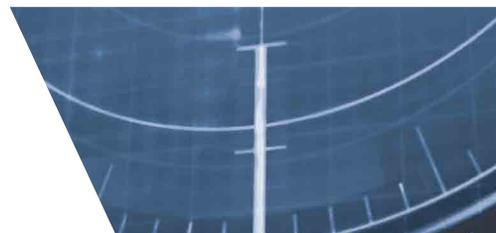# verteidigungspolitik.at

Risk monitor 2026

The end of order?

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The end of order?

Vienna, 2026

The individual contributions reflect the personal views and opinions of the respective authors and do not necessarily correspond to positions of the Federal Ministry of Defence of the Republic of Austria, or the institutions of their professional affiliation.

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Foreword by the Federal Minister of Defence

Klaudia Tanner

Is there still peace in Europe? Have we really arrived at the end of a liberal world order, as the title of this publication suggests? There are many reasons to believe so. The EU finds itself in a hybrid conflict with Russia, fought not only at the periphery of the European continent, but also within Europe itself. There are plenty of examples of this, such as the incursion of Russian drones and fighter jets into Polish airspace in September 2025, or the shutdown of Munich Airport in early October due to drone sightings. Not to forget disinformation campaigns, manipulation or damaging of undersea cables, or attempts at interfering in elections. Order seems to be eroding.

Rivalries between the major powers are continuously increasing. While the United States and China are contending to reshape the current order or to establish a new one, the respective relationship of these major powers with Europe remains multifaceted and complex. China remains a partner, but also a competitor and systemic rival to Europe. Meanwhile, the transatlantic partnership remains a cornerstone of Eu-

ropean security architecture, although the European Union plays an increasingly important role in defending Europe amid the US's increasing focus on the Indo-Pacific.

In view of these growing challenges, the question could be posed as to what courses of action remain for a comparatively small country in the heart of Europe. The world's problems cannot be solved by Austria's security and defence policy alone. Should we therefore bury our heads in the sand? Certainly not. Austria, too, is responsible for maintaining the rules-based international order. We therefore support multilateral organisations, particularly the UN, the EU and the OSCE. We actively seek cooperation, and wish to promote both dialogue and trust.

This publication, aptly titled *The End of Order?*, is dedicated to precisely these topics – and many more. It analyses emerging and ongoing international developments, the upcoming challenges for Europe's security situation, and the significance of the current threat situation for Austria's security. On the occasion of the 25th anniversary of the adoption of UN Security Council Resolution 1325, this volume is specifically dedicated to the topic of *Women, Peace and Security*, which is a key issue for Austria, and extremely important to me personally.

Like every year, renowned experts look to the future, outline what we should expect, and make valuable contributions to the debate on security and defence policy. I would like to express my gratitude, as I do every year, to the authors as well as to our experts in the Federal Ministry of Defence and the Austrian Armed Forces: Because their contributions and their expertise ultimately serve to protect our country.

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The next chapter for Europe: Security Union

Tinatin Akhvlediani

The full-scale invasion of Ukraine by Russia in 2022 and geopolitical fragmentation are forcing the EU to rethink its identity. The EU, originally established as a union for economic cooperation, has, over the past 30 years, developed into a political union and the most successful peace project in modern history. The next challenge is for it to develop into a security union. The EU's enlargement acts both as a catalyst and as a test of this transformation's success.

The combination of Russia's full-scale invasion of Ukraine, which marks its fourth anniversary at the beginning of 2026, and the fragmentation of global power have forced the European Union to question and redefine its identity. The EU itself emerged from two devastating wars, after which Europeans agreed that conflicts on the continent should no longer be resolved by military means. The idea was to prevent future conflicts by means of economic interdependence. However, the Union

subsequently continued to develop; the single market was introduced and the EU became a political union, and therefore the most successful peace project in modern history.

The EU sought to project this logic for decades, believing that economic dependencies would foster stability, that defence could be outsourced to NATO, and that multilateralism, trade liberalisation and globalisation would ensure secure supply chains. The Russian war of aggression against Ukraine shattered this long held conviction, as well as the foundations of Europe's post-Cold War order. Against the backdrop of Europe's biggest war since World War II, reignited rivalries between major powers and global fragmentation of power the EU now finds itself exposed to coercive measures, the weaponization of interdependence and hybrid threats. The EU is being pressured to become an independent geopolitical actor. "Strategic autonomy" developed from catchphrase to necessity. The Union has to follow up its words with actions.

What began as an economic union and transformed into a political one is now also being called upon to develop into a security union. In this respect, EU enlargement should be regarded both as a catalyst and a test of how far this transformation can go.

Security as the heart of the European agenda

The raging Russian war of aggression against Ukraine, combined with shaken transatlantic confidence and unpredictable US foreign policy, is forcing the EU to take its Common Foreign and Security Policy more seriously. NATO's call on its member countries to increase spending on defence coincides with an increasing internal realisation that Europe has to take on more responsibility for its security. New initiatives have signalled an awakening, although the process is still in its infancy. These initiatives include, for example, joint security and defence projects, the mobilisation of funds for joint development, production and procurement, and the reinforcement of joint defence capabilities.

In order to be successful, the Union not only requires astute strategies and additional financial resources, but above all a stronger political will and a common objective shared by the member states. The treaties make it clear that the EU only has the powers conferred upon it by the

member states. Being able to speak with one voice has been one of its greatest challenges for some time. Unless all member states recognise what is at stake for the entire continent should this transformation fail, the European peace project risks erosion. Peace must be protected and preserved, which requires credible deterrence.

The EU's emerging security and defence instruments depend on the member states' capabilities and political will. Strategic coordination remains fragile, and member states are still divided with regard to threat perception as well as the balance between European and transatlantic security components. Nevertheless, the direction is clear: The Union is gradually adopting both the mindset and the tools of a collective security actor. A security actor that not only defends its own territory, but also its values and democratic governance against military aggression, authoritarian pressure and internal erosion.

This securitisation of the EU's agenda also originates from global fragmentation. In view of this global rivalry between major powers, the vulnerabilities of Europe have been critically exposed. Russia has weaponised international trade, energy, and even food, China is striving to achieve global economic dominance, and the US's geopolitical stance has shifted under the *Make America Great Again* agenda. This has led to reconsideration of what sovereignty or strategic autonomy mean in the 21st century. They are no longer merely territorial, but systemic and rooted in control. This means controlling energy flows, standards, supply chains, data, technology and artificial intelligence, and extends to information security and climate resilience.

