

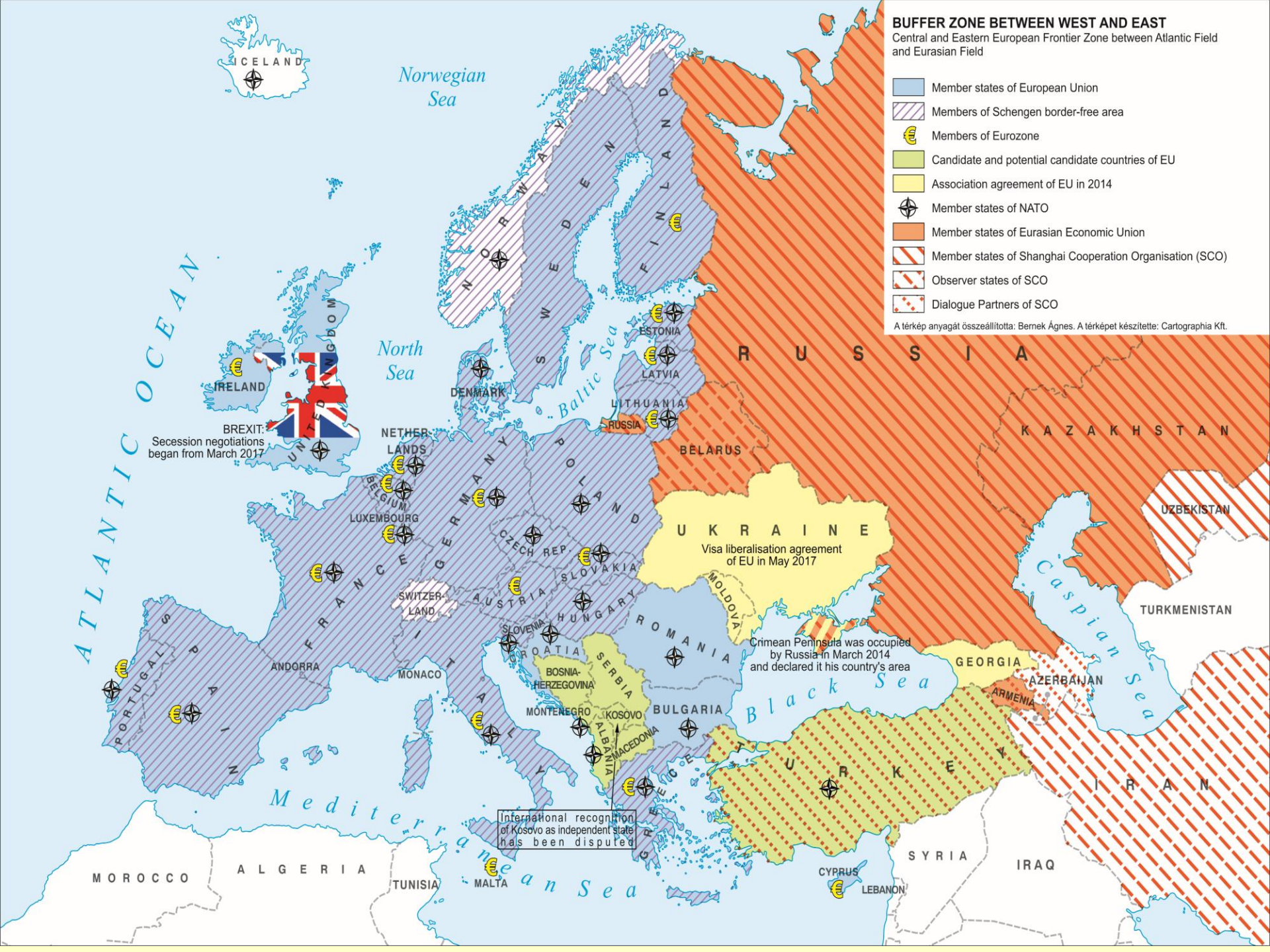
# *Central and Eastern European Countries in the Multipolar World of the 21st Century*

*Dr. Agnes Bernek*

*expert, Hungarian National Trading House*

*Belt and Road Forum – 15 May, 2018*





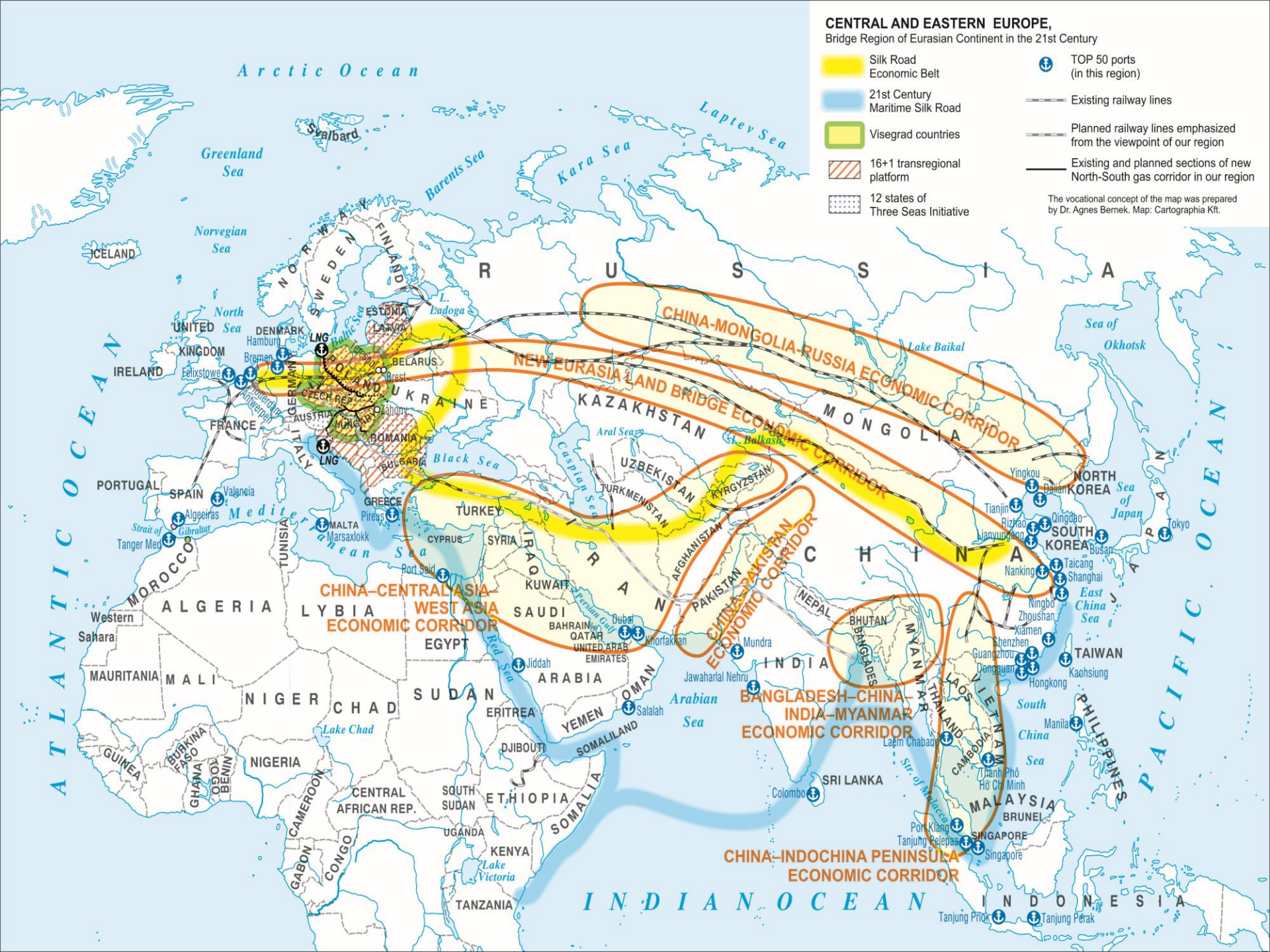


 Silk Road  
Economic Belt

Existing railway lines

Existing and planned sections of new North-South gas corridor in our region

The vocational concept of the map was prepared by Dr. Agnes Bernek. Map: Cartographia Kft.





