an oligarchic one-party-dominated state and the violence in Georgia, it should have acted earlier through political dialogue and diplomatic engagement. Sustained high-level EU pressure – in close coordination with key partners such as the US – on the Georgian government could have made a difference.<sup>2</sup> In the predatory post-Soviet context, pro-democracy rhetoric and so-called technical assistance to local NGOs needed to be backed by a sustained political commitment and engagement to promote democracy, they argued.

## 2020-2025: INACTION

The Georgian parliamentary elections were held amidst the Covid-19 pandemic on 31 October 2020. The Georgian Dream (GD) party received 48.15 % of the vote in elections that were deemed “far from perfect” by international observers.<sup>3</sup> Hence, even with the new electoral code approved in 2020, GD gained a majority in the parliament. Opposition parties obtained a handful of seats but were unable to challenge the dominance of the ruling party. After the elections, protests took place but died out gradually. The unity among opposition parties began to fragment as rumours about *agents provocateurs* infiltrating the opposition ranks began to circulate during 2021.

After the parliamentary elections, the ruling party's grab for administrative resources and desire to control the media, as well as the politicisation of the judiciary, became more aggressive. Some earlier democracy-enhancing decisions were reversed by the leadership: for instance, in 2023 the election code was changed again in a manner that favoured the ruling party, practically preventing the election of any significant opposition in the 2024 elections. The use of state resources to back the ruling party's position became more brazen by the day. As a result of these changes, Georgia's ranking in the Economist Intelligence Unit's Democracy Index fell from 5.45 in 2019 to 4.13 in 2025. This meant that the country ranked just above the ‘authoritarian regime’ category; Georgia was still a ‘hybrid regime’, but only just.<sup>4</sup>

Although civil society remained active in the country, it had a much reduced impact on

2 Andrew Wilson, “Lessons from Belarus: How the EU can support clean elections in Moldova and Georgia?”, *ECFR Policy Brief*, September 17, 2020, [https://www.ecfr.eu/publications/summary/lessons\\_from\\_belarus\\_how\\_eu\\_can\\_support\\_clean\\_elections\\_in\\_moldova\\_georgia](https://www.ecfr.eu/publications/summary/lessons_from_belarus_how_eu_can_support_clean_elections_in_moldova_georgia).

3 “Georgian Opposition Party Calls Elections ‘Unfair,’ Refuses Second-Round Participation”, *RFE/RL*, November 2, 2020, <https://www.rferl.org/a/georgian-opposition-party-calls-elections-unfair-refuses-second-round-participation/30925995.html>.

4 The EIU's democracy index is based on evaluation of electoral processes and pluralism; the functioning of government; political participation; political culture; and civil liberties. Based on the scores in these categories, each country is classified as one of four types of regime: full democracy, flawed democracy, hybrid regime or ‘authoritarian regime’. 48.4% of people in the world lived in a democracy of a sort (full or flawed) in 2019. See: EIU, *Democracy Index 2019, 2020*, <https://www.eiu.com/topic/democracy-index..>



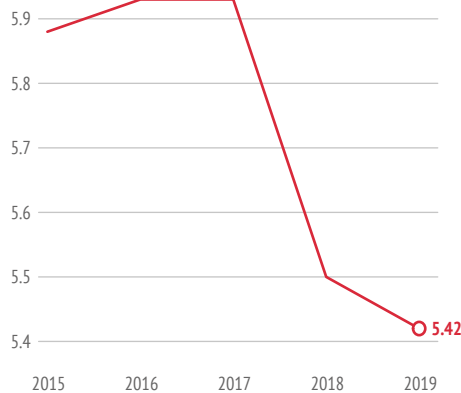
Georgian public life. As non-transparency became the norm in politics, it became harder to influence political processes. Part of this was to do with rapidly deteriorating press freedom: there were a growing number of reports of harassment of journalists and one of the few opposition TV channels, *Mtavari*, was shut down due to ‘financial irregularities’ in November 2023.<sup>5</sup> Furthermore, bleak employment prospects at home led to an increasing number of young well-educated Georgians – a group that had been very active in organising and participating in earlier protests – leaving the country in search of better opportunities.<sup>6</sup>

The EU response was weak and the Union failed to link its technical assistance with a more comprehensive foreign policy strategy: for example, it did not create linkages between EU funding for infrastructure or economic support and the requirement to uphold democratic norms and respect for civil society and media freedom.<sup>7</sup> In other words, the Union did not match the rhetorical support it offered to civil society and democracy promotion with deeds. Indeed, financial assistance to civil society is rarely in itself enough to make a difference, and it was clear in this case that it needed to be backed by proactive high-level diplomacy.<sup>8</sup>

The EU failed to act strategically when it could have had an impact on developments in Georgia. The failure likely resulted from two factors: first, the US had become less active in democracy promotion and in the region overall; second, there had not been a single major event that caused a sudden rupture in democratic development but rather gradual strengthening of anti-democratic measures by the government.

### Democracy index

Georgia, 2015–2019, 0 = lowest, 10 = highest



Data: Economist Intelligence Unit, 2019

As had been the case in other countries in the past, the EU mainly acted *post-factum*, when undemocratic developments had already led to a series of violent incidents. Despite a partial acknowledgement of this weakness and increased attention paid to the gap between the EU's resources in Eastern Partnership (EaP) states and

its political impact, the Union was not able to translate its vision into concrete policies in Georgia. Although the EU was an important trading partner, the biggest provider of financial assistance and maintained a significant footprint in Georgia, it failed to link democracy issues to the political levers it could wield in the country.

5 “Georgia’s independent TV channels allege state pressure”, *AFP*, December 14, 2019, <https://www.rfi.fr/en/wires/20191204-georgias-independent-tv-channels-allege-state-pressure>.

6 Shota Kincha, “Georgia’s youth protesters lead 2020’s political showdown”, *Global Voices*, March 2, 2020, <https://globalvoices.org/2020/03/02/georgias-youth-protesters-at-the-forefront-of-a-political-showdown/>.

7 On this point, see: Richard Youngs, “New Directions for EU Civil Society Support: Lessons from Turkey, the Western Balkans, and Eastern Europe”, *Working Paper*, Carnegie Europe, February, 2020, pp. 19–20.

8 A good example of this dates back in November 2019, when the US Embassy and the EU Delegation in Tbilisi were actively engaged in negotiations to break the deadlock between the government and opposition on the new electoral code and shift towards a more proportional system.

## BEYOND 2025: THE COST OF INACTION

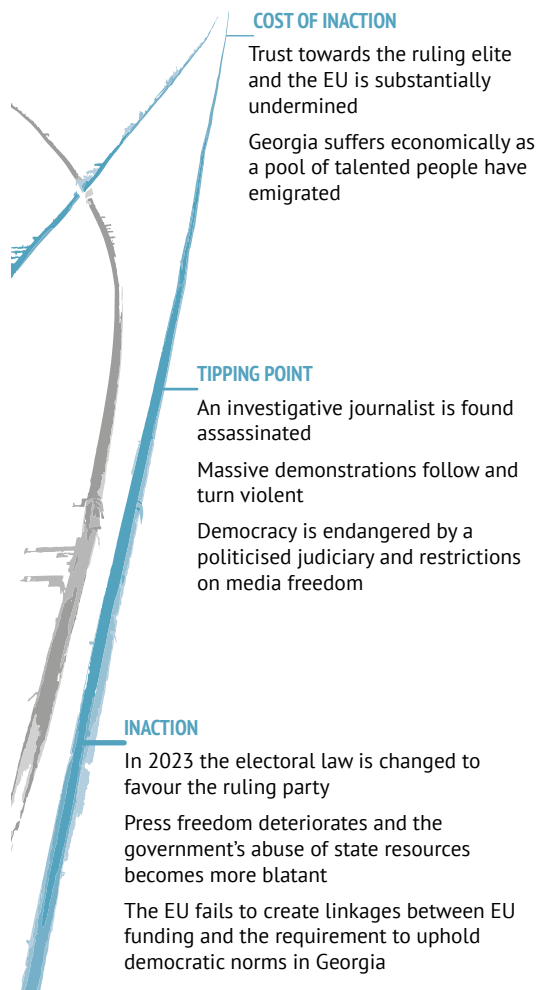
After Gogoladze's assassination, democracy activists grew increasingly desperate in Georgia. This led some activists to envisage a new and a more controversial strategy for defending their rights and political freedoms. Instead of employing methods of peaceful resistance and getting repeatedly beaten up by *zonderebi*-style provocateurs in response, they developed 'violent-when-provoked' resistance models and equipped themselves with stones, baseball bats and other weapons. This escalation was met with even more repression by the authorities and led to a rapidly expanding cycle of violence in Georgia.

The violent demonstrations also spread from Tbilisi to the second biggest city, Batumi, on the Black Sea. In Batumi, police violence quickly fuelled the flames of suppressed Adjarian particularism. The situation in the country seemed to be spiralling out of the government's control. Although Russia was not directly to blame for the undemocratic turn of events in Georgia, it was quick to take advantage of the political upheaval in the country by exacerbating internal divisions. For instance, there was growing evidence which supported the claim that Russian actors were funding secessionist forces in Adjara.

In the face of the growing violence and instability, the EU was called on to provide assistance and help to Georgia. At the same time, many claimed that the EU's inaction had indirectly encouraged the logic of violent activism: it seemed to be the only way to get the EU to pay attention to the negative changes taking place in the country and take action to counter them.

This criticism and feeling of being trapped in a never-ending 'time loop' in EaP countries<sup>9</sup> pushed the EU to launch an internal reflection

### Timeline



on the Union's democracy promotion priorities in the neighbourhood in 2026. The review concluded that as a strategic international actor, the EU should be able to detect and act *before* undemocratic developments spin out of control and violence occurs in its neighbourhood. In a similar manner to the 'Strategic Compass' for security, this document aimed to distil and strengthen a common vision on democracy promotion. The EU outlined different levers

<sup>9</sup> Ander Wilson, "Russia and its post-Soviet 'frenemies': Breaking free from the post-Soviet time loop?", in Sinikukka Saari and Stanislav Secieru (eds.), "Russian Futures 2030: The shape of things to come", *Chaillot Paper* no. 159, EU Institute for Security Studies, September 2020.

and measures at the Union's disposal to help in the practical implementation of its foreign policy goal of democracy promotion. Based on the document, the EEAS conducted a training programme for all heads and deputy heads of EU Delegations on how to conduct pro-active

and sustained democracy diplomacy. After all, a proactive strategy against undemocratic measures was more effective, more humane – and cheaper economically and politically – than *post-factum* engagement.

## CHAPTER 8

# WHAT IF... RUSSIA FAILS TO ACT AGAINST THE HIV/AIDS EPIDEMIC?

by  
STANISLAV SECRIERU

## 2025: THE TIPPING POINT

The most popular vlogger in Russia – Yuri Dud – has just uploaded a new documentary on YouTube. He opens his message to some 12 million followers with: “Hi guys! This channel has strived to uncover and make you aware of issues which our society shies away from discussing. Exactly five years ago, we talked about the spread of HIV in Russia. But since then the situation has only become worse. Our message, as well as the alerts of the World Health Organisation, about the risk of a large HIV epidemic in Russia went unheeded. As a result, today this virus is one of the major threats to public health in our country. And that’s why we decided to make this sequel.”

