

AFTER NICOSIA

A SECOND EARTHQUAKE: THE EU, SYRIA AND THE GULF IN A NEW INTERNATIONAL LAW-BASED STRATEGIC ALIGNMENT

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Analytical Intelligence — geopolitical analysis for decision-makers

EXECUTIVE SUMMARY

The informal yet perhaps most strategic EU summit in Nicosia on 23–24 April 2026 convened European heads of state alongside the GCC, Syria, Egypt, Jordan and Lebanon. This marks the second geopolitical earthquake in the restructuring of Europe's role in the international order. The first was triggered by the combination of Russia's invasion of Ukraine, the Israeli-US war on Iran, Iranian attacks on GCC states, and the consequential GCC-Ukraine-EU arms deals.

Both earthquakes share a common cause: Israeli-inspired US foreign and military policies so strategically incoherent that they have systematically undermined American interests while inadvertently strengthening the EU's strategic autonomy and its global impact. The consequences now visible at Nicosia: an EU–Arab–Gulf connectivity and security architecture; the collapse of the Israel-routed IMEC India-EU corridor; Syria's emergence as the indispensable transit hub; and the political conditions for suspension of the EU–Israel Association Agreement. None of these were designed by the EU. They were caused by others.

THE FIRST EARTHQUAKE — CONTEXT

This analysis builds directly on the author's earlier intelligence document, *Earthquake Change in International Security — Epicentre Kyiv*, published on 3 April 2026 on LinkedIn and distributed to senior diplomatic and analytical networks. That document argued that Russia's invasion of Ukraine — enabled by a decade of Western strategic complacency and the failure of US deterrence architecture — had paradoxically accelerated EU strategic autonomy, defence integration, and eastern enlargement far beyond what any deliberate EU policy initiative could have achieved. The earthquake metaphor was precise: the event was catastrophic, unintended by its architects, and restructured the underlying geopolitical landscape irreversibly.

The second earthquake follows the same structural logic: a catastrophic, self-inflicted strategic failure — this time Israeli and American — whose consequences are reshaping the European, Middle Eastern, and global order in ways its architects could not have intended and cannot now control.

§1 NICOSIA: WHAT ACTUALLY HAPPENED

The informal EU Council meeting of 23–24 April 2026, hosted by Cyprus in Nicosia under the chairmanship of European Council President António Costa, was formally convened to address the MFF 2028–2034 budget, the Ukraine war, and the Middle East fallout from the Iran conflict. What it became was structurally and strategically more significant: the first formal convening of EU heads of state alongside Syrian President Ahmad al-Sharaa, Egyptian President el-Sisi, Lebanese President Joseph Aoun, Jordan's Crown Prince Hussein, and GCC Secretary General Jasem al-Budaiwi.

"The current situation clearly underscores how closely Europe's security is linked with that of the Middle East, and how vital our cooperation on security and defence has become."

— António Costa, European Council President, Nicosia, 24 April 2026

No formal decisions were taken. The significance was architectural, not procedural. For the first time, the EU sat at table with the post-Assad Syrian government as a legitimate strategic partner, with a GCC represented at the highest secretariat level, and with a Mediterranean southern neighbourhood framed explicitly as a shared security space. European Commission President von der Leyen proposed expanding Operation Aspides from convoy protection to joint maritime coordination, called for structural defence production cooperation against drone and missile proliferation, and announced active work on economic, trade and political partnerships with Jordan, Egypt, Syria and Gulf nations — explicitly including defence dimensions.

The Hormuz closure — the effective blockade of approximately 20% of globally traded oil following US-Israeli strikes on Iran — was the material forcing function. Energy price shocks, supply chain disruption, and the threat of prolonged Strait closure have compressed timelines for European strategic decisions that were previously measured in years.

§2 THE EARTHQUAKE FRAMEWORK: UNINTENDED CONSEQUENCES

Both seismic events share a precise structural logic. In each case, a set of policies designed to serve Israeli or American strategic interests produced the opposite of their intended outcomes, while simultaneously and inadvertently strengthening the EU's strategic position.

