
Europe in 2030: four alternative futures

Luis Simón & Ulrich Speck (eds.) - December 2017

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Real Instituto Elcano - Madrid - España
www.realinstitutoelcano.org

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C/ Príncipe de Vergara, 51
28006 Madrid
www.realinstitutoelcano.org

ISSN: 2255-5293
Depósito Legal: M-8692-2013

Elcano Policy Paper

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Introduction

Luis Simón and Ulrich Speck

Europe's future is not what it used to be. Ever since the global financial crisis broke out nearly a decade ago, Europe has been hit by one crisis after another. There has been a debt crisis, an economic crisis, an Arab Spring gone bad, a Ukraine conflict, a migration and refugee crisis, a subsequent wave of populism and nationalism running through much of Europe and a Brexit crisis. And now there is a Trump crisis, putting vital transatlantic ties into question.

Granted, the mood seems to have changed recently. Economic growth is back. And the election of Emmanuel Macron as French President has brought a fresh, energising approach to discussions on the future of Europe. This could well create new political momentum to tackle some of the structural challenges faced by Europe. However, whether the new drive will lead to changes beyond the level of the symbolic remains to be seen. There are deep-seated, fundamental divisions in Europe over economic philosophies, foreign and security priorities and migration.

As the fulcrum of global power shifts away from Europe and the Atlantic, and given the ongoing uncertainty about the future of US foreign policy and engagement in Europe, the European order looks increasingly fragile, as do the institutions that embody that order. Beyond Europe proper, conflict and geopolitical competition are back and globalisation – with its vision of benign, harmonious global governance – appears to be under threat.

With the future becoming increasingly uncertain, there is a renewed interest in scenarios: how might the future look like if trends that are already visible today prevail and lead to massive changes? What if events suddenly change the course of history, as occurred in 1989? What is the purpose of European integration? What is it supposed to achieve or, for that matter, prevent from happening? What does a successful Europe look like? And a failing one?

At the Elcano Royal Institute's Brussels office we have decided to contribute to the ongoing debate about Europe's long-term future with a number of scenarios, looking at Europe in 2030. Our aim is to focus not on any particular institution (such as the EU or NATO) but on the broader European geopolitical architecture, paying special attention to the link between intra-European political relations and Europe's role in the world. That is where we want to put our mark, and set this exercise apart from others. Our main focus is thus on the interaction between European states, and their relations with great powers, primarily the US, China and Russia.

The broader question looming over our exercise is whether Europe will be a geopolitical subject or an object, ie, an actor in its own right or a playground for great-power competition. It goes without saying that there is no way to address the question in black-or-white terms, but rather through a fifty-shades-of-grey lens. Here we sketch out four possible answers that rely on the views of four foreign-policy experts on how the future might unfold.

The first contribution outlines the nightmare scenario: a divided, 'free for all' Europe, in which the continent falls prey to penetration from several external actors as well as to the reverberations of intra-European competition. What happens if Europe fails? How does a Europe in which nation states have largely ceased to cooperate, and the EU and NATO either wither away or become irrelevant, look?

The second contribution takes a radically different point of departure: a united Europe. In this scenario, the EU succeeds in becoming both the key player in European geopolitics as well as a significant force or pole in the world.

The third contribution is a 'rebirth of the West scenario', in which the transatlantic framework remains the organising factor of both European geopolitics and Europe's doings beyond Europe. It outlines a future in which the US and the UK emerge again as the leaders of a united West, and as the main focal points of European politics.

The fourth and final contribution presents a 'strong China' scenario, in which the mechanics of Chinese penetration in Europe are unpacked.

Developing a scenario implies taking some risks. The future that might be can look very different from all four scenarios presented here. But we believe that thinking about scenarios is nevertheless of key importance to policy-makers, experts and the wider public. Not because they predict with scientific rigour what is going to happen but because they make it easier to discuss expectations and to bring into the open the many implicit assumptions about the future on which our political discourse is built.

The credibility of scenario-based exercises depends not so much on their methodology, but rather on the ability of researchers to identify major trends, connect those trends with each other and use their imagination and creativity to go beyond conventional images about the future. In this project, we left it largely up to the authors to draw on their individual expertise and make a journey into the unknown. While we as editors were keen to have the four scenarios speak to each other, we did not want to limit the creativity and inspiration of each individual expert. In order to ensure a certain degree of coherence and cohesion, we discussed early drafts at an expert workshop in Brussels in May 2017, where we had the opportunity to gather input from several officials from the EU, NATO and member states, as well as experts from the think-tank and academic worlds and the media.

Political actors make decisions based on certain assumptions. They have goals in mind, and are driven by visions of (a) desirable future(s), often plagued by images of nightmare futures. Scenarios help us spell out the desirable and the undesirable in greater detail.

The aim of our project is to contribute to the discussion about possible futures for a Europe whose order is increasingly challenged in an increasingly volatile, contested world. It is an invitation to make a journey into the future. We found it intellectually stimulating and hope that our readers will enjoy the journey.

1 A failing Europe

Ulrich Speck

This is the doom and gloom scenario. Its aim is to map out how Europe might look in a world that has become markedly multipolar and is no longer characterized by the liberal order. In this world, Europe has failed to protect and further develop its institutional and cooperative architecture, enshrined in the EU and in NATO. In other words: Europeans face a Hobbesian world and a Hobbesian Europe: countries mistrust each other, have largely stopped multilateral forms of cooperation, compete aggressively over scarce resources and struggle to barely survive.

In this dark scenario, three major factors will shape Europe in 2030. First, the special relationship between the US and Europe is gone. NATO no longer exists. Secondly, the EU has become irrelevant, surviving only in name. The European institutions that were built throughout the second half of the 20th century have been unable to survive the crises of the 2020s. Third, on a global scale, a multipolar order has put an end to the attempts to build solid multilateral institutions and provide 'global governance' through organised cooperation. As a result, relations between states in Europe 2030 are characterised by mutual fear, suspicion and distrust. Most European countries are at the mercy of the few leading military powers who are calling the shots on the global scene.

1.1 The end of the West

The end of the West – of the transatlantic 'special relationship' – had been long brewing, and eventually came to 'fruition' in the 2026. In the years before, Americans had become increasingly unwilling to invest in Europe's protection. Europeans contributed to America's disenchantment by failing to pay more for their own defence. Repeated calls from Washington for Europeans to 'do more' largely fell on deaf ears, despite some symbolic gestures. For Washington, Europeans had become a burden instead of an asset. In particular, the refusal of Europeans to support the US when tensions with China mounted in the early 2020s led to much anger in Washington. US commentators spoke about 'a stab in the back', and called for disengagement from an 'utterly useless alliance'.

NATO did not fall apart with a big bang. Rather, it faded away slowly after Moscow realised that the only thing that kept the Atlantic Alliance alive was Russia's threatening behaviour. Intimidation and meddling in the domestic affairs of Western countries was backfiring for Moscow. Under its new President, who branded himself a 'liberal', Russia called for a 'reset' with the West. It presented itself as an honest partner, interested in cooperation with the West, even in the Russian neighbourhood. It proposed a new format for the eventual resolution of the Ukraine conflict. After some hesitation, most Western countries were breathing a sigh of relief, and started to let down their guard. NATO was apparently losing its *raison d'être*.

The mix of US isolationism, Europe's failure to step up its contribution to security, and the siren songs about cooperation from Russia led to NATO's dissolution in 2026. The US had in any case already withdrawn its troops from Europe in 2024. Leaders of almost all big European countries, with the exception of Poland, held a meeting with Russia in St. Petersburg in the autumn of 2025. The meeting's final communiqué stated that by 2028 negotiations for a new cooperative European security order should have reached their final stage.