Usually apolitical and restrained, Dud does not mince his words this time. The narrator continues: “Unfortunately, in 2020 as a reaction to the documentary some officials resorted to mathematical equations rather than to tackling the epidemic. They rushed to demonstrate that there was no HIV epidemic in Russia because the number of officially registered cases had not surpassed 1% of the population.<sup>1</sup> While playing semantic games, they failed to mention that according to UNAIDS it is still considered an epidemic albeit a low-level one. Now, with 14.3 million people living in Russia<sup>2</sup> and 1.6 million active confirmed cases, excluding those who have died since 1987, we are officially in the midst of a generalised epidemic<sup>3</sup>. If, however, we consider that in addition to this there are up to half a million infected who have not yet been diagnosed,<sup>4</sup> then the number of total active HIV/AIDS cases in Russia may be well above

1 “Onishchenko Declared That There Is No HIV Epidemic in Russia”, *Interfax*, February 14, 2020, <https://www.interfax.ru/russia/695362>.

2 Population projections, *OECD*, August 25, 2020, <https://stats.oecd.org/Index.aspx?DataSetCode=POPPROJ>.

3 As of April 2020, there were almost 1.1 million active confirmed cases in Russia. Between 2016 and 2018, over 100,000 new cases have been diagnosed annually. For data see: “Note on HIV-infection in Russian Federation”, *HIV-Center*, April 30, 2020, <http://www.hivrussia.info/wp-content/uploads/2020/05/VICH-infektsiya-v-Rossijskoj-Federatsii-na-30.04.2020-g..pdf>; Vadim Pokrovskiy et al, “HIV-infection”, *Info Bulletin* no.44, 2019, <http://www.hivrussia.info/wp-content/uploads/2020/01/Byulleten-44-VICH-infektsiya-2019-g..pdf>.

4 Interview with Vadim Pokrovskiy, Head of HIV-Center, *Interfax*, November 26, 2018, <https://www.interfax.ru/interview/639397>.

2 million – and thus we were experiencing a *de facto* generalised HIV epidemic in Russia even before 2025. For you to comprehend the scale of the problem, the number of people with HIV is equal to the entire populations of both Volgograd and Kazan taken together.”

Dud goes on: “The rising number of infected people is among the defining features of this phase, but not the only one. The other aspect of a generalised epidemic is that HIV transmission continues to expand across regions and age groups. The most economically active 30–40 year-old group leads by far in terms of new HIV infections, while the number of 50–60 year-olds with HIV has caught up with the 20–30 age group.<sup>5</sup> The number of regions where more than 0.5% of the population is affected by HIV/AIDS rose from 37 in 2020 to 45 in 2025; this is more than half of the subjects of the Russian Federation, and where over 65% of the country’s population resides. While globally the number of new HIV infections has been on the decline for more than a decade,<sup>6</sup> we and a few states in Africa are bucking the trend. How did all this become possible? Why did the epidemic in our country spiral out of control? In a nutshell: inaction.”

## 2021-2025: INACTION

Indeed, back in February 2020 Yuri Dud’s documentary about HIV/AIDS in Russia went viral, gathering 13 million views in only one week. Due to its impressive reach, the documentary had several short-term effects: Russians rushed to buy HIV express tests, the Russian Duma organised a special screening of the documentary for members of parliament and

Russia’s president requested a new strategy to fight the spread of HIV. The government subsequently adopted a strategy covering the period until 2030. But with the adoption of the strategy, the initial impetus triggered by the documentary ran out of steam.

Healthcare strategies, like all other public policy strategies, cannot run on autopilot: to succeed they need political and financial backing, as well as significant outreach efforts to the general public. For example, the targets of a similar strategy for 2017–2020, including putting 90% of those infected with HIV under medical observation and providing 90% of them with antiretroviral therapy (ART), had not been met by 2020.<sup>7</sup> Seen in retrospect, the new strategy to 2030 was a mere bureaucratic exercise; the state machine just ticked a box. The lack of political leadership on the HIV epidemic, inadequate funding for the escalating public health problem and conservative views resistant to preventive approaches caused a faster and wider spread of HIV in Russia thereafter.

In 2021, the Russian leadership abstained from framing HIV as an urgent problem, thereby avoiding raising awareness and mobilising state-machinery and society against the virus. HIV was conspicuously absent from the Russian president’s discourse. To recognise that there was an escalating HIV epidemic and talk about it would mean implicitly to recognise past failures. And to do it on the back of the Covid-19 epidemic in Russia, which revealed significant deficiencies in the healthcare system, would be politically costly even in an authoritarian system. Facing parliamentary elections in autumn 2021, the Kremlin was in no mood for self-criticism, and preferred to sweep problems under the carpet, highlight past achievements and make new promises. But the vote did not go smoothly and the number of regional anti-government protests in its aftermath

5 In 2018, the distribution of HIV/AIDS infections across age groups was 20–30 (15%), 30–40 (46%), 40–50 (25%), 50–60 (9%). Pokrovskiy, op.cit.

6 “The Global HIV/AIDS Epidemic”, *HIV.gov*, July 7, 2020, <https://www.hiv.gov/hiv-basics/overview/data-and-trends/global-statistics>.

7 “Healthcare Proposed to Postpone the Main Targets of Strategy to Fight HIV by 5 Years”, *Vademecum*, June 15, 2020, <https://vademec.ru/news/2020/06/15/minzdrav-predlozhit-otlozhit-dostizhenie-osnovnykh-pokazateley-strategii-po-borbe-s-vich-na-pyat-let/>.

soared. The state-society conflict took on a sharper edge ahead of 2024 presidential elections. Under these circumstances, the Kremlin focused more on the politics of survival (maintaining power via repression and co-option) rather than on designing and enacting effective public policies.

Financially, combating HIV had never been a major priority. Throughout the 2010s, the Russian government occasionally even cut funding for HIV treatment.<sup>8</sup> In the 2020s, as a result of the economic recession due to Covid-19, the Kremlin prioritised macro-economic stability (a low budget deficit and the accumulation of currency reserves) in order to weather external shocks. Whenever the government did open its coffers, it was for the distribution of pre-electoral gifts to the population and an increase of salaries for law enforcement personnel. All this pushed funding for HIV treatment further down the ladder. The financing of HIV-related programmes by 2025 had not increased. In the face of growing HIV infections, the funds were not sufficient to avert the onset of a severe epidemic. Federal and local authorities could not afford widespread free-of-charge ART; only around 50% of all patients diagnosed with HIV received ART, the level achieved in 2020.<sup>9</sup> Insufficient coverage of ART (a treatment which reduces the transmission of the virus from infected persons) by 2025 meant that more than half of

all those estimated to be infected with HIV in Russia remained contagious.

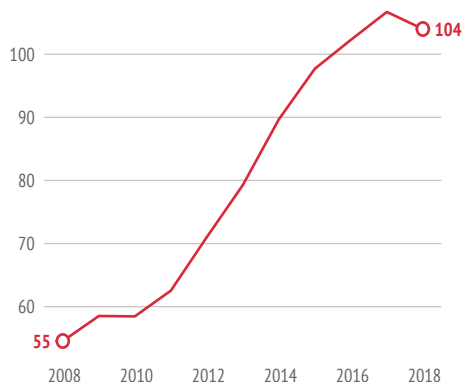
Russia not only failed to extend treatment to those infected; it also underperformed in terms of preventive measures. The top three ways of transmitting HIV in Russia in the ear-

ly 2020s were heterosexual contact (61.6%), intravenous drug use (34.9%) and homosexual contact (2.4%).<sup>10</sup> The consumption of drugs was and still is viewed mainly through the lens of criminal law rather than in terms of averting a generalised HIV epidemic. Thus, the new strategy did not foresee financial support for needle exchange centres. Instead, the government even created obstacles for NGOs performing

this function.<sup>11</sup> In spite of recommendations from the WHO and UNAIDS, the government also resisted the introduction of opioid substitution therapy (OST), which replaces the injection of fast-acting drugs with orally administered slow-action opioids, accompanied by drug dependence treatment. According to the Kremlin, in addition to allegedly encouraging more drug consumption, this preventive mechanism was considered far too expensive. After much debate, the authorities refused to back pre-exposure prophylaxis programmes (PrEP), which target HIV negative people from high-risk groups. By 2025, an HIV vaccine had yet to become a prevention tool, as all attempts to produce one in Russia failed. Similar clinical trials had not been successful on a global

### New registered HIV cases

Russia, 2008–2018, thousand



Data: Federal Center for the Prevention and Control of the Spread of AIDS, 2010 and 2019

8 Maria Evdokimova, "Russia Cuts Funding for HIV Treatment", *The Moscow Times*, July 13, 2016, <https://www.themoscowtimes.com/2016/07/13/russia-cuts-funding-for-hiv-treatment-a54541>.

9 "Note on HIV-infection", op.cit.

10 Ibid.

11 "HIV and AIDs in Russia", *Avert*, October 1, 2019, <https://www.avert.org/professionals/hiv-around-world/eastern-europe-central-asia/russia>.

level either. Last but not least, the government did not organise a country-wide sex education campaign or promote the use of condoms as a preventive measure against HIV. Such a campaign would go against so-called 'traditional values', promoted as one of the bedrocks of Russian society; this would also conflict with the interests of the influential Russian Orthodox Church.

## BEYOND 2025: THE COST OF INACTION

The HIV epidemic in Russia is accompanied by a heavy price tag: HIV will contribute to demographic decline. From 2007 to 2017, HIV/AIDS moved from 23<sup>rd</sup> position to 10<sup>th</sup> place among the main causes of premature death in Russia.<sup>12</sup> Beyond 2025, it may well reach the top 5. In 2007, HIV/AIDS contributed to 0.47% of total deaths in Russia, while in 2017 it caused 1.05% of deaths.<sup>13</sup> The out of control HIV epidemic (without wider coverage of ART) will continue to kill more people in Russia after 2025. The epidemic is likely to affect fertility rates, too: 38% of those infected with HIV in Russia (in 2020) are mostly women of reproductive age.<sup>14</sup> Their premature deaths will push down already low fertility rates. HIV also will contribute to the ageing of Russia's population as the average age of those who died from it in 2020 was 39 years old.<sup>15</sup>

In addition to the human costs, the epidemic is likely to be detrimental for the Russian

economy. The deaths among economically active citizens from HIV may, according to an International Labour Organisation (ILO) study, reduce the working-age population in Russia by 2.1 million by 2050.<sup>16</sup> While not the main cause, HIV will also be a factor contributing to a decline in productivity, as insufficient ART coverage will render many employees with HIV less active in the workplace. The decline of the working-age population may also contribute to a growing deficit *vis-à-vis* the pensions budget beyond 2025. In order to tame the epidemic, the Russian government will have to divert extra financial resources towards the healthcare sector in the second half of the 2020s.