Enlargement-Security Nexus

The EU enlargement policy fits into this scenario both as a security imperative and a transformation stress test. The prospect of incorporating the Western Balkans and the eastern neighbouring countries of Ukraine, Moldova and Georgia, should it continue on its European path, into the Union is reshaping the internal geometry of the EU. It is no longer only about expanding the internal market or exporting standards, but is more about defending the European security frontier. However, it also forces the EU to become aware of its own limitations, i.e. how to reconcile deeper integration with a broader membership base,

how to reform decision-making, and how to protect an enlarged Union. The credibility of the EU's enlargement policy will therefore depend on whether it can transform itself into a genuine security union, capable of accepting and defending new members while remaining functional and politically coherent.

These developments raise deeper questions about the nature of European power. The EU's strength has always been its ability to shape its environment rather than dominate it – by adhering to a rules-based liberal order and its values. The challenge now is to preserve the EU's DNA while adapting to a harsher world. Enlargement and security are no longer opposites, but mutually reinforcing pillars of Europe's survival and influence.

In this sense, EU enlargement policy is not just a political choice but a strategic necessity, i.e. the key to accelerate the EU's transformation into a security union. During this new phase, security must become the connective tissue running through all areas of EU policy. The success of this transformation will depend on the Union's ability to act unitedly and purposefully, without losing sight of what it ultimately seeks to protect: the survival of Europe as a peace project, capable of defending the values upon which it was established.

Key Messages

- Faced with the largest war in Europe since the end of World War II, political coercion, weaponized interdependence and hybrid threats, the EU needs to think and act as an independent geopolitical player.
- What began as an economic union and later became a political union now needs to evolve into a security union. In this context, the EU enlargement policy becomes both a catalyst and a test of how far this transformation can go.
- In order to be successful, the Union does not only need astute strategies and more financial resources, but above all political will and a common vision shared by the member states.
- EU enlargement is no longer only about expanding the single market or exporting standards, it is about defending the European borders.
- In this sense, enlargement is not just a political choice, but a strategic necessity: the key to accelerating the EU's transformation into a security union.
- The credibility of the EU's enlargement policy will therefore depend on whether it can actually transform itself into a union that is capable of accepting and also defending new members, while remaining functional and politically coherent.

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25 years of Women, Peace and Security

Christian F. Saunders

Peace, as the Women, Peace and Security (WPS) agenda understands it, encompasses not only the absence of war, but also a life of dignity, free from violence and with equal participation in public life. A quarter of a century has passed since Resolution 1325, and thereby the WPS agenda, was adopted by the UN Security Council. However, the progress which has already been made is now at risk. Sexualised violence against women and girls has reached a record level, while they remain excluded from positions of power in the field of peace and security. The political will to implement specific measures is required from the United Nations and its member states, in the interest of protecting women and girls and ensuring equal participation in the prevention, management and resolution of conflicts.

2025 marked a quarter of a century of the adoption of UN Security Council Resolution 1325, and therefore 25 years of the WPS agenda.

Despite numerous hard-fought successes, progress in this area remains limited and fragile. Cases of conflict-related, sexualised violence increased by 25 percent last year. These include crimes such as rape, sexual slavery, forced prostitution, forced pregnancies, forced abortions, enforced sterilisation, and forced marriages. The overwhelming majority of the victims are women and girls – in a total of 92 percent of all cases verified by the UN.

At the same time, women remain largely excluded from positions of power and decision-making functions in the field of peace and security. Although women and women's rights organisations are actively involved or even play leading roles in the majority of informal peace processes, they represent less than ten percent of the negotiators in formal conflict resolution mechanisms, which is clearly shown in the Secretary-General's 2024 report on Women, Peace and Security.

A quarter century of Resolution 1325

The Women, Peace and Security agenda was officially inaugurated in October 2000 with the adoption of Resolution 1325. Even now, this resolution represents a ground-breaking commitment: Women are at the heart of the efforts to achieve international peace and security. This also showed that the transformative potential of equality or the equal treatment of women in the efforts to achieve peace was recognised, as were the consequences of excluding women and girls from conflict prevention, conflict resolution and rebuilding, and the consequences of wars for women and girls.

Since then, the WPS agenda has been expanded along four pillars. These include the participation of women in peace-making and peace-building, protecting women and girls from conflict-related sexualised violence, the participation of women in conflict prevention, particularly local women's organisations and grassroots movements, and the inclusion of women and girls in relief and recovery. There are now a total of ten WPS related resolutions.

Threats to Women, Peace and Security

Nowadays the main threats to the implementation of the WPS agenda come from both internal and external forces. Firstly, we are witnessing a global backlash against women's rights. All over the world, civil society and women's organisations, which are currently on the front line in the fight against domestic violence, femicide and sexual assault, are facing increasingly coordinated and persistent resistance. This includes defunding as well as political and legislative regression, (digital) disinformation or even repression and violence.

Escalating geopolitical tensions, militarisation and the proliferation of weapons undermine the necessary prerequisites for progress in this area. Global military spending reached a record high of 2.7 trillion US dollars in 2024, which represents an increase of more than nine percent in comparison to the previous year. This threatens to come at the expense of the measures which are essential for advancing the WPS agenda: Diplomacy, disarmament, mediation, and peacekeeping.

Finally, the lack of funding represents a key challenge to the commitment to women and girls. Funds are often fragmented and tied to small, time-limited projects. This also makes them vulnerable to the changing priorities of different governments and donors. The recent, sweeping cuts in development aid and humanitarian and peacekeeping programmes highlighted this fragility globally.

The future of the WPS agenda

If the goals of the WPS agenda are to be achieved and lasting peace secured, the UN and its member states must be committed to predictably and sustainably financing protection from sexual violence and other forms of violence. As the coordinator of the UN system's efforts to combat sexual abuse by its own personnel, I am aware that UN institutions must meet the highest standards of protection and accountability. Nevertheless, more than 1,100 cases of sexual abuse involving UN peacekeeping personnel have been reported since 2010, affecting more than 1,700 victims. Furthermore, research by the International Peace Institute which was published in the book *Blue on Blue: Investi-*

gating Sexual Abuse of Peacekeepers revealed that one in three female peacekeepers suffered sexual abuse by her colleagues.