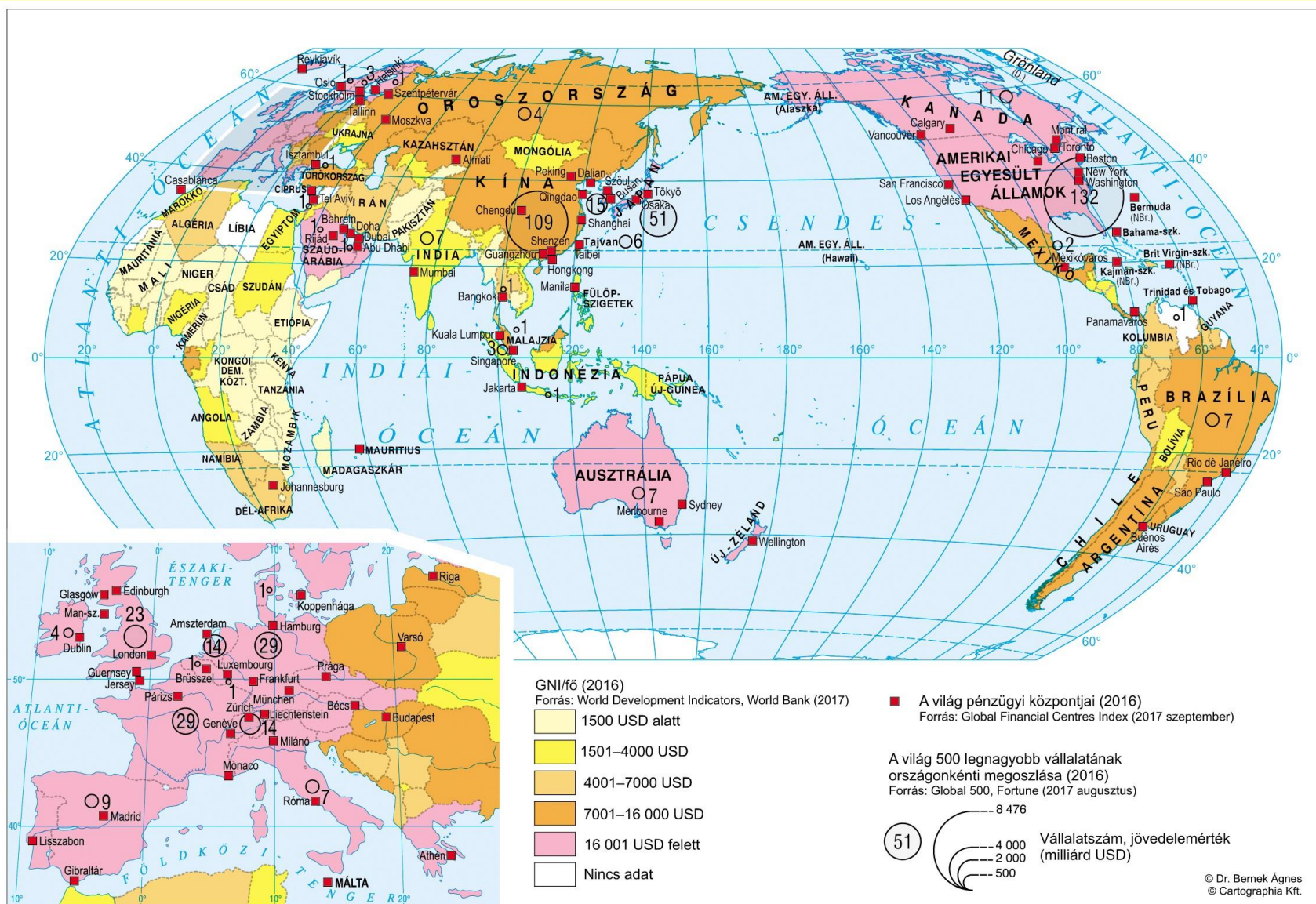








# Pacific ocean-centered world economy in 2016







Mackinder's "Fig. 5," entitled "The Natural Seats of Power," showing what he termed the "pivot area," the "inner or marginal crescent" and the "lands of outer or insular crescent." (Reprinted by permission of The Royal Geographical Society, London.)

*Mackinder, The Geographical Pivot of History, 1904*

*"Who rules East Europe commands the **Heartland**;  
who rules the Heartland commands the **World-Island**;  
who rules the World-Island commands the **world**."*

*Mackinder, Democratic Ideals and Reality, 1919*



*Geopolitical power matrix in respect of the Central and Eastern European countries*

***LARGER WEST***

***EURASIAN CONTINENT***

***USA***

***Russia and the  
Eurasian Economic  
Union***

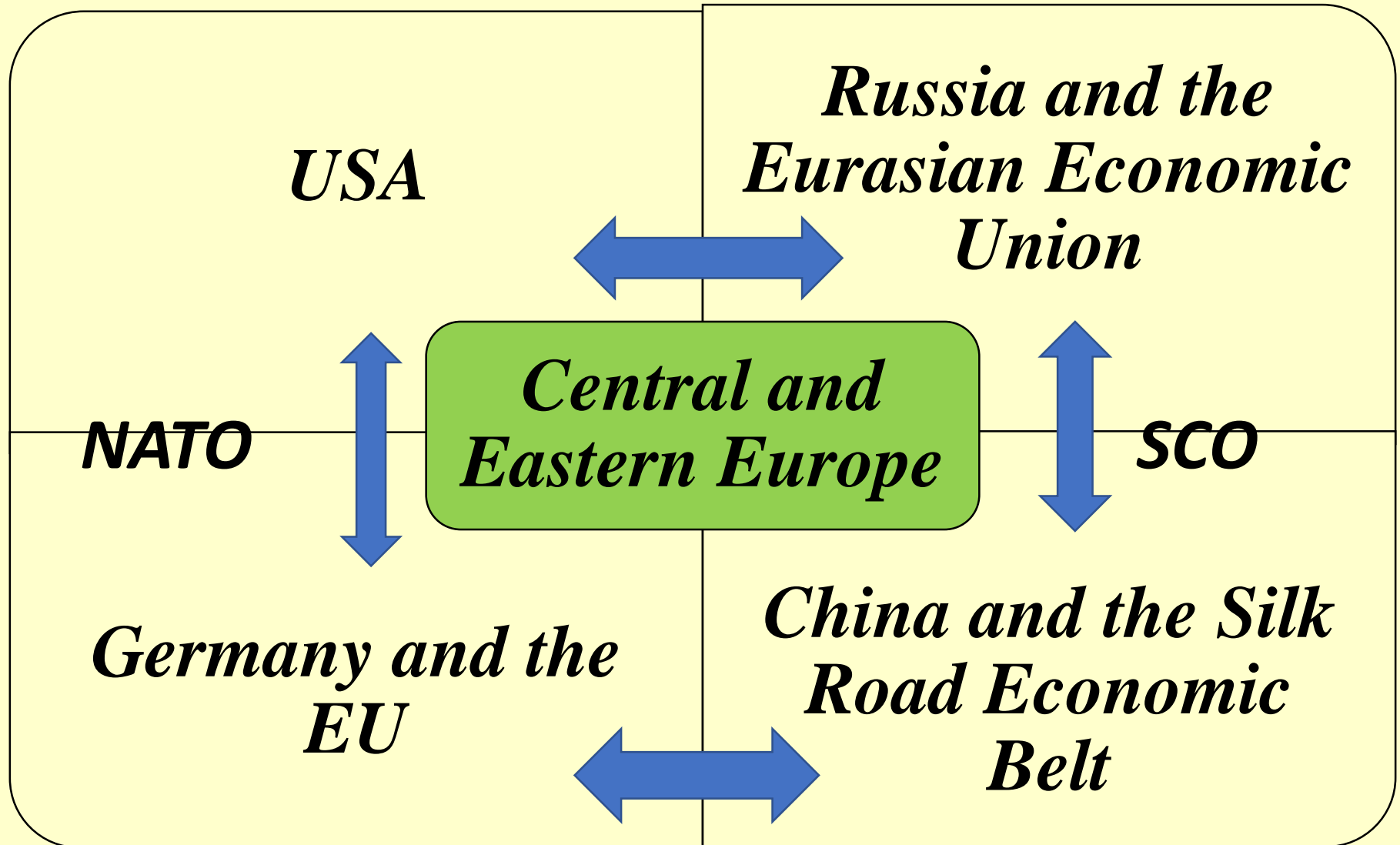
***NATO***

***Central and  
Eastern Europe***

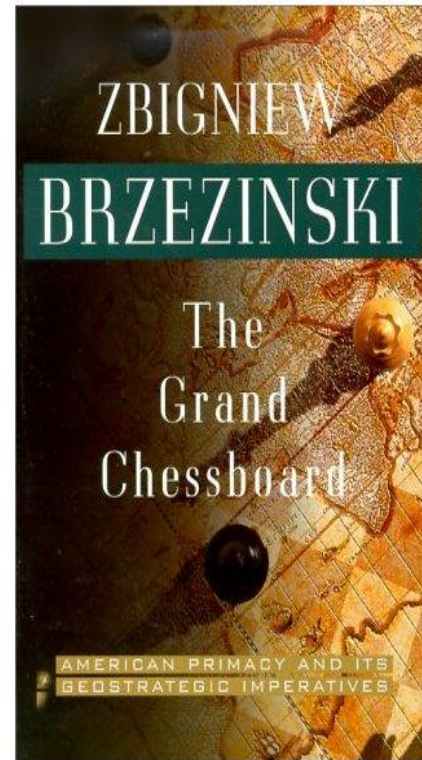
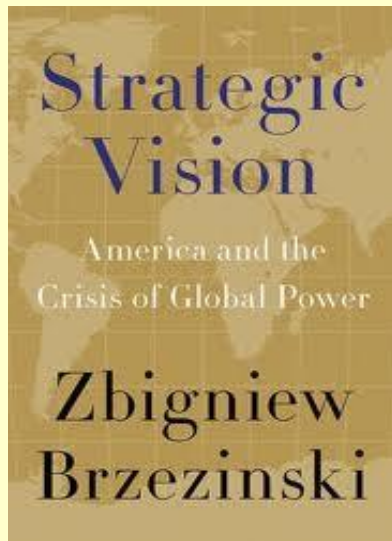
***SCO***