The HIV epidemic may exacerbate state-society tensions, fomenting societal discontent over the government's neglect of public healthcare. Finally, the HIV epidemic will have reputational costs abroad. Russia has tried to project an image of a recovering economic and military power. But the epidemic will severely dent the country's great power ambitions. The rampant spread of HIV will lead to the perception of an internally weak state, unable to get the disease under control, especially given that other peers in the great powers league had successfully contained the virus by 2025.<sup>17</sup> In Europe, since the mid-2010s Russia has been perceived as a creeping military threat. But in 2025, with the fastest growing rates of HIV infection per 100,000 on the continent<sup>18</sup>, Russia may increasingly be perceived as a menace to Europe's public health as well.

This worst-case scenario is not inevitable. To avoid it, action has to replace inaction. The top leadership should clearly spell out the risks of

12 The Institute for Health Metrics and Evaluation, "Russia: What Causes the Most Premature Death?", <http://www.healthdata.org/russia>.

13 The Institute for Health Metrics and Evaluation, "Causes of Death in Russia (2007, 2017)", <https://vizhub.healthdata.org/gbd-compare/>.

14 "Note on HIV-infection", op.cit.

15 Ibid.

16 International Labour Organisation, "Russia Model to Assess Socio-economic Consequences of HIV/AIDS Spread", February 10, 2004, [https://www.ilo.org/moscow/news/WCMS\\_245561/lang--en/index.htm](https://www.ilo.org/moscow/news/WCMS_245561/lang--en/index.htm).

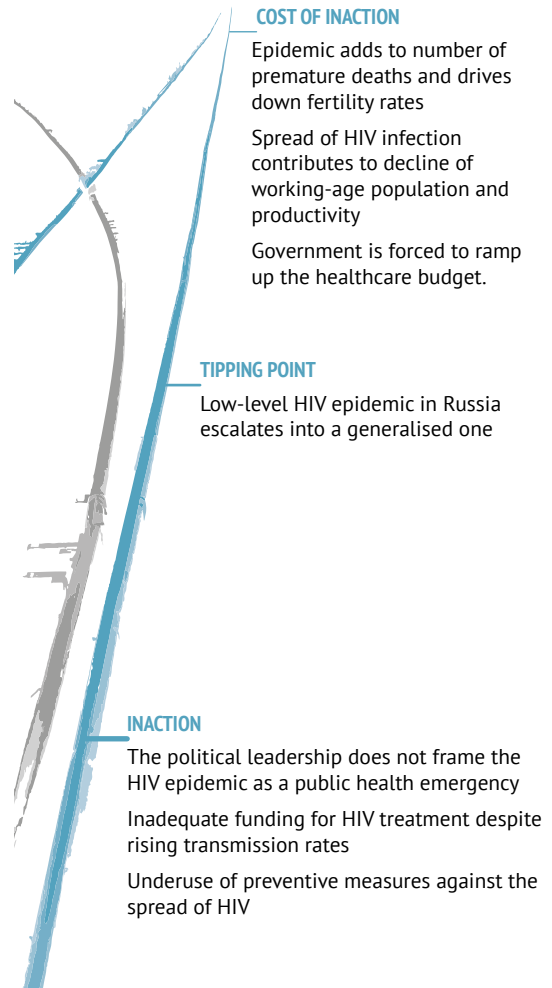
17 UNAIDS, "Country Progress Report – China", *Global AIDS Monitoring 2019*, [https://www.unaids.org/sites/default/files/countrydocuments/CHN\\_2019\\_countryreport.pdf](https://www.unaids.org/sites/default/files/countrydocuments/CHN_2019_countryreport.pdf).

18 World Health Organisation, "HIV/AIDS surveillance in Europe – 2019", 2019, <https://www.ecdc.europa.eu/sites/default/files/documents/hiv-surveillance-report-2019.pdf>.



a generalised epidemic. The government has to reach out to society through educational programmes; it also needs to allocate more funds to test and treat the growing number of HIV positive patients. Authorities should improve the procedure of antiretroviral drugs acquisition to avoid shortages in the future. Last but not least, the Russian government should learn from other countries' experiences – including best practices from EU member states – and embrace innovative preventive approaches to curb the current wave of HIV infection.

## Timeline







# CONFLICT FATIGUE



## CHAPTER 9

# WHAT IF... AFRICA'S URBANISATION IS NOT CONTROLLED?

by  
GIOVANNI FALEG

## 2025: THE TIPPING POINT

There had been reports of small-scale riots in several cities, primarily in West and Central Africa, between the spring of 2023 and the summer of 2025, which were, however, largely spontaneous and short-lived. African nations had only in late 2024 reinforced intelligence, policing and patrolling to prevent these isolated phenomena, occurring in what were dubbed 'sin cities', from descending into widespread violence. They initially seemed to succeed, as the protests were contained without major cases of social violence.

At 8:30am on 2 September, 2025, a furious crowd of around 1,200 people, led by a group of waste management workers and mostly comprised of people living in the slums of Abidjan, Côte d'Ivoire, attacked offices of the state police. This occurred simultaneously across several communes and the resulting unrest ravaged neighbourhoods, with rioters burning shops, restaurants and art galleries. The crowd then smashed windows with stones and other objects, broke into shops and set SOTRA buses and stations ablaze. When the police tried

to respond, rioters set fire to their vehicles: the policemen, who were vastly outnumbered and outmatched, were forced to retreat. Having neutralised the police stations and facing no resistance, rioters then attacked municipal council buildings. Elsewhere, the mayor fled his home just in time before the crowd stormed in and set it on fire. In all the areas experiencing rioting, mobs attacked and killed numerous shopkeepers, artisans and the residents of wealthier homes – especially expensive, recently-developed condos. By night, the mob had grown to several thousand people, established control in 4 out of 10 communes and had secured food, as well as water supplies.

Riots and destruction continued the following day. The Ivorian government declared a state of emergency and martial law, allowing the army to use any means necessary to quell the riots. What followed was three days of urban warfare and unprecedented repression, leading to hundreds of deaths and arrests. In the wake of this, large parts of the city and its public infrastructure had been destroyed. It was only in the morning of 7 December that the rioters surrendered and disbanded, making it possible for the authorities to regain control of the communes. In only five days, Abidjan had transformed into a ghost city. The 'Babidon' riots (merging *Babi*

– Abijan's nickname – and *bidonville* (slum)) kick-started a wave of urban revolutions that would plague Africa for years.

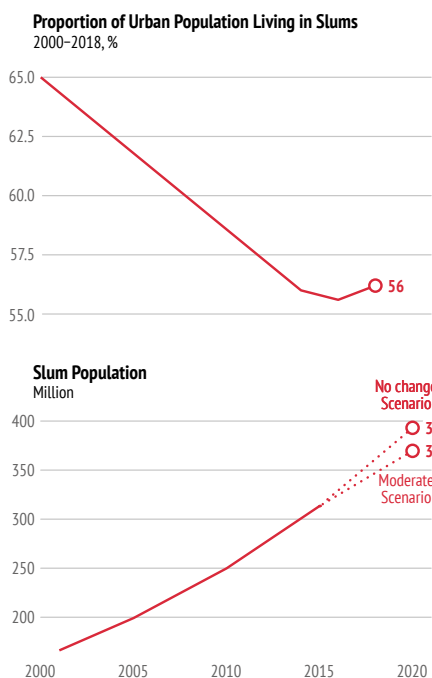
## 2021-2025: INACTION

The origins of the Babidon riots can be traced back to two developments: structural problems related to urbanisation in Africa, and the rise of the 'sin cities'. Both can be attributed to governance failures, directly resulting from inaction by local administrators, mayors and political institutions. The latter failed to curb the uncontrolled growth of African cities, for instance, by not addressing urban sprawl. They also failed to turn urbanisation into an opportunity for sustainable growth.

In 2022, the majority of Africans moving to expanding urban agglomerates were still unable to achieve tangible improvements in living standards, according to a Pew Research Center survey.<sup>1</sup> A number of African think tanks had also outlined that urbanisation without industrialisation would be detrimental to sustainable economic growth, as well as hamper the fight against poverty. West Africa was only the tip of the iceberg in this regard. Across the whole continent, urban growth produced huge numbers of new city dwellers, especially young people.<sup>2</sup> Due to the lack of opportunities, low-income jobs and low capital investment, these people ended up in the informal job market and were forced to live in slums, with very limited or no access to basic services, such as drinking water, electricity, sanitation and health care. The percentage of the population living in urban slums in sub-Saharan Africa rose from 57% in 2009

### Slum population

Sub-Saharan Africa, 2000–2020



Data: United Nations Human Settlements Programme (UN-HABITAT), 2020

to 78% in 2029, with Ghana and Côte d'Ivoire experiencing the most marked increases (from 40% to 80% and from 57% to 90%, respectively) due to regional mobility trends.<sup>3</sup> Urban growth without industrialisation created so-called 'exhaustion cities', characterised by resource depletion, climate and social degradation, and economic collapse.<sup>4</sup>

The structure of African cities and poor urban planning acted as a second structural factor. In lieu of becoming geo-economic spaces where the benefits of economic agglomeration could flourish, badly planned cities created obstacles to industrial development and trade. Chaos in