Protection as such is the foundation of trust in our institutions. In order to preserve this trust, we must hold the perpetrators accountable, embed protective measures in all areas of defence planning and operations, and uphold the principle of "do no harm" as a core value of military service and peacekeeping. Furthermore, the UN and its member states must take concrete steps to reduce systemic inequality, and ensure that women and girls participate in the prevention, management and resolution of conflicts. Both protection and participation are fundamental prerequisites for lasting peace: Genuine peace will remain unattainable for as long as violence and exclusion hold back half of our population.

The first step is to expand female leadership within our own institutions, but there also needs to be a power shift so that women can participate in all areas. The most important thing is for sustained and genuine attention to be paid to the role of women in the field of international peace and security. Women should not only be regarded as victims of sexual violence who require protection, but also as decisive actors and leaders.

The collective commitment to lasting peace should be the foundation for the future of the Women, Peace and Security agenda. Lasting peace involves more than just the absence of war. It requires the creation of a world where all people can live in dignity and equality, free from sexual violence and with full and meaningful participation in public life. WPS represents the renewal of the hope of the Charter of the United Nations for a world in which all people live together in peace.

Key Messages

- A quarter of a century after its adoption, progress toward the implementation of the Women, Peace and Security agenda remains limited and fragile.
- Women and girls are affected by record levels of conflict-related sexualised violence, while remaining largely excluded from positions of power and decision-making.
- The implementation of the WPS agenda is threatened by a movement against women's rights, growing geopolitical tensions and militarisation as well as by a lack of sustainable funding.
- The UN and its member states must commit to reliably and sustainably fund protection against sexualised violence.
- They must also take concrete steps to ensure that women and girls can participate in conflict prevention, management and resolution.
- Continuous recognition of the role of women as key actors is essential – and not just as victims of sexualised violence who require protection. Protection and participation of women are fundamental prerequisites for lasting peace.

Austria's security and defence policy environment

Developments until 2035

Bernhard Richter

The international system is undergoing a far-reaching transformation. Global power shifts, geo-economic fragmentation, technological disruption and ecological stress factors are changing the foundations of European security policy. For Austria, this results in an increasingly complex environment, characterised by the erosion of multilateral order, the return of major power rivalries, and the geopolitical weaponization of economic dependencies. These dynamics are leading to a fundamental realignment of the European and Austrian security architecture, with questions pertaining to resilience, the industrial base and strategic autonomy taking centre stage.

The strategic foresight at the Federal Ministry of Defence is based on so-called „environment scenarios" and their long-term monitoring. These represent long-term alternative futures, which act as guidelines for Austria's security and defence policy. The expectation range up to 2035 is derived both from the assessment of these scenarios by experts and from the monitoring of these scenarios. This expectation range may have changed only slightly in comparison with the previous year, however it has done so in crucial aspects.

Expectation range and trend scenario 2035

Illustration 1: Trend scenario 2035
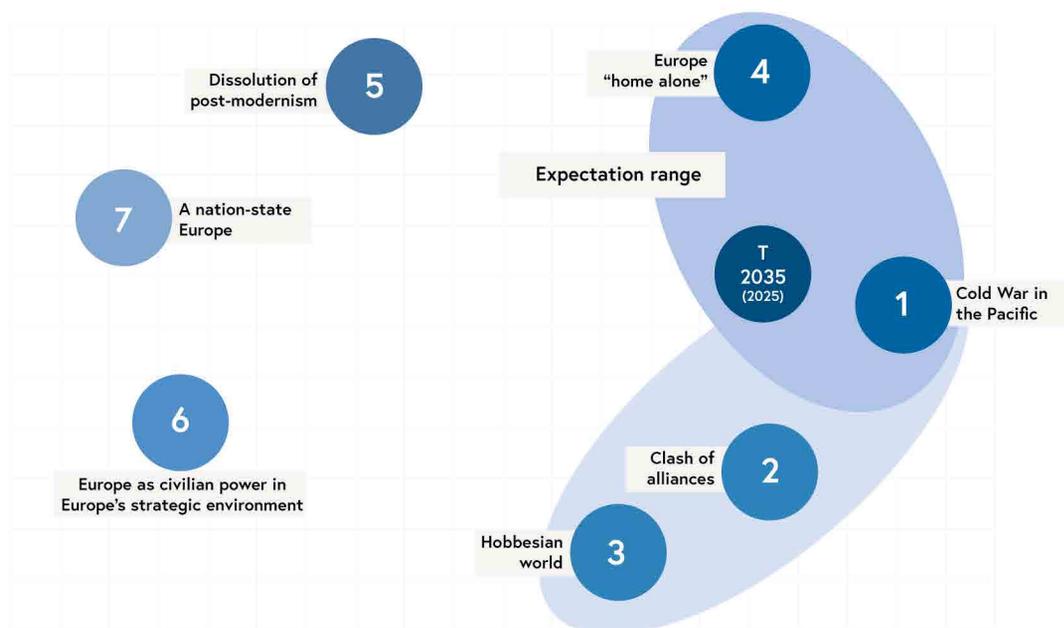
While the scenarios "Cold War in the Pacific" (Scenario 1), "Battle of the Alliances" (Scenario 2), "The World of Thomas Hobbes" (Scenario 3) and "Europe Home Alone" (Scenario 4) were rated as almost equally likely last year, Scenarios 2 and 3 have fallen slightly behind in the rating. Expectation ratings for Scenarios 1 and 4 have increased. As can be seen in Figure 1, a core expectation range containing Scenarios 1 and 4, and an extended expectation range containing Scenarios 2 and 3 were developed.

Scenario 1 describes a bipolar order, a bloc confrontation between the US and China. In this scenario, Europe, which is only partially integrated, serves as a junior partner of the USA. Scenario 4, however, describes a confrontational world order under the leadership of the US as

the single, unilaterally acting superpower. Europe is again only partially integrated in this scenario and must more or less assert itself in this environment without US security guarantees. As can be seen from the situation in the 2035 trend scenario, this year's evaluation shows that expectations are leaning even more strongly towards Scenario 1.

Shifts in the global order

The increasing erosion of the liberal world order and the emergence of a confrontational multipolarity characterise the strategic background of the coming decade. The rivalry between the United States and China is the main structural conflict. Whereas Washington is pursuing a transactional, hemispheric hegemonism during Donald Trump's second presidency, China is relying on long-term power projection by means of geoeconomic initiatives and normative counter-proposals. At the same time, the weight of international institutions is shifting. The United Nations, the World Trade Organisation and even NATO are losing coherence, whereas authoritarian countries are propagating their own order models.