***Germany and the  
EU***

***China and the Silk  
Road Economic  
Belt***



# *The World from Washington*



***WEST – EAST***  
***Larger West and New East***  
***Balancing the East, Upgrading the West***  
***A Larger West – Russia and Turkey to***  
***the Atlantic Power Zone, too!***



*„Smart power”  
„the tide of war is receding”*



*From unipolar world (dominance  
of the Atlantic Zone) to the  
Transpacific partnership!*

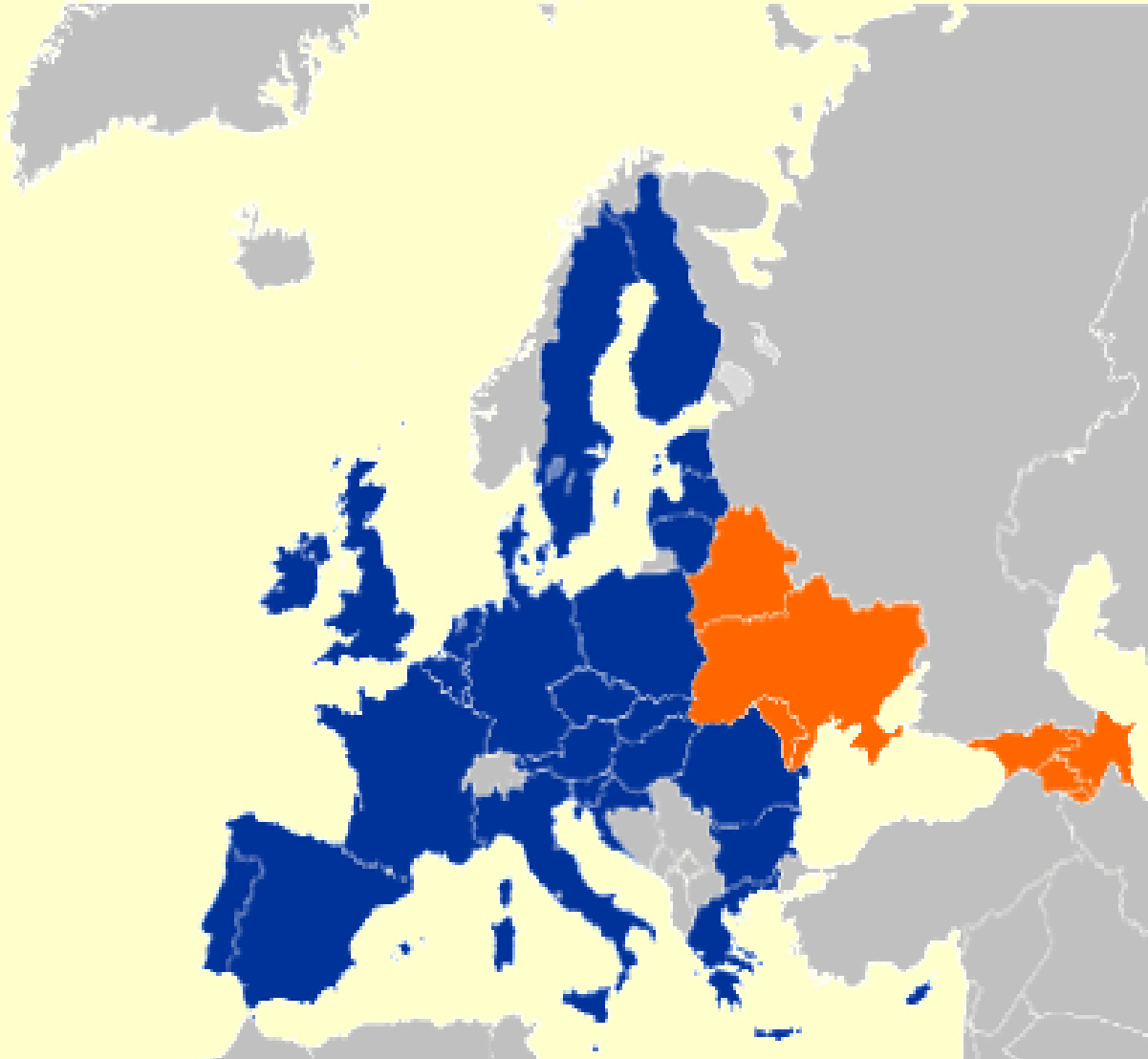
*”*

*New geopolitical  
directions!*

*New American  
power role  
based on  
diplomatic  
instruments and  
cooperation with  
the rest of the  
countries of the  
world!*



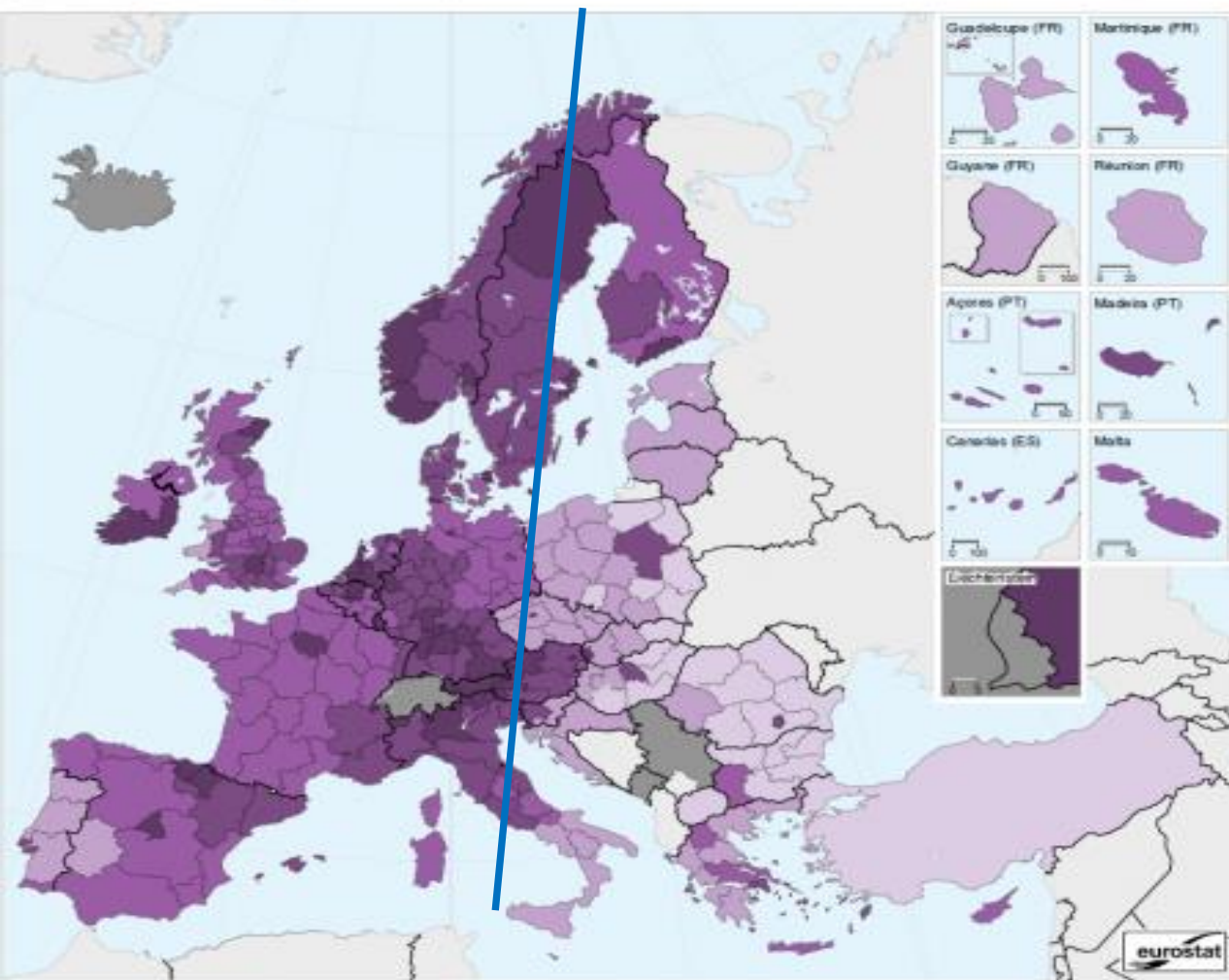
# *The World from Brussels*



- *Eastern partnership with six countries in Eastern Europe and the South Caucasus*
- *Where is the border of European Union?*
- *European values – is it question of the geographical border?*
- *Georgia and Moldova!!!*



Gross domestic product (GDP) per inhabitant, in purchasing power standard (PPS),  
by NUTS 2 regions, 2010 (\*)  
(% of the EU-27 average, EU-27 = 100)



(% of the EU-27 average, EU-27 = 100)

EU-27 = 100



Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat  
Cartography: Eurostat — GISCO, 06/2013



(\*) Turkey, national level.

