

Pirates and Buccaneers: Battle of the Seas and the End of the Liberal Century?

A brief glance at the international headlines in recent months leads one to suspect that something has visibly shifted on the high seas. As Russia (and Iran and Venezuela before it) resorted to a vast fleet of decrepit oil tankers to ship its crude oil, the [U.S.](#), [France](#), [UK](#), and [Finland](#) have moved to board and seize them, including in international waters. Before that, Russian shadow fleet tankers had resorted to tactics straight out of the buccaneer movies, changing flags, ports of attachment, and names several times during their voyage. Similarly, Russian and Chinese “shadow” ships are likely to have damaged vital communication cables in a tactic that the British head of MI6, an intelligence agency, [called](#) “tactics just below the threshold of war.”

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Increasingly, the high seas are becoming less free for trade, with littoral powers securing their rights. And while the U.S. administration’s renaming of the Gulf of Mexico is more of a symbolic gesture, it carries a hint of real concern about securing the domination of maritime routes near its economic borders. And the recent transatlantic spat over Greenland is, among other things, driven by the desire to control Arctic trade routes, leading researchers to [call](#) it a “New Security Frontier.” This trend was further underscored just days ago, when thirteen states with access to the Nordic and Baltic seas [coordinated efforts](#) to effectively push Russia’s shadow fleet out of the Baltic Sea.

And the determination to lock down territorial seas for access – for economic and strategic ends – was put to a startling show, when China [amassed](#) thousands of fishing ships and apparently assembled them in blocking patterns in the East China Sea.



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Simultaneously, the tariff wars, unleashed by President Donald Trump with such media fanfare, are wrecking the WTO-policed system of free trade, which had already been challenged for a decade, including by replacing NAFTA with USMCA. The series of trade deals between the European Union and major regional economic actors, such as [India](#) and [MERCOSUR](#), which had been in the works for years and even decades, has been accelerated by geopolitical rather than purely economic considerations.

Some analysts and observers wonder whether all of these events are merely symptoms of a broader shift in the international order's underlying economic structure, at the juncture where trade and politics make each other tick in recognizable patterns. Some think that the capitalist system is reverting into an economic profile that has been just as characteristic to it as the liberal market, namely, mercantilist, regionally defined economic em-

pires. That has profound implications for the way international relations are structured.

Politics of Finitude?

French historian Arnaud Orain, in his [2025 book](#), introduced a polemical reading of economic and trade history. In his reading, global economic relations have been structured by two types of tendencies: free-trade liberalism and the mercantilist periods (16-18 cc, 1880-1945). He believes we are living, or rather have been falling into one of these periods after the global financial crisis of 2008 and more fundamentally since 2010.

Orain advances a hypothesis that goes beyond the classification of "mercantilism" but refers to the underlying philosophical and practical assumptions of such global periods, which he calls "the politics of finitude."

Free trade liberalism is based on the assumption that trade is mutually enriching for the participants. By drawing on comparative and competitive advantages, linking the supply chains of resources and goods, and lowering tariffs and other trade barriers, the global economy and prosperity grow, benefiting the greatest number of people. Deep down, free-market liberalism is based on the idea of infinite growth, which is driving a nearly obsessive focus on GDP and trade growth figures. It also carries the underlying assumption that growth benefits everyone – perhaps not equally, but still helps lift millions out of poverty, which is considered economically beneficial. Richer masses are better consumers, expanding demand and fueling further growth. It also has political implications: it is assumed (though often unsupported by reality) that wealthier citizens (the Weberian middle class) demand voice and participation, pushing societies towards greater pluralism. The adherents of this view tend to see the world (in economy and in politics) through the prism of an individual, a consumer, and a citizen, who are supposed to benefit from globalization.

But another type of worldview is based on the assumption of precarity, the inherent finitude of resources. The writers and philosophers in the late 19th and early 20th century have [postulated](#) that since the globe is by definition finite and most of the territories on it are more or less occupied, while the population is growing “the offer is limited, while the supply is without limits [...] and thus the price of one meter of land is growing by day.” That kind of thinking led to the so-called “colonial race” among the European powers, bent on solidifying their regional trade empires through closed supply chains. The famous writings in geopolitics, concepts of the “vital space” and “closed space” popularized by Friedrich Ratzel and Halford Mackinder have reflected this thinking and underpinned this worldview. As opposed to free-market capitalism, this “mercantilist” version looks at the world through the prism of zero-sum competition

among (industrialized) states for finite resources. The benefit for the “nation” outweighs the benefit of the individual, and politics, as well as economic and trade policy, places itself on the side of the producers rather than the consumers. The competition of the industrial nations also connotes the normality of conflicts between them.

Privates of the Caribbean

This brings us back to the initial point of discussion – naval power and trade. It has been theorized that the free-trade episodes in modern history have coincided with the emergence of the hegemonic naval superpowers – Great Britain since 1815, the U.S. and its allies since 1945. The freedom of the high seas, however, is not the norm during the “mercantilist” phases, and its apparent gradual disappearance can be a symptom of the world falling into precisely such a phase.

