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Study No. 1. Consolidation of a resilient European economy on the horizon of 2040. Romania's integration into European value chains

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The study examines the consequences of the last two major crises (the COVID-19 pandemic and the Russian aggression in Ukraine) on the European economy and traces how the economic and industrial policy of the European Union (EU) has changed in response to these two events. The research presents the general state of the European as well as Romanian economy, through the lens of the effects that these two shocks have had. The analysis is made within the framework of a shifting dynamic within the global economy. This study covers the period from 2020 to 2023, with the research focusing on the latest bibliographic sources and available data. The study's goal is to identify the macro trends and understand how Europe has responded, including at the sectoral level, and what it plans to do to consolidate the **resilience of its economy** by 2040-2050. The final chapter focuses on those areas, which, if progress is made, may increase **Romania's resilience** along the coordinates of the four ongoing transitions (geopolitical, economic policy, energy, and digital).

The term “resilient economy” has been in use for over 20 years, but its use has intensified especially over the last decade. Used to describe how economies have reacted to the terrorist attacks of 11 September 2001, or the 2008 economic crisis¹, the term “resilience” holds multiple meanings and was borrowed from the field of environmental studies, where it started to be used during the 1970s². Although, in a broader context, being resilient means understanding the source of risks and opportunities, and coping with uncertainty and shocks, in this study, we consider a resilient economy to be:

„the ability to minimize potential vulnerabilities, to promote more robust and inclusive growth, to enhance the capacity of the macro-economy to withstand shocks and reallocate resources to harness new growth opportunities.”³

The study is structured in three chapters. Chapter one – *The changing balance of power in the world economy* – highlights the meta-changes taking place in the global economy by discussing the different types of transitions we are currently experiencing as well as the way in which the fragmentation of international trade along geopolitical lines is occurring. The study shows how two major events—the **COVID-19 pandemic** and **Russia's war against Ukraine**—and the way they have affected supply chains and transformed economic thinking and industrial policy in Europe and the United States over the past three years. Although the start of deglobalization can be traced back to 2018, with the trade war between the US and China, the two “black swan” events that followed only accelerated this process. Bringing production back home (*reshoring/onshoring*) or to geopolitically allied countries (*friendshoring/ally-shoring*), has

¹ For an analysis of how economies reacted to the 2008 financial crisis, see Didier Tatiana, Hevia Constantino, Schmukler Sergio L., “How resilient and countercyclical were emerging economies during the global financial crisis?”, *Journal of International Money and Finance*, Volume 31, Issue 8, 2012, pp. 2052-2077, <https://doi.org/10.1016/j.jimonfin.2012.05.007> (12.10.2023).

² Myers-Smith Isla H., Trefry Sarah A., Swarbrick Vanessa J., “Resilience: Easy to use but hard to define”, *Ideas in ecology and evolution*, 5: 44-53, 2012.

³ “Overview Paper on Resilient Economies and Societies”, OECD, Meeting of the OECD Council at Ministerial Level Paris, 6-7 May 2014, p. 2, [https://www.oecd.org/mcm/C-MIN\(2014\)7-ENG.pdf](https://www.oecd.org/mcm/C-MIN(2014)7-ENG.pdf) (10.07.2023).

become a priority. This re-alignment of global economic relations and flows generates not only problems, but also opportunities. Developments in the industrial policy of both the United States and the EU in the past three years represent the internalization of the awareness that, from the perspective of security of supply, manufacturing and jobs, “Globalisation was very good for developing countries and particularly for Asia, but (...) very bad for liberal democracies.” (Suzanne Berger, author of *Making in America*⁴). The recent crises have acted as a catalyst for articulating a long overdue and appropriate policy response meant to restore balance in favour of the West.

Chapter two, *The European economy by 2040*, shows a selection of relevant economic indicators from recent years and examines the trajectory of the European economy in light of two significant events (pandemic and war). The pandemic has exposed weaknesses in supply chains (e.g. single supplier strategy), and the factors that inhibit domestic production of medicines and critical equipment (medical gloves, ventilators). In response to the Russian aggression of 24 February 2022, the European Union has adopted a set of 12 sanctions packages meant to reduce the European Union’s economic dependence on Russia, and limit commercial ties with the aggressor country. The chapter discusses the specific effects of economic decoupling from Russia, and the symptoms that were most visible in 2022: inflation, high energy prices, overhaul of the traditional supply routes for crude and petroleum products, but also the European Union plan to drastically decrease its natural gas consumption while scaling up its green hydrogen production.

Also, here we discuss the European Union’s strategic value chains (clean vehicles, semiconductors, clean industry), and present the main strategies by means of which the European Union seeks to strengthen its economy. The analysis looks at the key documents adopted in 2023, which aim to fundamentally reposition the European Union within the global economic landscape: *the European Union Industrial Strategy* (including *the Regulation on Critical Raw Materials* and *the Net-Zero Industry Act*), *the European Union Economic Security Strategy*, *the Strategy for Solar Energy*, but also older ones such as *the Sustainable Mobility Strategy*. The chapter details some concrete measures that will reshape the economy by 2040, such as European Union -wide targets (for recycling and domestic production of net-zero technologies), industrial alliances (in existence and the pipeline) and international partnerships (old and new). Last but not least, this chapter addresses the issue of strategic vulnerabilities, i.e. those areas in which the European Union is far too dependent on other global actors, especially on China. Continuing along the lines of “lessons learned” from the pandemic and the war of aggression in Romania’s vicinity, the analysis goes into two strategic and sensitive areas: medical production and access to strategic minerals.