However, talks broke down suddenly –predictably, according to critics– in 2027. Then, Russia swung back towards its former strategy of intimidation and influence-building, especially in Eastern Europe, but also in Western European capitals. The Russian President argued that Western European powers had betrayed Russian goodwill. A year after the closure of the NATO headquarters in Brussels, however, there was no political will on the US side to revive the alliance, especially as cooperation between Washington and Moscow in the Middle East seemed to become more promising at that moment.

European attempts to replace NATO, especially its nuclear umbrella, under British and French leadership fell apart at an early stage when it became clear that neither country would be willing to provide Central Europe with credible security guarantees (which would include, among other things, a 'tripwire' military presence). At the same time, Germany remained largely passive in those debates and activities, failing to seriously upgrade its military hardware and lacking a convincing commitment to European defence.

1.2 The failure of the European project

In parallel to NATO, the European 'project' had failed as well. What led to the EU's downfall was not another crisis of the joint currency but the spill-over effects from the war zones in the Southern neighbourhood and the Sahel. Mass poverty and mass migration had led to even more instability in the region, with elites in most countries being neither willing nor capable to build stable, inclusive states, and instead looking after the interests of their families and clans. Regional and outside powers were also pursuing equally short-sighted ad hoc policies oriented towards very narrow goals, and this led to conflicting strategies.

The European powers could not agree on a joint strategy to deal with these crises and challenges or with the growing migration pressure from the South. Greece and Italy had to deal with the growing refugee waves largely on their own. Overburdened and angry, both countries decided to send the migrants across their borders further north. This in turn led to a re-introduction of permanent border controls and to a fortification of Greece's and Italy's northern borders.

In 2026 radical right-wing nationalist leaders took over in both countries with similar agendas. They promised to 'clean up' their countries of immigrants. And both declared they would hold referendums on EU membership, tapping into the deep frustration with fellow EU countries. When they won landslide victories, spreads between the bonds of southern Eurozone countries and Germany were skyrocketing; finally, Germany, scared and angered, took the step of leaving the Eurozone, which led to its immediate collapse.

The turmoil that followed the end of the Euro led to an economic shockwave across Europe and beyond. On a political level, the remaining trust immediately broke down, with each EU member state blaming others. While nobody wanted to take the radical step of declaring the EU dead, the institutions in Brussels were losing almost all relevance as countries started to ignore them. The European summits, held only annually, became photo-shoots with no real content; and ministers started to send their deputies to meetings in Brussels. As one commentator in Berlin wrote: 'Today's EU look as empty and useless as the Holy Roman Empire before it fell prey to Napoleon in 1806'.

1.3 The rise of a multipolar global order

By 2030, 'global governance', 'rules-based order' and 'liberal order' have disappeared from the lexicon of international politics. Leaders and opinion-makers have adopted the 'realist' vocabulary that defines international politics more or less as a shark-tank where only the strongest survive – ruthless competition between states in an anarchic environment. Early promoters of this view have been, besides some US foreign-policy analysts, the governing elites in Russia and China.

These elites were seeking to purge the international order of all its liberal and democratic features, as they threatened their hold on power. What they aimed at was 'to make the world safe for autocracy', as a prominent Russian political expert with links to the Kremlin described it. Russia and China, however, tried to maintain some elements of the UN system to bolster their great-power status. And they put some effort in keeping large parts of the international economic system intact in order to be able to sell commodities (Russia) and to trade internationally (China).

They were largely successful in destroying the liberal international order that had been built by the US and its partners in the second half of the 20th century. The new 'multipolar' order was integrating states vertically instead of horizontally. Hierarchy became the defining feature of the new system. It contained broadly three tiers: the top-level of great powers (US, China and Russia), followed by a few nuclear powers capable of retaining some independence (the UK, France, India and Iran) and 'the rest', made up of all other countries who were not treated as sovereign, providing the space in which top-level powers competed for influence.

What made this transformation possible was America's failure to stand up for the world it had made. The US abandoned its leadership role; it did not see itself any longer as the architect and primary guarantor of the international system and largely stopped investing in it. Instead, it wanted to become a country 'like all others', a player inside this order: a superpower for sure, but not one that had any more responsibility for the maintenance of the system than others. The US largely followed the prophetic words of Donald Trump's security advisor H.R. McMaster and of his economic advisor Gary D. Cohn, who had laid out in 2017 that 'the world is not a "global community" but an arena where nations, nongovernmental actors and businesses engage and compete for advantage. We bring to this forum unmatched military, political, economic, cultural and moral strength. Rather than deny this elemental nature of international affairs, we embrace it' (WSJ, 30/V/2017). But with the US abandoning its leading position, the liberal international order itself fell apart.

European countries were unable to step in and step up, as they were consumed with their own failure to uphold the regional European order that emerged after 1945 and after 1989. They also failed to understand what was at stake, and that they would necessarily be among those who suffered most from the emergence of a 'multipolar' order – because Europeans had been among those who profited the most from the horizontal integration in a multilateral order led by the US in its role of a largely benign hegemon.

The multipolar order came with a sharp increase in regional tensions, especially in regions where the top-level powers had a major interest: in South-East Asia, in the Middle East and in Europe. As in the Cold War, it was again in the periphery of the spheres of influence of the leading powers where clashes occurred, turning different local factions, supported by different big powers, against each other.

With the rise of the multipolar order, globalisation largely fell apart. The big global players were aggressively protecting their industries and trying to force weaker countries to join regional trade blocks. Global, interregional trade suffered increasingly and diminished.

1.4 A weak Europe in a multipolar world

During the 2020s Europe failed to keep the multilateral order alive – an order based on the idea of mutually beneficial cooperation between states that accept each other as equal, and of the integration of their societies. 'A noble dream', as a recent history of the EU has put it, 'but obviously tied to a specific historical period and geo-political constellation, the Cold War, when American dominance ended centuries-old European competition and monopolized defence and strategic leadership in its own hands. Once the US withdrew from Europe, power moved back into intra-European relations as the defining feature, and with it the old distrust and competition that many had hoped Europe had overcome forever'.

When the US withdrew its remaining troops from Europe in 2024, Russia immediately doubled its efforts to strike a deal with Germany, using all kinds of carrots, such as economic cooperation and friendship, as well as sticks, ie. veiled threats. After some hesitation, Germany agreed to negotiations on a broad bilateral framework agreement. The deal was finalised in 2027. Ever since, the Russian embassy in Berlin has played a central but discrete role in shaping German policy; Russia has a de facto veto over the major decisions of the German government. What looked like a deal among equals was, as a Polish commentator wrote, 'nothing less than Germany's entrance into Russia's political sphere of influence'. Germany got security, market access and a reliable flow of energy, while Russia made sure that Germany would not stand in the way of its imperialist objectives, especially in Eastern and Central Europe, and would provide Russia with the most advanced technology.

For Poland, it was a nightmare come true. Warsaw saw itself encircled and tried to enlist the help of Western allies. But the US gave Poland the cold shoulder, arguing that 'Europe is a rich continent that can take care of itself'. Furthermore, Washington at that time was in complex negotiations with Moscow over cooperation in the Middle East and East Asia. Britain was busy building ties with Asian economies and was cosyng up to oligarchs from

Russia and the post-Soviet sphere, to attract their investments. France on its part had just signed a friendship treaty with Russia, hoping that Russia would help with its military operations in North Africa and the Sahel, and accept a French role in the Middle East.