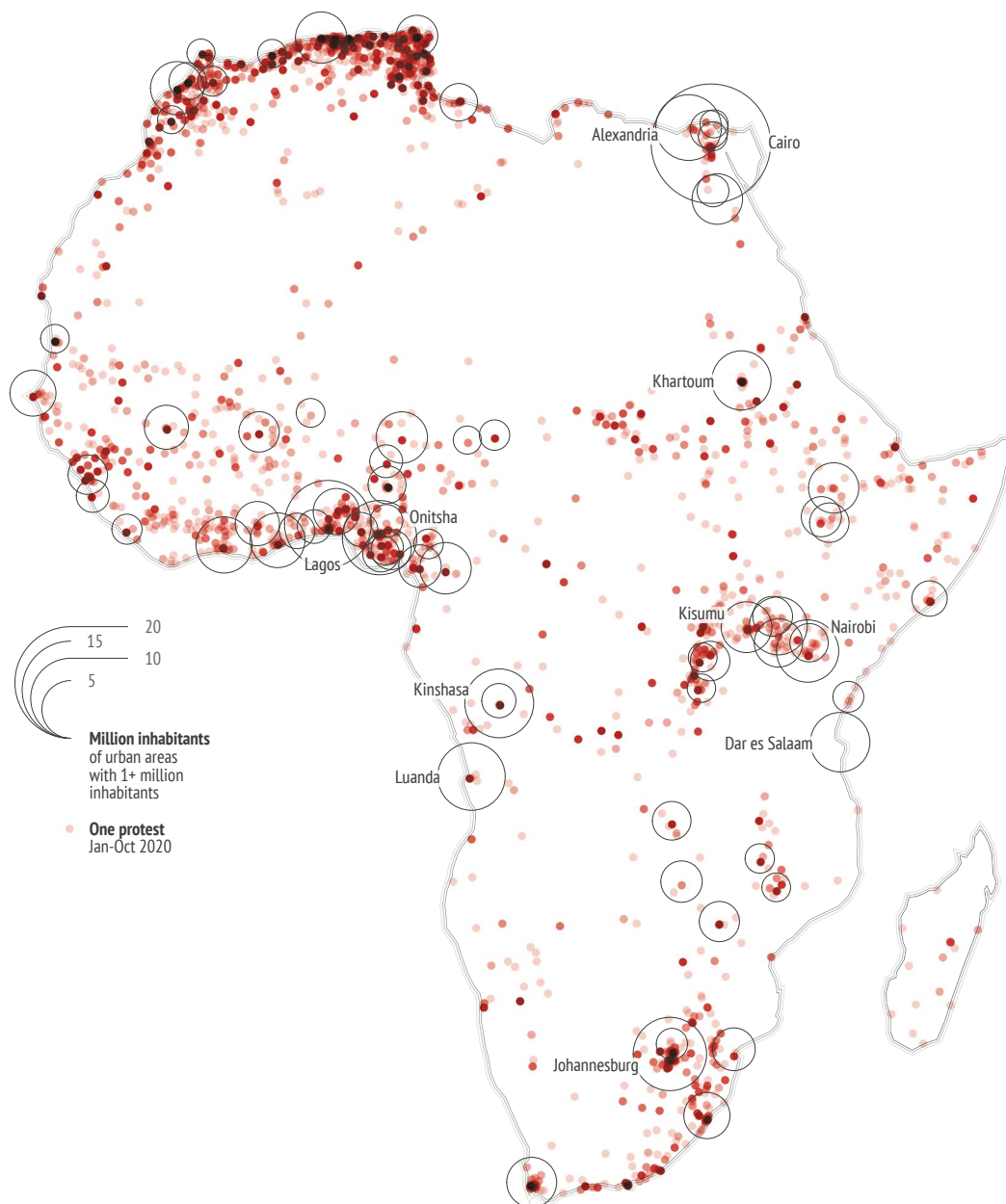
1 On the role of expected income as driver of rural-urban migration, see: John R. Harris and Michael Todaro, "Migration, Unemployment and Development: A Two-Sector Analysis", *American Economic Review*, vol. 60, no.1, 1970, pp.126–142.

2 Brookings Institution, "The New Urban Agenda and Demographic Dividend: Investments for Africa's Youth", January 2019.

3 World Bank, "Population living in slums (% of urban population) – Sub-Saharan Africa", (United Nations Human Settlements Programme – UN HABITAT), [https://data.worldbank.org/indicator/EN.POP.SLUM.UR.ZS?end=2009&locations=ZG&most\\_recent\\_year\\_desc=false&start=2009&view=map&year=2009](https://data.worldbank.org/indicator/EN.POP.SLUM.UR.ZS?end=2009&locations=ZG&most_recent_year_desc=false&start=2009&view=map&year=2009).

4 Douglas Gollin, Remi Jedwab and Dietrich Vollrath, "Urbanisation with and without Industrialisation", International Growth Center (IGC), March 9, 2016.

## Cities and protests



Data: OECD/SWAC, Africapolis Database, 2020; Armed Conflict Location & Event Data Project (ACLED), 2020

the management of urban planning made African megalopolises disconnected, fragmented, overcrowded and costly.<sup>5</sup> In many cases, new constructions were not clustered, but built on the edge of the urban area or in satellite zones that did not even border on a pre-existing city.<sup>6</sup> This phenomenon, known as 'urban sprawl', worsened the conditions for people living in the outskirts, who are often isolated and spatially segregated, and exacerbated the socio-economic dichotomy between people on the margins and the people in the centre. At the same time, the high concentration of urban dwellers, alongside the lack of basic services, facilitated the risk of disease transmission, as the spread of Covid-19 in the top five African urban agglomerations (Lagos, Cairo, Algiers, Casablanca, Kinshasa) between 2020 and 2022 dramatically demonstrated.<sup>7</sup>

With regard to the development of 'sin cities',<sup>8</sup> it is unclear how exactly and why these waves of urban violence started. The first riot recorded took place on 16 March, 2023 in Lomé, Togo, emerging as a response to an unregulated housing bubble.<sup>9</sup> The Lomé riots in March 2023 were short-lived and not particularly violent. However, they paved the way for the creation of a social network of urban dwellers, known online as 'sin city', which would promote civil unrest in protest against the poor living conditions in West African cities. The network rapidly increased in followers, expanded to other African regions, and coordinated small-scale protests originating from the slums of urban areas, from Accra to Addis Ababa, employing a mix of violent and non-violent resistance. It was in Abidjan, however, that the wave transformed into a tsunami. Like Lomé, the city had neglected sustainable urbanisation development, and suffered from widening social polarisation. But what made Abidjan a powder keg compared to

other urban centres was a peculiar mix of other intervening factors: a prolonged period of economic boom in the late 2020s, followed by an abrupt halt to economic growth caused by the Covid-19 pandemic, which impoverished the rising middle class and wiped out the service industry; a constant influx of intra-Africa migration and expatriates, altering the social identity of the city and creating new social tensions, which were not mitigated by the city administration; the decision by the government in 2020 to demolish some of the city's slums, starting with the largest in Boribana (home to nearly 60,000 people), without adequate plans to ensure relocation, provide sufficient compensation or offer shelter. Thousands became homeless and joined the 'sin city' cause as a last resort. Organised crime exploited this situation by infiltrating the social network, with the ultimate purpose of using it as a means to destabilise the state. When the Abidjan police launched an operation to counter illegal hazardous waste disposal in August 2025, the unexpected killing of a waste worker lit the fuse, triggering the most deadly urban war Africa had experienced since the turn of the century.

## BEYOND 2025: THE COST OF INACTION

Following the Babidon riots, urban revolutions spread across the African continent and affected more than 40 countries for five years until 2030, making it the most widespread revolutionary wave in African history since decolonisation. Only a minority of the uprisings de-escalated; many were suppressed by governments, with tens of thousands of people

5 Compared with countries at comparable income levels, the prices of goods and services consumed by households in urban Africa are around 30% higher. See: Shohei Nakamura et al, "Is living in African cities expensive?", World Bank Group, *Policy Research Working Paper*, no. WPS 7641, 2016.

6 This is the so-called 'leapfrog development'.

7 UN-Habitat, "COVID-19 in African cities. Impacts, Responses and Policies Recommendations", 2020.

8 Defined as "cities suffering from extreme weather conditions, high levels of corruption, crime and violence and low levels of economic activity". See: Florence Gaub, "Arab Futures 2.0: the road to 2030", *Chaillot Paper* no. 154, EUISS, September 2019, p. 25.

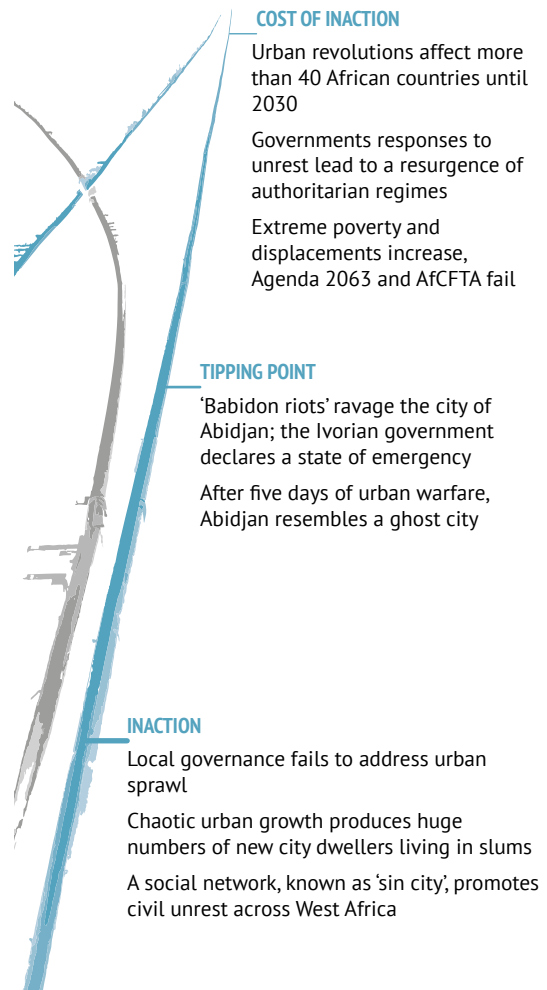
9 Since the mid-2010s, the population of Lomé had continued to grow at an uncontrolled pace leading to unregulated expansion of expensive private developments. Against this backdrop, Lomé still lacked 500,000 decent and affordable housing units in 2023.

killed, arrested or forcibly displaced. In addition to the heavy death toll, they had a major impact on economic and political dynamics. In many countries, government measures to contain the unrest led to a resurgence of authoritarian regimes, with the military establishment taking control to restore order, limiting freedom of speech and clamping down on the press and political opposition.

In addition to the political consequences, urban revolutions affected economic development, hindering trade, industrialisation and economic growth.<sup>10</sup> The World Bank estimated very high costs of urbanisation spiralling out of control in Africa: for \$1 unspent (or misspent) to prevent urban challenges, the Bank estimated that national economies could lose up to \$50, considering the diversified economic, political and social impact of inaction, and the response measures needed to contain urban violence and conflict, instead of preventing it from happening. Impact on intra-African trade was severe. In 2027, the AfCFTA Secretariat declared that the implementation of economic and trade integration in Africa would stagnate due to the lack of political will from its member states and the unprecedented instability that prevented the development of open markets and the free movement of goods and service. Other effects of the urban revolutions were a sharp increase in those living in extreme poverty in Africa and of those forcibly displaced, prompting a rise in illegal migration both within Africa and towards Europe.

Finally, urban violence affected Africa's relations with the rest of the world, undermining the Strategic Partnership with the EU due to the high levels of violence and repression, and creating space for other global players to expand influence and develop ties with the newly 'elected' authoritarian leaders in exchange for military, political and economic support with no conditionality. The collapse of African cities eventually led to the collapse of all of the ambitious proposals set out in the joint EU-Africa

## Timeline



strategy a decade prior, and marked the *de facto* end of Agenda 2063 and the attempt to usher Africa into an era of democracy, prosperity and multilateralism. While urbanisation is an African phenomenon requiring African solutions, the EU could have played a key role by supporting capacity building and improving planning for cities; making 'smart urbanisation' a priority in its new partnership with Africa and stressing its importance for conflict prevention.

<sup>10</sup> Somik Vinay Lal, J. Vernon Henderson and Anthony J. Venables, "Africa's Cities. Opening Doors to the World", World Bank, 2017.