The final chapter of the study focuses on Romania’s economy. The authors use a SWOT analysis (of the effects that the two crises had in Romania) to start a discussion on the new opportunities that open up for **integrating Romania into the European value chains**. This exercise seeks to identify the sectors with the highest potential for integration into the emerging European value chains. With a medium-sized economy (12th at the European level, but which accounts for only 1.8% of the European Union GDP), the picture of the current structure of Romania’s economy shows a still rather high share of the industry (8th country in the European ranking) and constructions (5th country in the European ranking). Agriculture occupies a disproportionate place if you look at the share of agriculture in GDP (4.3%, compared to the European average of 1.9%), but also by the percentage of active workforce employed in this sector (approx. 20%, compared to the European average of only 4.5%). The contribution of services to the formation of Romania’s GDP places the country towards the end of the European ranking and below the European average (of 71.9%). In research and development, Romania continues to

⁴ Barber, Peter. “Doubts linger over Biden’s industrial push”, *Financial Times*, 18.10.2023, <https://www.ft.com/content/f45da696-4514-470c-92bd-2b0d2b5ef79a> (19.11.2023).

occupy the last place in the European Union, with only 0.48% of GDP allocated to the field in 2021 (compared to the European average of 2.26%).

To be able to make the transition from an “emerging innovator” to a “moderate innovator” (as envisioned by the *National Strategy for Research-Development and Smart Specialization 2022-2027*), Romania must prioritize financial support for innovation. The realignment of economic relations underway at the global level, and the new industrial policy of the European Union create new opportunities for Romania’s economic development in the context of “friend-shoring” and green transition (battery cell production, hydrogen economy, recycling, mining for strategic minerals). This section presents also two case studies: one on Galați County, which may become an ecosystem for green investments (“green valley”), and the other on Arad County which is a local authority that has clear criteria for prioritizing investments. The chapter also offers a unique grassroots perspective on difficulties faced by local authorities in attracting investors and the weak/insufficient correlation with European policies and priorities. The low level of competitiveness of the Romanian economy requires a smart specialization approach not only at the national level, but also at the local level. Especially here, there’s a stringent need to overcome the mindset that looks back (at what once existed) instead of looking forward (the path laid down in the NRRP, the Green Deal, and other European strategies and programs).

The **study offers a series of recommendations** for taking advantage of this unique moment. These include: articulating a *Made in Romania Strategy* and directing public investments for upward convergence (i.e., helping less competitive regions improve their performance, while guaranteeing that the most competitive ones continue to prosper). Romania has considerable economic potential, which must be mapped, monitored, and developed with the help of NATO and European Union allies. The formats can vary from development through specialized clusters to public-private partnerships. The main point is that this has to be closely correlated with the industrial policy of the European Union and with its sectoral strategies (on solar, wind, hydrogen, storage, etc.), so that investments made do not go against European policy, but are in sync with the European vision.

As to the **methodology** used, the research was carried out in three stages. The starting point was looking at how the hyper globalization of the last 20 years entered a downward slope in recent years (we refrain from using the term “reversal of globalization” because it could turn out to be a completely different path in the future). We then looked at the European response framework, i.e. the sectors in which Europe already is or aims to become resilient. Subsequently, the researchers identified some relevant policy tools and reached out to actors in Romania to assess domestic resilience in comparison to the European one. Finally, the case studies (on battery production in Europe or new sustainability directions in the auto industry such as the production of “green” tires) highlight examples of good practice and help formulate recommendations through which Romania can become more embedded in European value chains. The study was carried out using mixed research methods such as comparative analysis, documentary research, case studies, and a questionnaire for local administrations (the study includes qualitative data collected through extensive dialogue with 17 local administrations).

The study is available [here](#) (in Romanian).

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Study No. 2. European integration process in the Western Balkans. Perspectives and orientations of Romania

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In 2023, the topic of the European Union’s enlargement has re-emerged as a critical concern for the EU. This study delves into the latest developments in the Western Balkans’ European integration process from the Romanian perspective. Due to Romania’s vested interest in expanding the European Union to the Western Balkans and the political and economic support it aims to provide, understanding the dynamics and mechanisms of European integration is exceptionally significant. Furthermore, given the challenging geopolitical backdrop of Russia’s ongoing war in Ukraine and the escalating tensions among the Western Balkan countries, the importance and relevance of this study are undeniable.

The year 2024 is anticipated to bring a series of geopolitical turning points that will directly impact the European integration of the Western Balkan states. Whether the impact will be positive or negative remains to be seen. By painting a broad picture of the trends influencing the Western Balkans’ European integration process, it becomes clear why emphasizing the crucial strategic decisions on European Union enlargement foreseen for the end of 2023 and the beginning of 2024 is essential. Assessing the potential scenarios and determining the most advantageous position for Romania is crucial at this juncture.

The primary purpose of this study is to conduct a thorough reassessment of the opportunities and challenges posed by the changing regional dynamics in the Western Balkans and Romania’s role within this context. To achieve this goal, we strive to gain a profound understanding of the global and strategic trends that have the potential to influence, both positively and negatively, Romania’s involvement in the region. Spanning six chapters, this study scrutinizes the recent political, societal, and economic developments of the six Western Balkan countries, with a strategic emphasis on three key areas: justice reform and anti-corruption initiatives, the energy sector, and the preservation of minority rights. Herein, we will provide a synthesis of each chapter and highlight the most significant arguments developed therein.

Chapters 1 and 2 offer a comprehensive overview encompassing the geopolitical backdrop, critical discussions on the ongoing Western Balkans integration, and the research methodology underpinning the findings and recommendations within this document. **Chapter 1 – Introduction** - provides the recent historical context of enlargement policy and the European Union-Western Balkans dynamics is explored, with a particular emphasis on scrutinizing Romania’s role amidst pivotal geostrategic events. The chapter meticulously outlines the study’s objectives and methodological approach, providing a nuanced understanding of the EU enlargement process in the Western Balkans. This understanding extends beyond decision-makers and institutional perspectives to include insights from both European Union member states’ citizens and Balkan states’ citizens, as gleaned from the *2023 Eurobarometer* and *Balkan Barometer* opinion polls. The study sheds light on the contemporary challenge posed by conflicting attitudes—some European Union states and their citizens resist Western Balkans enlargement on geopolitical grounds, while others fervently advocate for an expedited process.

Chapter 1 continues by delving into the region's significance, especially considering the war in Ukraine and escalating tensions. Notably, the Western Balkans found a place in both the *European Union's Strategic Compass* and *NATO's Strategic Concept* in 2022, emphasizing the shared priority of bolstering the region's security and resilience. These strategic imperatives align with Romania's foreign policy strategy, focusing on both the Western Balkans and Black Sea states.