Germany's influence in 2030 is diminished. The country had economically suffered from the geopolitical turmoil in Europe, especially from the break-up of the Euro and the decline of the Single Market and its freedoms. But it had managed to pluck some sort of mini-EU from the ashes: a Berlin-centred economic union made up of most of its northern and eastern neighbours. But integration was only superficial. Overall, Germany's neighbours were very suspicious of it, and the trust that had been built up over decades was gone. Eastern neighbours were nervous about the German-Russian rapprochement while Western neighbours were fearful of German hegemony.

Increasingly, Russian oligarchs were busy penetrating South-East and Central Europe. The kleptocratic system slowly but surely undermined the rules-based market economy, moving from east to west. Germany tried to keep at least some features of the market economy intact, but was not in a position to resist serious pressure from Moscow.

While not openly competing with Russia in Europe, China made sure that its commercial interests in the old continent were respected. It had negotiated a number of trade deals with individual European countries on Chinese terms, basically treating Europe as a place to sell consumer goods and to gain access to the most advanced technology. China was also in firm control of the trading routes to Europe, over land and over sea. Russia and China had found some fragile power-sharing agreement over Central Asia, the Caucasus and Eastern Europe. Only very few European companies, mostly German, were still able to gain some (limited) access to the Chinese market.

With the economic and political turmoil in Europe, fear and anger were becoming predominant sentiments in the political arena. The centre failed to hold, extremist parties and movements on the right and left were rising, nationalism and xenophobia became dominant all over Europe. In 2030 parts of Eastern and Southern Europe were run by strongmen, following the example of Turkey, where Recep Tayyip Erdoğan had managed to stay in power. Spain and Portugal had suffered heavily economically from the decline of the EU. But they had been less drawn into the geopolitical turbulence, thanks to their geographical location. Both were trying to re-orient themselves geopolitically by strengthening ties with Latin America, which remained relatively stable and prosperous, despite some heavy economic blows following the collapse of the Euro.

Conclusion

The departure of the US and the breakdown of Europe's main institutional framework, the EU, has not led to a situation similar to the 19th century, when Europe was run by a 'concert' of great powers, or the first half of the 20th century, when two major wars took place. Instead, Europe has become a space in which more powerful and more aggressive countries are increasingly competing for influence, primarily Russia and China. Only the two nuclear powers, France and the UK, were able to retain some independence. Germany remained true to its pacifist stance, kept a low military profile and was hoping to be able to pursue its economic interests by not standing in the way of Russian and Chinese neo-imperialist designs.

Overall, the Europe of nations that emerged out of the ashes of NATO and the EU was much poorer, much less secure and much less free, living largely at the mercy of others. 'Divided we fall', as the Prime Minister of Luxembourg resumed when he received the last Charlemagne Prize in Aachen in 2026.

2 A strong and united European core

Alexander Mattelaer

This scenario presents a future in which Europeans grasp the opportunity to fend for themselves in an increasingly contested world. As the international system gravitates back towards multipolarity, the EU stands out as a beacon for multilateral statecraft. While it may not always succeed in getting others to adopt its preferred playbook, the EU does acquire the teeth to defend its collective security and economic interests when they are threatened. In many respects, this is the most rational scenario for Europeans if the US chooses to retreat from its historical role as guarantor of the liberal and democratic world order.

What conditions need to be fulfilled for Europe to stand united and strong in 2030? This scenario is premised on three major developments born during the gradual crumbling of the post-Cold War order. The first of these concerns the consolidation of a European core as the political point of reference for defending the collective interests of Europeans on the world stage. While controversial in domestic politics, this consolidation into a European federation eventually materialises as the product of growing internal and external pressures. The second relates to Europe's relations with the wider world, which can be characterised as cordial as far as the transatlantic relationship is concerned but increasingly transactional with regards to the other major powers. Thirdly, Europeans have collectively learnt to articulate a foreign policy vision that appeals to partners in the neighbourhood as well as beyond the horizon. As such, Europe leads the way in 2030 as a multilateral great power.

2.1 *The emergence of a European core*

During the 2010s, the European project went through a period of unprecedented stress. The near-collapse of the common currency, uncontrolled migratory flows crossing the Mediterranean and the chaotic departure of the UK from the EU ground the process of European integration to a near halt before propelling it forwards again in the early 2020s. Led by a core group of member states unwilling to see the EU unravel completely, Europe successfully reinvented itself as a federation of nation states pursuing collective interests together. By 2030, Europe has become a more unitary actor than it was in previous centuries. Compared to other powers, it remains more diverse and more loathe to use force, true to its liberal democratic traditions, yet ultimately it faces a world in which weakness invites external interference. As such, Europeans learnt to fend for themselves by relying on the benefits of scale brought about by multilateral cooperation.

Europe's trajectory towards consolidation was not pretty. From the rejection of the EU's proposed constitution in 2005 onwards, domestic controversy about the future direction of the Union started to increase. The bursting of the debt-fuelled economic boom in 2008 – triggering many years of painful economic reforms – and the temporary loss of control over Europe's external borders in 2015 substantially aggravated latent tensions in European societies. Political polarisation ensued in nearly all European capitals. In 2016 the desire to 'take back control' convinced the British to vote in a referendum to leave the EU. In Central

Europe, various governments started backsliding towards autocracy, setting the scene for high profile confrontations with the European institutions.

As turmoil within Europe kept on increasing, various actors hostile to the EU and the Western world more generally sought to capitalise on the opportunities this offered. A revanchist Russia sought to exploit European divisions to expand its sphere of influence in Eastern Europe. Meanwhile, radical Islamists launched a terrorist insurgency campaign across Western European capitals with a view to sparking a violent clash within these societies. In 2019 the UK formally left the EU without a new framework in place to maintain trade and cooperation. Soon afterwards, the EU membership of Poland and Hungary was de facto suspended as their governments were no longer willing to recognise the supremacy of European law. In several other members, Eurosceptic parties made substantial headway. Under all the accumulated stress, Europe faced nothing less than internal political implosion.

From 2020 onwards the tide started to turn. Recognising the dysfunctionalities of the EU and the relative neglect of the NATO alliance by the second Trump Administration, ever more European leaders became convinced the constant turmoil and gridlock could not continue. In particular, the twin ideas of US security guarantees no longer being unconditional and Europe's monetary architecture being incomplete drove forward European thinking on the need for a macropolitical framework. During a special summit hosted by the German Presidency in Bonn, agreement was reached that 'Europe needs to reinvent itself once again: more integration for those member states able and willing, less for those who want to pursue national autonomy, with each option presenting its own advantages and disadvantages'.

In 2021 17 member states went on to sign a new treaty establishing a European federation. In many European capitals the political debate was intense, but eventually all signatories managed to ratify the new treaty. All other member states were cordially invited to join 'if interested and when ready to accept the associated costs and obligations', effectively muffling complaints about different tiers of membership.

The newly established European federation was designed with a view to allowing greater differentiation between a looser EU focused on the single market and a more tightly integrated European core, built not only around a single currency but also including a separate budget for macro-economic stabilisation and a mutual defence guarantee. In effect, the new treaty did not so much alter the existing EU acquis, but rather provide an overlay designed to offset existing shortfalls and clarify the division of policy competences between the national and the two European levels. Most notably, the new treaty included substantial provisions for harmonised fiscal policies, the establishment of a European treasury and the introduction of qualified majority decision-making in the fields of foreign policy and defence, albeit without obliging member states to provide military contributions without national parliamentary support. As such, the new treaty did not create a fully-fledged European superstate, but rather an amended version of the earlier EU rendered more functional by greater cohesion amongst a smaller number of member states.