This development means that Europe is faced with a twofold challenge. On the one hand, the decreasing reliability of the US as a security-political guarantor is weakening the existing transatlantic security architecture, on the other hand, the increasing systemic competition is forcing greater autonomy. The EU is becoming more and more of a security-policy actor with its own distinct character, but it first needs to secure its institutional and industrial strategic capacity to act.

There is a considerable amount of uncertainty in the academic debate about the future order of the international system. The majority assumes that there will be a development towards a confrontational multipolarity with several power centres challenging each other. Others, however, think that the US-led unipolarity will continue, based on the continuing dominance of the US and doubts about China's ability to continue its ascent. A bipolar system in which there is a balance between the US and China is also regarded as a possibility. These differing assessments reflect the structural uncertainty concerning the future global system architecture, which is also evident in the scenario assessments and the scenario monitoring.

The role of Russia

The trends which have been analysed indicate that the relationship between Russia and the West is highly unlikely to improve. Several structural factors suggest that the confrontation will continue. Russia is expected to remain a crucial, albeit weakened actor in Europe's security environment until 2035. Its authoritarian course, the militarisation of the economy, and its dependence on China result in a hybrid power profile: aggressive in its foreign policy, but fragile in its domestic policy.

Moscow is expected to continue its revisionist policy, not from a position of strength, but because of structural vulnerability. For the EU and its member states, this probably means a long-term, low-intensity confrontation characterised by cyberattacks, disinformation and nuclear deterrence rhetoric. However, military conflicts on the periphery of Europe are possible.

The role of NATO

Since 2025, NATO has been experiencing its most profound period of upheaval since the end of the Cold War. The Russian war of aggression against Ukraine has put the focus back onto collective defence, and has triggered a realignment of structures and priorities. While the US is shifting its strategic focus in the direction of the Indo-Pacific, Europe is under increasing pressure to take more responsibility for its own security.

The second Trump administration has also expressed doubts about the obligation of the US to assist NATO partners, which is now prompting European countries to increase their defence spending. 23 of the 32 NATO members reached the two percent target in 2024, i.e. defence spending amounting to two percent of their GDP. At the same time, tensions are arising within the Alliance, particularly because of differing attitudes towards Ukraine joining NATO. Overall, there are indications of a long-term trend towards Europe taking more responsibility for itself within NATO.

Geoeconomic fragmentation

Concurrent with political fragmentation, geoeconomic decoupling is also taking place. Supply chains are being regionalised, and globalisation is being replaced by "friendshoring", i.e. relocating production and supply chains to politically or ideologically "friendly" countries to reduce dependencies. The competition for critical raw materials such as rare earths, lithium and cobalt is now becoming an instrument of power. New vulnerabilities are emerging for Europe, and particularly for Austria, which is heavily dependent on imports.

Energy transition is exacerbating this trend, as it is increasing the demand for critical materials. Geopolitical tensions are threatening supplies. The EU is responding to this with diversification, strategic reserves and a circular economy. Although Austria plays a part in making these decisions, it has little manufacturing capability and therefore relies on technological cooperation and diplomatic raw material partnerships.

Stability of the Euro-strategic environment

The European neighbourhood is likely to remain characterised by instability, authoritarianism and geopolitical competition in 2026. There is political fragmentation, weak statehood and an increasing amount of external influence in almost every region, from the Western Balkans to North Africa and Central Asia. Authoritarian forms of government are becoming entrenched, while democratic structures erode. The EU often reacts to this pragmatically and tolerates "stabilocracies", but weakens its own normative credibility by doing so.

Russia, China, Türkiye, Iran and the Arab Gulf states are competing with the EU and the US for influence. This rivalry destabilises the regions surrounding the EU and reinforces dependencies. The situation is exacerbated by migration pressure, climate change and social inequality. At the same time, the EU is using its neighbouring countries as buffer zones rather than encouraging structural solutions.

The strategic development of the EU

In recent years, the strategic development of the EU, which is a key factor in the strategic outlook of the Austrian MoD, has been characterised by a high degree of uncertainty and contradictory trends. Neither trend analyses nor assessments by experts have allowed clear statements to be made about the direction of future developments. Only the most recent analyses have provided more clarity: For the EU, the next ten years will be characterised by structural weakness, increased capabilities and persistent geopolitical challenges.

Although the EU can establish itself as an independent actor in a multipolar world, this will probably only be possible within a flexible, fragmented framework. Deep integration of all member states appears increasingly unrealistic; instead, "Multi-Speed Europe" is emerging. Despite economic strength and institutional stability, the Union's „soft power" is losing effectiveness. Matters of security, technological sovereignty and geopolitical reach are becoming more important, whereas deficits with regard to foreign policy and military capability persist.

Key Messages
- The international system is turning into a system of confrontational multipolarity, and a structural conflict is developing between the US and China.
- Because of declining US involvement, Europe needs to take on greater responsibility for its own security policy. The EU is developing into an independent actor, but in a fragmented form ("Multi-Speed Europe").
- Russia is expected to remain a revisionist actor with hybrid forms of conflict and nuclear deterrence rhetoric until 2035.
- NATO is in a state of upheaval; the shift of the US's focus to the Indo-Pacific is forcing Europe to take on more responsibility for its own security policy.
- Geoeconomic fragmentation, competition for resources and regional instabilities are increasing the vulnerability of Europe and Austria.

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Risks in 2026

The 2026 Risk Monitor

Ronald Vartok

The 2026 Risk Monitor describes the increasing shift away from a rules-based, liberal order towards confrontational multipolarity. The security situation is being shaped by major power rivalries, protectionism, hybrid threats and climate change. Europe needs to act more independently, reinforce its defence architecture and promote its resilience. Austria remains embedded in the EU security structure, and has to secure its military capability to act.

The rules-based world order, which is founded on democratic principles, is in a state of upheaval. The trend towards the return of power and aggression as a way of enforcing power-political interests in international relations is becoming increasingly pronounced. Various actors, particularly Russia and China, are endeavouring to renegotiate or reshape this world order. The trends which were predicted in the past by the Strategic Foresight of the Austrian Federal Ministry of Defence

(MoD) have not only been confirmed in this respect, but have, in many cases, even been exacerbated. Countries are increasingly focusing on competition rather than cooperation, the existing major power rivalries appear to be intensifying, and protectionism is on the rise.

