INSTITUTE for DEVELOPMENT and DIPLOMACY

ANALYTICAL POLICY MEMO

14 March 2025

The European War at its Junction

The Beginning of the End, or the End of the Beginning?

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The inauguration of Donald Trump's second presidential administration in the United States on 20 January 2025 opened a period of turbulence, uncertainty, and unpredictability at the worldwide level. Shifting strategic paradigms, fluctuating international alliances and new situational alignments, tariff wars, cynical transactional deal offers, non-diplomatic pressures, bombastic claims, and many other factors are reflecting the tectonic rearrangement of the global security landscape.

Despite the haze of ambiguity shrouding the ongoing developments, it is safe to suggest that the above description of the state of the globe is likely decisively alter the existing world (dis)order in the years to come. Though it is too premature to jump to definitive conclusions, certain outlines are discernable even now. This IDD Analytical Policy Memo focuses on the potentiality of a transformation (or, more precisely, a transfiguration) of the ongoing European War into a broader conflict that would draw in more actors and wider geographic space.

Bifurcation of the West

In the past three years, the war in Ukraine (which I dubbed the European War in all my publications since its very beginning in February 2022) and its multiple ripple effects persisted as one of the most fundamental and intricate international problems. The

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determination to stop that war and "establish peace through a deal" that was first boldly manifested and then demanded by Trump Administration is short of delving too deeply into its roots, causes, and nuances. It rather reflects the intent to cut the Gordian knot soonest and capitalize on its benefits for "America First"—regardless of the potential collateral damage. However, such a compelling "rush towards peace" could cause penalties of a strategic magnitude.

The first of these observable collateral effects is an apparent implosion of the "Transatlantic consensus" (or even the "Transatlantic link"), which follows from the unforeseen (unforeseen from the European and Ukrainian perspective, that is) entente between Washington and Moscow. This move upsets the previously consolidated Western stance on support for Ukraine and attempted full-scale international isolation of Russia. There are de facto "two Wests" now (the U.S. and EU+UK+Canada), maintaining two diametrically opposed visions and policies towards Russia, the war in Ukraine, and the way to end this war (or, at least, active hostilities). The utmost strategic outcome of such bifurcation of the West is that the European countries cannot bet anymore on unconditional U.S. security guarantees and American military power in case of a potential standoff with Russia. NATO's "European pillar" relied on the U.S. protective factor in the eight decades since 1945, especially during the post-Cold War era of "peace dividend." Yet, the sobering moment came to Europe's decisionmakers suddenly, despite many warning indicators issued by the Trump team prior and after the November 2024 U.S. elections. Another ensuing aftermath of the American u-turn is the uncertain future of NATO as a cohesive defence alliance.

These two conditions, which have been caused by Trump's "strategic counterrevolution," raise three questions. The first question is whether and how the European powers can bridge the suddenly emerged defence and security abyss. The second question is how Moscow will perceive and exploit Europe's "defense dystrophy" that would result from a possible U.S. abandonment. The third question is will all this establish a permissive environment for the potential confrontational scenarios between Russia and Europe (or more specifically, a selected group of the continent's actors).

Before trying to answer these questions, there is a need to look at one particular region, which is in the top risk zone of the hypothetic direct clash between Europe and Russia.

The "Shadow War" in the Baltics (and Beyond)

With the elongation of the European War to 2023, the countries of the continent became increasingly exposed to subversive activities publicly attributed to Russian intelligence services. As reported, to date there have been over 150 registered cases of Russia-related covert actions and diversions. The Baltic Sea region has emerged as the pivot of such activities.

The first instance occurred in October 2023, when a Chinese container ship sailing from Russia "accidentally" damaged the Baltic connector underwater gas pipeline between Finland and Estonia in the Gulf of Finland. This incident raised suspicion of the Russian involvement. Since the end of 2024, this pattern has become quite consistent.