At the macro level, it became clear that the idea of European unity did not have any clear geographical referent. The federation that ensued could grow and shrink like a breathing lung as long as the commitment to European cooperation remains intact. The European core thus resembled an arc spanning from the Iberian Peninsula in the south-west to the Baltic Sea region in the north-east. Nations from the European north-west could find a suitable home in a free-trading arrangement with the European federation, whereas parts of central and south-eastern Europe constituted a soft underbelly in which competition with other powers – notably Russia – endured. Whereas feeble attempts at deterring external interference failed to ensure security for the wider EU, the European federation constituted the territorial bulwark the constitutive members committed to defend with all necessary means. This did require European nations to commit a significant increase in military expenditures with a view to shoring up their hollowed-out defence establishments.

2.2 Cordial transatlanticism vs transactional international relations

As the 2020 progressed, political and economic developments in East Asia came to dominate the international agenda. The most notable development in this regard was the increasingly adversarial relationship between an expansionist China on the one hand and the US and its regional allies on the other. This prompted intense foreign policy soul-searching for the young European federation. With respect to its relationship with other great powers, the outcome was the pursuit of an autonomous but cordial and cooperative relationship with the US and a retreat into an increasingly transactional relationship with other regional powers. By the end of the decade, a commercial relationship with China persisted, although characterised by frequent disputes over market access and the protection of intellectual property. In contrast, the relationship with Russia failed to recover following the many years of rhetorical hostility and influence competition in the non-federated parts of Central, Eastern and Southern Europe.

The most intensely debated foreign policy issue within the young European federation concerned the transatlantic relationship. As the second Trump Administration continued to regularly scorn the value of the Atlantic alliance and went on to shift an ever-greater share of US diplomatic and military resources to the management of the East Asian theatre, many Europeans lost faith in the longstanding role of the US as a friend of European integration. The prospect of seeing Ivanka Trump succeed her father in the White House in 2024 led to calls by some constituencies in Paris and Berlin to 'decouple' Europe from the US. This prompted great dismay in London, but as the UK was still reeling from an enduring economic crisis caused by the disruption of its European trade links, it found itself unable to meaningfully influence European decision-making. As the debate unfolded, however, it soon became clear that the unity of the European federation itself could not survive such a proposed decoupling. While fraught in domestic controversy in many capitals, the emerging consensus was to stress the autonomy of European decision-making but pursue a wide-ranging and cooperative relationship with Washington as much as possible. The relative interest in Washington to work with European allies – itself fluctuating in function of US domestic politics – thus became the key determiner of the strength of the transatlantic relationship and the vitality of the NATO alliance.

Vis à vis other great powers, the debate on the federation's foreign policy orientation was easier to settle: positive relations were pursued wherever possible, more strained relationships if European preferences and interests were ignored. The relationship with China, increasingly keen to compete with the US in its quest for regional hegemony in East Asia, was arguably the most complex one to define. Longstanding squabbles over mutual market access in different sectors and frequent disputes over intellectual property rights endured, and the increased use of automation and robotics resulted in a partial repatriation of production processes to the European continent. Nonetheless, substantial trade flows continued between Europe and East Asia, even as Europeans actively pursued a wide array of commercial partners in the region. Relations with India and Indonesia, for instance, provided important complements to trade with China. The European preference for dealing with democratic counterparts meant that such relationships somewhat warmer, even if not devoid of occasional differences of opinion.

Despite recurring European efforts to pursue a policy of détente, the relationship with Russia remained broadly speaking adversarial. The conflict by proxy that had started in Ukraine in 2014 had continued to fester until an uneasy truce in 2028 – born out of the sheer exhaustion of local parties – finally ended the sporadic fighting and de facto split the country into two. Moscow's constant efforts to disrupt European unity in the late 2010s had the paradoxical effect of shoring up domestic support for the proposed federation. When this European core came about, Moscow continued to portray this as yet another manifestation of a European empire encroaching on Russia's sphere of influence, to be resisted with all available means. In spite of repeated attempts to come to a geopolitical understanding – even offering Russia to join the residual EU – the regime in Moscow choose to mark the European federation as its principal rival. This left Europeans in the unenviable position of having to constantly manage Russia's latest attempts at causing disruption, while preserving the integrity of the young federation and protecting its essential economic and security interests.

2.3 Europe as a multilateral great power

Looking back from 2030, the most noteworthy development in international relations was perhaps not so much the return of geopolitical contestation in the 2010s and 2020s, but the fact that some of the multilateral institutions painstakingly constructed during the Cold War and post-Cold War periods managed to survive and adapt to the new era of rivalry. The consolidation of the European core into something less than a superstate, but something qualitatively different from a group of nations constantly competing for national advantage, constituted the most enduring evidence in this regard. The articulation of the European foreign policy vision – premised on the notion that multilateral cooperation in the long run trumps international competition – helped to keep the hope alive that the 21st century may still become an improvement on earlier times. This provided different partner countries in the European neighbourhood and beyond with an alternative to getting caught up in the multitude of conflicts amongst other powers. This constituted the basis of a European sphere of influence based on attraction rather than power.

In many respects, the migration crisis that engulfed the EU in the second half of the 2010s underscored the very attraction of the European way of life. As rising numbers of immigrants prompted Europeans to strengthen external border controls and invest energy and resources into developing partnerships with nations across the Mediterranean and beyond, the increasing exclusivity of the European model prompted other nations to emulate its political and social achievements. By 2030, progress on this front remained uneven at best, but the development of constructive relationships with different North African countries constituted an important reminder that major progress could be achieved.

The European model of multilateral international cooperation also resonated amongst parties at great distance from the old continent. South Korea, for instance, worked to maintain close relations with the European federation when it became increasingly caught up in the regional standoff between the US and China. When the latter powers became embroiled in a regional trade war from 2019 onwards, shipping to and from Europe constituted a critical economic lifeline for Seoul. Similarly, Brazil came to play an increasingly important role in the international dynamics of the Latin American world and the South Atlantic. Building on longstanding ties with Spain and Portugal as well as a deep-rooted commitment to the fledgling UN system, Brazil and the European federation developed into close partners in the 2020s. The fact that Mercosur during the 2020s developed along a trajectory not unlike the European Community constitutes the clearest sign that the multilateral template of conducting international relations has yet much upward potential.

Conclusion

Having averted internal implosion in the 2010s, the amorphous European core that survived the uptick of international rivalry and corresponding retreat into nationalism went on to become a beacon of international stability and modest regional influence. The European federation could not claim to shape the world in the same way as great powers have historically done: it had to go on the defensive in a territorial as well as in an ideological sense. Institutionally and politically, it remained a convoluted arrangement of overlapping institutions and policy competences. Yet it did manage to muddle through when the headwinds were blowing the strongest, driven not so much by political ambition as by the collective resolve not to return to an ugly past. With much of the remaining world plunging into chaos, most citizens of the European federation considered themselves lucky to be relatively sheltered from such turmoil. They did have to learn the hard way that this carried a price: not just in terms of the way in which they were politically represented, but also in rediscovering that citizenship sometimes implies sacrifice when key interests are at risk. By 2030, Europe could stand united and strong.

This scenario may read as science fiction, and it may well be. Yet the development of European integration only looks realistic with the benefit of hindsight. After all, history is a future that is not yet written.