At the same time, the security situation in the European environment is eroding – the number of conflicts is increasing in Eastern Europe, North Africa and the Middle East. Russia's hybrid warfare against Europe is intensifying, while the US government under President Donald Trump is seeking to reshape transatlantic relations. This is all happening against the backdrop of increasingly frequent extreme weather events due to the ever-accelerating speed of climate change.

The Risk Monitor

2026 will also be characterised by numerous complex crises, different risks and challenges. It is therefore essential for the MoD to continue carrying out professional and scientifically sound strategic risk foresight. Through its long-term perspective, it not only forms the basis for planning of the Austrian Armed Forces, but also specifies the risks and challenges which we will most probably also have to face at national level.

Uncertainty and incertitude must always be taken into consideration as determining factors. Before certain scenarios occur or certain risks materialise, it is often unclear whether they will actually occur or not. This is the nature of complex systems, such as the system of international relations. Accordingly, the MoD analyses the relevant trends and key factors regarded as crucial for the continued progress of security and defence-political developments.

The MoD's Risk Monitor is a product of this strategic foresight. It allows risks to be identified at an early stage, systematically recorded and analysed thoroughly. This involves assessing the probability of individual risks occurring on one hand, and the possible impact of such an occurrence on the republic, on the other hand. The probability of occurrence depends on how the dynamics of the overall strategic situation develop. Individual risks may change, depending on the circumstances. Strategic foresight can therefore form the empirical basis for policy development and government action.

Risks and challenges in 2026

It is currently evident that the shift away from a liberal, rules-based world order towards confrontational multipolarity is continuing. The international system shows signs of a polycrisis, exacerbated by parallel, differing international and regional conceptions of order. The transactionalist US policies under Donald Trump could thus lead to economic protectionism, thereby increasing the likelihood of a genuine economic crisis, for example. At the same time, existing international regulatory models such as the World Trade Organisation are being called into question, while alternative regulatory models are being strengthened. Various analyses also describe the dangerous effects of major power rivalries on the integrity of world trade. All of this affects the availability of essential raw materials (particularly rare earth minerals) and therefore the general security of supply.

That is not all: The security situation in Europe is continuously deteriorating because of the confrontation with Russia. Because of the revival of an "America First" policy and the changed transatlantic relations, Europe is called upon like rarely before to reinforce its security architecture and to develop into an effective security and defence-political actor, who is not only able to guarantee its own security but also capable of exerting a stabilising effect in the European environment. This includes both defence against hybrid actors such as Russia and its allies, and defence against increasingly malignant activities in the cyber and information domain.

The current risks and challenges in the European environment are of essential importance to the continent's security situation, not least because Russia knows how to exploit them to its advantage. The effects of the war in Ukraine are by no means restricted to this region, but have long since reached global dimensions. Examples include the security situation in the Western Balkans, the current conflicts and wars in the Middle East, jihadism and terrorism in the Sahel, and civil wars on both sides of the Red Sea. Russia's activities in Africa and the Caucasus are expectedly also influencing the security situation there, which in turn is causing transnational migration flows. Geopolitical and asymmetrical threats also affect multilateral organisations, whose legitimacy and effectiveness are increasingly being questioned.

European and Austrian security architecture

These developments, which are often outside Austria's sphere of influence, nevertheless represent a significant challenge to Austria's security architecture and therefore to its overall national resilience. Austria does not stand alone, however, but rather is an integral part of the EU's community of shared laws and values. The EU therefore continues to be the primary framework of action for Austrian security and defence policy, which must therefore no longer be considered purely nationally, but always in conjunction with European partners.

The EU is highly committed to closing current capability gaps. The key focus currently lies on military mobility. Because of its geographical location in the heart of Europe, Austria plays an important part in case military forces and resources need to be deployed rapidly. It is important to prepare for such scenarios, as it cannot be ruled out that military transports may have to pass through Austria.

Austria has a responsibility to take measures to increase its national resilience. This requires a nationwide effort involving measures within the framework of comprehensive security provision. And last but not least, this also includes strengthening the Austrian Armed Forces to ensure their capability to act. The Austrian Armed Forces are Austria's insurance policy: The better structured, capable and ready for deployment they are, the better prepared Austria will be as a whole in case of emergency.

Key Messages

- The world order continues to change from a rules-based structure to confrontational multipolarity; major power rivalries, protectionism, and hybrid threats are on the rise.
- Russia is intensifying its hybrid warfare against Europe, while the US under President Trump is redefining transatlantic relations amid increasing protectionist tendencies.
- Climate change is exacerbating crises through extreme weather conditions, resource scarcity, and the destabilisation of entire regions.
- Europe's security is threatened by conflicts in Eastern Europe, North Africa, the Middle East and the Western Balkans, whereby Russia strategically exploits regional instability.
- Austria is deeply embedded in the European security architecture, and needs to strengthen its national and military capabilities and resilience.
- Military mobility in the EU and NATO is becoming increasingly important; Austria plays a key role in logistical movements because of its geographical location.
- The Austrian Armed Forces are Austria's "insurance policy", and must be modern, ready and crisis-proof in order to guarantee national security.

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New order, old principles

Change and continuity in international relations

Arnold H. Kammel

The international order is in a phase of far-reaching reorientation. The weakness of international institutions, rivalries between great powers, regional conflicts and hybrid threats shape Europe's security environment. The law of the strongest is threatening to undermine the power of the law. In this fragmented world, Europe needs to strengthen its strategic capabilities and assume responsibility for its own security.

Much has been said in recent years about turning points, multipolar (dis)order, the end of dreams, and new constellations of actors which would pose enormous challenges for the West. One thing all these descriptions have in common is that the international order is undergoing a process of far-reaching transformation, at the heart of which is the question of the dominant influencing factors for future international relations. The uncertainty about a new world order is fuelled

by the emergence of new alliances whose primary objectives appear to be breaking Western dominance, questioning traditional structures, and casting doubt upon the ability of multilateral institutions to solve problems.

While the question of supremacy in this „New World" cannot yet be conclusively assessed, the number of wars and conflicts continues to increase. The current hotspots include Ukraine and the semi-consolidated regions of the Western Balkans and Eastern Europe, the Middle East, Africa, particularly from West Africa (the recent coup in Guinea-Bissau, for example) through the Sahel region, from Sudan to Ethiopia, but also developments in Asia such as the situation in Myanmar.