DIMENSION	FIRST EARTHQUAKE Epicentre: Kyiv	SECOND EARTHQUAKE Epicentre: Gaza/Iran/Nicosia
Causes	Russian invasion enabled by US deterrence failure	Gaza war and Iran strikes enabled by unconditional US support for Israel; Iranian strikes on GCC states; Gulf-Kyiv-EU arms deals
Goals	NATO primacy reassertion; EU security subordination to Washington	US control of Iranian oil vs China; Arab-Israeli normalisation; Israel embedded in IMEC corridor

DIMENSION	FIRST EARTHQUAKE Epicentre: Kyiv	SECOND EARTHQUAKE Epicentre: Gaza/Iran/Nicosia
Actual Outcome	EU defence autonomy accelerated; Franco-British nuclear deterrent; German-Polish conventional leadership	IMEC Israeli route evaporated; Syria emerges as corridor hub; EU-Arab security architecture; EU-Gulf partnerships; Global South credibility restored

§3 THE FALL OF IMEC — THE BIRTH OF THE SYRIA ROUTE

The India–Middle East–Europe Economic Corridor (IMEC), announced at the G20 New Delhi summit in September 2023, was never purely an infrastructure initiative. It was the material architecture of the Abraham Accords strategy: connecting India, the Gulf, and Europe through Israel, with Haifa port (acquired by India's Adani Group) as the Mediterranean entry point. A pivotal strategic goal was facilitating Saudi-Israeli normalisation by making economic integration with Israel a precondition for Gulf access to the EU-India supply chain.

Netanyahu called IMEC "a blessing for the Middle East." He was describing not an infrastructure project but a geopolitical wedge designed to make Palestinian statehood irrelevant to Gulf states' economic futures. The massacre in Gaza destroyed this architecture within weeks of the IMEC announcement. Saudi Arabia's position — no normalisation without a credible pathway to Palestinian statehood — proved structurally immovable. IMEC's Israeli leg entered a coma from which it has not recovered. The Iran war and Hormuz closure then administered the coup de grâce to the broader connectivity assumptions on which IMEC rested.