3 An Atlantic revival

James Rogers

When conceived in the late 1990s, nobody imagined that HMS Queen Elizabeth, a 70,000 tonne behemoth – the only supercarrier ever put to sea by a European country – would be leading in a tense stand-off some 30 years later with the Chinese 2nd Indo-Pacific Fleet. Few would have accepted, either, that China and Russia would eventually come to a ‘mutual understanding’ and form a new alliance, with the means – if left uncontested – to dominate international politics, in a way even more profound than Sir Halford Mackinder’s worst nightmares in relation to Germany and Russia at the beginning of the 20th century. Equally, few would have thought that the EU’s efforts to form a common security and defence policy, apparently moving forwards quickly when HMS Queen Elizabeth was on the drawing board, would come to naught, let alone that much of the EU’s eventual institutional apparatus would be quickly disbanded once new geopolitical forces pulled them apart from within and from without. While some might have foreseen both NATO’s continued primacy, and the continued existence of the unique relationship between the US and the UK – a necessary partnership for Euro-Atlantic security – few could have foreseen the intra-European developments that would change both profoundly. The world of 2030 was very different from the world of 2000, yet in some ways it remained much the same.

This scenario aims to glimpse the future and see what the world will look like if the West – led by the ‘Atlantic democracies’, the US, the UK and France, along with their allies – still dominates international affairs. This scenario sees not only the maintenance of an ‘Atlanticist’ international order, but also its strengthening, particularly as a Eurasian ‘axis of autocracies’ takes hold to contest the system upheld by the Atlantic democracies. It is this development that spurs the leaders of America, Britain and France to work closer together to protect their system from external attack, just as they did during the Cold War. In this optimistic scenario, the world is shaped by four entwined trends. First, a ‘pentad’ takes shape, as Japan and India join France, the UK and US as custodians of the expanded ‘Atlanticist’ order. Secondly, this splinters the EU, and deflates the vestiges of Europeanism, facilitating the rebirth of a genuinely ‘Atlanticist’ model, guided by the principles of the 1941 Atlantic Charter. Third, NATO – already greatly empowered, particularly after the Russian takeover of Belarus (and Eastern Ukraine) in 2025 – resurges as the Europeans’ forum of choice and European defence spending is ramped up in response. Finally, the establishment of the Pyongyang Pact by China and Russia in 2028 further alarms the Western democracies and the liberal-democratic Asian nations, spurring the extension of NATO towards the Pacific in the form of an Atlantic-Pacific Defence Organisation (APDO). And the APDO adopts a new containment strategy to prevent the Pyongyang Pact from expanding out from its heartland in Eurasia.

So, the world of 2030 is not inter-polar, multipolar or unipolar. It is broadly bipolar. On one side sits the APDO, dominated by the ‘pentad’ of the US, UK, France, Japan and India, with Germany, Canada, Italy, Turkey, Malaysia, Poland, Singapore, Spain, Australia and New Zealand, and South Korea among others, in support. Founded in 2029, the APDO now has a

population of over 2.5 billion, and an economy producing just over two thirds of the world's economic output, and two of the world's three leading financial centres (London and New York City; Shanghai ranks third and Mumbai fourth). Equally, with a military budget of US\$1.8 trillion, the APDO is the strongest alliance in world history. It will become stronger still when the US, British, French, Indian and Japanese navies take receipt of their new class of 'arsenal ships' in 2034: 85,000 tonne behemoths armed with long range hypersonic cruise missiles, electric railguns and protected with tactical defence lasers, designed to enable the vessels to penetrate and operate within range of the complex systems China and Russia have used to generate anti-access and area-denial (A2AD) environments.

On the other side sits the Pyongyang Pact, formed when the Shanghai Cooperation Organisation (SCO) – once ignored by Western statesmen as Beijing's plaything – was dissolved and reformed into a formal alliance. This pact contains China and Russia, along with Taiwan, Vietnam, Burma, Bangladesh, Indonesia, Pakistan, Iran and most of the countries of Central Asia. It is nominally weaker than the APDO, but is gaining strength fast. Its aim – in the words of the Security Advisor to the new Russian tsar – is to make the world safe for autocracy. It is a distinctly continental alliance, investing heavily in anti-access and area-denial capabilities, in an attempt to frustrate the US, UK, French and Japanese navies from being able to move around the European and Asian rimlands unhindered.

3.1 The regeneration of Euro-Atlanticism

Territorially, Europe in 2030 looks little different to 2017. However, the EU – once thought of as the future – has ceased to exist in a meaningful political sense. Europeanism has also long been consumed by aggressive nationalist impulses and wider geopolitical change. In any case, the EU was incompatible with Atlanticism: it was a 'particularist' project to generate a European community, distinct at first from the US and Canada, and later also – once it had fully withdrawn in 2021 – the UK. In hindsight, while many thought it was madness at the time, the decision of the British people advising their government to leave the EU came with a silver lining. As the British were shut out of the European corridors of power over the course of 2018 and 2019, Anglo-American relations steadily grew, particularly as it became clear that the EU was digging in, as part of an attempt to frustrate British withdrawal from the bloc. The imperious President of the European Commission stated at every opportunity that 'Brexit cannot be a success'. The European bureaucracy in Brussels creaked to put this policy into effect. At every turn, British initiatives to form a deep partnership with Brussels were thwarted. The US, increasingly alarmed at Germany's 'geo-economic' commercial policy, and worried that the EU was starting to represent an effort to segregate its members from the wider Euro-Atlantic order – and the US and UK in particular – sided firmly with the British.

On 11 November 2018, the centenary of the day the guns of the First World War fell silent, provided an optimal moment for celebrating the Anglo-American alliance: the Prime Minister and President announced that, after the commissioning of HMS Queen Elizabeth in the spring, a new joint UK-US strike group would be set up in the Gulf, freeing up American naval equipment for redeployment to East Asia. London and Washington also

moved forward in developing a Comprehensive Trade Pact, which was to be implemented the day after the UK formally left the European bloc.

France and Germany reacted differently to the tightening UK-US alliance. Prior to the German federal election in September 2017, many analysts had imagined that Berlin would continue to undergird the EU, particularly had the Christian Democratic Union (CDU) managed to acquire another large share of the vote. However, the growth of the far-right 'Alternative for Germany', combined with the political stagnation resulting from the so-called 'awkward coalition', which reigned from 2017 to 2021, turned Germany into a very status-quo power. This created an inopportune environment for the other part of the European engine: France. The German election confirmed that the two countries were developing progressively different visions as to where the EU should go.

For Berlin, the EU was now more than ever about fiscal and structural reforms, to enable other European countries to reach German levels of economic and industrial efficiency. For Paris, the EU was about the construction of a transfer union, moving wealth – amassed by Germany through its 'geo-economic' approach – to the less affluent regions of the union, including several regions of France. But Berlin held firm. Due to internal coalition politics, it would not countenance transfers of its cash to what many German taxpayers felt were lazy and inefficient peripheral European peoples. Paris became increasingly disillusioned, particularly as the French President's popularity remained stuck in a rut. The French began to look less favourably on their German partners; meanwhile, as Paris started to build closer relations with Rome, Warsaw, Madrid and Athens, some German commentators even started to fret that France was starting to isolate their country.

In addition, throughout the early 2020s, some European countries, already concerned that the EU was taking an unnecessary turn, began to break ranks with the European officials in Brussels, as well as their German backers. The Polish, Nordic and Baltic members of the Northern Group, keen to maintain close links with the British, and by extension the Americans, looked increasingly to the UK to undergird their security, not least as the German-Russian relationship started to warm up again after the Social Democrats romped to power in the 2021 German federal elections. To make up for leaving the EU, London had already taken the most active European stance in backing the deterrence measures adopted by NATO, persistently deploying warships, troops, tanks and fighter jets to Estonia, Lithuania, Poland, Rumania and the Baltic and Black seas. The Joint Expeditionary Force initiative had progressively drawn Sweden and Finland closer to NATO, as well as to the alliance's British and American custodians. And the American president's increasing focus on the worsening geopolitics of East Asia merely concerned them further still. An ardent realist, he took Barack Obama's 'pivot' or 'rebalance' to Asia to its logical conclusion: Asia first; Europe second.