Two decades after the Thessaloniki European Council, which outlined a European perspective for ex-Yugoslav states and Albania, substantial transformations have occurred in both the region and the Union. With eight candidate countries and two potential candidates in the current enlargement process, the European Union plays a pivotal role as the primary development donor, a leading investor, and a major trading partner for the Western Balkans. However, since Croatia's 2013 accession, the process has experienced a relative slowdown attributed to "enlargement fatigue". Renewed interest in European Union enlargement surfaced in 2023 amid the Ukraine conflict and membership applications from Ukraine, Republic of Moldova, and Georgia. Moreover, in 2023, the renewed interest for the enlargement of the European Union was also expressed through public statements in various forums, for example, the speeches of Charles Michel, the President of the European Council, Ursula von der Leyen, the President of the European Commission in the *State of the Union* speech, or the German Chancellor Olaf Scholz. In addition, the process was also a priority for the Spanish presidency of the Council of the European Union from the second half of 2023. Despite these statements of support, the member states of the Union have different positions. Some are more reserved, while others favour an accelerated accession, and the purpose of the analysis is to illustrate what would be the most favourable position for Romania between these two poles.

While they are in the European Union's "waiting room", the six Western Balkan states are at different stages of accession, with Serbia and Montenegro achieving candidate status in 2012 and 2014, respectively. Negotiations have recently opened for North Macedonia and Albania, while Bosnia and Herzegovina obtained candidate status in late 2022. Kosovo remains the sole potential candidate, albeit facing challenges due to normalization blockages with Serbia and security incidents in 2023.

NATO's "open door" policy, guided by Article 10, has welcomed most Western Balkan states, with exceptions for Bosnia and Herzegovina, Serbia, and Kosovo.

Beyond national geopolitical considerations and security prospects, the study accounts for public opinion, which, at times, diverges from governmental stances. For example, in Germany and France, the electorate does not favour enlargement, but the governments are making efforts to facilitate it. Several member states have elections and this, of course, influences the positioning of the leaders. Based on these contextual observations, two large groups of states and possible coalitions in the European Council emerge. Starting from these factors, we observe that two categories of member states are forming: one that supports treaty changes and conditionalities in order to facilitate an accelerated integration, while another supports the internal institutional reform of the European Union and a gradual accession. This study discusses and analyses these proposals in detail: the French-German Report and the Baltic-Polish Proposal.

Despite a decline in Western Balkans' public enthusiasm to join the European Union, roughly 59% of the population favours accession. In the most recent study of the *Balkan Barometer*, included in the analysis, a visible difference between the states is observed. Romania has a unique set of interests in the integration of the Western Balkans both from an economic point of view and from a security point of view. It has continuously supported them within the Union and has included this support in its current national Government program where the region is mentioned five times.

The chapter articulates the study's primary objectives, focusing on anti-corruption, energy, and minority rights as areas where Balkan states require direct support and where Romania can contribute with expertise.

Chapter 2 – Study methodology - introduces the chosen methodological approach, employing a blended methodology that combines both qualitative and quantitative data. This comprehensive strategy involves content analysis, the facilitation of two online meetings with experts from Romania and the Western Balkans region, and the utilization of statistical methods for a comparative analysis of recent developments. This mix of approaches ensures the seamless and coordinated integration of diverse datasets, enhancing the overall potential of the study.

Including data and studies from secondary sources is pivotal in achieving a thorough understanding of the region's geopolitical dynamics. Secondary data were gathered through a meticulous review of reports and progress studies on each state, sourced from institutions such as the European Union (specifically, progress reports from the European Commission), resolutions of the European Parliament, and reports from international non-governmental entities like *Transparency International*, *Freedom House*, *Bertelsmann Transformation Index*, *European Stability Initiative*, and *V-Dem*.

Additionally, qualitative data obtained from two virtual meetings with experts on September 19 and September 21, 2023, have been integrated. To scrutinize Romania's role and engagement in the region, a triangular methodology was employed, encompassing foreign policy analysis and a quantitative examination of projects financed in strategic areas through pre-accession funds. The chapter concludes by addressing the study's limitations and ethical concerns arising from data access or challenges in obtaining specific types of information.

Chapter 3 – The European integration process of the Western Balkans - stands out as one of the most intricate sections in the overall analysis, delving deeply into the progression of the European integration process within the Western Balkans. This chapter meticulously examines each of the six Western Balkan states individually, employing a structured approach with state-specific sub-sections dedicated to Albania, Bosnia and Herzegovina, Kosovo, North Macedonia, Montenegro, and Serbia. The exploration focuses on the three pivotal aspects of the integration process: anticorruption measures, energy policies, and the safeguarding of minority rights. Additionally, the chapter introduces a diverse array of key actors interconnected with both these thematic areas and the broader European integration process. Each state-specific presentation follows a uniform structure, facilitating easy comparison and analysis.

The analysis kicks off with a concise historical overview of the respective state's relations with the European Union. Subsequently, it assesses the current stage of the integration process, emphasizing the identification of state-specific opportunities and challenges. The chapter, next, scrutinizes the impact of the conflict in Ukraine on each state, delineating relevant geopolitical dynamics and detailing recent internal political crises influencing the integration process. Noteworthy is the examination of indicators reflecting fluctuations in democracy quality and the implementation of European Union conditionalities over recent years, influenced by factors such as the COVID-19 pandemic and the Russian war against Ukraine. These fluctuations are contextualized within the national settings of each state.

In summary, the comparative analysis of the developments across these three key areas in the Western Balkans reveals a complex landscape characterized by a deficiency in structural reforms, and internal and cross-border political and ethnic tensions, posing a risk of further delays in the European path of these states. Despite the challenges, the Western Balkans have demonstrated progress towards European integration, with the geopolitical crisis in Ukraine injecting renewed momentum after a perceived decade of "enlargement fatigue". However, the six states face hurdles, lacking the capacity or, in many instances, the internal political will to enact the necessary reforms for concluding negotiations with the European Union. The rule of law

presents a particularly intricate challenge. Montenegro and Serbia lead in the accession process, but grapple with significant political tensions and democratic regression tendencies. Kosovo and Bosnia and Herzegovina face precarious situations marked by internal threats of secession, instability, and security incidents. Meanwhile, Albania and North Macedonia find themselves in an intermediate position seemingly conducive to faster transposition of the *acquis communautaire* in the coming years.