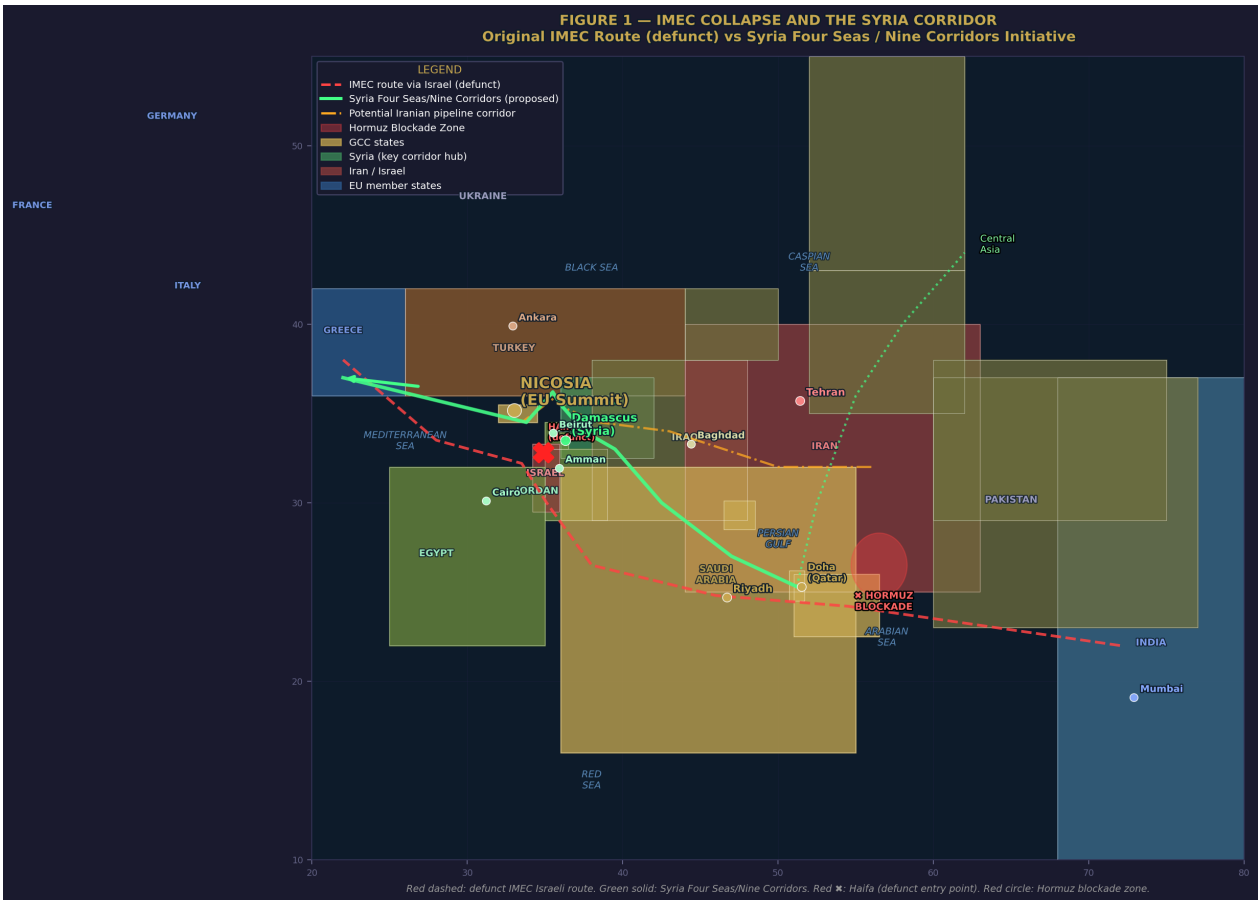


Figure 1: IMEC original route via Israel (red dashed) versus Syria's Four Seas / Nine Corridors initiative (green). The red X marks the defunct Haifa entry point. The Hormuz blockade zone (red circle) further invalidates IMEC's maritime assumptions. Amber dash-dot line indicates potential Iranian pipeline route via Iraq and Syria to Mediterranean terminals.

Into this vacuum stepped Syrian President Ahmad al-Sharaa at Nicosia, presenting the "Four Seas Initiative" and "Nine Corridors Initiative" — a connectivity architecture routing Gulf-to-Mediterranean trade overland through Damascus, linking Central Asia and the Gulf to European markets without passing through Israel or the Strait of Hormuz.

"Syria is positioned to become a secure strategic corridor linking Central Asia and the Gulf with the heart of Europe. Europe needs Syria as much as Syria needs Europe."

— President Ahmad al-Sharaa, Nicosia, 24 April 2026

The Syrian proposal achieves in one move what years of EU connectivity diplomacy could not: an overland Gulf-Mediterranean corridor that is Israel-free, Hormuz-free, and explicitly conditioned on European pressure to constrain Israeli actions on Syrian territory. Al-Sharaa did not invent the opportunity. Israeli policy created it. He is simply the first actor to walk through the door.

§3b "ZUVIEL PANZER, ZU WENIG GEHIRN" — SYRIA'S ENERGY GEOGRAPHY AND WASHINGTON'S STRATEGIC BLINDNESS

THE PIPELINE HISTORY WASHINGTON CHOSE TO FORGET

Syria's emergence as the indispensable energy transit hub for the post-IMEC Middle East is not a new idea. It is a suppressed one, blocked for two decades by the Assad regime's alignment with Moscow and Tehran, and now released by Assad's fall.

In 2009, Qatar proposed a \$10 billion, 1,500-kilometre natural gas pipeline running from the South Pars/North Dome field — the world's largest gas reserve, shared between Qatar and Iran — through Saudi Arabia, Jordan, Syria, and Turkey to European distribution terminals via the Nabucco network. Assad vetoed it. The reason was explicit: Moscow pressured Damascus to protect Russian gas's European market share. Assad complied, signing instead a competing agreement with Iraq and Iran for an "Islamic pipeline" running eastward.

Assad's fall in December 2024 changed everything. Within two days of the regime's collapse, Turkey's Energy Minister announced Ankara was considering reviving the Qatar–Turkey pipeline through Syria. Qatar, Turkey, Saudi Arabia, and the UAE all moved immediately to establish relationships with the new Damascus government — the energy geography frozen for fifteen years was suddenly liquid again.