Source: Eurostat (online data code: name\_r\_e2gdp)

*The new  
border  
between West  
and East?  
Where is the  
Central-  
Europe?  
North and  
South?*



# *Franco-German Europe? Russo-German Europe?*



*East-Central Europe is  
between Germany and  
Russia*



*Gazprom North Stream  
- Opening Ceremony  
November 8, 2011*

# *US and Russia – The new cold war?*



*US - Obama:  
„Russia is only  
regional power”*

*Russia - Putin:  
..with NATO’s  
expansion to the  
East, as well as  
the deployment  
of military  
infrastructure at  
our borders”*

*June 17, 2013 – Northern Island – G8 Summit*



# *The World from Moscow*



*March 18, 2014*

*Address by V. Putin to  
the State Duma  
deputies*

*„In short, we have every reason to assume that the infamous policy of containment, led in the 18<sup>th</sup>, 19<sup>th</sup> and 20<sup>th</sup> centuries, continues today. They are constantly trying to sweep us into a corner because we have an independent position, because we maintain it and because we call things like they are and do not engage in hypocrisy. But there is a limit to everything. And with Ukraine, our western partners have crossed the line, playing the bear and acting irresponsibly and unprofessionally.”*

# *Valdai Club – September 16-19, 2013*



[www.valdaiclub.com](http://www.valdaiclub.com)

„The 21st century promises to become the century of major changes, *the era of the formation of major geopolitical zones*, as well as financial and economic, cultural, civilisational, and military and political areas. ....The Eurasian Union is a project for maintaining the identity of nations *in the historical Eurasian space in a new century and in a new world*. Eurasian integration is a chance for the entire post-Soviet space *to become an independent centre for global development, rather than remaining on the outskirts of Europe and Asia.*”



# *New Eurasian Union*



*V. Putin –  
Izvestia –  
November 2011*

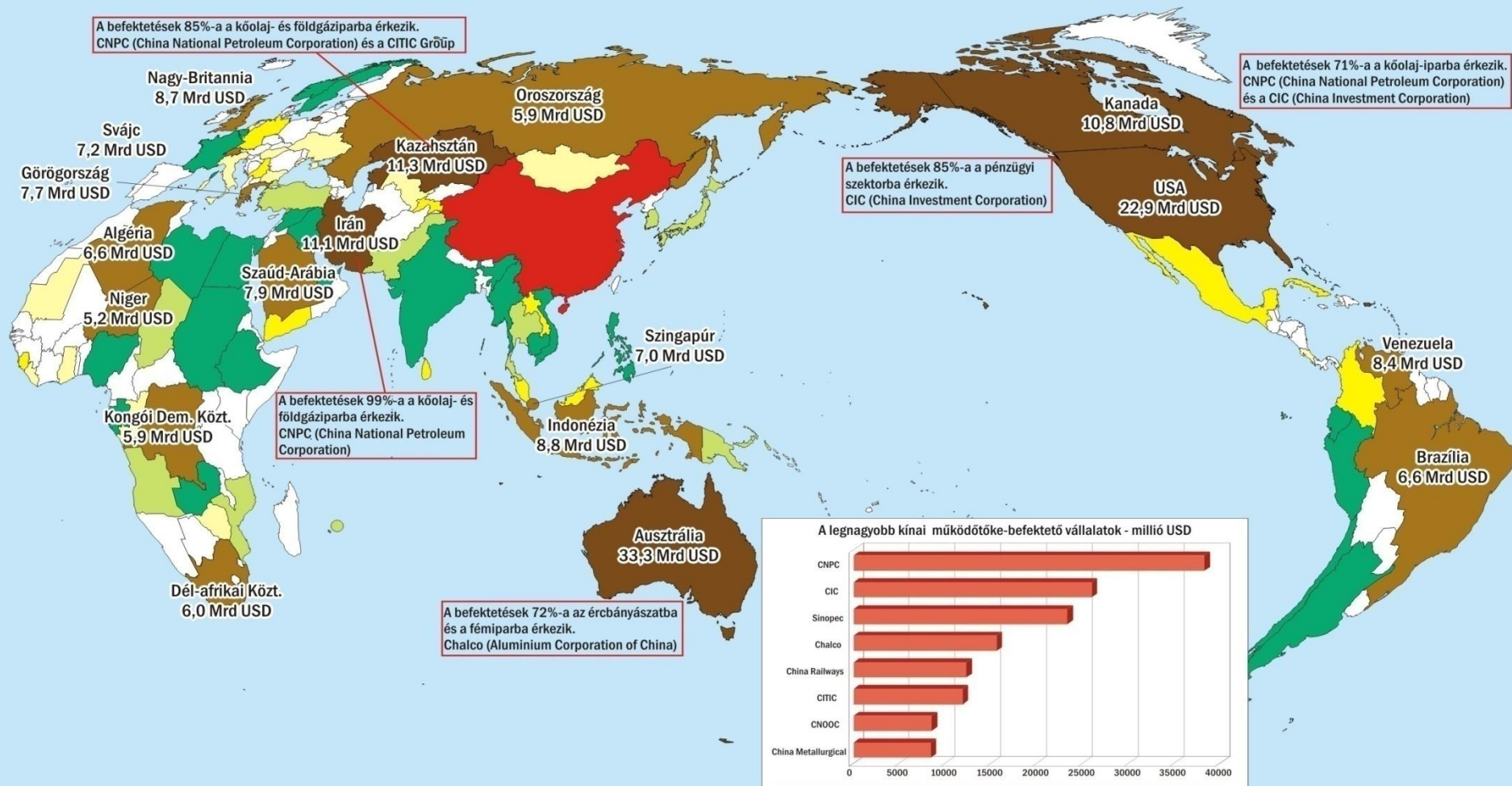
*„Larger Europe”*

*Eurasian Union would  
stretch from Lisbon to  
Vladivostok! – Is it real?*

*Russia would fill a geographically determined role as a bridge  
between Europe and Asia!*

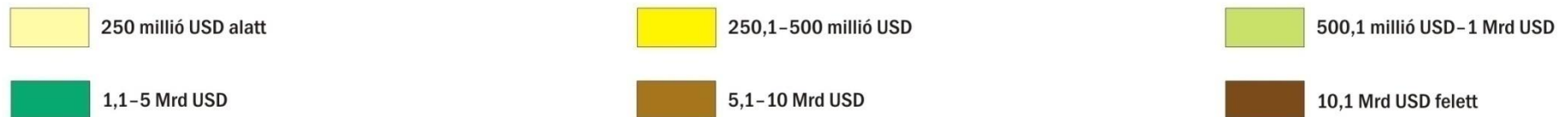
## A 21. századi „Kínai Birodalom”

### Kína külföldi működőtőke-befektetéseinek területi szerveződése 2005 márciustól 2010 júniusig



A térkép a The Heritage Foundation "China Global Investment Tracker 2010" adatállománya alapján készült.