Chapter 4 – The involvement of the international actors in the Western Balkans - focuses on researching the involvement and influence of external states on socio-political developments in the region and, implicitly, on the European integration process. This research approach is focused on the actions of the member states of the European Union - such as France, Germany, or the countries from the Visegrad Group - but also on the role of international actors with aspirations to influence the Western Balkans, such as China, Russia, and Türkiye.

The chapter shows how in the last decade, the Western Balkans have become a space of geopolitical competition between the great powers, with the increasing influence of Russia and China. At the same time, other actors outside the region, such as Türkiye, have become active. Together with the involvement of the countries of the European Union, this competition affects the process of European integration and complicates the calculations of local elites. France and Germany, together with the countries of the Visegrad Group, contribute positively to accelerating the European integration process, but their influence seems limited.

The Visegrad Group countries, especially Poland, also support other intergovernmental projects and initiatives aimed at helping enlargement in the Western Balkans, such as the *Berlin Process*, which is an initiative to intensify regional cooperation with the ultimate goal of integrating the Western Balkan countries into the European Union. At the bilateral level, too, the four states are highly active in supporting economically and politically the countries of the Western Balkans.

Concerning the consistent support provided by France and Germany, the two states are presented separately to highlight specific elements of their respective support. France had several moments when it opposed the European integration of certain Western Balkan states and these are detailed in the study, along with France's investments in the region. The chapter recalls a significant event that triggered friendly reactions in the region, namely President Macron's initiative to launch the *European Political Community* (EPC) in May 2022 - open to countries such as Ukraine and Western Balkan states wishing to join the European Union, but also to the ones that have left the Union, such as the UK - to intensify cooperation based on common values. Some critics of this intergovernmental political project have argued that France is trying to propose "possible alternatives" to the enlargement process to mask its refusal to support/accept certain states in the integration process. In Germany's case, support is much more transparent and stronger, both in terms of direct investments and regional initiatives to support the enlargement process in the Western Balkans, such as the *Berlin Process* launched in 2014 by then-German Chancellor Angela Merkel. Recently, in the last months, Chancellor Olaf Scholz announced the intensification of diplomatic efforts with the Western Balkans.

This chapter also includes a subsection presenting the main European Union reform proposals to facilitate the integration process of the Balkans, Moldova, and Ukraine, dubbed the *Franco-German vs. Baltic-Polish version of the European Union's enlargement*. The Franco-German report, drafted by a host of leading experts from both countries, outlines a potential European Union's "supplementary reform treaty" that would allow "willing" member states to move forward with treaty reform, without the support of more sceptical countries. The European Union needs to reform the decision-making process before it can accept new countries. The unanimity condition has been criticized by some governments and experts as either substantially slowing down or even blocking European Union development, as all decisions in these areas must

be reduced to the lowest common denominator. The study also presents a report by analysts from Denmark, Estonia, Finland, Latvia, Lithuania, Poland, and Sweden, dubbed the “Baltic-Polish proposal” in the press. The Franco-German proposal of a “four-speed Europe” advances radical reforms of the European Union in the context of the accession of new states, and the reality of decision-making blockages, proposing, to this end, the changing of the treaties. In direct contrast to the Franco-German report, the Baltic-Polish proposal argues that, for the capitalization of this momentum, enlargement policy must be reinvigorated – but without sacrificing quality. Creative solutions, such as gradual or accelerated integration and merit-based milestones or extending qualified majority voting (QMV) to some areas, should be considered. However, compliance with conditionality must be maintained to ensure the sustainability of reforms and avoid backsliding.

Both documents see the enlargement as a security necessity in the first place. Also, the proposals point out that a new procedure for the enlargement process is needed, but the types of transformations required make the difference between the two approaches. The Baltic-Polish perspective is more pro-enlargement, understood as having as an endpoint the full membership in the European Union, with all that this implies, while the Franco-German perspective creates the premises for an “acceleration” of the process, while also suggesting that Ukraine or Republic of Moldova, should be connected to the European Union also through other instruments, not necessarily with membership status. Thus, we argued that it is important to take into account in our analysis these two visions and the fact that they have the role of resizing coalitions between member states in preparation for the European Council in December 2023 - where the decision regarding the opening of accession negotiations with Ukraine and the Republic of Moldova was announced - a decision that will have an important impact on the Western Balkans states.

The last part of this chapter unpacks the influence of international actors outside the European Union. In Russia’s case, the various types of instruments used to divert Western Balkans states from the Euro-Atlantic path and the increased strategic rapprochement with Serbia are highlighted most visibly. It is also underlined that the long history of cultural, political, and social relations between Russia and Western Balkans societies will continue to provide it with opportunities and access to sources for influencing political developments in the region.

In China’s case, the ambitious global infrastructure project *Belt and Road Initiative* (BRI) is mentioned, along with other Chinese investments in infrastructure projects, such as highways, railways, and energy facilities, which have multiplied in the region over the past decade. Chinese loans and investments have provided an alternative source of financing for infrastructure projects but have raised concerns about debt sustainability and China’s potential for economic influence. The analysis signals that one of the significant implications of Chinese influence is the potential dilution of Western Balkans countries’ commitment to European Union standards and values.

Finally, it is mentioned the accentuated role of Türkiye’s influence in the Western Balkans, marked by the ambivalence of Türkiye’s foreign policy from the perspective of *soft power* in the Balkans (especially in religious and ideological terms, promoting traditional Islamic values and investing in the construction of mosques and confessional schools), along with its tendency to “de-Europeanize” (stopping or delaying the European Union accession process). Of all the Western Balkans states, Türkiye is the most active in states with a Muslim minority – especially Bosnia Herzegovina.