## CHAPTER 10

# WHAT IF... THE EU MISSES ITS CHANCE TO OUT-INVEST THE PANDEMIC?

by  
**DANIEL FIOTT**

## 2025: THE TIPPING POINT

“Please answer the question!” proclaimed newly elected Member of the European Parliament (MEP) Klarissa de Jong. Sitting in an almost empty parliamentary committee room, one of the assembled officials from the European Commission retorted: “any decision to invest in capability development through the European Defence Fund is taken by national capitals. We cannot be held responsible for their decisions”. Disgruntled, and annoyed that member state representatives could not be held accountable in the same way, MEP de Jong was dissatisfied with the response. “While I recognise that the Fund did not get the best start back in 2021 with a reduced budget of €7 billion and not the €13 billion you had asked for, the bottom line is that the Commission’s own analysis showed that you expected to unlock €4 billion in national investments for every €1 billion spent under the Fund. Tell me, what strategies

had you put in place to ensure that you had sufficient member state investment guarantees?”. There was silence in the committee room.

The MEP’s line of questioning, while mathematically inaccurate, was nevertheless also echoed in a series of think tank commentary pieces that followed the committee hearing (many more watched the hearing online). One report by the Centre for European Security Affairs (CESA) argued that:

“Back in 2018, the Commission asked for €13 billion (actually €11 billion if one uses 2018 prices), but by 2020 this had been cut back to €7 billion. Since 2021, the Commission has had to make do with €2.2 billion for defence research and €4.8 billion for capability development for a 7-year period. The US military spends a similar amount on procuring uniforms, so how was this ever going to revolutionise EU defence? Worse still, and largely owing to the pandemic, the €4.8 billion window has failed to leverage the expected 1:4 factor (some €19 billion) in member state commitments.”<sup>1</sup>

<sup>1</sup> Diana Marsh, Kyle Wojciech, Petra Levebre and Wolfgang Bitte, “Dead-End Defence: Time to Give Up on EU Security and Defence?”, *Policy Brief* no. 67, Centre for European Security Affairs, Brussels, March 26, 2025, <https://www.cesa.org/pubs/briefs/dead-end-defence/en/64302.pdf>.

This point was not lost on defence reporters either. An editorial in *Le Monde* ran the headline ‘l’Europe abandonne sa défense’. The news article had quoted anonymous senior EU officials who stated that the Fund had become a sort of ‘piggy bank’ for smaller niche projects. ‘There is no ambition for large-scale strategic projects – and we can mainly blame Covid-19 for that. European defence is being built on stilts’, the official remarked.<sup>2</sup> Another piece in the *Financial Times* anonymously quoted one European defence minister: ‘the pandemic has hit us hard but we are yet to see the real fruits of the Fund. The money may be better spent elsewhere’.<sup>3</sup>

## 2021-2025: INACTION

Things already seemed challenging for the European Defence Fund (EDF) in 2021. True, the Commission had proven the viability of the Fund’s preparatory programmes before this time by effectively managing defence research and capability development project calls. Indeed, by mid-2020 some 16 defence industrial and technology projects worth over €200 million had been agreed and at the start of 2021 a further €160 million was allocated.<sup>4</sup> However, the Multiannual Financial Framework (MFF) negotiations were finally settled at the end of 2020 in a way that saw the Fund receive €7 billion (in 2018 prices) over the 2021-2027 period. Against the context of a drastic reduction of the Fund, and the ongoing economic fallout from Covid-19, EU institutions failed to devise policies to address the budgetary black hole.

Member states were adamant that institutions should keep out of national budgetary issues, although EU officials made clear that more – not less – European collaborative investment was required to weather the economic storm.

Although an initial vaccine was rolled out in 2021, a new strain of Covid-19 meant that the range of vaccines was rendered ineffective. This meant that the virus continued to severely effect the global economy and dent national defence budgets. Euro area real Gross Domestic Product (GDP) growth fell by 8.7% in 2020<sup>5</sup> and, after a modest rise of 1.7% in early 2021 on the back of news that a vaccine was ready, rates fell by 7.2% in the autumn of 2021 and by a further 6.9% in early 2022 after it was clear that the vaccine did not work – chronic stagnant growth prevailed after this time with recession hitting a number of countries. Defence spending in the EU started to contract sharply, losing €10 billion in 2021 alone – by 2025, overall spending stood at €160 billion (EU member states spent €215 billion in 2019).<sup>6</sup> Worse still, global demand for European defence equipment declined, meaning that EU governments could not offset budgetary reductions or make up the losses from declining European demand. Elephantine debt levels in the US saw Washington slash allied reinsurance programmes, too, causing further problems for European defence planners. China flooded the global defence market with cheap equipment, thus undercutting European competitiveness further.

EU policymakers had little response to this structural problem. Early signs of trouble for the Fund appeared when many of the Permanent Structured Cooperation (PESCO) projects agreed to after 2021 were not eligible for the

2 Pierre Gusteau, “L’Europe abandonne sa défense”, *Le Monde*, April 1, 2025, [https://www.lemonde.fr/politique/article/2025/03/26/europe-abandonne-sa-defense\\_700794\\_829348.html](https://www.lemonde.fr/politique/article/2025/03/26/europe-abandonne-sa-defense_700794_829348.html).

3 Jackie Harmer, “Europe has wasted time and money on defence”, *Financial Times*, April 3, 2025, <https://www.ft.com/content/10de9947f-7er8-45608-901d-5f6b3525pp42>.

4 European Commission, “European Defence Fund: €205 million to boost the EU’s strategic autonomy and industrial competitiveness”, June 15, 2020, [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_20\\_1053](https://ec.europa.eu/commission/presscorner/detail/en/ip_20_1053).

5 European Central Bank, “Macroeconomic Projections”, June 18, 2020, [https://www.ecb.europa.eu/pub/projections/html/ecb.projections202006\\_eurosystemstaff-7628a8cf43.en.html#toc10](https://www.ecb.europa.eu/pub/projections/html/ecb.projections202006_eurosystemstaff-7628a8cf43.en.html#toc10).

6 For early projections see: Doug Berenson, Dominik Kimla and Alix Leboulanger, “Defense Spending and COVID-19: Implications on Government Finance and National Security”, *Avascent White Papers*, April 15, 2020, <https://www.avascent.com/news-insights/white-papers/defense-spending-and-covid-19-implications-on-government-finance-and-national-security/>.

additional 10% ‘PESCO bonus’ offered by the Fund. In fact, several member states seemed to prefer PESCO’s opaque reporting structure as a way to publicly hide how much was really being invested in European collaborative projects, while maintaining the appearance that they remained committed to EU security and defence. Member states pushed through 8 further PESCO projects in 2021, 16 in 2022, 5 in 2023, 10 in 2024 and 15 in 2025 – some of the projects were of questionable operational relevance, however.

The Strategic Compass initiated in 2020 was also dented by the ongoing pandemic and decreasing defence budgets. The Compass was delivered at the start of 2022 and it certainly did help clarify the EU’s level of ambition in security and defence, although critics argued that the level of ambition was divorced from prevailing budgetary realities. There was an attempt during the Strategic Compass process to hold a special European Council summit in December 2021 to push for defence spending cooperation pledges, but an initial proposal was rejected out of hand, as some governments believed that a summit of this nature would quickly descend into a divisive finger pointing or blame game.

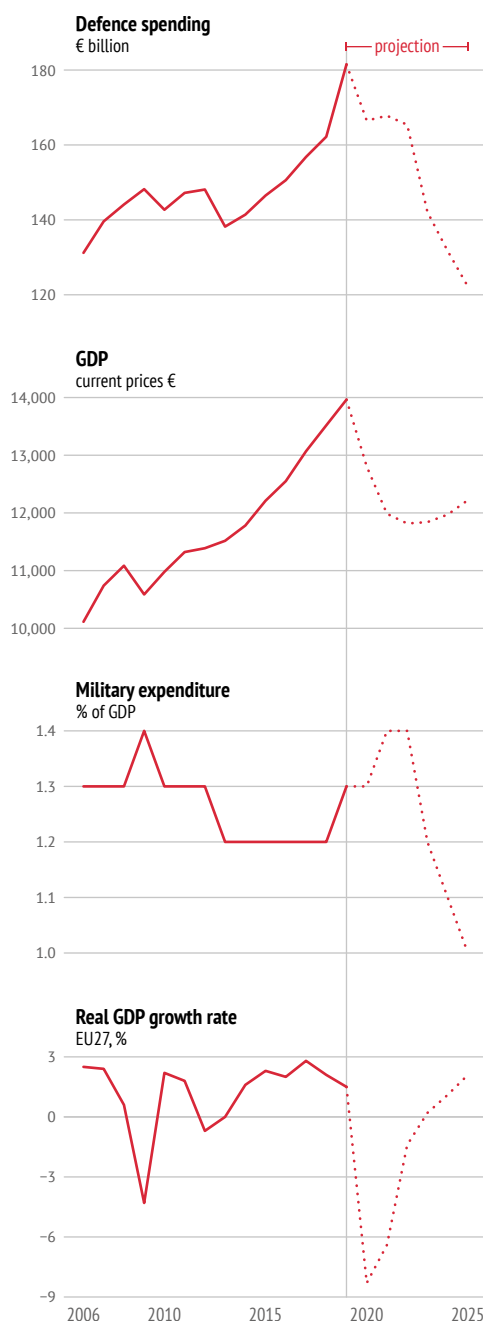
## BEYOND 2025: THE COST OF INACTION

After 2025, only pockets of European defence cooperation remained: for example, in 2026 the French, German and Spanish governments still managed to conduct a demonstrator test flight for the Future Combat Aircraft System (FCAS). However, the pandemic and the haphazard budgetary response by the EU severely undercut the Union’s quest for technological sovereignty. While it is true that the ongoing pandemic had helped buoy the EU’s medical science sector, defence and aerospace industries suffered. Although there were rumours from industry insiders that the European defence market was on the brink of a wave of mergers, in reality defence-relevant small and medium-sized enterprises (SMEs) were being acquired by firms with dubious financial and ownership

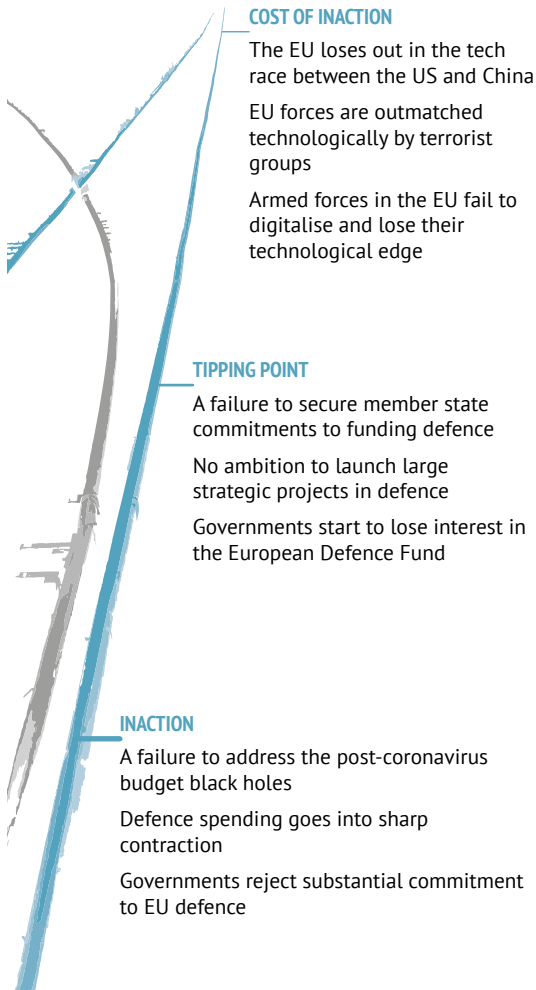
### Defence spending 2020–2025

A hypothetical evolution

All data from 2006–2019 is real. The hypothetical data from 2020 onwards depicts a scenario in which the EU economy is severely hit by the Covid-19 pandemic and news that vaccines are ineffective. Although the EU27 economy picks up in 2023, defence expenditure as a share of GDP starts to decrease in line with the presumed need to finance other areas of the economy such as health, education, etc.