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What are its key signs and symptoms? First, contested seas. The (real) pirates of the Caribbean in the 1630s, the corsairs, the all-powerful navies of the international trading companies in the 1700s, the naval forces in the lead-up to WWI, and the German Navy in the interwar period all disrupted the naval trade routes and interdicted access to their rivals – both state and quasi-state (like competing trade companies).

Second, the armament and militarization of the merchant navy. As historians and most gamers with a penchant for strategy games know well, 17th-18th-century merchant ships also pack formidable firepower. By the end of the 19th centu-

ry, the colonial trade companies – while nominally civilian – were structured along military lines, and their merchant fleets were heavily militarized. What is more, the states “delegate” their sovereign powers – military, law enforcement, public administration – to these companies in the overseas colonies. Throughout the mercantilist period, trade and war were intrinsically linked. Navies accompany and protect merchant fleets, fight for trade routes, and naval officers have careers that span both the navy and the merchant fleet.

The extreme monopolization of distribution is a contemporary reality: the Big Five (MSC, Maersk, CMA CGM, COSCO, and Hapag-Lloyd) dominate the global shipping trade. Amazon and its Chinese copycats are distribution companies that operate worldwide and often operate under special legal regimes in host countries.

Third, the growing economic and political influence of the distribution companies and logistical hubs. In contrast to the free-trade periods, most international trade is conducted within spheres of influence; ports are closed to outsiders, and trade with them is almost always conducted through highly militarized hubs. Since the objective of the politics of finitude is to maximize the use of natural and other finite resources (remember the current obsession with rare-earth metals, potassium, etc.), it requires establishing territorial supply chains that bring primary materials to production facilities. The emergence of the global markets is indeed initially structured by distribution (of colonial produce), which is replaced by industry only by the end of the 19th century. The extreme monopolization of distribution is a contemporary reality: the Big Five (MSC, Maersk, CMA CGM, COSCO, and Hapag-Lloyd) dominate the global shipping trade. Amazon and its Chinese copycats are

distribution companies that operate worldwide and often operate under special legal regimes in host countries. The mega-logistical hubs are key to these companies' operations.

What does this analysis tell us about the direction of the world? If Orain's analysis is correct, then several things are going to happen in international affairs.

On the one hand, the free-market ideology will be increasingly questioned and rejected. Tariffs and trade barriers will become increasingly common, triggering trade wars.

An accelerated rush for resources will lead to the “securitization” of trade. This would become especially visible in two areas. First, navies will be called upon to accompany and protect merchant vessels carrying critical resources (a practice increasingly undertaken by China and Russia, and to a lesser degree by European and U.S. navies, in critical straits). Second, states will compete for establishing sovereign control of the “distribution hubs” – critical regional ports. This can be done either by states or quasi-state companies (elements of these approaches are already evident in Chinese Belt-and-Road projects).

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On the other hand, the pursuit of “growth” will be replaced by the pursuit of “power” – the focus would shift from the consumers to the producers. This is where the “multipolar” vision of the world meets the economic reality. If the regional powers consolidate economic influence over major landmasses, the economic logic will shift from

the benefits of competition (prices are down, efficiency grows, prosperity grows) to the benefits of consolidation (state and quasi-state economic monopolies accumulate more power within their own sphere of influence, so that they can subsequently expand that sphere of influence through power projection and weaken others).

And finally, Orain thinks that the territorial colonization that historically accompanied the domination of the “politics of finitude” will return, both in the simple form of “landgrabs” and in the more modern phenomenon of the occupation of productive landmasses by monopolist quasi-states (such as hubs for Amazon or databanks for the GAFAM).

What About Us?

The analytical prism presented by Orain can be contested on many levels. It is, as the author readily admits, intuitive, rather than analytical, but it is still rooted in history. From the perspective of small states, it offers a useful meta-frame of reference that can help make sense (or not) of the deluge of information we confront every day. More specifically, it situates the seemingly inexplicable will of the global superpower – the United States – to shed the free trade system and trans-Atlantic security alliance that underpinned the world order after 1945, or to insist on the „need“ to fully and physically control Greenland. Truth is, that the current U.S. administration’s fascination with the Gilded Age and Monroe Doctrine harkens back precisely to the periods that Orain qualifies as “politics of finitude.”

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Moreover, the world has become increasingly concerned about resource scarcity. The technological

advances in energy-saving technologies and sustainable energy generation – falling prices of solar power plants, the exploitation of offshore wind, advances in nuclear fission and fusion – have made the rush to hydrocarbons less pressing. Yet, these very advances made the control of the new resources – rare earths, is a good example – a priority. In addition, even (and, somehow, especially) the climate change deniers feel that the transformation of our planet is likely to make the simplest and vital resources – like drinkable water – relatively rare, and that the parts of the globe that are likely to be relatively shielded from the nefarious effects of global warming, more desirable.

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In his acclaimed speech at the World Economic Forum in Davos, Canadian Prime Minister Mark Carney [spoke](#) about the possibility of a middle-power trade alliance to resist and counter the expansionist designs of the big powers. That may, perhaps, prove possible.

Yet, whether small states can carve out their independent existence in the dawning world of finitude, and what are the resources whose sovereign control could grant it the “ticket” to perdure in the new era, remains to be seen ■