Finally, **Chapters 5 and 6** are focused on identifying and analysing Romania’s role in the European integration process of the Western Balkans states. **Chapter 5 – Romania and the Western Balkans** - presents Romania’s significant contributions to promoting this process, with an emphasis on comparing its efforts with those of other European Union countries. Here are first presented arguments to support the role of “security guarantor” assumed by Romania in the Balkans both through involvement in other regional formats, such as the Black Sea Economic Cooperation Organization (BSEC), the Central European Initiative (CEI), the South-East

European Cooperation Process (SEECF), Danube Commission and European Union Strategy for the Danube Region, as well as through military participation in the peacekeeping missions of NATO, such as KFOR in Kosovo (operation started in 1999) and of the European Union, such as EUFOR (ALTHEA) in Bosnia and Herzegovina (operation started in 2004). Romania now aims to become the largest troop contributor to ALTHEA operation in Bosnia with over a thousand troops, reflecting its strong commitment to regional stability in the Western Balkans.

As far as Romania is concerned, **Chapter 5** shows that our country's role is positive in promoting the European integration of the Western Balkans, but not visible enough. Local actors in the Western Balkans frequently mention Romania's lack of visibility in the region, and the contributions made seem not to be significant and impactful enough to attract attention. However, Romania is often mentioned as a model for European integration, especially in terms of the fight against corruption and substantial economic development over the past two decades. This chapter presents recent data to illustrate Romania's support for the Western Balkans states in terms of economic investments. Reviewing the data found in Romania's International Development Cooperation Agency *RoAid - National Plan for International Development Cooperation and Humanitarian Assistance* (for 2020, 2021, 2022, and 2023) we notice a steady increase in the number of funded projects in the Western Balkans, with a particular focus on Serbia – where most projects have been implemented. However, the amounts offered through the funding program are relatively small, having a rather symbolic impact, and intended to cover some of the social needs of these states. After an overview of bilateral imports and exports emphasizing the close relations with Serbia, North Macedonia, and Albania, the chapter includes a presentation of a series of projects recently carried out by Romania in four of the six states in the region. We found insufficient bilateral data in order to include Bosnia and Herzegovina in the analysis, and Kosovo is a special case with no representation at the embassy level, so we could not collect any public data other than the economic data presented above. After presenting specific projects, but also a brief analysis of our country's strategic communication in these states (through websites or *Facebook* pages), the chapter ends with a comparative analysis that sums up possible lessons to be learned - what other states are doing more impactful in the region, and what successful projects Romania has made that need to be continued. Thus, we argued that there is a need for public diplomacy with a better-defined and direct communication strategy addressed to the public in the Western Balkans states, as well as for increasing the number of economic incentives allocated by Romania in the Western Balkans.

Finally, **Chapter 6 – Conclusions and Recommendations** - aims to present a concrete set of recommendations addressed to Romanian institutions and decision-makers regarding the continued support provided to the countries of the Western Balkans region. To begin with, the specific needs of the states in the region are presented, as discussed by us directly with the experts in the field. Therefore, it was underlined that it is a real need of the Western Balkans to start more efforts towards the European Union in order to obtain consensus and support at the level of the European Council, in addition to the consistent, constant economic aid of recent years. At the same time, other overly sensitive issues faced by the Western Balkans were formulated, such as the process of recognition of Kosovo, the issue of ethnic conflicts, cyclical problems of the governments, the elevated level of corruption, etc. These, plus those generated by the COVID-19 crisis, economic shortcomings, and the crisis in Ukraine, contributed to changing the perspective towards integration from Euro-enthusiasm to Euroscepticism. There were also mentioned the fears concerning putting together the Republic of Moldova and Ukraine alongside the states that (such as North Macedonia) have been waiting for a decade and a half to start negotiations, being constantly blocked by the *veto* of one member state, and not by the lack of implementation of the required reforms. There are also highlighted the main areas where Romania can strengthen its role in the region - also connected to the three areas on which we focused our entire analysis - rule of law, energy, and protection of minorities - which were confirmed by the experts we discussed as

crucial areas where both the needs of the Western Balkans states are urgent, and Romania's potential to step up its support is high. The last section presents the main recommendations formulated based on all the data collected in the study organized as a general recommendation, applicable to the entire region, but also specific, in the case of certain states with a focus on Serbia, a state where Romania's role is and will continue to be a major one.

To enhance the impact of Romania's initiatives in the Western Balkans, we suggest that the Ministry of Foreign Affairs bolster its communication efforts regarding the outcomes of actions, projects, and events organized by Romania in the region through the implementation of the following strategies:

1. **Establishing an inter-institutional task force within the Ministry of Foreign Affairs (MFA) dedicated to strategic communication both about and directed towards the Western Balkans.** This initiative aims to formulate a comprehensive communication plan for the social media platforms of Romanian Embassies in the region. The goal is to convey common strategic messages at a regional level.
2. **Creating a regional dialogue platform named “*The Romanian Friends of the Western Balkans*” that will bring together stakeholders from civil society, business, politics, and culture in Romania and the Western Balkans.** This platform has the potential to unite actors with different interests and perspectives, fostering an environment conducive to identifying new initiatives and projects that support the integration of the Western Balkans and enhance Romania's presence in the region. Meetings under the platform's auspices can receive funding from the MFA, private sources, or European funds, and should occur in both Romania and the Western Balkans countries on a rotational basis.
3. **Establishing a new *Romanian Cultural Institute* based in Belgrade.** Although there are numerous cultural initiatives organized in recent years in Belgrade, a better visibility for them would be ensured by the presence of a Romanian Cultural Institute in Belgrade that could maintain contact with local artists from the region, not only from Serbia, while simultaneously promoting representative elements of the Romanian culture.
4. **Advocating for the appointment of a Romanian to the position of Commissioner for Enlargement Policy (DG NEAR) in the upcoming term of the European Commission (2024-2029).** Although it is not directly related to the role of Romania - because the Commissioners are independent from national governments and they represent the supranational interests of the European Union - holding such a strategic position can contribute to increasing the visibility and influence of our country in the coordination of the European Union's regional agenda.
5. **Creating a task force within Romania's International Development Cooperation Agency RoAid focused on accessing European funds.** Following the model of the German GIZ Development Agency, Romania's International Development Cooperation Agency RoAid could broaden its recruitment scope for experts involved in project implementation, allowing external applications. Thus any Romanian citizen with the required expertise, whether from abroad or in the private sector, could apply. Additionally, this task force can target projects for implementation through public-private consortia, utilizing the pre-accession funds from *IPA III – Instrument for Pre-Accession Assistance for the period 2021 – 2027*.