- November 2024: Another Chinese bulk carrier sailing again from Russia reportedly severed the East-West Interlink and the C-Lion 1 undersea internet cables (one linking Sweden to Lithuania and another Finland to Germany), by dragging its anchor along the seabed.
- December 2024: The Finnish Coast Guard forcibly boarded and detained the Russia-owned *Eagle S* oil tanker, suspected of "aggravated sabotage," which damaged the Estlink 2 seabed internet cable between Finland and Estonia, again by dragging its anchor.
- January 2025: The Swedish Coast Guard boarded a Maltese-flagged oil tanker that was suspected of cutting the internet cable between Latvia and Sweden, also with its anchor.
- February 2025: The over 1000 km-long C-Lion 1 fiber optic telecom cable was ruptured again in the Swedish economic zone; no attribution has been provided by the investigators so far.
- March 2025: The suspected sabotage incident on a water pump temporarily left the entire Swedish island of Gotland without tap water.

NATO and European political leaders and heads of defense and security establishments perceive those incidents to be part of Russia's deliberate hybrid warfare strategy aimed at getting them to reconsider their support for Ukraine. To implement it, Russia operationalizes unconventional tools, such as reflagged oil tankers of the "dark fleet" that carries the Western-sanctioned export product to the global market. The Russian GU (military intelligence service) actively uses fishing and hydrographic research vessels as intelligence gathering assets. In general, any Russian or Russia-related merchant vessel in the vicinity of underwater or offshore critical infrastructure (e.g., seabed communication and electricity cables, oil and gas pipelines and rigs, wind farms) in the Baltic and North Seas triggers a "red alert" in the headquarters of Western defense and security establishments.

But the foregoing is just a part of the story. The German Navy officially reported three cases of sabotage against its combat warships in 2024-2025. In one case, unknown perpetrator(s) cut power cables on the minesweeper *Homburg*. Then, someone uploaded several dozen kilograms of metal chips into an engine of the brand new corvette *Emden* shortly before its sea trials were scheduled to commence. In the latest case, the unidentified offender(s) tried to contaminate the potable water supply on the frigate *Hessen* prior to its overseas deployment. As of this time of writing, no individuals tied to these sabotage acts have been identified and detained; however, Vice Admiral Jan Christian Kaack, the Inspector (i.e., top commander) of *Deutsche Marine*, referred to the "Russian threat" in this regard. (On a side note, it is worth noting that German naval bases are located in the closest proximity to the wharfs hosting the sanctioned luxury superyachts of many Russian oligarchs.)

The described dramatic events in the Baltic maritime theatre call for historic analogies. In 1936-1940, a certain Ernst Friedrich Wollweber, a former Imperial German navy sailor (who later became indoctrinated by Communist ideology and ended his spectacular career as the head of East Germany's Stasi security service in the 1950s), organized and activated a clandestine saboteur network. His organization, handled from Moscow, conducted over 20 diversions against naval and maritime targets in the Baltic area and Scandinavia. It is not improbable that Russia could operationalize the same blueprint again, with up-to-date modifications and sophistications.

Meanwhile, two can play the same game of sabotage: Ukraine has struck back. The story of the destruction of the Nord Stream seabed gas pipelines in September 2022 speaks volumes (although Kyiv has denied its awareness and has never admitted it officially sanctioned this attack—and Putin has accused the U.S. of being responsible for these acts of sabotage). Prior to 2022, Ukraine already maintained a pool of naval special warfare forces (based in Ochakiv on the Black Sea). In the course of the war, Ukraine's operational and technical capabilities and outreach expanded even more, thanks to the assistance of the United Kingdom, Sweden, and some other of its Western partners. Add to that the activities of the GUR (the Main Intelligence Directorate) and the SBU (the Security Service of Ukraine), which are both that country's paramount force multipliers in the unfolding "war in shadows."

In December 2024, the cargo vessel *Ursa Major*, leased by the Russian Defense Ministry, sunk off the Spanish coast in the Mediterranean Sea, owing to three "externally caused" explosions (Russia complained of a "terrorist attack," hinting at Ukraine). Then in January-February 2025, three oil tankers, reportedly carrying Western-sanctioned Russian oil, suffered damage from similar outward explosions caused by an "unknown source" while sailing or being anchored off of Turkey, Libya, and Italy. Even more remarkably, on 9 February 2025, the oil tanker *Koala*, berthed in the Baltic Ust-Luga seaport near Sankt-Petersburg, suffered three detonations, possibly caused by Italian-made limpet mines or other kinds of explosives. . Simultaneously, an "external impact" damaged the internet cable connecting mainland Russia with its Kaliningrad exclave. A couple of days after these events, the Russian Foreign Intelligence Service (SVR) accused Ukraine of "preparing provocations" in the Baltic Sea, including "false flag" attacks against third parties' ships to put the blame for it on Russia.