© Bernek Ágnes - Zentai László, 2010





# China aims to build a global infrastructure network

## "Belt and Road" infrastructure projects, planned and completed (March 2017)







Ronald D. Asmus  
Foreign Affairs,  
January/February 2008  
„Europe’s Eastern  
Promise: Rethinking  
NATO and EU  
Enlargement”

*„If by 2012 the only  
change is Croatia’s  
(and expectedly  
Albania’s) accession to  
NATO and Croatia’s  
membership in the EU,  
then a geopolitical  
stalemate would  
emerge!”*



# *Latin Intermarium*

## *From the Black Sea to the Adriatic Sea*



*After World War I. - settlement  
plan of  
Polish Marshal Józef Piłsudski  
- Intermarium - Trimarium  
„Miedzymarze”*

*21. century*

- *Eastern frontier of EU*
- *Western frontier of  
Eurasian Economic Union*

*New North-South relationship*

## Three Seas Initiative (TSI)



„3Cs”

- Compatibility
- Connectivity
- Commerciality

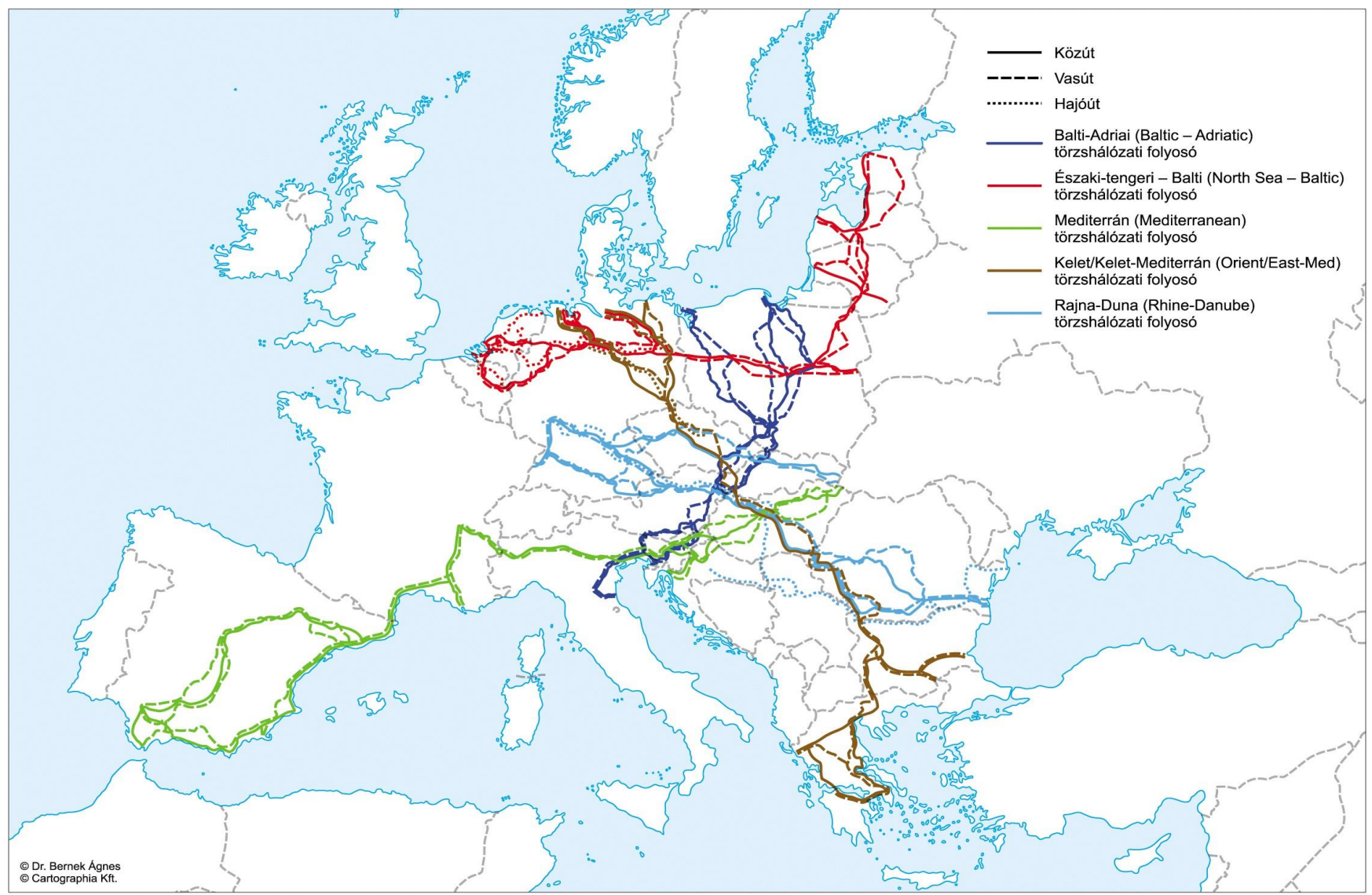


- *Visegrad cooperation*
- *Three Seas Initiative (12 Eu members)*
- *16+1: China and 16 Central and Eastern European countries*





# *The five TEN-T network corridors in the Central and Eastern European region*





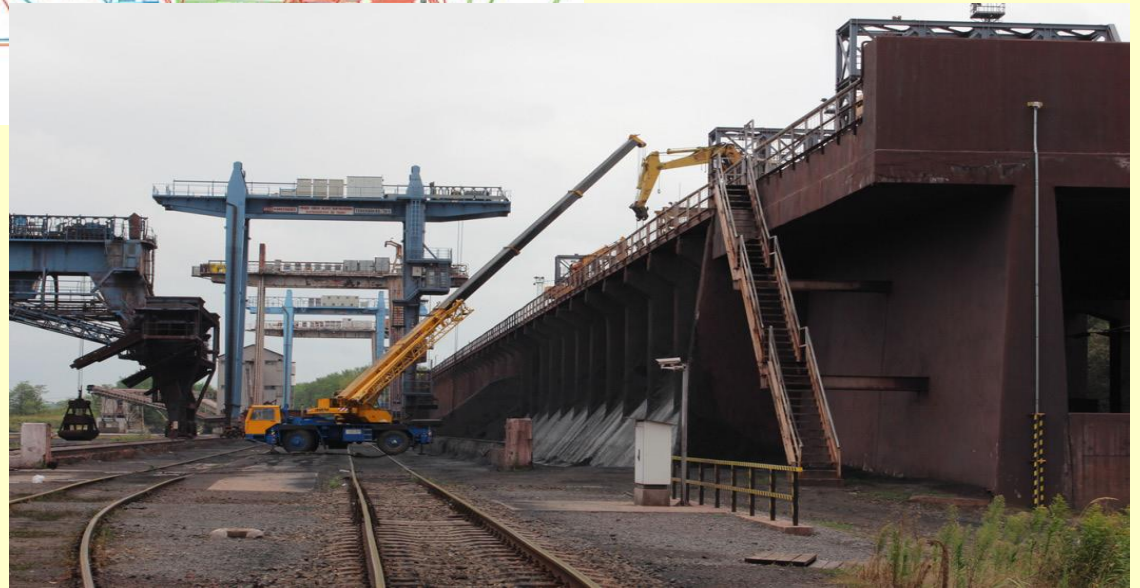
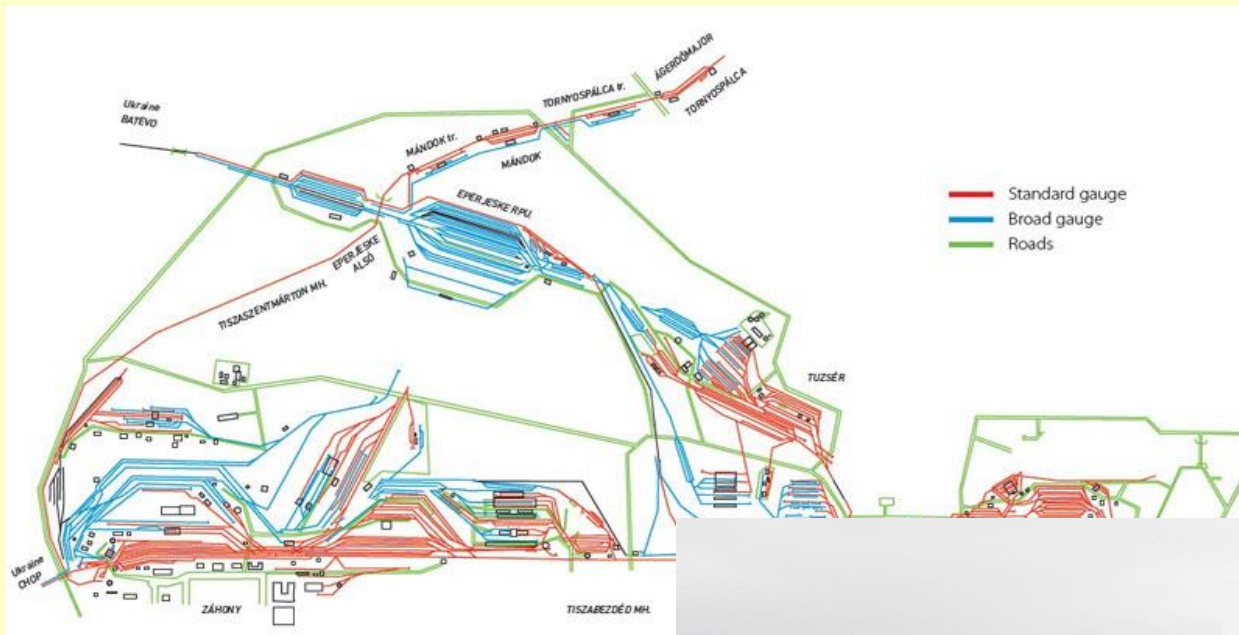
*The  
Mediterranean  
TEN-T core  
network corridor*