The study is available [here](#) (in Romanian).

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Study No. 3. The role of regional cooperation mechanisms in the current geopolitical context – opportunities and challenges for Romania

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The study examines Romania's opportunities and challenges derived from its participation in a series of regional cooperation mechanisms. Both a "conceptual decoding" and a "dynamic mapping" of the factual in-the-field realities are being proposed, whose representations are nevertheless affected, despite all of the desired detachment, by value judgments. The analysis equally features both an *explicatory/critical* stake and a *predictable/creative* one, while observing various possible/plausible/probable/preferable evolutions. Thus, both determinants of regional cooperation – the most important of which being the interdependence, the pressure from abroad, and the common identity –, and their consequences in several areas – such as the economy, security, and diplomacy – are being taken into consideration. The points of interest being targeted are the competition of cooperation opportunities (*friendshoring*), the effects of the overlapping crises, the concentrated recovery efforts, the resonances (as well as any dissonances) between the regional formats and the member states of the European Union and NATO while emphasizing those formats in which Romania's performance and its standing out are the most visible.

The framework for reflection starts from the *2021-2024 Governing Programme*, as well as from other *international documents* adopted by Romania, with the expository character of merely referencing official paperwork being exceeded, identifying directions in both the "*black-box*" canon political action registry, as well as "*out-of-the-box*" breakthroughs. The team assumed the following research goals:

- O1.** mapping Romania's participation within the framework of the regional cooperation mechanisms specific to Central and Eastern, as well as South-Eastern Europe;
- O2.** analysing the opportunities and challenges which appeared as a result of Romania's participation in the regional cooperation mechanisms;
- O3.** examining the potential of the Three Seas Initiative/3SI politically, economically, and strategically from Romania's standpoint;
- O4.** making recommendations regarding the support in favour of increasing Romania's role in the regional cooperation mechanisms, including assessing the possibility of an increased correlation/synergy between the (sub)regional cooperation formulas. All of these orientations show potential for development that the present study opens up.

The present study is structured in three chapters, which flow logically – from general to particular, from panoramic to precise, and from conceptual to applicative/practical. Thus, in **Chapter 1 – Romania's Geo-Coordinates that are relevant for the Regional Cooperation in the Central and Eastern Europe and in the South-Eastern Europe: toward clarifying and overcoming the perpetual condition of "border country"**, we start by evaluating the geopolitical/economic-/strategic profile of the regions of Central and Eastern Europe and South-Eastern Europe, respectively, from Romania's viewpoint; we continue with a synoptic investigation of the regional cooperation mechanisms "portfolio" available to Romania and its "management", noticing the reciprocal ties between and the relative weight of participating

countries in **Chapter 2 – Opportunities and Challenges of an imperfect political-economical geography: an evaluation of Romania’s participation in the main regional cooperation mechanisms from Central and Eastern Europe and South-Eastern Europe**; and, in **Chapter 3 – The Three Seas Initiative – the most effervescent regional cooperation format of Romania: more than reactive geopolitics, proactive geo-economics trough the interconnection of infrastructures** -, we insist upon the format in which we may best observe Romania’s mark in terms of mutualizing interests and materializing intentions (the Three Seas Initiative). The results obtained vary, from reconfirming some concerns already present on the public agenda and signalling new ways of improving cooperation, insisting upon those formats in which the degrees of pragmatism and advantageousness are manifesting, since declarative consonance is fruitful only when it delivers common projects, providing for regional prosperity and security.

Chapter 1 – Romania’s Geo-Coordinates that are relevant for the Regional Cooperation in the Central and Eastern Europe and in the South-Eastern Europe: toward clarifying and overcoming the perpetual condition of “border country” - analyses the present geopolitical context, in a critical manner, overlapping three layers of analysis – global, regional, and local, through emphasising the factors that shape regional cooperation, maybe even in the system of *friendshoring* (economic survival in hostile geopolitical contexts, a reconfiguration of *offshoring* based on security principles). From this point of view, Romania is at a vulnerable point, where the three layers overlap: at the most active outskirts of the Transatlantic structures, at the geopolitical frontier/fault between the West and Russia, in the immediate proximity of the “red line” (the Pont-Baltic isthmus and the Kaliningrad-Belarus-Ukraine alignment, at which we add the Eurasian extension represented by the trans-Caucasian states) – the *global* level; at the Black Sea (the “geopolitical node” of Eurasia), where all the axes of continental importance intersect and where the most complicated system of geopolitical pivot points is located – the *regional* level; owning one of the Black Sea’s geostrategic points, the Danube’s Mouth – the *local* level. As a practical application, we also prepared an analysis of the Three Seas Initiative, a catalyst of Romania’s geopolitical and geo-economic expression – both globally and regionally.

As a *methodological option*, this chapter resorts to applying the theoretical grids of geopolitical analysis (global, regional, local), interpreted in the *real-politik* logic (of keeping the conflict-driven inclinations specific to a naturally anarchic international system), without evading the idealistic visions (seeking various coordinated and consoling architectures of cooperation, configured, for instance, in sub-regional cooperation mechanisms – such as those investigated in this study –, regional macro-structures – European Union, NATO – or global organizations – UN, WTO, IMF, the World Bank and so on).

Chapter 2 – Opportunities and Challenges of an imperfect political-economical geography: an evaluation of Romania’s participation in the main regional cooperation mechanisms from Central and Eastern Europe and South-Eastern Europe - evaluates the opportunities and challenges faced by Romania, which result from its taking part in the regional cooperation mechanisms, through the investigation/mapping of the Romanian participation in 13 regional cooperation formats from Central and Eastern, as well as South-Eastern Europe. Thus, our investigative approach identifies the opportunities/openings/strengths and challenges/risks/vulnerabilities generated by Romania’s affiliation to each of the 13 regional formats through a comparative analysis, surveying the potential of the other member states belonging to each of those said entities. In this context, we are examining the possibilities of augmenting Romania’s opportunities which resulted from its taking part in the Three Seas Initiative and in the other cooperation structures from the Danube’s basin and the extended area around the Black Sea, identifying/proposing the niches/sectors whose functional improvements would generate/support an increase in Romania’s role within the respective regional cooperation mechanisms, based on their possible readjustments resulting from involving external actors

(European Union, NATO, USA) in the context of the conflict in Ukraine, which works as a genuine accelerator of the re-evaluation of the regional dimensions of its surrounding states.