Late 2024 was the moment when everything clicked into gear. When the autocratic regime of Alexandr Lukashenko collapsed on his death, pro-Russian figures took control of the country with great speed. For many years, observers had wondered to what extent Moscow

had penetrated the levers of power in Minsk. Now they had their answer. The fact that Moscow had already gained – albeit slowly and with much bloodshed – control over much of Eastern Ukraine only alarmed Europeans further. The Poles, Nordics, and Baltics now joined ranks with the Greeks, Spaniards and Italians, and denounced the EU and its German underwriters. France made it clear that it was unhappy. The French and the northern and eastern flanks of the EU wanted to keep the British and Americans – with their nuclear forces and strategic reach, uniquely integral to the defence of NATO – involved in European security, while the southern European countries, especially those in the Balkans, wanted to retain close relations with London and Washington to prevent Berlin from becoming too powerful. The EU started to falter. And Germany, backed only by the increasingly unpopular European institutions in Brussels, and a handful of the more prosperous states in the nebulous ‘Germanosphere’, was left largely isolated.

The election of a popular Democrat leader in the US in 2024 led to a changed atmosphere in Washington. Trump, who eventually got to grips with the levers of power, but was never taken seriously by the elites, was gone. British officials had been quietly cultivating close links between the new Administration and the British government in London. The new US President, although from the opposite end of the political spectrum to her British counterpart, understood the importance of a close Anglo-American relationship, in much in the same way as Bush and Blair had. In light of Brussels’ clear efforts to disaggregate the EU from the wider Euro-Atlantic security order, she also admired the British Prime Minister’s arguments about ‘reconnecting’ – as he put it – the Anglosphere countries, particularly the UK and US, to their European counterparts. She found his visceral loathing of the EU sometimes too extreme, but both Brussels’ and Berlin’s popularity in Washington was at an all-time low: they were seen as self-absorbed, responsible for giving Russia an easy ride, alienating Turkey and ultimately frustrating America’s Asian turn, even by those less receptive to British arguments. The British and American leaders were equally keen to dismantle the increasingly quasi-religious ideology of Europeanism, which they both saw as a thorn in the side of Atlanticism. And the British leader was a committed globalist: his strategic horizon reached over mainland Europe; to include the forging of even closer relations with UK and US allies like Japan, Turkey, South Korea, Singapore, Canada, Australia and New Zealand.

On the other side of the world in East Asia, early 2027 was the year North Korea’s hermit regime was finally disarmed. But it was not disarmed by a US bombardment. Instead, it was disarmed because Beijing and Moscow moved to cut off its lifelines. In fact, they did more than that: they issued, through the back channels they had to Kim Jong-un, that unless he stepped down and ‘retired’, albeit at the youthful age of 43, they would take active measures to overthrow him. The withdrawal of the Chinese and Russian ambassadors put the wind up the regime, especially after its attempt at building effective nuclear-tipped ballistic missiles had failed due to crippling international sanctions. Fearing imminent Chinese and Russian attack, the North Korean leader revealed to Beijing that he would step down from power if he was allowed to retire in China. His wish was granted. A transition occurred in North Korea, backed by Chinese economic might. Unsurprisingly, the country remained autocratic, but the brutal *juche* ideology was dropped and Pyongyang gradually opened up

to Chinese and Russian investment. Beijing and Moscow moved fast: fearing reunification of both Koreas, they stepped in to prevent – as they saw it – the expansion of Western power on the Korean peninsula, on their own borders. The new North Korean President, at Beijing's behest, offered to host the governments of China, Russia, Iran, Kazakhstan, Tajikistan, Turkmenistan, Vietnam and North Korea in multilateral talks to discuss the future security of Asia. The result, announced in March, was the Pyongyang Pact.

3.2 Expanding Atlanticism

Washington, London, Paris and Tokyo were startled. For the first time in history, a large chunk of Eurasia was once again under a hostile alliance. In response to the Sino-Russian initiative, the US President moved fast. She announced her intention to withdraw the US from NATO and form a new alliance, predicated on the model of NATO, but greatly expanded to cover other Western countries, particularly those surrounding the new Sino-Russian bloc. The Americans had been in close consultation with London and Paris, which had, in turn, tipped off their newfound allies in Europe and the Middle East. Everything crystallised quickly: a grand summit was announced to take place in Copenhagen. Those supportive of the EU were swivelling, uncertain of which way to turn. They soon realised that the 'landlords' of European security, the US and UK, had called time on their squatters' party, and that – as always, when push came to shove over European geopolitics – the French would support the British and Americans. Both Washington and London hoped that Berlin would play a weightier role in European security, particularly now that it was crystal clear that Russia would never be co-opted by German investment. Germany's leaders signalled to Washington and Paris that they foresaw the need to do more in securing Eastern Europe from further bouts of Russian geopolitical revisionism.

The Cold War was finally over; the exclusively European structures created during that time began to unravel. With no alternative, all European NATO and EU members accepted membership of the APDO, which became a kind of 'league of democracies'. Although NATO had finally 'gone global', it would still be underpinned by the unique geopolitical constellation predicated on the North Atlantic. The US, UK and France remained the centrepiece of the Western world, with the strongest military forces and the confidence to act as strategic custodians of the wider system. Turkey, although less democratic and liberal than many had hoped, was seen as a vital bulwark against Islamist extremism in the Middle East. The Japanese, closely allied with the US, having deepened relations with London and Paris, with significant technological know-how, and equipped with a large and advanced navy, agreed to join them.

As 2029 rolled on, India remained the prize. Its weight – 1.55 billion people and the world's third-largest economy – would greatly inflate the alliance it decided to join. Beijing and Moscow wanted New Delhi as an observer in the Pyongyang Pact, while the Western powers were keen to prevent this development at all costs. The leading APDO capitals – Washington, London, Paris and Tokyo – saw New Delhi as a liberal democracy, with deepening connections to the Gulf states, and thus a natural partner for the West. Despite a lot of pro-US, British, French and Japanese sentiment among New Delhi's political and

economic elites, India saw itself increasingly as a third pole, with sufficient weight to forge its own path in international affairs, a theme picked up since independence from the UK, and autonomy from the superpowers during the Cold War. Although India was terrified of China and the Pyongyang Pact, it was keen to retain cordial relations with Russia and was particularly cautious of forming a closer partnership with the West, especially due to the historical residue relating to the British Empire and the US. However, the way in which Pakistan and Iran were gobbled up by the Pyongyang Pact in 2029 forced the Indians' hand. Surrounded on all flanks by Chinese proxies and naval fleets, and with China's looming power directly above them, they began negotiations to join the APDO. The fact that the Western powers promised vast sums of aid for India's rickety infrastructure tipped the balance. New Delhi's admission occurred the following autumn, giving the West a decisive lead over the Pyongyang Pact.

This brings us round to 2030, back to where we began: HMS Queen Elizabeth and her central battlegroup, part of the APDO's 2nd Combined Fleet, were ploughing through the Arabian Sea to reassure the West's allies in the Gulf. The Chinese 3rd Indo-Pacific Fleet was cruising fast from Gwadar to meet it, with orders from the Admiralty in Shanghai to block access to the Strait of Hormuz to reassure Iran. On meeting the 3rd Fleet, the commander of HMS Queen Elizabeth, laden with a new generation of 60 US, British and French unmanned stealth combat jets armed with tactical defence lasers, contacted the APDO's High Command to request orders. 'The Chinese are blocking access, Ma'am!' said the Commander. 'Proceed, with caution!' replied the US High Admiral. The ship was ordered to move into the Strait and defend itself if fired upon. The APDO 2nd Combined Fleet – comprising an assortment of US, British, French, Indian, Japanese, Spanish and South Korean vessels glistening in naval grey – cruised forward. The Chinese balked and gave way, opening a passage for the Allied ships to cruise through. In one fell swoop, and before the eyes of a nervous world, the APDO had re-asserted the twin pillars of Atlanticism, namely, the centrality of the 'pentad', the West's network of democratic power, as well as command of the ocean.