## Timeline



structures. What is more, there was a proliferation of global patent disputes aimed at damaging Europe's innovators and the ongoing trade war between the United States and China hit supplies of critical materials to Europe.

Yet, what took hold was a more general apathy towards EU defence because of the ongoing pandemic. This spurred the Commission to produce a White Paper in 2026 which called for greater EU defence integration. However, the truth was that the institution's political energy was overly dedicated to managing the Schengen area and dealing with state aid rather than defence. In the run-up to the 2027-2033 MFF

negotiations, many questioned whether the Commission would secure more funding for the EDF. This seemed like an illogical case to make given that some of the capability projects funded by the Commission from 2020, such as maritime surveillance and cyber defence, were being utilised by several military forces in the EU.

The geopolitical consequences of not having supported the Fund during the pandemic were clear, too, especially as nationalistic responses to defence spending curtailed any room to invest in collective capabilities. For example, EU member states had failed to keep up collective investments in counter-drone technology. In one attack on EUFOR Sahel's fuel depot in Ouagadougou in 2026, media reports detailed how Islamic State militias were using modified commercial drones to attack fuel supply lines and ensure more silent approaches when approaching EU troops. Furthermore, in one classified report delivered by EU intelligence bodies to the Political and Security Committee (PSC) in early 2026, evidence was provided of the Islamic State's use of drone swarms to deliver toxic chemical pathogens over EU force locations. In some cases, such attacks were avoided through the use of EDF-funded counter-drone technologies but not every EU member state had acquired the technology, thus lowering interoperability between EU forces.

What is more, budgetary wrangling ensured that there was no coherent EU approach to military data science. Any opportunity to use the Fund and PESCO to train military data analysts or create 'data boot camps' was curtailed because of budgetary pressures. This meant that after 2025 only one or two EU member states were fielding data scientists or 'analytics translators' to help senior military commanders make sense of the explosion of data militaries were now collecting. The reality was that EU militaries were collecting large swathes of data but they were unable to process it. For example, in 2026 a combination of freak high winds and forest fires in the nearby Vrelo Bosne National Park engulfed Camp Butmir, Sarajevo, meaning that EUFOR Operation *Althea* was placed on standby. An investigation revealed that relevant meteorological data in Sarajevo had been collected, but it had not been processed or communicated by EU forces.

## CHAPTER 11

# WHAT IF... THERE IS NO DISARMAMENT IN LIBYA?

by

**FLORENCE GAUB**

The author would like to thank Wolfgang Pusztaï for providing input to this scenario.

## 2025: THE TIPPING POINT

It was yet another sunny May morning in Tripoli when the EU ambassador was kidnapped. Her convoy had been on the way to a meeting at the United Nations when a roadside bomb hit the first car. “Exit!” yelled the driver of the ambassador’s car, hitting the accelerator to speed past. But he had to come to a screeching halt that threw the ambassador hard against her seat belt: the road was blocked by several pickups. The kidnappers had clearly studied the protocol of diplomatic convoys in such situations – they had plenty of opportunity in a Libya embroiled in its third civil war. In the ensuing firefight, two bodyguards were killed, and the ambassador, who was physically unharmed, was dragged into another vehicle.

What was a dark day for Brussels was just another day in the life of Libya at war: that same day, the Islamic State (IS) attacked an oil pipeline, militias abducted children for ransom, and rockets hit hospitals and schools. Mercenaries from Sudan and Chad patrolled streets in Benghazi, and Turkish troops were accused of war crimes in Tripoli. Libya’s third civil war was nearing the end of its second year, and no resolution appeared in sight.

“Where did this all go wrong?” the ambassador reflected as she crouched handcuffed and blindfolded in the kidnappers’ car. When she had taken up the post in 2023 Libya had just been through two comparatively stable years. But now, war was in full swing, with new levels of violence and destruction on a daily basis. “Please God, let this not be the Islamic State” she prayed.

## 2021-2025: INACTION

All had looked rather hopeful back in 2021. The arrival of Jan Kubis, the new head of the United Nations Support Mission in Libya (UNSMIL), had paved the way for the most successful peace process yet. Channelling the spirit of the defunct Jamahiriya, Kubis had called for a People’s Congress, bringing together the representatives of the Tobruk-based House of Representatives along with the High Council of State, adding the representatives that had been elected at municipal level since 2014. The Congress agreed to the creation of a federal system inspired by Libya’s first political structure following independence, and created two chambers that would effectively be filled with

## Heavy machinery

Weapons spotted in Libya since 2011

### Since 2011

Since 2011, it is estimated that 15 million light arms have circulated in Libya in addition to heavy weapons and more sophisticated ones, snatched from national weapons storage sites or imported despite the UN arms embargo.

Assault rifles  
FAN FALS



AK-47



Handguns



Machine guns



Rocket-propelled grenades  
RPG-7



Manpads



### Since 2014

In the years since 2014, armoured vehicles, armed unmanned aerial vehicles (UAVs), combat helicopters and combat aircraft delivered by Russia, Turkey and the United Arab Emirates have proliferated.

Air missile defence system  
Pantsir S-1

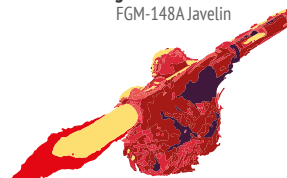


Attack helicopter  
Mi-24p



Used by LNA and  
General Haftar's troops

Anti-tank guided missiles  
FGM-148A Javelin

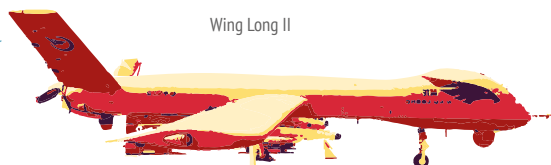


Unmanned combat  
aerial vehicles (UAV)

Bayraktar II



Wing Long II



Used by  
GNA's troops

Anti-tank  
guided weapons  
9K115-2 Mettis-M



members of the Tobruk and Tripoli parliaments. The agreement was bolstered by a ceasefire in place since early 2021. The ceasefire was to be monitored by an international military observer mission of 5,000 troops, including EU member states, but also Russian and Turkish troops. After a decade of violence, Libya appeared to be finally on track for stability.

The agreement had only one major flaw: it left any security-related decisions for a later stage. Armed groups were to continue to be in charge of security in their respective localities, with the High Security Council, made up of representatives of these groups, meeting every other week to exchange information and coordinate. For the time being, it was considered to be enough to try and stabilise the security situation in Libya. There was indeed a logic to postponing the difficult discussions on the security sector: it was one of the main areas in which lack of agreement had obstructed previous attempts at peace. Neither the 2015 Libyan Political Agreement, nor the 2020 Libyan Political Dialogue Forum had included thorough and detailed ideas on the future of the security sector. Once a commonly accepted political structure was in place, so the reasoning went, this would create conditions for the more difficult discussions.

This ignored one of the main tenets of successful Disarmament, Demobilisation and Reintegration (DDR): that it has to be a continuous process flanking any political undertaking, rather than a separate sequence of events.<sup>1</sup> It also meant missing the window of opportunity the agreement itself had created: the enthusiasm and support from various actors could have been seized to push through on the most sensitive issue. And security was a highly

difficult domain in Libya: not just the political ambitions of militia leaders made it a complicated area to touch. 250,000 or so men were under arms, organised in several hundred militias of varying sizes, equipment levels and influence.<sup>2</sup> Even though most of the 15,000 mercenaries from Syria, Chad and Sudan were in the process of leaving Libya, several other foreign actors stayed behind – notably the IS in Libya's South.<sup>3</sup> In addition, the country was awash with weapons – after the war in 2011, it was estimated that 15 million light weapons had flooded Libya's black market from looted stockpile and weapons deliveries. In the years thereafter, the UN arms embargo was ineffective, and armoured vehicles, armed unmanned aerial vehicles (UAVs), combat helicopters and combat aircraft were delivered by Russia, Turkey and the United Arab Emirates (UAE).

But following the establishment of the People's Congress, the security situation remained calm, and DDR was not a priority. The ceasefire allowed for oil production and reconstruction; the new political arrangements allowed for some level of dialogue; and the small peace-keeping mission (tasked with managing the demilitarised zone) seemed to ensure a degree of compliance with the agreement. But by 2022, old conflict lines reappeared, at first in the oil sector. Disagreements over resource allocation and salaries showed that Libya's economy, too, was in dire need of reform. From there, it quickly spiralled into a heated debate over Libya's political structure and power. By 2023, the kidnapping and subsequent assassination of the oil minister led to the mobilisation of several militias. The international mission had neither the mandate, nor the firepower, to stand in their way.

- 1 Peter Swarbrick, "Avoiding Disarmament Failure: The Critical Link in DDR. An Operational Manual for Donors, Managers, and Practitioners", Small Arms Survey, 2007, <http://www.smallarmssurvey.org/fileadmin/docs/F-Working-papers/SAS-WP5-DDR-Manual.pdf>.
- 2 Jason Pack, "Kingdom of Militias: Libya's Second War of Post-Qadhafi Succession", ISPI, May 31, 2019, <https://www.ispionline.it/en/publicazione/kingdom-militias-libyas-second-war-post-qadhafi-succession-23121>.
- 3 United Nations Security Council, "Final report of the Panel of Experts on Libya established pursuant to Security Council resolution 1973 (2011)", December 9, 2019, <https://documents-dds-ny.un.org/doc/UNDOC/GEN/N19/34/5/94/PDF/N1934594.pdf?OpenElement>.