"Assad vetoed the Qatar pipeline to protect Russian gas revenues. His departure unlocks a Gulf-to-Europe energy architecture that Moscow spent fifteen years and a civil war preventing."

IRAN'S OIL AND THE SYRIAN BALANCING ACT

The energy geometry of the new Syria contains a further dimension that most Western analysis has systematically ignored: the potential for Iranian oil to find an export route westward through Syrian territory, bypassing the Hormuz chokepoint entirely. Under the current Iran war and Hormuz closure, this is not a theoretical proposition. Iran holds the world's fourth-largest proven oil reserves and is effectively landlocked from its primary export markets.

A pipeline corridor through Iraq to Syria, connecting to Mediterranean export terminals, would give Iran partial relief from the Hormuz stranglehold. For the new Syrian government, facilitating such a route would generate transit revenue, provide geopolitical leverage over both Washington and Brussels simultaneously, and demonstrate Damascus's capacity to act as an independent regional actor. For the EU, the correct response is not alarm but engagement: a Syrian corridor carrying Iranian oil westward, under EU-negotiated terms, would create an Iranian economic incentive for engagement with a European-anchored regional order that years of sanctions have not achieved.

HEGSETH'S CONTEMPT AND ITS STRATEGIC SELF-EXPOSURE

On April 24, 2026 — the same day as the Nicosia summit — US Defense Secretary Pete Hegseth dismissed European efforts to address the Hormuz crisis as "a silly conference" and accused Europe and Asia of "freeriding" on American military protection. "The only country that can do something about it is the United States," Hegseth said, describing US oil exports as "a new global conga line headed to Texas, a beautiful picture."

The contempt was strategic panic dressed as bravado. The US-Israeli decision to strike Iran closed the Strait of Hormuz — a chokepoint that primarily affects European and Asian energy security, not American. Having created the crisis that most damages its allies, Washington then accuses those allies of freeriding when they construct alternative supply architectures that bypass the American-controlled chokepoint.

"Zuviel Panzer, zu wenig Gehirn — too much armour, too little brain. Washington created the Hormuz crisis, blamed its allies for the consequences, and watched from the sidelines as Nicosia built the architecture that makes the Strait irrelevant to European energy security."

THE LAST SPY: WHAT THE CIA KNEW AND WHAT IT REPEATED

The Last Spy, directed by Katharina Otto-Bernstein and released in cinemas on April 24, 2026, is a portrait of Peter Sichel — a German-Jewish refugee who became the CIA's first Berlin Station Chief and one of the most consequential intelligence officers of the Cold War era. Sichel passed away in February 2025 at the age of 102; the film draws on his final, unredacted testimony.

The film's most direct relevance to the current moment is Sichel's account of the 1953 CIA-MI6 coup that overthrew Iran's democratically elected Prime Minister Mohammad Mosaddegh — engineered, as the documentary makes explicit, to protect British and American oil interests from nationalisation. In 1953, the US and UK removed an Iranian government to prevent oil nationalisation. In 2026, the US and Israel have launched a war against Iran and imposed a blockade of the Strait of Hormuz. The mechanism is different. The underlying logic is identical: control of someone else's oil.

Released by a Jewish-German filmmaker on the day of the Nicosia summit, drawing on the final testimony of a Jewish CIA officer who survived Nazi Germany, *The Last Spy* provides the moral and historical framing that the EU, the GCC, and Syria's new government now share: that the pattern of American intervention in the Middle East is not about democracy, security, or nuclear non-proliferation. It is about the control of hydrocarbon resources that others own, others need, and that the United States has consistently sought to subordinate to its own strategic interests.

§4 THE EU–ISRAEL ASSOCIATION AGREEMENT: THE UNUSED INSTRUMENT

The EU–Israel Association Agreement, in force since 2000, grants Israel preferential market access worth billions annually. Article 2 makes human rights and democratic principles an "essential element" of the agreement, with suspension available as a remedy for material breach. The legal groundwork for suspension has already been laid by EU institutions: in June 2025, the office of High Representative Kaja Kallas formally found that Israel had breached the human rights clause during the Gaza war. ICJ genocide case proceedings, with Netherlands and Iceland filing interventions, have further clarified the international legal context.