International system diagnosis

The end of the Cold War and the break-up of the bloc constellation initiated a new phase in international relations, which – also driven by globalisation – envisioned that the world would be brought closer together on the basis of a rules-based, free trade-oriented world order under the aegis of the United Nations and other international organisations. However, in a way that was often unnoticed, this phase also led to the revitalisation of the competition between the major actors, and the gradual emergence of an interest-driven international order. The current international actors are making the situation increasingly unpredictable as a new multipolarity with shifting alliances is created. It is clear that deterrence and (military) strength are increasingly seen as essential foundations for peace, stability and security, and issues relating to human security are often pushed into the background. New centres are emerging or have already emerged, and cooperation with power blocs is no longer exclusive. On the contrary, countries continue to pursue so-called „hedging" strategies, attempting to minimise risks by means of cooperation with multiple partners.

Nevertheless, the great powers are increasingly prepared to enforce their own interests by military force, if necessary, which represents a challenge to the international system as such. Ignorance of international law and multilateral structures has reached new dimensions. A new world seems to be developing which could be described in the words of the ancient Greek historian and strategist Thucydides: the

strong do what they can; the weak suffer what they must. *The law of the strongest* threatens to undermine the strength of the law. But who is strong and who is weak in such a world?

Europe's dilemma

This global realignment also poses a strategic dilemma, particularly for European countries. What is the best way to address this power confrontation, and how can the "effective multilateralism" described in the EU Global Strategy be salvaged? On the one hand, Europe must be able to defend itself and its member states against both hybrid and conventional adversaries. On the other hand, the EU is called upon to stabilise its own environment – by military means, through economic cooperation and by observing the principles of the rule of law and partnership. All too frequently, it is subject to criticism regarding the way it handles its post-colonial legacy. The conditionality of the cooperation with the West is another point that Europe must learn to deal with: offers of cooperation usually come with a price tag – be it demanding compliance with human rights or setting certain economic or legal requirements.

However, this supposed weakness may also work to Europe's advantage. European foreign, security and defence policy follows principles and fundamental values which make Europe a normative force. This may mean that its foreign policy is shaped by a tug-of-war between interests and values, but its fundamentally principle-led approach also makes Europe a reliable partner, or at least gives it the potential to be one. But for this to succeed, this community of values, the biggest peace project since the end of World War II, needs consistency and the willingness to be involved in shaping the international environment above all else. Thereby it must also accept that different models of order may exist in parallel.

The transatlantic alliance and the further development of the CFSP/CSDP

This applies even more since the United States has returned to a policy of transactionalism following the re-election of Donald Trump as US

president. „Peace through strength" seems to be the motto for ensuring stability and security. "America First" and the inconsistency of US policy, particularly in trade-related matters, make it clear that Europe has probably indulged in the illusion for too long that it could maintain its economic strength without military backup, and that the US was a partner which would always be by its side.

The current US administration requires Europe to define its interests and positions within this transactionalism, and clearly stand up for them so as not to be dictated to by others. The fear of losing its American partner has thus led Europe to seek a deal in the tariff dispute and, at the NATO summit in The Hague, make a clear commitment to increase spending on European security and defence. Unlike previous commitments, on this occasion the US demanded concrete assurances regarding defence spending.

However, at the same time it is becoming clear to the EU that, regardless of the development of the transatlantic relationship and therefore also the future orientation of NATO, the Union's security and defence capabilities as well as its military capabilities must be increased. Under the umbrella of "Defence Readiness 2030", the defence-industrial base is therefore to be significantly strengthened, particularly in order to increase the Union's strategic autonomy. The European Commission is taking on more and more of a pioneering role in this. Because decision-making in the field of the intergovernmental and therefore primarily consensus-based Common Foreign and Security Policy (CFSP) and its Common Security and Defence Policy (CSDP) is often difficult, the supranational area is becoming increasingly important.

In competition with other players

Europe generally needs to maintain its place on the world stage, and not be worn down and outplayed in the competition between the major actors. Apart from the transatlantic relationship, which is currently difficult, Russia and China are among the major challenges for Europe and the EU. In addition to the classic armed conflict in and around Ukraine, it is hybrid threats in particular that other actors are using to try to expose weaknesses in Europe's resilience and exploit them accordingly. The fact that these attacks are difficult to attribute plays a particular-

ly important role. Cyberattacks, information operations, and even airspace disruptions are now on the menu for hybrid actors.

A certain change to Europe's perception of China has taken place. China is regarded as both a partner and a systemic rival of the EU, as the European Council noted in its conclusions of 30 June 2023. This means that Europe wants and is going to cooperate with China in overcoming global challenges. The focus is on having stable and constructive international relations, in spite of the differing positions of Brussels and Beijing. It should not be overlooked that China is in a very real great power rivalry with the United States, and is trying to assert its own economic and political interests. This also involves the targeted use of alliances such as BRICS+ or the Shanghai Cooperation Organisation (SCO) in order to leave a bigger footprint. It must also not be overlooked that China's major goal of being a world power on the occasion of its 100th anniversary in 2049 is continuously pursued in the background.

However, it is precisely the focus on the major actors and the competition between the US, Russia and China that offers the EU and Europe some major opportunities alongside all of the challenges. In a world dominated by force and power, the European approach to international relations is gaining in importance. Many regions and countries are yearning for closer cooperation and coordination with (EU) Europe in order not to become completely insignificant in this confrontation between great powers and not to have to concede supremacy to the law of the strongest. However, Europe needs to seize these opportunities in a clearer and more sustainable manner.

Austria's contribution to strengthening Europe's capability to act

Like all of the other EU member states, Austria is directly affected by these global developments. In addition to its traditional role as a mediator and host country of international organisations, the export-oriented country that is Austria has a crucial role to play in advocating for the resurgence of a rules-based international order, to thereby also strengthen Europe's role in the world. At both the European and international levels, Austria has proven that even small countries can be global trendsetters by introducing new perspectives, particularly the

gender perspective, emphasising human security and highlighting the impact of climate change on security and defence policy issues. Austria's specific know-how in crisis regions in the European neighbourhood, such as the Western Balkans but also in the Middle East, allows it to actively participate in shaping and further developing the EU policies towards these regions.