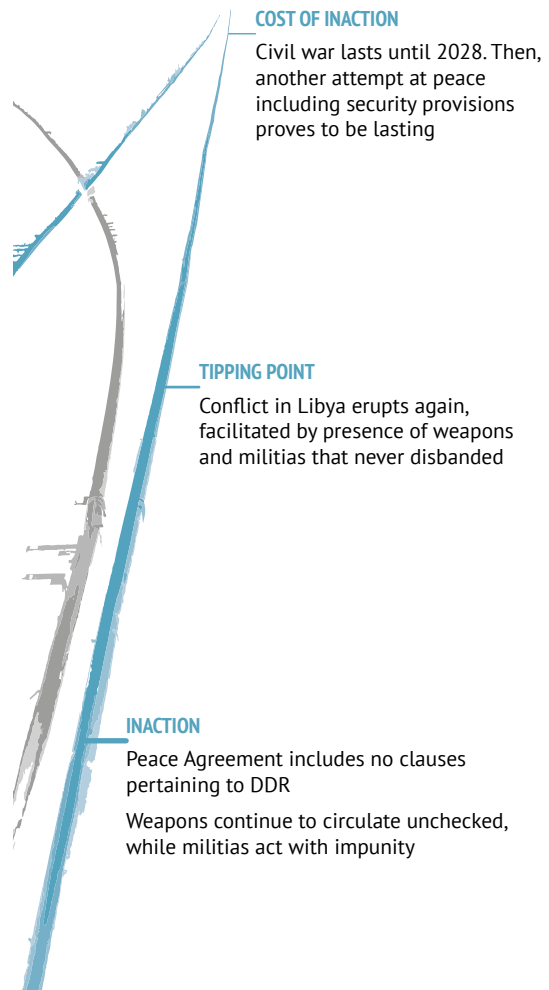


# BEYOND 2025: THE COSTS OF INACTION

Once fighting had resumed, the political structure created to prevent it collapsed quickly. European troops withdrew from Libya not much later after a terrorist attack killed 12 Belgian soldiers. These developments also led to the release of the EU's ambassador. She was not the only one who had become a pawn in Libya's escalation game: Russian soldiers were discovered beheaded in Eastern Libya, and a Turkish frigate sank in the harbour of Misrata following a terrorist attack. Fighting between militias was concentrated along the coast, but in the south, the IS had established a firm presence. It had now doubled in strength as foreign fighters joined its ranks from Tunisia and Egypt, and expanded operations south of the Sahel zone. This was also the most violent of Libya's three civil wars: with more than 21,000 people killed in 2011 alone<sup>4</sup>, and 22,000 between 2014 and 2020,<sup>5</sup> the death toll now approached 200,000.<sup>6</sup> By 2027, over a million people had fled Libya as the war made conditions unendurable for the population.<sup>7</sup>

After three years of fighting, Libya's civil war finally came to an end with the revival of the People's Congress in 2028. This time, a large-scale DDR programme was included in the negotiations leading to the ceasefire, and Libya invited a UN mission to supervise and enforce the process.<sup>8</sup> Economic reforms flanked the process, facilitating the integration of the 250,000 or so men under arms. Under the supervision

## Timeline



of a much stronger UN blue helmet mission, Libya's security sector was finally beginning

4 Mohamed A. Daw et al., "Libyan armed conflict 2011: Mortality, injury and population displacement", *African Journal of Emergency Medicine*, vol. 5, no. 3, September 2015, pp. 101-107, <https://www.sciencedirect.com/science/article/pii/S2211419X15000348>; Hana Salama, "Counting Casualties: Operationalizing SDG indicator 16.1.2 in Libya", *Small Arms Survey Briefing Paper*, May 2018, <http://www.smallarmssurvey.org/fileadmin/docs/T-Briefing-Papers/SAS-SANA-BP-Counting-Casualties-Libya.pdf>.

5 Reliefweb, "Civilian casualties report from 1 January - 31 March 2020", April 2020, <https://reliefweb.int/report/libya/civilian-casualties-report-1-january-31-march-2020>; "Civilian casualties report from 1 April - 30 June 2020", July 2020, <https://reliefweb.int/report/libya/civilian-casualties-report-1-april-30-june-2020>; New America, "Airstrikes, Proxy Warfare, and Civilian Casualties in Libya", June 2, 2020, <https://www.newamerica.org/international-security/reports/airstrikes-proxy-warfare-and-civilian-casualties-libya/>

6 This is an extrapolation from the Bosnian civil war. See: *The Bosnian Book of Dead* (Sarajevo: Research and Documentation Center, 2013).

7 This is an extrapolation of the refugee numbers for 2011.

8 Lilli Banholzer, "When Do Disarmament, Demobilisation and Reintegration Programmes Succeed?", German Development Institute, Discussion Paper 8/2014, [https://www.die-gdi.de/uploads/media/DP\\_8.2014.pdf](https://www.die-gdi.de/uploads/media/DP_8.2014.pdf).

to be rebuilt from scratch. In a much-watched ceremony broadcast on national TV, 300,000 weapons were destroyed on Martyr's Square in Tripoli – of course, these were just the tip of the weapons iceberg.<sup>9</sup>

In 2035, this process was finally declared completed. The EU ambassador who had been kidnapped in 2025 was invited to attend the ceremony. In her remarks, she stressed that “nowhere is the cost of international community inaction clearer than in Libya. But while outsiders made the mistakes, Libya paid the price.”

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<sup>9</sup> Small Arms Survey, “Removing Small Arms from Society: A Review of Weapons Collection and Destruction Programmes”, July 2001, <http://www.smallarmssurvey.org/fileadmin/docs/B-Occasional-papers/SAS-OP02-Weapons-Collection.pdf>.

## CHAPTER 12

# WHAT IF... THE EU FAILS TO PREPARE FOR ATROCITIES IN ITS NEIGHBOURHOOD?

by  
KATARIINA MUSTASILTA

## 2025: THE TIPPING POINT

Ada had spent 89 nights in the detention centre. She had initially been afraid of losing track of time without her phone, but the gradual inflow of new inmates meant that keeping time was not one of her concerns. Her recollection of the last months also rested mostly on information from the new detainees.

This is what she knew: the killings had become more widespread since the Belek massacre. Belek, an informal settlement mostly occupied by asylum-seekers and migrant communities, had practically disappeared overnight in mid-May after a series of explosions and subsequent fire that left over a 1,000 people dead and many more injured (and homeless). The government's explanation that the disaster had been caused by illegally stored gas cylinders exploding had been quickly undermined by video clips showing high-speed unmanned aerial vehicles flying above the neighbourhood before crashing into some of the residential buildings, causing a series of blasts that started the fires. The drones were instantly linked to a local paramilitary force that had boasted of their 3D-printed

'exterminators' on social media earlier in the spring and made pledges to rid the country of its 'parasite' problem. While the fires were still being put out, local security forces had moved in to clear other camps and informal settlements as an alleged safety measure, but leaving hundreds of casualties and horrific accounts of violence in their wake.

Three months later, the government continued to deny any responsibility and play down the severity of the continuing violence that human rights organisations estimated had already killed around 10,000 migrants. The result was a massive movement of people towards the country's western borders, and the escalating violence increasingly targeted anyone associated with the anti-regime movement. At least 500 people had been killed in anti-government protests sparked by the Belek massacre and over 10,000 citizens had disappeared both off- and online. Ada had been arrested a few days after she gave an interview to a German journalist on what she thought to be a secure connection.

In Brussels, a meeting by the Foreign Affairs Council of the EU was once again accompanied by large crowds of protesters outside chanting 'down with indifference!' and demanding swifter action to stop the killings and human

rights violations just outside the Union's external borders. International attention was also increasingly focused on Brussels: earlier that afternoon, the South African president had re-tweeted the US Secretary of State's live story on how the crisis revealed the EU's struggles in ensuring regional security. Within the UN Security Council, a resolution calling for the immediate disarmament of the paramilitary forces and authorising an investigative mission was, unsurprisingly, blocked by a group of permanent and non-permanent members.

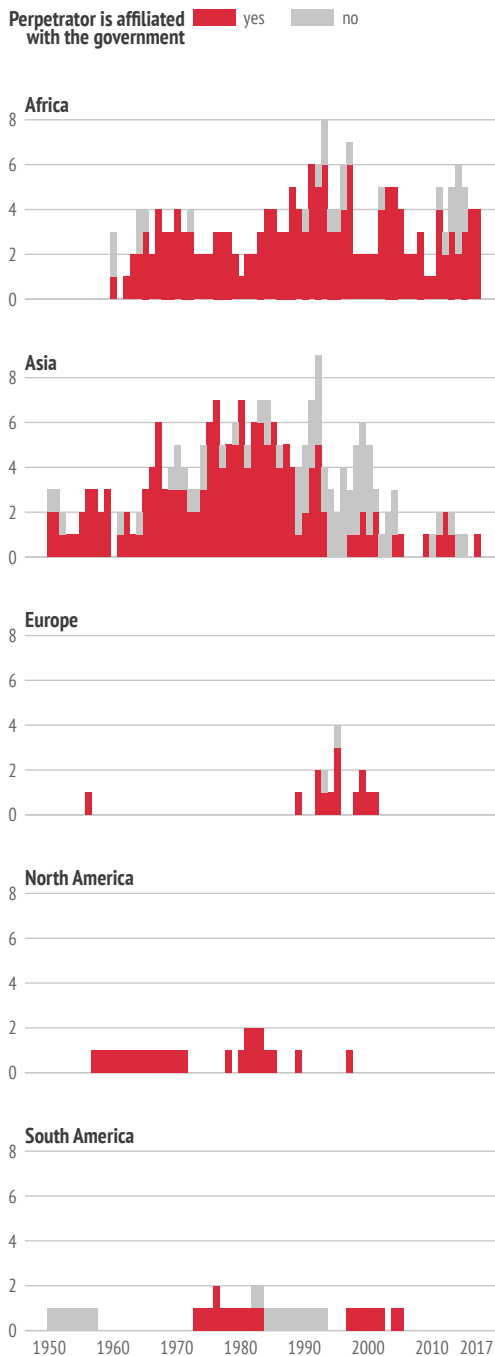
The next day, the Council Conclusions re-iterated the call to stop all violence and stated that the EU would expand its sanctions regime to include key individuals also beyond the paramilitary forces. Due to the opposition of some member states, no explicit reference to the responsibility to protect (R2P) norm was made.

## 2021-2025: INACTION

The early 2020s witnessed two developments that led to an upward trend in atrocities and complicated international responses to them. First, the pandemic intensified structural vulnerabilities, such as poverty and unemployment, restricting freedom of movement, and strengthening nationalist sentiment.<sup>1</sup> It also amplified opportunities to commit atrocities, particularly by militarising public health governance.<sup>2</sup> In Ada's home country, the crisis normalised the role of paramilitary groups in maintaining order and exacerbated xenophobic

### Targeted mass killings in the 2010s most numerous in Africa

Mass killings by government-affiliated groups and non-state groups by region, 1950-2017



Data: Charles Butcher et al., "Targeted mass killing dataset for the study and forecasting of mass atrocities", *Journal of Conflict Resolution*, vol. 64 no.7-8, (2020), pp.1524-1547

1 International Institute for Democracy and Electoral Assistance (IDEA), "Global Monitor on Covid-19's impact on Democracy and Human Rights", 2020, <https://www.idea.int/gsod-indices/#/indices/world-map/covid19=1>; OECD, "OECD, Employment Outlook 2020: Worker Security and the COVID-19 Crisis", 2020, <http://www.oecd.org/employment-outlook/2020/>; Eric Taylor Woods et al., "COVID-19, nationalism, and the politics of crisis: A scholarly exchange", *Nations and Nationalism*, July 2020.