*The North Sea-  
Baltic TEN-T  
core network  
corridor*





# *Hungarian Záhony – „dry port” eastern gate of the Mediterrán TEN-T core network corridor*





Russian Federation

Khorgos  
Gateway

Kazakhstan

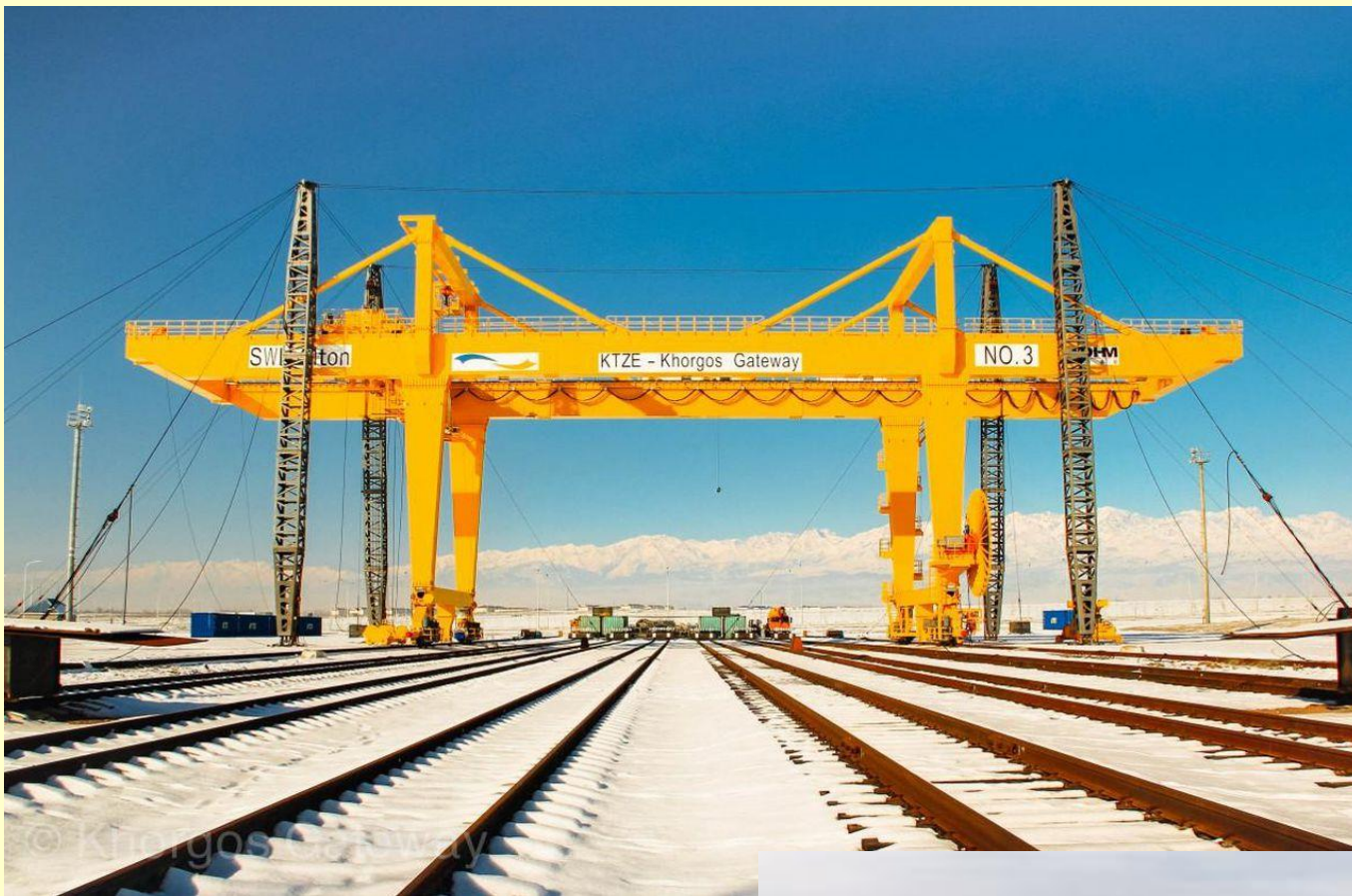
Mongolia

China

India

Где Восток встречается с Западом





## **KHORGOS GATEWAY:** Where East meets West



## Воздушная карта

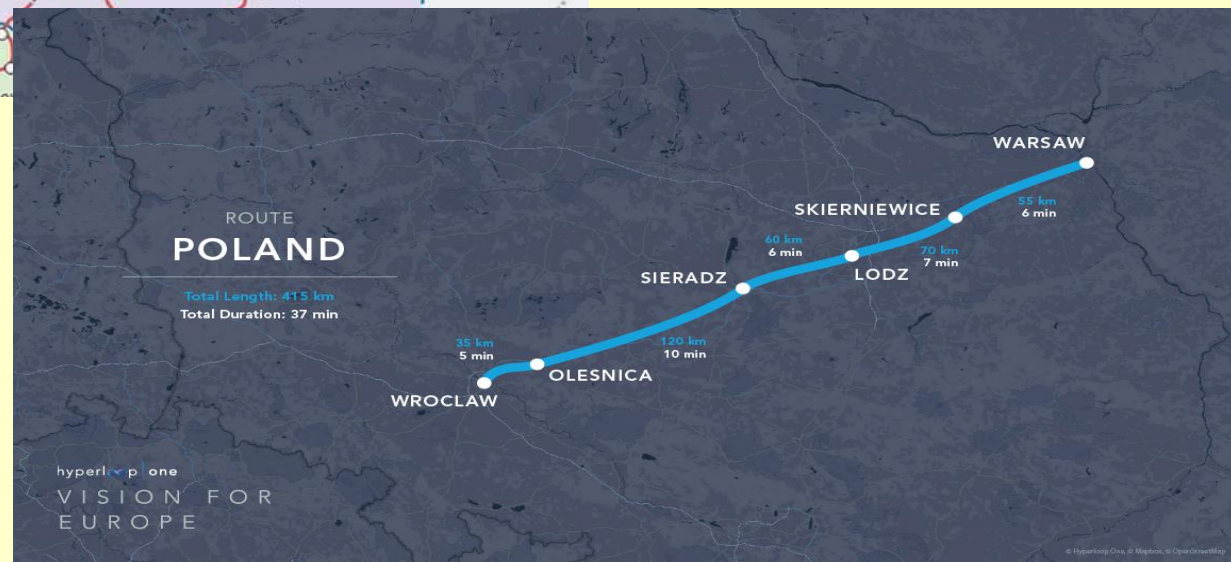