4 A strong China subverts the European order

Alice Ekman

The driving hypothesis behind this scenario is that, by 2030, China's strategy of active diplomacy towards the European region has come of age, and Beijing's approach to Europe has become highly efficient.¹ In a heterogeneous Europe, often divided on key economic and geopolitical issues, China has accelerated the pace of its initiatives at various levels (local, national, sub-regional, EU). Beijing is confident it is high time to promote its own modes of multi-layered interactions, and to steer Europe away from the institutional traditions and processes set by member-states and the EU, which it considers inefficient and suboptimal for the promotion of Chinese interests.

At the economic level, by 2030 China has increased and diversified its investments in Europe, in the framework of its 'Belt and road initiative'. After heavily investing in transport infrastructure – in particular, railways, ports (more than a dozen Mediterranean ports are concerned) and airports –, China's state-owned companies have also heavily invested in telecommunication and energy infrastructures of the European continent. In addition, China has promoted the development of industrial parks throughout Europe, located near the transport infrastructures developed, with the aim to develop industrial and R&D clusters for Chinese companies and import-export platforms.

At the political level, China has closely followed the domestic evolution of different European countries. In particular, Beijing has developed a savvy understanding of Europe's electoral calendars and pulse, having invested in developing relationships with a wide variety of political parties across the continent, and having built ties with a new generation of European political elites in anticipation of future elections and political appointments. In the period 2018-22, the Communist Party of China had invited 15,000 members of foreign political parties to China for exchanges, as announced by Xi Jinping in December 2017.

At the military level, China has conducted a significant number of joint exercises in European waters – following the first joint China-Russia naval drill in the Eastern Mediterranean in 2015, and in the Baltic sea in 2017. It has also reinforced its military-to-military dialogues and exchanges – in various formats – with most European militaries. Moreover, China has become an important arms provider across Europe's neighbourhood – especially in the Maghreb – and has started to sell small and bigger military platforms (from drones to boats) to an increasing number of European countries.

¹ The author would like to remind readers that the text below –written before the 19th Party Congress– is a hypothetical scenario and not an assessment of the current situation. The methodology includes taking into full account China's foreign policy initiatives and ambitions appearing in current official communication, in particular the latest speeches (2017) pronounced by Xi Jinping in multilateral summits. It is also based on the assumptions that China's current political system will remain largely unchanged, under the leadership of Xi Jinping and the Communist Party of China in the years to come, and that China's economic growth will continue to slow down but not to a point that would lead to a significant downgrading of the foreign policy initiatives and ambitions expressed today.

At the institutional level, China created a cooperation mechanism with 16 Central and Eastern European countries in 2012, a so-called '16+1' forum, that included both EU and non-EU member states. Building on that philosophy, by 2020 China had also set up a flexible mechanism to organise its dealings with Southern Europe (including Spain, Italy, Portugal, Cyprus, Greece and Malta) as well as Northern Europe. Held annually, these regional forums became important gatherings for businesses. China's aim is to promote cooperation in sectors that are relevant from an economic or national security perspective (eg, maritime, big data and telecommunications, tourism, etc.). The success of the Chinese-led annual sub-regional forums, and China's active and efficient public diplomacy, have led to an impoverishment of the agenda of multilateral frameworks embodied by the EU. Issues that are important to China, such as 'infrastructure development' or 'connectivity', have come to dominate European discussions, to such a point that the space left for other topics—especially those perceived as sensitive or irrelevant to Chinese national interests—has shrunk dramatically.

China's foreign policy continues to be based on a strong geographical hierarchy of priorities. Beijing pursues a more assertive and anticipative foreign policy in its immediate neighbourhood, especially regarding cross-Strait relations with Taiwan and sovereign claims in the East and South China Seas. It displays a more moderate attitude towards those far away challenges, especially if they are seen as less directly related to its 'core interests'. However, China has progressively stepped up its role in those international institutions and venues that address all kinds of global or transnational security issues, including security and human rights in the Middle East. In this context, those European countries that are economically dependent on the Chinese market have become less eager to pursue objectives such as the promotion of human rights, especially when perceived by China as running counter to its economic or political interests. Chinese investments have also affected the attitude of some European governments towards key issues involving China in the greater Asia-Pacific region (such as the territorial disputes in the East and South China Sea or the Taiwan issue).

4.1 China's Eurasia strategy

China's approach toward Europe is part of its broader Eurasian strategy, which also includes Central Asia, South Asia and East Asia. China considers that it is in its economic and geostrategic interest to consolidate its leadership position across Eurasia. With this aim in mind, Beijing has developed a flexible and accommodating relation with Russia, and pursued an active economic diplomacy towards most countries in the Eurasian region, including European ones. Progressively, Russia's further economic and diplomatic decline allowed China to become the leading power in Eurasia.

While the US-led security alliance remained strong and largely unchallenged on the Western part of the European continent, China's increasing economic influence in Central and Eastern Europe began to crystallise around stronger political and security ties with the countries of those areas. This was helped by domestic political dynamics promoting 'illiberal' or more authoritarian forms of governance across Central and Eastern Europe, as well as a general questioning of US ideological, political, and geostrategic influence in some of these countries. Overall, China began to see its presence in Europe as an asset to undermine America's global position and influence, and to build a multipolar world in which Beijing

would ultimately be the strongest pole. However, a significant number of EU member-states – mainly from Western Europe – emphasised both their attachment to the EU and the importance of cooperating with the US on a range of China-related issues. Perhaps most notably, they managed to coordinate their positions in an EU context to negotiate with China over its lack of reciprocity in terms of market access.

China also saw Europe as a useful source of political support to restructure the global governance architecture. Support from key European member states with the establishment of the Asian Investment and Infrastructure Bank (AIIB) in 2014-15 contributed to cementing such a perception in Beijing. Building on the AIIB template, China continued to propose new multilateral initiatives throughout the 2020s, and lobbied intensively those EU member states more likely to join such initiatives, and get them up and running. China remained proactive in those areas of global governance that were already well-developed (finance and trade, security governance) but also very much interested in those areas that were still largely under construction (cybergovernance, space governance, green governance, etc.).

America's approach to global governance had not recovered from the Donald Trump's days, which presided over a retreat from the Trans Pacific Partnership (TPP) and a shift towards bilateralism, thus undermining Washington's credibility and influence as a stakeholder of multilateralism. Fully aware of that, China continued to 'fill the void' left by the US throughout the 2020s – taking a cue from Xi Jinping's 2017 speeches in Davos and Geneva. Back then, Xi portrayed China as the lynchpin of 'economic globalisation' and multilateralism, in sharp contrast with the sort of 'America First'-like protectionism embodied by Trump's decision to exit TPP. But even as China seized any opportunities that arose during and after the Trump years, its ambitions are informed by a longer-term global-governance strategy. No country seems to be able to rival China's determination to restructure the global governance architecture, let alone its efficiency in terms of planning, coordination and implementation.