In the area of foreign, security and defence policy, the EU is the main framework of action for Austria, as is also clearly expressed in the new Austrian Security Strategy. Austria has already made active contributions to the development of the CFSP/CSDP in the past, and is at the forefront of the EU with regard to per capita participation in peacekeeping missions and operations, both within the framework of the EU and in other international operations. However, the new EU programmes and instruments also provide new opportunities to reinforce the country's excellence in defence research, and contribute to successfully positioning Austrian research and development.

The path of rearmament has also been successfully initiated in Austria, and interoperability with other armed forces has been increased by means of joint procurement. Modern Austrian Armed Forces play their part in making the EU stronger and more autonomous in matters of defence.

Conclusions

International developments have made it clear that the rules-based world order which has been created over decades is giving way to an order in which strength and transactionalism are taking centre stage. It is therefore important for the EU and its member states to define the future role of Europe and make appropriate commitments. However, an eye must be kept on multidimensionality.

Security policy goes far beyond defence readiness and military measures. Security requires integrated approaches which systematically take the key cross-sectional issues into consideration. In view of the far-reaching changes of traditional security-political challenges, it is clear that issues like this not only represent normative obligations, but

also make a significant contribution to the effectiveness and efficiency of security-political action.

The 25th anniversary of United Nations Security Council Resolution 1325, "Women, Peace and Security" of 2000 highlights the fact that various perspectives – and also multilaterally anchored agendas, such as in the area of human security or climate and security, are essential in order to gain a comprehensive understanding of risks and their management. Their consistent integration reinforces a modern and credible security and defence policy, and, at the same time, makes an important contribution, both from a whole-of-nation and whole-of-society perspective, to consolidating the multilateral, rules-based order and maintaining the dominance of the rule of law over the law of the strongest. This could be a crucial factor in strengthening the role of Europe.

Key Messages
- The global order is shifting from a rules-based structure towards increasingly confrontational multipolarity.
- Great power rivalries between the US, China and Russia are increasingly determining security-political dynamics.
- Europe must develop strategic autonomy and military capability in order to ensure its own security.
- Transatlantic relations remain important, but require greater European involvement and commitment.
- Hybrid threats, cyberattacks, and information operations require new approaches to resilience.
- A modern and credible security and defence policy makes an important contribution, both from a whole-of-nation and whole-of-society perspective, to consolidating the multilateral, rules-based order and maintaining the dominance of the rule of law over the law of the strongest.
- Security requires integrated approaches that systematically take the key cross-sectional issues into consideration. Austria's specific know-how in crisis regions in the European neighbourhood, such as the Western Balkans but also the Middle East, allows it to actively shape and further develop the EU policies towards these regions.

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Global risks and challenges

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Global risks and challenges

Nikolaus Rottenberger

The world order of the 2020s is undergoing a comprehensive systemic change. Authoritarian regimes are getting stronger, liberal democracies are losing influence, Russia and China are promoting conflicts and alliances against the West, while the US is increasingly withdrawing. Global institutions are losing their effectiveness, armament dynamics are increasing, and economic dependencies and technological monopolies are exacerbating power shifts.

The examination of various specific threats and risks to Austria, Europe and the world reveals interconnections and dependencies as well as the long-term nature of risks. A more detailed analysis of these findings suggests a systemic change which, historically speaking, is rarely perceived as such by society, as everyday life usually appears unaffected. In the sciences, too, structural change only occurs against the vehement resistance of established assumptions, ultimately in a revolutionary way. Thomas S. Kuhn described this as a paradigm shift in the 1960s.

Paradigm shift

Such a paradigm shift can also be observed in the 2020s. Political scientist Jan Marwecki describes the actions of the administration of US President Donald Trump not so much as a cause, but rather as a symptom of far-reaching changes that bring about the decline of Western dominance. Conversely, the causes thereof lie, *inter alia*, in the change in US domestic policy, such as the revival of the "America First" movement, with roots going back to the interwar period.

Another cause lies in the global strengthening of authoritarian ideologies and government systems, in which more than 70 percent of the world's population now live. This increases the pressure on the remaining liberal, democratic and market-based countries, and weakens their position and effectiveness in traditional international organisations such as the United Nations, the OSCE and the EU. The pressure is particularly increasing from China and Russia, who aim to divide and weaken Western systems or Western security agreements with friendly countries such as Japan or South Korea.

System conflict

With the support of China and Belarus, Russia is expected to continue the war in Ukraine in 2026, and also continue to wage a comprehensive hybrid war against the EU, its member states and NATO. China's involvement turns this dispute into a global systemic conflict. At the same time, despite its internal economic and political problems, China strives to strengthen its global position. By both conventional military and sub-conventional means and methods, Beijing is increasing the pressure on its neighbours in East and Southeast Asia, and does not shy away from taking drastic measures, as was shown by the deployment of the "People's Armed Forces Maritime Militia" in the South China Sea in 2024 and 2025.

In conflict with the West, China and Russia will continue to strengthen their alliances in 2026. The positioning of emerging India under Prime Minister Narendra Modi remains unclear, as it seems to prefer an ambivalent foreign and security policy to a clear alignment with one camp or the other. Against this backdrop, an international arms race is taking

place in 2026, which is more akin to rearmament in Europe, particularly under the impression of Russian threats and the gradual departure of the US from its NATO partners. Global efforts for disarmament and arms control, which have existed since the 1960s, will continue to lose meaning or go nowhere, which is another sign of the above-mentioned systemic change.

Geostrategic races

Alongside regional crises and conflicts in Eastern Europe, the Middle East and East and Southeast Asia, the race for dominance in the Arctic or on the oceans often fades into the background. Although the Arctic is undoubtedly of paramount importance for the global climate and should therefore be protected, many of the regional and global actors focus on the straits, potential military bases and raw material deposits. This race for control and dominance harbours further potential for conflict.

The use of the world's oceans, both above and below sea level, and the raw material deposits under the seabed will also lead to further conflicts in 2026. Global warming, pollution and overfishing are bringing these seemingly unlimited raw material providers and transport routes close to collapse, which will have global repercussions.

Comprehensive system change

What is happening in geopolitics and security policy can also be observed in economic terms: a comprehensive systemic change. The existing global economic system, which was shaped by the US after the Second World War and therefore promoting globalisation and free trade, is being questioned or changed not least by the currently prevailing protectionism of the US administration, and also by hegemonic behaviour such as that of China. This results in supply chain bottlenecks, resource scarcity, and geopolitical dependencies.