## *Terespol now*



## *Hyperloop – planned route in Poland*



# *Nord Stream 1. and 2. of Gazprom*

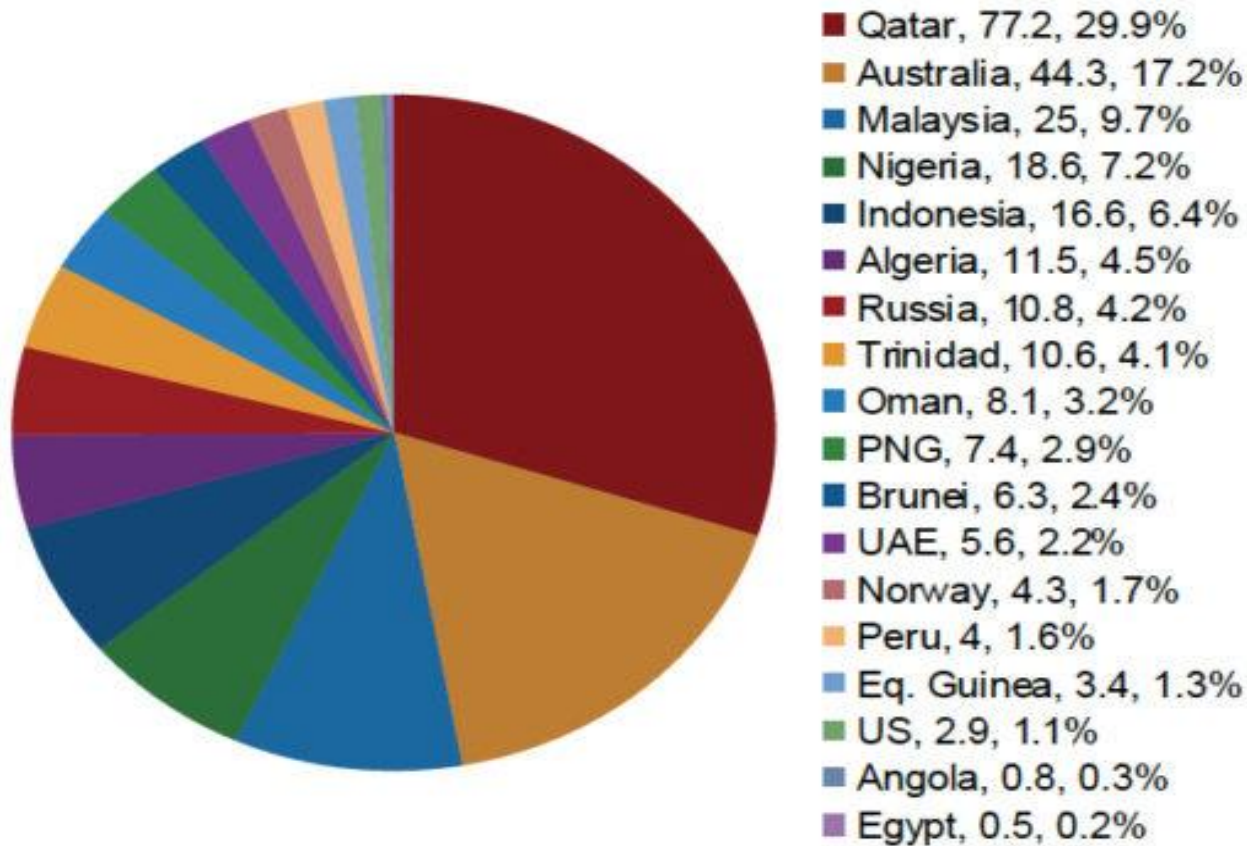




# *2016 – Lech Kaczynski LNG terminal – Swinoujscie*



Figure 3.2: LNG Exports and Market Share by Country  
(in MTPA)



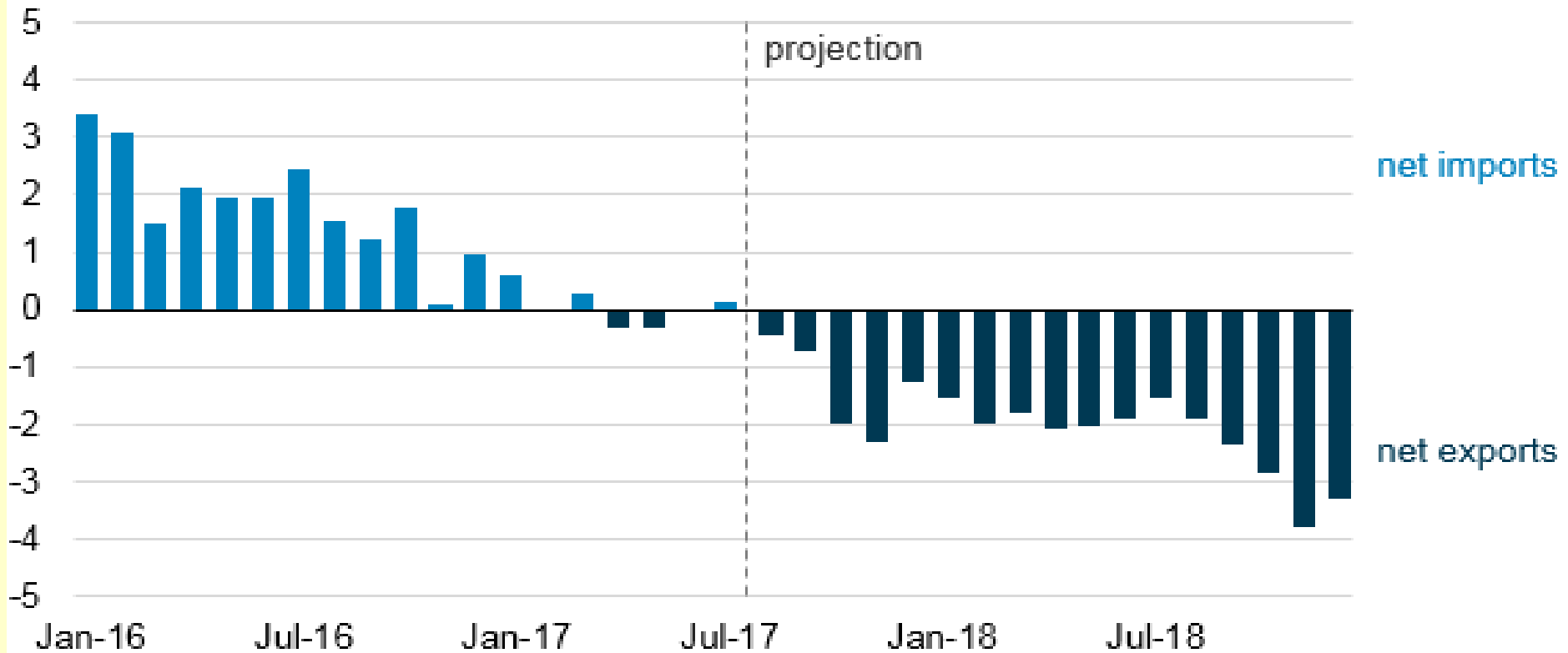
*Note: Numbers in the legend represent total 2016 exports in MT, followed by market share. Source: IHS Markit, IGU*