2 Katariina Mustasilta and Roman-Gabriel Olar, "Militaries and Covid-19: implications for human rights and democracy", *Political Violence at a Glance*, May 19, 2020.

and inter-communal tensions. Second, great power competition continued to fissure the international order, which rendered it increasingly difficult to cooperate on already contested norms, such as the R2P.

Against this political context, the EU's earlier steps in strengthening its commitment to atrocity prevention – particularly the appointment of the R2P Focal Point and launching of the Atrocity Prevention Toolkit<sup>3</sup> – presented important resources to enhance its own action and maintain multilateral momentum for responding to atrocities. However, these steps were not followed up on and the need to operationalise how the EU understands and applies the R2P norm was overlooked in the early 2020s. Rather, the EU continued to see atrocity prevention as something integrated within its conflict prevention, democracy, and human rights policies.<sup>4</sup> This inaction in adopting a clear atrocity prevention strategy deprived the EU of capacities to assess the threat, apply preventive tools and respond to the crisis.<sup>5</sup>

First, the scant attention paid to atrocity risk within the EU's Conflict Early Warning System (CEWS) made it hard to systematically assess the nature and gravity of the threat. As the CEWS components remained focused on armed conflict over government and/or territorial control, atrocities falling outside of these contexts either in countries without a high threat of armed conflict or regarding groups not actively involved in ongoing conflicts were hard to recognise.<sup>6</sup> In practice, this meant that there was little attention paid to the growing opportunities for certain actors to commit atrocity crimes (e.g. the local security and paramilitary forces).

Second, even as the warning signs grew stronger amid xenophobic attacks and hateful rhetoric by local leaders, these were interpreted from a general conflict prevention perspective with little targeted action to prevent atrocities. For example, a programme was funded to support inter-communal dialogue between locals and migrant communities. While preventive from a conflict escalation perspective, experts on atrocity risk noted that there was little action to disincentivise the potential perpetrators or strengthen institutions protecting the potential victims of atrocities.<sup>7</sup>

Even in the wake of the Belek massacre, the EU was slow to name and shame the perpetrators or invoke any punitive measures against the regime that failed to disarm them. Instead, it opted for facilitating dialogue between the regime and the opposition movement and committing to support the country with managing its situation with large migrant communities.<sup>8</sup> Only when the killings had spread to a wider geographical area did the first high-level references to the threat of atrocity crimes appear. At this point, the lack of common understanding among the EU member states on the course of action in such a situation became clear. In particular, there was disagreement over the feasibility of military involvement in stopping the atrocities. Even when the UN finally authorised civilian protection action, the EU failed to respond in a timely fashion. This reflected both a lack of consensus over the scope of action to stop atrocities and the lack of readily available CSDP capacities in atrocity mitigation.

3 Edward Newman and Christian G. Stefan, "Normative Power Europe? The EU's Embrace of the Responsibility to Protect in a Transitional International Order", *Journal of Common Market Studies*, vol. 58, no. 2, 2020, pp.472–490.

4 Eglantine Staunton and Jason Ralph, "The responsibility to protect norm cluster and the challenge of atrocity prevention: an analysis of the European Union strategy in Myanmar", *European Journal of International Relations*, 2019, pp.1–27.

5 Darina Dvornichenko and Vadym Barsky, "The EU and the Responsibility to Protect: case studies on the EU's response to mass atrocities in Libya, South Sudan, and Myanmar", *InterEULawEast*, vol. 7, no. 1, 2020.

6 Matina Halkia et al., "The Global Conflict Risk Index: A quantitative tool for policy support on conflict prevention", *Progress in Disaster Studies*, vol.6, 2020.

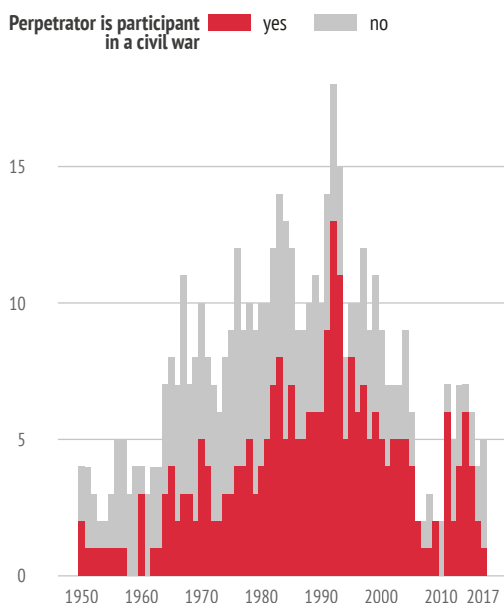
7 Op.cit., "The EU and the Responsibility to Protect: case studies on the EU's response to mass atrocities in Libya, South Sudan, and Myanmar".

8 See: Budapest Centre for the International Prevention of Genocide and Mass Atrocities, "Task Force on the EU Prevention of Mass Atrocities, The EU and the Prevention of Mass Atrocities: An assessment of strengths and weaknesses", 2013.

## Mass killings take place both in and outside armed conflicts

Targeted mass killings around the world in 1950-2017

Targeted mass killing refers to deliberate killing of non-combatants by a formally organised armed force that results in 25 or more deaths in a year, with the aim of intentionally destroying or intimidating a political and/or ethnic and/or religious group.



Data: Charles Butcher et al., "Targeted mass killing dataset for the study and forecasting of mass atrocities", *Journal of Conflict Resolution*, vol. 64 no.7-8, (2020), pp.1524-1547

## BEYOND 2025: THE COST OF INACTION

By the time Ada was released almost a year after her detention, approximately one-quarter of the 2 million asylum seekers and migrants in the country had been forced to leave and/or had lost someone in the violence. As a consequence, the rapid intervention operation that Frontex had deployed in September 2025 evolved into

a longer operation to manage the intensified migration pressures in the Eastern Mediterranean. Thousands of opposition members remained missing in the country.

The atrocity undermined both the EU's legitimacy and credibility as a global actor. Credibility was lost with regard to its capacity to act as a cohesive security actor in its neighbourhood. This had further negative implications for the safety of vulnerable communities in the region, and the number of people fleeing persecution at the external borders in the region remained high for the rest of the decade as violent tactics spread. Simultaneously, the crisis undermined the EU's legitimacy. A mass survey in 2024 had shown that Europeans perceived oppression of individual rights as an equally high threat to peace as violent extremism. The crisis subsequently diminished trust in the EU, which had been seen as the main international actor protecting these rights. Internationally, the EU faced a severe backlash, for example, within the UN Human Rights Council, as a group of Latin American and African countries demanded the expulsion of three newly-chosen EU member states for the lack of resolute action in the face of the crisis. In short, the crisis severely weakened the EU's claims to be a "principled yet pragmatic actor", since it did not appear to have been either.

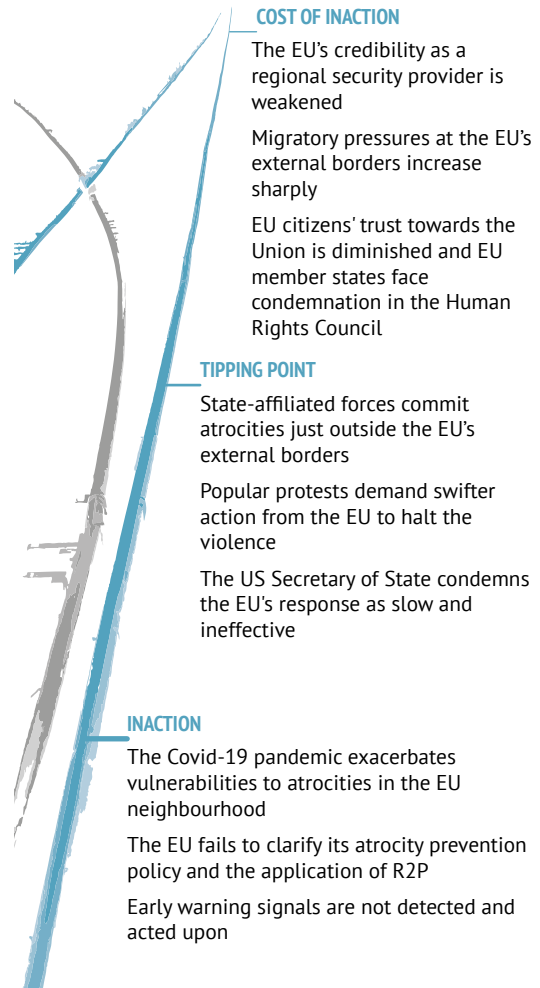
Several lessons were learned. By prioritising atrocity prevention, the EU could regain some of its lost normative power and legitimacy while – if the scope and purpose of shared responsibility was clearly defined – avoiding over-promising or appearing arrogant as a global actor. After all, the principle of preventing atrocity was something most members of the international community had to agree on – at least in principle. It was also understood that prioritising atrocity prevention would advance the EU's strategic interests, particularly the stabilisation of the neighbourhood.<sup>9</sup> On this basis, a Joint Communication to the European Parliament and the Council on the EU's

<sup>9</sup> "First things first: prioritise mass atrocity prevention", PeaceLab, July 18, 2019, <https://peacelab.blog/2019/07/first-things-first-prioritize-mass-atrocity-prevention>.

atrocities prevention policy emphasised the following elements:

1. The EU prioritises upstream atrocities prevention as the most cost-effective strategy that helps to avoid more punitive action. This requires integrating specific atrocities prevention lenses in different realms of external action, particularly in strengthening resilience;
2. Atrocities risk is to be better addressed as an outcome in the CEWS exercise; EU Delegations play an important role in channelling early warnings;
3. To secure early action, a threshold of atrocities risk is defined; passing the threshold will invoke systematic action, including an assessment of how to apply the Human Rights Clause and/or preferential trade terms in the given situation;
4. Operational atrocities prevention relies on disincentivising and disabling the perpetrator and protecting the potential victims, through, for example, digital and offline diplomacy, support to countering violence-inducing ICT use and disabling the arms acquisition of potential perpetrators;
5. The EU swiftly names and shames perpetrators of atrocities and refers these – according to International Law – to the International Criminal Court (ICC). CSDP capacities (e.g. an atrocities stand-by Battle-Group) are made available to prevent or halt atrocities.

## Timeline





Foresight is an *action*-oriented endeavour: only rarely does it look at events *not* taking place, actions *not* taken, or the consequences of doing *nothing*.

But inaction can have far-reaching repercussions. Policymaking is not just about devising and implementing policies, but also about decisions: those crossroads where action and inaction may lead to divergent outcomes.

The 12 scenarios presented in this *Chaillot* Paper draw attention to the cost of inaction in a variety of areas, ranging from Russia to Africa, from cyberspace to environmental matters. They highlight the (geo)political, economic and strategic implications of not taking action at a critical juncture. Together, they apply the precautionary principle to foreign and security policy, whereby calculating the different consequences of action and inaction in the future would help policymakers take crucial decisions ahead of time.