Thus, a non-attributed hybrid warfare in the Baltic Sea region (and beyond it) is underway, which has produced a further rise in tensions. What does this mean strategically, given the unfolding controversial dynamic in the U.S.-Europe-Russia triangle?

European Response: Crystallization of the Kernel

Europe is not truly unified: political divisions between a solid majority of European countries and several others belonging to the same geography is its soft link, above all else (e.g., cumbersome governance superstructure, limited military power, non-effective financial mechanisms, etc.). Internal dynamics in the EU and NATO in the past three years provide enough examples of inconsistencies, ambiguities, indecisiveness, slow reaction, and bureaucracy.

However, in *force majeure* conditions (i.e., ongoing geopolitical shifts), ongoing divisions within the broader group known as “Europe” could lead to the crystallization of a “hardcore” kernel consisting of actors, whose security stakes are highest. It is impossible to overlook the emerging coalition of the willing centered on the Nordic-Baltic region, which already encompasses the three Baltic states (Estonia, Latvia, and Lithuania), the five Scandinavian states (Denmark, Finland, Iceland, Norway, and Sweden), the United Kingdom, Poland, and the Netherlands. There is a high chance that Germany’s new government will join this coalition; equally, it is possible to suggest that France (which is already thinking about “projecting” its nuclear deterrence capabilities in defense of its European allies), some other European states, and Canada will be on the same page eventually.

Actually, the process of maturing the enhanced Nordic-Baltic coalition started shortly after the beginning of the European War in 2022 and gained momentum afterwards. The Baltic and Scandinavian states are heavily funding Ukraine’s defence capabilities whilst strengthening their own ones. Ten European countries created the high-alert Joint Expeditionary Force and launched operations “Nordic Warden” and “Baltic Sentry” in order to surveil and control air, surface, and underwater environments in the Baltic Sea and contiguous waters. The key focus is the Danish Straits—the vital bottleneck in that part of the world that facilitates access to and exit from the Baltics. In particular, on 17-20 February 2025, naval exercises off Denmark (under the aegis of NATO, but without the U.S. direct participation) extensively tested the use of the naval drones similar to those that Ukraine has successfully applied in the Black Sea.

On the political side, on 14 February 2025, the top leaders of the Nordic-Baltic Eight (NB8) once again expressed their affirmative solidarity with Ukraine and pledged to provide more support at time when Washington has clearly demonstrated a change in its approach towards the European War.

Russian Rationales: No Way Back

The consolidation of the Nordic-Baltic block and activities in support of Ukraine constitute a strategic irritator for Moscow at a time in which the Trump team’s true intentions remain half-doubtful. However, if America were really to turn its back on the

Old World and “strike a deal” with Russia (that includes an imposed ceasefire agreement), it could stop the fighting in Ukraine but (paradoxically) transform the European War into another armed conflict.

In this context, here are a few things to think about. The wartime strength of the Russian armed forces’ was inflated to [1.5 million service members](). In the event of a ceasefire in the Ukrainian theatre of operations, there is a narrow space for a massive redeployment of Russian forces elsewhere, in part because there is an insufficient number of bases and barracks to host the newly-raised army formations in peacetime. Moreover, even a partial demobilization would inject hundreds of thousands of seasoned veterans (many of whom likely suffer from post-traumatic stress disorder and possibly “backstabbing syndrome”) back into society. That could and would aggravate the criminal situation and cause enormous social stress. The wartime economy would experience the huge impact of reconversion to peacetime mode. The sum of these factors may go against the fixed political stability trajectory and the post-2022 elite consensus. In some ways, the situation resembles the eight-year-long Iran-Iraq War, at the end of which Saddam Hussein had one million soldiers at his disposal, whom he had to keep in service or discharge back into the ruined economy and society. His choice eventually brought him to Kuwait two years after.

The Kremlin would face a similar uneasy dilemma in the case of a ceasefire taking hold in the Ukraine theater: either deal with a potential multidimensional domestic crisis or redirect military resources to another theater. There are few opportunities for the latter option, save the Baltics and the post-Soviet space (i.e., Belarus, and the Silk Road region, that is to say, the South Caucasus and Central Asia).