As a *methodological option*, this chapter proposes a synoptic analysis (an otherwise inevitably selective one) of Romania's economic, social, political, and security capabilities in relation to those of its partners from the various regional cooperation mechanisms, just as they result from the evaluations offered via relevant *proxy* indicators. We started from the idea that this set of *state performance* indicators could show an encompassing image of Romania's *soft power* dimension, most realistically displayable by an actor with its profile, something which further translates into the specific reach of our country's "voice" and its credibility and influence in various (sub)regional formats.

Chapter 3 – The Three Seas Initiative – the most effervescent regional cooperation format of Romania: more than reactive geopolitics, proactive geo-economics through the interconnection of infrastructures - catalogues and investigates the reasoning behind the formation and evolution of the Three Seas Initiative, which is considered the regional cooperation format, which has the most to offer to Romania. Reuniting 13 European Union member states – Austria, Bulgaria, Croatia, Estonia, Greece, Latvia, Lithuania, Poland, the Czech Republic, Romania, Slovakia, Slovenia and Hungary (the Hellenic Republic joined the 12 founding countries after the 2023 Bucharest summit) –, 3SI articulates its cooperation on the principle of "*non multa, sed multum*" (contextually, this translates to "not on many levels, but much on the chosen levels"). Economic development, European cohesion, and Transatlantic relations constitute the bases of cooperation. The focus is kept on the realm of transportation infrastructure, energy, and digitalisation projects. In addition, to prevent differences regarding topics such as leadership/management, this arrangement is purposely non-institutionalised, being supported as a political platform, and coordinated through high-level meetings (*summit diplomacy*). Despite its regional character, it has attracted the interest of many actors with global influence, who relate to 3SI in complex ways, both cooperative and competitive – e.g., the US, European Union, Germany, France, Italy, and the UK.

As a *methodological option*, this chapter prioritises the content analysis, starting (and distinguishing) from various communications between the decision-makers/political officials belonging to the states and organisations involved with 3SI development, the influencers who find themselves in their wake and the independent presenters, to paint an encompassing picture of the current *state* of the Initiative, as well as to anticipate the *processes* which will be at the forefront of its (re)configuration, in a fluid and feverish climate, in which the opportunities and challenges are not symmetrically and synchronically distributed among the participants, partners and tertiary stakeholders, but quite the contrary: for instance, the challenges faced by some (today) might become someone else's opportunities (tomorrow).

A mention should also be made regarding the selection and treatment of the plethora of regional cooperation mechanisms/formats. Thirteen such cadres were chosen and considered to have contributed, in various circumstances and configurations, to the achievement of Romania's foreign policy goals of (re)anchoring in the Euro-Atlantic community. Arranged chronologically, thus capturing the maturation and sophistication of Romania's political-diplomatic expressions – the *Danube Commission*, 1948; the *Central European Initiative*, 1989; the *Black Sea Economic Cooperation Organization*, 1992; the *South East European Cooperation Process*, 1996; the *trilateral format Romania—Poland—Ukraine*, 1997; the *Danube Cooperation Process*, 2002; the *Regional Cooperation Council*, 2008; the *Black Sea Synergy*, 2008; the *European Union Strategy for the Danube Region*, 2011; the *trilateral format Romania—Poland—Türkiye*, 2012; the *Bucharest Nine Format*, 2015; the *Three Seas Initiative*, 2016; the *European Political Community*, 2022 –, these were evaluated in an essentialized and homogenized way, without going into the structural-functional details of each one, the stake being the observation of how Romania has the means, but also the reasons, to claim a role more substantially, while understanding that many of

the formats exist as platforms for “dialogue” and less for “action”. The notable exception is 3SI, a quintessential profit/economic endeavour.

The 3SI Summit in Bucharest (September 6, 2023) represented Romania’s most important “regional moment” in the last year and, indirectly, one of increasing its global relevance. Among the results recorded on this occasion, analysed punctually or within the broader framework of the phenomenology to which it refers, are: the integration of Greece, which increases the geo-political-economic contiguity of the 3SI alignment; the receipt by the Republic of Moldova, after Ukraine, of the status of participating partner of the Initiative, a step intended to support the two countries in the not-so-easy path aimed at integration into the European Union; the continuation of the involvement of the United States, recognizing the importance of the long-awaited financial contribution from Washington in the interconnectivity projects, many of which also have an obvious security stake; evaluation of the performance and perspective of the 3SI Investment Fund (3SIIF), potential sources of international funding, and the need to complete it with a new one, oriented towards sustainable projects; the idea of launching an 3SI Innovation Fund, intended to support technological development in the region; revising the list of priority projects; balancing the various options for institutionalizing the Initiative, which, despite a deliberate formal lightness, could benefit from an 3SI Chamber of Commerce or dedicated secretariats by sector/industry, as solutions to increase the efficiency of internal coordination efforts, as well as external communication of the lucrative opportunities offered by the participating states.

The present research adopted a discourse and a language that tried to privilege the critical and creative “spirit” of the research idea, keeping it away from the “letter”, often opaque, of the bureaucratic-administrative documentary formats and formulations, with the abundance of references to “normative acts”, “official communications”, “institutional reports”, acronyms of various bodies and fora, dates of meetings and names of responsible persons. Nor was numerical, quantitative information, or metric modelling abused, preferring, rather, comparative, qualitative judgments.