*Qatar  
or  
USA?*

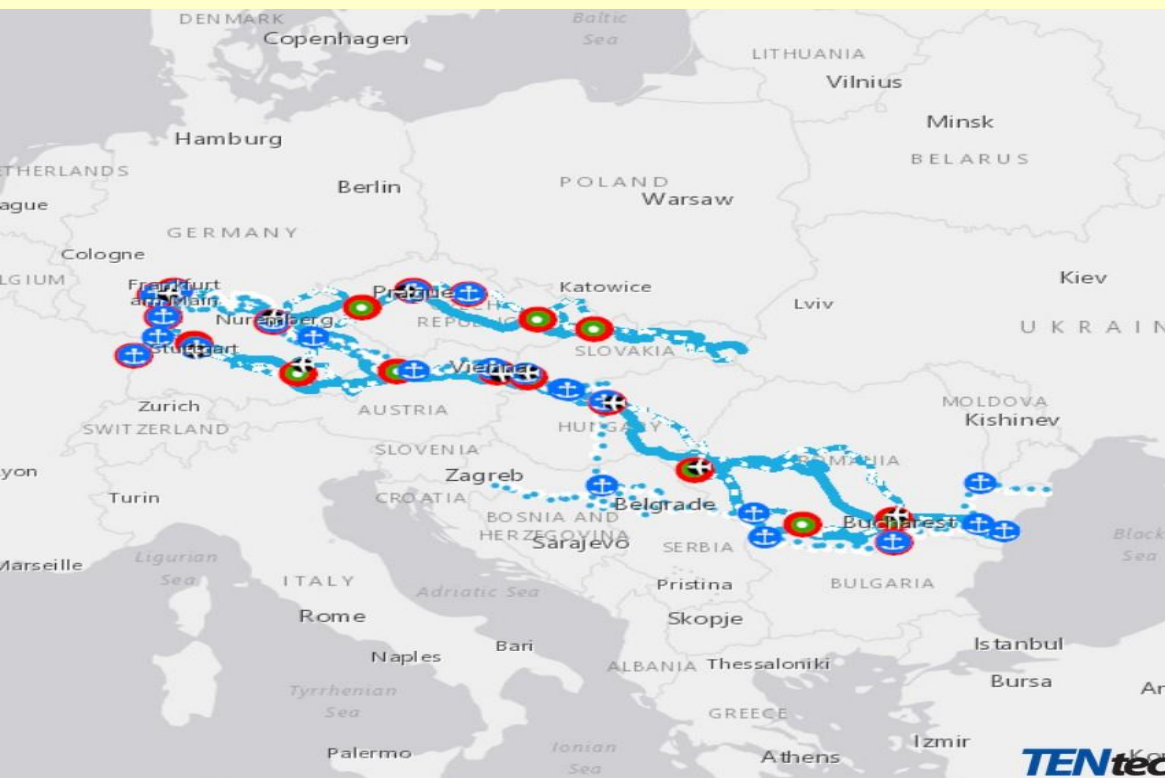


# *From 2017 USA LNG exporter*

U.S. natural gas net trade  
billion cubic feet per day



*World LNG market – the new role of USA?*

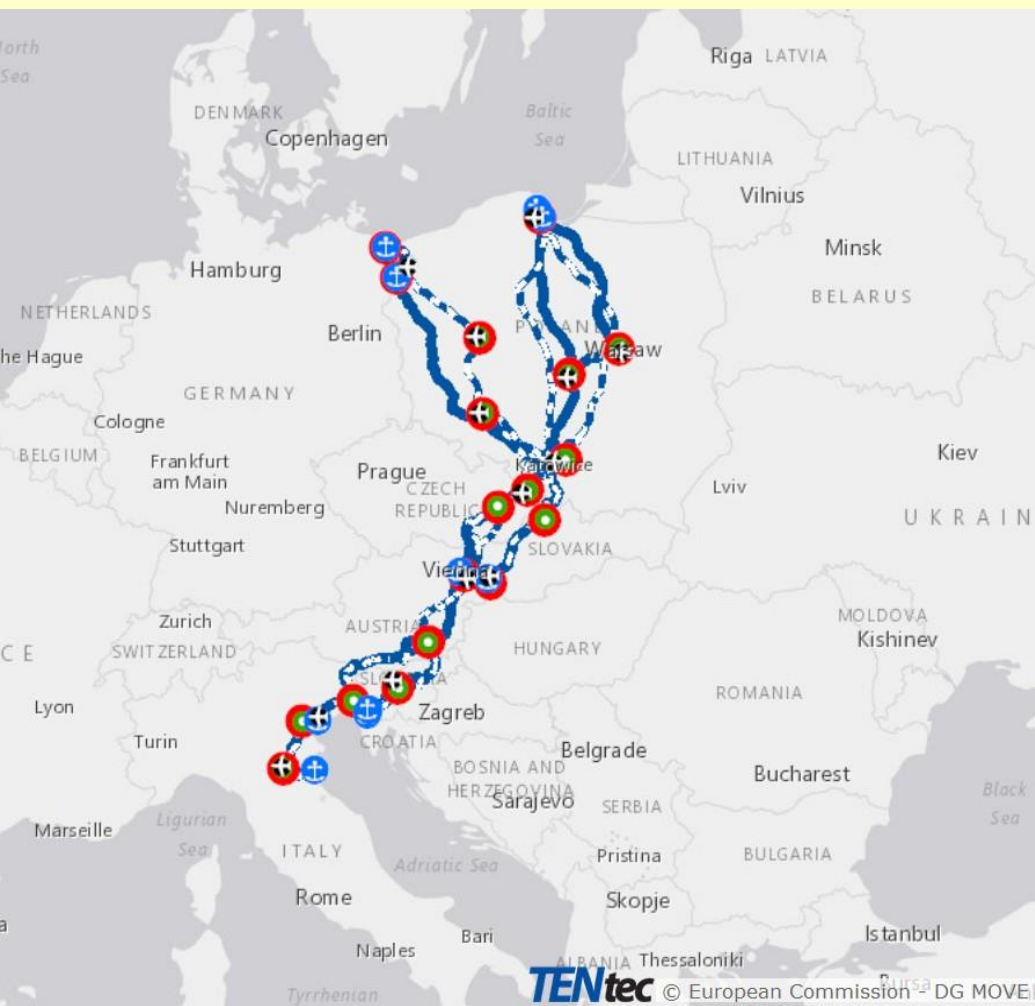


*The Rhine-Danube core network corridor*


*The territory of the EU macro-regional strategy for the Danube region*







## *The Baltic-Adriatic TEN-T core network corridor*


 POLSKI INSTYTUT SPRAW MIĘDZYNARODOWYCH  
THE POLISH INSTITUTE OF INTERNATIONAL AFFAIRS

### Three Seas Initiative (TSI)

↓

„3Cs”

- Compatibility
- Connectivity
- Commerciality



Signatories of the Joint Statement of the Three Seas Initiative (the Dubrovnik Statement) from 25 August 2016



***LNG  
terminals in  
Lithuania,  
Poland and  
in Croatia  
(at present  
building)  
new North-  
South gas  
corridor***





*Barack Obama in Warsaw,  
July 2016,  
NATO Summit*



*First American LNG  
tanker- Clean Ocean*



*Donald Trump in Warsaw - July 2017  
Three Seas Initiative 2. Summit*



*The Orient/East Med  
TEN-T core network  
corridor*



*Southern gate –  
the port of  
Piraeus*



# Top 15 container ports in Europe in 2017

Total container throughput in 1000 TEU

Rank 2017	Rank 2016	Rank 2007	Port	Note	2017 1000 TEU	Growth 2016/2017	Growth 2007/2017
1	1	1	Rotterdam (NL)		13,735	10.9%	27.3%
2	2	3	Antwerp (BE)		10,451	4.1%	27.8%
3	3	2	Hamburg (DE)		8,820	-1.0%	-10.8%
4	4	4	Bremerhaven (DE)		5,537	0.9%	13.2%
5	6	8	Valencia (ES)		4,832	2.1%	58.8%
6	5	6	Algeciras (ES)		4,381	-8.0%	28.1%
7	8	-	Piraeus (EL)		4,060	10.5%	195.7%
8	7	7	Felixstowe (UK)	Est. 9M	3,810	-5.1%	14.0%
9	9	12	Marsaxlokk (MT)		3,150	2.3%	65.8%
10	13	10	Barcelona (ES)		2,969	32.7%	13.7%
11	11	9	Le Havre (FR)		2,884	14.5%	0.3%
12	12	14	Genoa (IT)	Est 11M	2,638	14.8%	42.2%
13	10	5	Gioia Tauro (IT)		2,449	-12.4%	-28.9%
14	14	13	Southampton (UK)	Est. 9M	2,035	-0.1%	8.9%
15	15	-	Sines (PT)		1,669	10.3%	1012.7%
Theo Notteboom TOP 15					73,419	4.2%	19.8%
February 2018 TOP 3					33,006	5.4%	14.4%



CEMIL  
Center for European  
Maritime & Inland Logistics



Theo Notteboom

February 2018

PortEconomics



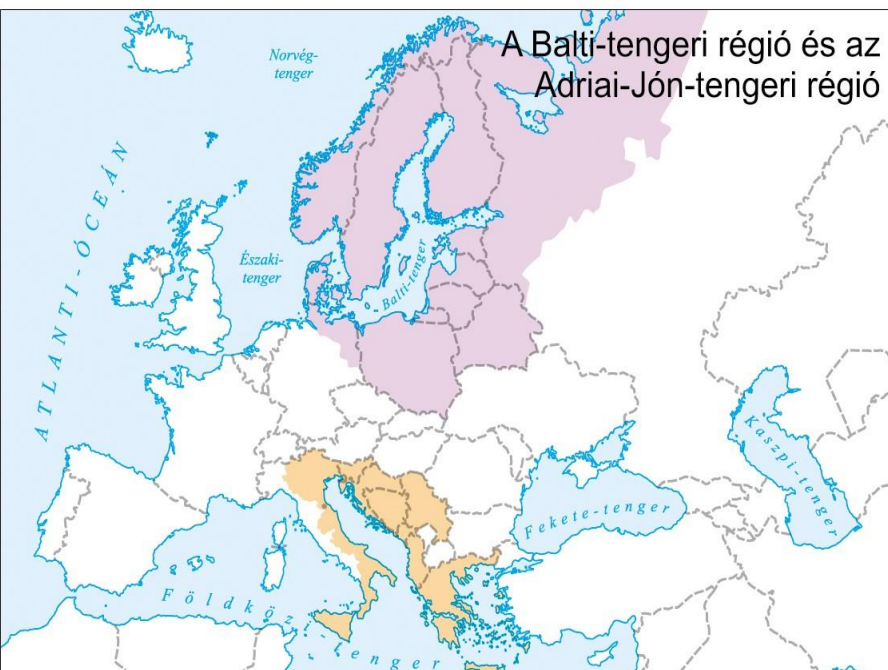
*We Deliver Value*



*In August 2016 - COSCO bought a 67 percent stake in the port of Piraeus  
(COSCO – the world's 4. largest maritime shipping company)*



A Balti-tengeri régió és az  
Adriai-Jón-tengeri régió



A Fekete-tengeri Gazdasági Együttműködés



A Duna régió



A Kárpátok régió



# Geopolitical macroregions and the new North-South economic axis





# „Wider” Central Europe in the 21st century

## New connections between Central and Eastern Europe



# *Central and Eastern Europe in the 21st century*

**Buffer states – *negative prognosis***

*Semi-peripheral. land-locked (in majority), transit countries,  
middle income development level, small economic size on the  
global level, extremely open to the global market*

**Bridge states - Strategic geographical places – *pozitive prognosis***

*Service provider acting as a liaison between key  
economic spheres – „turntable” between West and  
East – logistic center – business and financial center*

*We have to create the new geopolitical strategies of the  
Central and Eastern Europe's for the 21st century!*



*From Eastern Europe to Central Eurasia?*  
*World Island in the 21st Century – New world order?*  
*New Eurasian paradigm – New Eurasian supercontinent*





*13 July, 2014 – Rio de Janeiro*

*Many thanks for your attention!*  
*abernek@t-online.hu*