China managed to lead such a process and, ultimately, to undergird a global institutional and normative architecture in which it is becoming more influential than the US and its allies. Institutional and ideological competition unfolded apace. And Europeans were themselves increasingly receptive to China's promotion of an alternative model of development and governance. Such model was particularly appealing to a small but increasing number of Europe states, especially those confronted with long-lasting economic and social difficulties.

4.2 Soft power, Chinese style

Throughout the 2020s, and after having done so previously in less developed parts of the world, China began to more actively promote towards Europeans models for economic development and government that were alternative to the 'Washington consensus'. Beijing presented itself as a pragmatic 'solution' provider (promoting the official concept of 'China solution', or 中国方案), and openly pointed out the weaknesses of Western liberal democratic systems. This discourse has been promoted through training programmes directed at European officials, politicians, engineers and technicians in various fields, among other professionals. In addition to offering practical training, such programmes also

bore an ideological component. China also leveraged its media outlets – many of which broadcasted in local languages in a number of European countries – to promote its image as a ‘solution provider’. Interestingly, Chinese-owned outlets had progressively become media of reference in some parts of Europe, especially in those countries where the national media landscape was weak and mired in financial difficulties.

It has also promoted such image in the multilateral gathering it is actively participating in (such as the World Economic Forum in Davos, in which China had steadily increased its level of participation since the 2017 edition) or organising itself (such as the numerous high level ‘Belt and Road’ Forums organised in most European cities). In addition, China has managed to consolidate its ‘Belt and Road’ network of actors (‘Belt and Road’ think-tank network, university network, laboratory network, business network, etc – as Xi Jinping called for in his May 2017 speech at the Belt and Road Forum –) to such an extent that it became the main platform of multilateral and sectoral interactions on the European continent, and some of them have become norms and standards setters.

In addition to institutional activism, China’s conceptual activism also generated outcomes: China’s key official concepts – such as ‘Community of Common Destiny’ and ‘New Type of International Relations’, among others – became mainstream regional and international concepts used by a growing number of international actors and organisations.

If most European diplomacies are fully aware of China’s activism, and the risks that it may pose to some of their national interests, this awareness does not easily convert into political decisions and/or practical measures. When it does, these measures are not always able to face China’s initiatives in a timely and efficient manner, given that these initiatives are flexible in nature (such as the Belt& Road – which has constantly evolved since the beginning of its promotion in Europe in 2013 –), sometimes taken swiftly, if not suddenly, by the Chinese Presidency, and extremely well-coordinated since the beginning of the leadership of Xi Jinping (much more than during Hu Jintao’s era). For Xi Jinping and his successor, the most important is that China keeps taking initiatives, and at a fast pace. While European countries are busy trying to address and respond to these initiatives, most of them lack time and human capabilities to build a longer-term strategic vision that would be essential to define a fully-fledged foreign policy vision and strategy that would not only be defined in reaction to China’s.

In 2030 China still has 20 years to go to celebrate the centenary of the founding of the PRC in 2049. That year is seen as a significant milestone for the full implementation of the diplomatic initiatives launched so far and ultimately the ‘great rejuvenation of the Chinese nation’, an official concept based on the strong sense of national pride and belief that it is time to restore the Chinese nation to a position of international recognition and respect – in particular in front of ‘Western’ countries – and supersede the collective trauma of the ‘100 years of humiliation’ that dates back to the First Opium War.

As during the early years of Xi's mandate, Beijing continues in 2030 to consider that it should keep launching initiatives (both at bilateral and multilateral levels), but also, more than before, that it is now time to connect the various initiatives of its proactive economic diplomacy across regions (in particular investments in strategic infrastructure under the 'Belt and Road' framework that consists of ports, airports, railways, pipelines, telecommunications, submarines cables and satellites) to gain a logistic and geostrategic advantage beyond its immediate neighbourhood. In particular, China enhances the connection of its transport infrastructures to its security infrastructure (such as the military base in Djibouti, among other bases that China has built and launched throughout the 2020s and 2030s) to better protect and enhance its interests abroad.

Conclusion

In 2030, China's traditional antagonism against Western liberal democracies – and the US first and foremost – continues to shape much of its foreign policy discourse and orientations. More than ever, China is promoting an alternative model of international relations – based on economic and security partnerships rather than alliance systems (and certainly not a US-led one). Xi Jinping has started to do so in the Asia-Pacific region in the first part of his mandate (in line with China's white paper on Asia-Pacific security cooperation policies, published in January 2017), has consolidated the development of its alternative partnership system in this region in the second part of his mandate, and the new President of the People's Republic of China is now continuing and expanding this endeavour on the broader Eurasian continent, and in Europe more specifically – in line with his predecessor's ambition to implement a long-term and ambitious foreign policy strategy for China's greater neighbourhood. In this context, Europe is increasingly divided on China, with a gap emerging between 'pro' and 'anti' China, and ultimately between 'pro' and 'anti' partnership system promoted by China, that could ultimately erode the transatlantic alliance.

Conclusions

Luis Simón and Ulrich Speck

Looking at the four scenarios outlined above, only one thing seems certain: 2030 Europe will look quite different from 2017 Europe.

Disruption is at the heart of Ulrich Speck's scenario, 'A failing Europe'. Here, European nation-states are unable to build a stronger union. Failure to do so leaves them vulnerable to increasing penetration from external neo-imperialist powers. Outside pressure mounts in a world that is dominated by good old-fashioned geo-politics. Great powers haggle over spheres of influence, in a process of hyper-competition that turns militarily weaker countries into mere satellites. The US has largely retreated from its role of guarantor of a liberal world order, and a divided Europe pays a steep price. Only Europe's two nuclear powers – France and the UK – are able to retain a relatively high degree of independence, while the rest of the continent falls into different spheres of influence.

Alexander Mattelaer's description of a 'A strong European core' assumes that, in 2030, Europe is only somewhat different from 2017. The centre holds – but only the centre. From the wider EU emerges a core Europe that is able to unite, and willing to play power politics in a more competitive, rougher world. This core resembles an arc spanning from the Iberian Peninsula in the south-west to the Baltic Sea region in the north-east. Although it can grow and shrink like a breathing lung, this core Europe manages to become a pillar of multilateralism, capable of maintaining a close relationship with the US and able to stand up to Russian and Chinese assertiveness.

In the third scenario, James Rogers outlines the parameters of 'An Atlantic revival'. The EU and NATO have failed. Building on a Cold War analogy of sorts, the world is divided into two camps. The Atlantic powers of the US and UK lead a wider alliance that includes France, India and Japan, but also other maritime powers like Spain and South Korea. On the Eurasian continent, Russia and China have teamed up but are too weak to withstand the US-UK-led maritime alliance.

In Alice Ekman's 2030 vision, a strong China has subverted the European order as we know it today. China has slowly but steadily increased its influence over Europe. Playing the economic rather than the military card, Beijing has skilfully managed to leverage existing differences between European nation-states to play divide-and-rule politics and put itself at the centre of Europe. European countries have failed to assert themselves and they become increasingly dependent on China, the dominant economic power.

The four scenarios cover a wide range of possible futures for Europe. Some are more disruptive; some remain rather closer to the present. However, a common theme seems to emerge: European interests and values are at risk in an increasingly volatile and fragile world, in which old-style geopolitics are back. The big question will be whether Europe manages to become more cohesive and develop the capabilities that will allow it to be a global actor,

whether in the framework of a strong transatlantic relationship or that of a united Europe. The alternative is to become a geopolitical playground, at the mercy of other powers. The answer to these questions will not only depend on decisions made in Washington, Beijing or Moscow. It will also depend, to a large extent, on decisions made in Europe's capitals. It is up for Europe to decide if it wants to be a player or a pawn.

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