The main resultants of the analysis undertaken, according to the proposed structure and the assumed methodological options, group the conclusions and recommendations on three major alignments accumulated consecutively: a) generic considerations, of a geopolitical, geoeconomic, and geostrategic order (derived from **Chapter 1**); b) relational considerations and related public policies (derived from **Chapters 2 and 1**); c) pragmatic/investment project considerations (derived from **Chapters 3, 2 and 1**). Compacted into a “Decalogue”, they could be summarized as follows:

1. Despite the risk of sounding like the result of a reductionist take on regional cooperation (leaning too much towards an overly “economic” perspective), *pragmatism* emerges as a legitimate “paradigm” for evaluating performance, specifically in the Central-Eastern/Southeastern European region, given its historically complex backdrop. The factors that can effectively bring together nations with such diverse cultural, spiritual, and political backgrounds, despite (or perhaps because of) their shared destiny, are those that are demonstrably lucrative, productive, and financially rewarding.

2. Rather than resigning ourselves to being *prisoners* of geography, be it physical or symbolic, it is prudent to harness its *power* to the fullest extent possible. Romania’s territorial features, endowments, and regional relationships exhibit both elements of invariance and historical variability. These aspects need to be addressed from civic, political, economic, and scientific perspectives, with a combination of vigilance and foresight. This approach is essential for the best course of action, whether reactive or proactive, operational or strategic, individual or collective, within the unique framework of this *geography*, which is, before anything else, *humane*.

3. There are no clear-cut separations between *local*, *regional*, and *global* geo-levels, and the layers of cooperation, as well as international competition, have long been interconnected. Terms like deglobalization, sub-regionalization, and sovereigntism denote the spasmodic movements of

a society that remains *international*, continually adjusting its loyalties and disloyalties, filtering relations with neighbours through those with regional or global powers, and vice versa; the evaluation of costs and benefits of their twists and turns is done on a marginal basis; and calculations are nevertheless influenced by economic and electoral cycles.

4. Romania's role and position in the various mechanisms of regional cooperation need careful consideration and prioritization to achieve foreign policy *ends* by arbitrating, integrating, and optimizing the *means* provided by these mechanisms. The perception, fuelled by inadequate or inefficient public communication, is that these mechanisms are approached in a fragmented manner, with performances validated through ritualistic alignment of diplomatic actions with *their* functioning "logic", rather than absorbing this logic into *our* (desirably pragmatic) "philosophy".

5. Expressions of *soft/smart power*, even in the realm of the "geopolitics of the small", have always relied on a combination of *reputation* (for instance, in terms of sound socio-economic governance highlighted by objective indicators) and *resources* (internationally shareable under mutually advantageous conditions, rather than ostentatiously stockpiled). Romania, like any other country, can only become relevant by proving that it *knows how* and *has what it takes*, being credible and resourceful (not just demanding), to regional partners and, together with them, to those beyond its borders. Any alternative approach is merely rhetorical or naive.

6. Considerations about shared routes for capitalizing on *opportunities* related to Euro-Atlantic integration (in the first wave of Central and Eastern Europe/South-Eastern Europe regionalism) and collective responses to security *challenges* on the new eastern flank of the extended Euro-Atlantic community (in the second wave) reveal both the external catalysts' coagulating force and the opportunistic and challenging behaviours from regional partners. Bucharest understands that the strength of the value *chains* in terms of regional cooperation lies in the *links* least attached to common values (Budapest?, Bratislava?, Belgrade?).

7. The most vibrant format for Romania's regional cooperation is 3SI. This is primarily because it pragmatically covers areas where our country has significant gaps (transport infrastructure) – featuring on the "demand side" – and unique strengths (energy resources) – featuring on the "supply side". The digital component serves as a neutral ground, oscillating between the mythology of a thriving IT&C sector and the stark reality of low technological penetration in society. Thus, 3SI should be nurtured as an *economic* outlet for *political* outcomes from other, relatively more silent, cooperative formats.

8. Undoubtedly, Three Seas Initiative (alongside Bucharest 9) does justice to Romania's potential (territorial and population-wise) in the region, even allowing space for the hoped-for *regional leadership*. However, certain conditions must be met: understanding the *order and measure of things* (e.g., acknowledging the moral primacy of Poland, cultivating the strategic partners, involving associated states, etc.); direct participation in efforts to sensitize mutually interested parties (political *capitals* and private *capital*); presenting priority projects not as national ambitions but as *gateways* to the regional market.

9. The Three Seas Initiative platform has the advantage, thanks to the existing Investment Fund (and those planned to be added), of having a *capitalist/entrepreneurial* financial aspect, more versatile than the alternative mobilization and *public/bureaucratic* management of financial resources. Open to diverse cultures of the capital(ist) world, the Initiative can act as a lever for necessary pro-business reforms, amplifying economic freedom at the expense of statist inertia. However, there is also the flip side, given the new ESG (*environmental, social, governance*) requirements, which may surpass the processing capacity in these societies.

10. Without fetishizing the role of the academic environment, eternally (self)invited to major societal projects (though often serving as a certifier, not a censor of public policies), research, undertaken responsibly, must be part of the discussion in regional cooperation. The arguments

stem from understanding the role of science as a *civilizational* interconnector between diverse *cultural* spaces (regionally), the costs of isolating it, as well as the benefits of sharing it, in a global environment where only *knowledge-based economies*, whether *national* or *regional blocs*, will be sustainable and resilient.

The present study attempts to offer a lecture entry point – one of the many potential ones – regarding Romania’s regional cooperation mechanisms, useful not only to the *producers* of external policies, but to all those who *consume* its shortcomings. This approach attempts to make itself useful by signalling the multitude of interpretations of the international reality, which goes from chancelleries all the way to the level of the common citizen and which demands an intelligent reconciliation and a wise reconnecting at possibly the most difficult to calculate parameter when it comes to the beingness and functioning of a state: the *national interest*.

The formulated conclusions emphasise, rather than exhaust, the wide range of possibilities of regional cooperation, in a heterogeneous/eclectic set of inventoried formats/mechanisms, which must be detached, before anything else, from the realm of monotony and rigidity. We are talking about promising, uncharted fields, but also about upsetting redundancies; about lucrative components, but also bureaucratic laziness; about room for national initiative, but also convenient conformity. These aspects are further complicated by the upsurge of the contestation of the *international rule-based order*.

The study is available [here](#) (in Romanian).

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