The procedural basis for suspension does not require unanimity — the Council can act by qualified majority on Commission proposal for protective measures and partial suspension, as established by precedents including the Belarus case. The blocking coalition has narrowed decisively. Spain, Ireland, Belgium, and

Slovenia are publicly in favour of enforcement measures. France is moving instrumentally in this direction. Hungary's veto capacity is disappearing post-Orbán. The blocking coalition has effectively narrowed to Germany.

SUSPENSION SERVES GERMAN INDUSTRIAL INTERESTS DIRECTLY

The trade-off Germany is currently making — protecting Israeli commercial relationships at the cost of African and Asian raw material partnership credibility — is strategically incoherent on Germany's own terms. Germany's electric vehicle transition dependency on cobalt, lithium, and manganese from DRC, Zambia, Namibia, and South Africa are existential industrial priorities. African leaders have been explicit and consistent: European Rule-of-Law credibility is destroyed by the Gaza position.

Suspension — targeted, graduated, with explicit conditionality — would achieve five simultaneous strategic objectives:

- Create genuine EU leverage where none currently exists — Brussels issues statements; Israel ignores them; suspension creates a negotiating instrument.
- Restore Global South credibility — demonstrating that EU Rule-of-Law commitments are not purely instrumental.
- Create political conditions for Syrian corridor investment — Arab partners cannot fully commit to EU-anchored connectivity while the EU maintains unconditional Association status with a state actively striking Syrian territory.
- Decouple European Middle East policy from Washington — expanding EU diplomatic space with Gulf states, India, Turkey, and China simultaneously.
- Provide Merz with a European leadership moment — aligned with 70%+ of German electorate opinion, strengthening CDU against AfD pressure from a position of principled strength.

§5 MERZ, GERMAN POLITICS, AND THE EUROPEAN LEADERSHIP MOMENT

Friedrich Merz governs with an approval rating of approximately 19% — the most structurally vulnerable CDU chancellor since reunification. The AfD now polls above CDU nationally. This political reality transforms the calculus on Israel policy fundamentally. Merz cannot afford to defend a position that approximately 70–75% of the German electorate has abandoned.

Nicosia offers Merz precisely the European leadership moment his political survival requires. Germany taking a leadership role in the Association Agreement suspension process — framed as Rule-of-Law enforcement, consistent with Germany's stated values, supported by the EU's own legal findings, and aligned with German industrial interests in Africa and the Gulf — would be the defining act of his chancellorship. The AfD threat is not answered by defending niche positions on Israeli policy. It is answered by demonstrating that CDU can lead the EPP confidently into a new strategic era.

§6 UN RESOLUTIONS, RULE OF LAW, AND THE LEGAL FRAMEWORK

The post-Nicosia EU position on Israel is not a radical departure from existing international law. It is the application of that law. A strong majority of EU member states and their electorates support demands grounded entirely in UN Security Council resolutions and ICJ findings. The Association Agreement suspension mechanism converts stated positions into actionable leverage for the first time. This is not new EU policy. It is existing EU policy with teeth.

The conditionality should be precise and legally anchored: halt West Bank settlement financing and expansion in violation of international humanitarian law; comply with ICJ provisional measures; cease strikes on Syrian territory in violation of the 1974 Disengagement Agreement.

§7 THE EMERGING EUROPEAN SECURITY ARCHITECTURE

The security architecture now taking shape is the direct consequence of US strategic retrenchment under Trump and the operational lessons of the Ukraine war.

NUCLEAR DETERRENCE: THE FRANCO-BRITISH PILLAR

Under the Lancaster House framework, France and the United Kingdom are developing the European nuclear deterrence architecture. The practical mechanism is not a formal NATO-style nuclear sharing arrangement, but a consultative framework in which French deterrence is understood to cover scenarios directly threatening EU territorial integrity, with the UK providing complementary capability and targeting coordination. The clearest expression of this emerging architecture was Prime Minister Starmer's speech at the Munich Security Conference, delivered surrounded by members of the EU Coalition of the Willing.

