

Report From Bucharest

by George Friedman - June 2, 2025

My wife and I arrived in Romania last Wednesday after a two-night stopover and time adjustment in Frankfurt. We stayed in Bucharest with Antonia Colibasanu, who lives in Romania and is part of our team. I should add that she is also a professor of geopolitics.

The visit has reminded me of the necessity of travel. I arrived here a week after the Romanian elections. Geopolitics, in my model, is an abstract and ideally passionless methodology. It grasps the necessity of things but takes little note of the passions that geopolitics demonstrates. But it is one thing to create abstract models and another to experience the powerful emotions that arise from and shape them. Bucharest was a necessary reminder of this.

While in the Romanian capital, I had the good fortune to meet with think tankers, former diplomats, generals, politicians and the media. As in the rest of the world, passions here define the foundational argument of this moment: nationalism versus internationalism. The main question is whether Romania should be part of transnational institutions such as the European Union and NATO, or follow a nationalist, “Romania first” approach and avoid entanglement with Europe. This is in part a question of Romanian geopolitical strategy and in part a cultural matter. Europe’s transnational institutions are founded in a liberal vision of a shared European culture, built on the edifice of liberal democracy. This vision regards, in principle, the unique idiosyncrasies of national cultures as a challenge to European principles. Likewise in the United States, there is a struggle between those who would put U.S. interests first and those who see internationalism as the foundation of national interest.

In Romania, Russia is an important dimension of this dispute. The Soviet Union dominated Romania from the end of World War II until the fall of communism. It imposed communist internationalism on Romania and the rest of Eastern Europe. More recently, however, Russia has shifted dramatically from this ideology to nationalism as its organizing moral principle. Romanian nationalists (considered right wing) see Russia as a model to follow, while internationalists, or Europeanists, see Russian nationalism as simply a variation on the Soviet model. They view Russia as a powerful force hoping to resurrect its power, influence and control of the region, driven by its national interests. They view the rise of Romanian nationalism as a product of Russian influence and imperial ambitions, and Romanian nationalists as tools of the Kremlin. The struggle therefore is between pro-Europe

internationalists (aligned with Brussels and Washington) and “Romania first” nationalists (aligned with Moscow).

The presidential election last month was a relatively close race in a battle for Romania’s soul. It was won by a pro-Europe candidate, seen as a defeat of right-wing, allegedly Russia-sympathizing Trumpism. U.S. President Donald Trump is perceived as an American nationalist intent on disengaging from multinational organizations – economic and military – to protect American interests. He is also viewed by some as collaborating with Russian President Vladimir Putin. The strange thing is that many assume the two leaders can collaborate because both are seen as nationalists. Many in this part of the globe see nationalism as an international movement working to rebuild a world that has been divided into unique cultures but shares a common interest. But the history of nationalism is fraught with conflict, which means that Russian and American interests could at some point clash.

The level of passion over this matter is similar to the battle raging over Trump in the United States. But in Europe, it goes to deeper. Left wingers used to be at least for detente (if not alliance) with Russia, while the right was hostile to Moscow. This has now reversed. Where I see Russia as a failing state, unable to conquer Ukraine and struggling to cope with an economy lagging far behind the U.S., China and Europe, the pro-Europe camp sees it as a dark power seeking to resurrect its empire using nationalism in the same way that it once used communism. For them, the extreme right-wing nationalists share not only Moscow’s nationalist ideology but also its desire to break multinational organizations like NATO and the EU.

One of Russia’s core demands in negotiations over the war in Ukraine is that the United States legally accept Crimea as part of Russia. Since the Russians have held Crimea since 2014 and no one is prepared to invade to retake it, this seems to me a minor matter. Recognizing the obvious would appear to be a low-cost concession. But the Romanians see it as a fundamental threat. If Crimea’s occupation is recognized, wide areas of airspace and critical waterways would also be acknowledged as belonging to Russia. The area in question involves parts of the Black Sea vital to Romania, including the site of a future energy project that Bucharest hopes will make it a gas provider for southeastern Europe. The U.S. could agree to cede Crimea to Russia with the provision that Moscow’s control of airspace and waterways would be limited. Without such an arrangement, Romanian Europeanists would see any formal concession on Crimea as a fundamental challenge to Romanian interests. Interestingly, Romanian nationalists do not seem concerned – which is odd considering that nationalists usually prioritize issues of fundamental national interest.

The truth is that here in Romania, the Cold War is not over, even if ideologies have shifted. The Romanians remain obsessed with Russia – which is reasonable given the geography of the region – and see it as either a model to emulate or an imperial force dedicated to undermining Romanian sovereignty and security. Apart from the reversal of right- and left-wing positions, it's clear that in Romania, Russia remains the pivot of strategic thinking. And because I see Russia as profoundly weakened since the fall of communism, I am regarded as naive in not facing its ability to influence and control events.

We will travel next to Belgrade to see how Serbians view the matter. Romanians are a sophisticated people and know Russia far more intimately than I do, so I must take their views into account. But I admit at this point that my impression of the issue stands in contrast to theirs.

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