The Baltic region could emerge the most at risk in such a scenario for the following reasons:

- NATO’s cohesion is in question due to Trump’s ambiguous policies. That could upset the Alliance’s reaction to a potential hostile attack that requires an activation of Article 5 (collective defence). In addition, some NATO member states may have alternative views and can torpedo a required consensus in crisis time (think of Hungary, Slovakia, and perhaps Türkiye). Such a situation could produce a temptation to “test the waters.”
- In the event of a withdrawal of the U.S. military forces from Europe and the cessation of American support to NATO’s Enhanced Forward Presence, Baltic Air Policing, Enhanced Vigilance Activities, and other Alliance missions related to the Baltic Sea region, temptations would only increase.
- The end of active operations in Ukraine would release much of Russian ground forces from their wartime commitments, while its air and naval forces (except those based in the Black Sea) remain largely intact and represent a credible threat. If needed, they would require a relatively short pause to recuperate, restore combat capabilities, and regroup in the Baltic theater.

- The continuing Nordic-Baltic support to Ukraine, a potential transfer of frozen Russian assets that are put at Kyiv's disposal, the imposition of new and enhanced sanctions, and actions against the "dark fleet" can be separately or together interpreted by Moscow as *casus belli*.

Forecasting potential wartime scenarios is beyond the format of this publication. Just three things to consider. First, the "major event" can start with a random incident (related to challenging air and/or electronic warfare activities, maritime subversive actions, or disturbances in the ethnic Russian communities in the Baltic states). Such incidents could be either unintended or intentionally constructed; however, they could promptly trigger a horizontal and vertical escalation. Second, in the event of broader hostilities, Russia would most likely engage a reluctant but dependent Belarus in a joint attack across the Suwalki Gap to hack through an overland corridor to Kaliningrad. That, in turn, would bring Poland into the fighting as well as, potentially, Germany. On 1 March 2025, Vladimir Putin ratified an agreement on security guarantees with Belarus within the Union State. Now, watch the Russian-Belorussian joint military wargames, which are scheduled for September 2025. Third, in the worst-case scenario, the still contemplated European peacekeeping mission in post-ceasefire Ukraine could find itself in a mega-trap if Russia decided to up the ante and attack the assembled force—especially as it would unlikely be supported by the United States or fall under Article 5.

Synopsis

- As the global and continental security environment swings sharply and unpredictably, the Nordic-Baltic region emerges as one of the high-risk areas, where the focus of the Russian-European standoff could shift from Ukraine in the event of a truce or ceasefire agreement.

- The trajectory of current developments could potentially create incentives for Russia to undertake limited military action at the exposed NATO's Baltic flank.

- A twofold strategic objective of Russia's hypothetical action would be:
  - To create a crisis that would politically ruin the Alliance from within due to an inadequate reaction;
  - To prevent—or, more accurate, to delay—its own internal crisis.

- Such a plot could spin out of control and cause a wider escalation in the Baltic Sea region and beyond it.

- The engagement of the Scandinavian states in a hypothetical conflict in the Baltics would imminently spread the hostilities to the Arctic region (as I discussed in one of my previous papers).

- As the effectiveness of NATO now is doubtful, the establishment of an alternative defense alliance encompassing the military forces of willing European states and Ukraine's battle-hardened army may come out as imperative.

- However, such an undertaking will require enormous efforts, including an urgent and costly increase of funds into strengthening Europe's defense capabilities (at the expense of Europeans' social contract), continental cohesion-building, mobilization of political will, and an adaptation of a "peacetime" mentality to the emerged realities.

- Europe has potentials and capacities to defend itself; however, its most critical shortage is time.

I reiterate that the key condition that could potentially create a permissive environment for a direct Russian-European confrontation in the Baltic region is a suspension or pause in the ongoing hostilities in Ukraine, which will not necessarily materialize.

Paraphrasing the famous quote by Sir Winston Churchill, the current moment could be either the "beginning of the end" (of the European War) or the "end of the beginning" (i.e., an advent of settings that would draw Europe and Russia into a broader conflict). The future will tell, perhaps sooner than later. In any case, this is Europe's second *Zeitenwende* in the past three years. It is time to act swiftly; there could be no third chance.