CONVENTIONAL LEADERSHIP: GERMANY AND POLAND

Germany has the industrial base — if *Zeitenwende* spending commitments are delivered — and the political will to lead the conventional pillar. Poland has operational military seriousness, geographic position on NATO's most exposed frontier, and a political culture that takes the Russian threat seriously at a level Germany is still developing. A Polish or German SACEUR would signal that NATO's effective centre of gravity has moved east to reflect operational reality.

CANADA: FROM NORTH AMERICAN PARTNER TO EUROPEAN ASSOCIATE

Canada's trajectory under Mark Carney's government is one of the most significant and underreported developments in the current strategic restructuring. Facing American economic coercion, Ottawa has pivoted decisively toward European alignment — seeking not formal EU membership but a "Norway position": integration in European security, economic, and institutional frameworks. A Canadian NATO Secretary General would signal that North America is no longer a monolithic bloc, and that Canada has chosen the European order over the American one.

§8 THE TURKISH VARIABLE

Turkey is watching the Syrian corridor proposal with a mixture of competitive anxiety and strategic calculation. Ankara had positioned itself as the indispensable Eurasian land bridge — the Iraq Development Road, the Zangezur Corridor, the Middle Corridor (TRIPP), and energy hub ambitions all reflect this posture. Al-Sharaa's Four Seas initiative threatens Turkish transit centrality by offering Europe a Gulf-Mediterranean

land route that bypasses Turkey entirely.

The EU needs Turkish acquiescence to make the Syrian route function efficiently at the northern end. This gives Ankara significant leverage — and gives Brussels a strong incentive to offer Turkey something in the long-frozen accession process. A Turkish accession reinvigoration, offered in exchange for facilitative cooperation on the Syrian corridor, would itself be a third-order earthquake — and another unintended consequence of the chain of events originating in Gaza.

§9 CONCLUSIONS — THE SECOND EARTHQUAKE: CONSEQUENCES

The following conclusions are not predictions of intended policy. They are analytical assessments of consequences already in motion — consequences caused by others, now available for the EU to convert from passive windfall into active strategic architecture.

1.

The Nicosia summit is a structural inflection point, not a diplomatic event. The format — EU heads of state plus Syria, Egypt, Jordan, Lebanon, GCC — will not revert. It establishes a southern neighbourhood security and connectivity council in embryonic form. The May 11 EU-Syria high-level political dialogue in Brussels is the immediate next act.

2.

IMEC's Israeli route is geopolitically dead. The combination of Saudi normalisation refusal, Gaza, the Iran war, and Hormuz closure has destroyed the political and logistical foundations of the Israel-routed corridor. No change of US administration or Israeli government corrects this within the strategic planning horizon.

3.

Syria has emerged as the indispensable transit hub for the new corridor architecture. This was not the EU's design. It is the consequence of Israeli policy eliminating every alternative. Al-Sharaa understands this leverage and is deploying it with precision.

4.

The EU–Israel Association Agreement suspension is legally available, politically achievable, and strategically necessary. The Kallas finding provides legal cover. There is no unanimity obstacle. The blocking coalition has narrowed to Germany, whose own industrial interests now argue for suspension rather than against it.

5.

Germany holds the key and Merz holds the opportunity. A chancellor governing at 19% approval, facing an AfD larger than his own party, with 70%+ of the electorate supporting Rule-of-Law enforcement on Israel — this is not a politician with incentives to block European consensus.

6.

The European security architecture is consolidating around a coherent framework. Franco-British nuclear deterrence under Lancaster House; German-Polish conventional leadership and a Polish or German SACEUR; a Canadian "Norway position" in EU security and institutional frameworks; a possible Canadian NATO Secretary General.

7.

The EU's global position — in Africa, Asia, Latin America — depends on making this move. The Association Agreement suspension is the single act most capable of restoring Global South credibility at scale, at precisely the moment when raw material and market access from those regions is an existential European industrial priority.

8.

Both earthquakes share a common cause and a common consequence. Israeli-inspired US policies, in Ukraine and in Gaza, have systematically damaged American interests, strengthened European strategic autonomy, and produced a regional architecture in the Middle East that Israel's own strategy was designed to prevent. The EU did not cause this. The EU is the beneficiary. The question is when — not whether — Brussels will find the strategic clarity and political will to convert accidental windfall into deliberate architecture. That is not a revolution. That is institutional consistency, finally applied.

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