There are also disruptive technological developments which are promoted by large companies. "Big Tech", as a collective term for extremely large, influential technology companies with a significant effect on

the digital economy and modern life, plays a defining role. The five US companies Apple, Amazon, Alphabet (Google), Meta (Facebook) and Microsoft dominate the digital landscape via a wide range of products and services, and strive to evade governmental and supranational regulations, such as those imposed by the EU. Distortion of competition and restrictions on the sovereignty of countries are consequences that will also be felt in 2026.

The global systemic change of the 2020s marks a far-reaching transformation of international regulatory patterns. Liberal, free-market and democratic principles are increasingly competing with authoritarian and protectionist models. This development not only calls existing power relations into question, but also the foundations of international cooperation, economic interdependence and technological dependencies.

For Europe, and particularly for smaller countries such as Austria, this results in the need to strengthen resilience, consolidate strategic partnerships and secure its own ability to act in a global order that is becoming increasingly fragmented. The coming years will show whether it will be possible to find a new balance between security, sovereignty and sustainability among these tectonic shifts, or whether the systemic change will lead to a permanent erosion of global stability.

Key Messages
- The 2020s mark a global systemic change in which the old power and regulatory structures are disintegrating.
- Authoritarian regimes are gaining more influence worldwide, whereas liberal democracies are losing strength and the power to shape policy.
- Russia and China are deepening their strategic cooperation and waging a systemic conflict against the West, while the US is increasingly withdrawing.
- The security policy environment is being shaped by a new arms race and the erosion of international institutions (UN, EU, OSCE, NATO).
- Protectionism, dependencies, and Big Tech monopolies are shifting the global balance of power in the economy.
- For Europe and smaller countries such as Austria, this results in the need to strengthen resilience, strategic partnerships and the capacity to act in order to survive in the fragmented world order.

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The revival of America First

Rachel Tausendfreund

At the end of World War II, the America First movement, which had opposed the participation of the US in the war for a long time, seemed defeated. This was most evident in the establishment of a system of international order and cooperation based on the power of the United States. The US government under President Donald Trump is signalling a fundamental departure from US-led hegemony. The challenges to the international order are obvious.

The so-called America First movement, which had long opposed the participation of the US in World War II, seemed to have been defeated in 1945. This was most evident in Washington spending the first post-war years creating a system of international order and cooperation based on the power of the US. The Bretton Woods economic system was based on the US dollar as its anchor currency. The newly founded United Nations was based in the state of New York in 1946, before its permanent headquarters was established in New York City in 1952. Following the Marshall Plan and the Truman Doctrine, NATO was founded

in 1949, followed by a security alliance between the US and Japan a few years later.

Despite progress in multilateral relations during the six decades that followed, the systems of global governance and security that emerged from this policy continue to rely heavily on the US to this day. This is why the resurgence of a new version of the America First policy under US President Donald Trump has had such a destabilising effect.

Departure from hegemony

Trump's policies signal a fundamental departure from US-led hegemony. Washington is emphasising the principle of burden-sharing more clearly, and is putting greater emphasis on regional security structures. However, this is accompanied by a considerable amount of uncertainty, as US policy appears unpredictable, and traditional guarantees appear less reliable. Trump's willingness to use security dependencies as leverage in economic and trade negotiations has reinforced this tendency. For example, the EU found itself in a weak negotiating position regarding US tariffs because it wanted US support for Ukraine and NATO to continue. Whereas all of the US presidents of the past twenty years have urged European partners to assume a greater share of the security burden, Trump is the first one to signal his willingness to withdraw from commitments and show a lack of sympathy for alliances.

In the short term, this has led to a positive result, namely a renewed willingness among the European NATO partners to comply with US demands for burden sharing, and to a stronger European commitment to expanding defence capabilities. The dismissive attitude of the Trump administration has also forced European countries to focus more on one another, whereas Washington had previously been the preferred partner for many countries regarding security matters.

Multipolarisation

In the medium term, the persistent doubts about whether the US is really committed to defending its allies will have a destabilising effect. While this could lead to more intensive cooperation between European

countries, there is also a risk of increasing tensions within Europe along the eastern or southern lines, for example. The reason for this is actions taken by countries out of uncertainty. Increasing uncertainty can also be expected in a global context, as well as the growing influence of other powers such as Russia and China.

If the United States is regarded as an unreliable partner or even a threat, there is little incentive to resist closer cooperation with China or Russia. This contributes to the creation of a more multipolar security order in which the UN standards are no longer considered guaranteed, and aggression or invasion does not necessarily entail global consequences. Beyond the immediate security context, the withdrawal of the US has also opened up opportunities for China and Russia to expand their influence in Asia, Africa and the Middle East in terms of soft power and development cooperation.

Impact on vulnerable groups

Apart from the medium-term issues of global influence distribution, the reduction of activities by the US Agency for International Development (USAID) has very real and often deadly consequences for women and other vulnerable groups. Founded in 1961, the role of USAID has expanded to encompass a wide range of health activities, including maternal health, the health of children and reproductive health. USAID spent nearly 40 billion US dollars a year on international aid, mainly on health programmes. It was one of the biggest providers of family planning services worldwide, with almost 600 million US dollars spent on contraceptive services in poor countries. A report by UN Women came to the conclusion that the US development aid cuts have led to a dramatic situation. UN Women surveyed 411 organisations in 44 countries and discovered that "90 percent of respondents said their work was financially impacted, almost half expected to have to close within six months, and the majority had already reduced the number of staff or shut down key services".

The prevention of and response to gender-based violence, protection services and women's health are particularly affected. These cuts are expected to result in many thousands of preventable maternal deaths per year, and many thousands more preventable deaths within vulner-

able groups because of the restricted availability of support and pro-
tection services. There are also wider normative consequences: When
the United States rolls back its policies regarding diversity, equality, and
inclusion, other countries or political movements are encouraged to do
the same. The US precedent is being observed and sometimes imitated.

Conclusion

Trump's America First policies are a tragedy for the hundreds of thou-
sands worldwide who depend on US health and development aid. The
medium and long-term consequences regarding global security architec-
ture are still unclear. The pessimistic scenario foresees a complete col-
lapse of the weakened international order into a conflict-ridden multipo-
larity and a return to unbridled power politics. However, there is also
an optimistic scenario in which democracies and other actors who are
interested in stability unite to create a new system of global order that
is less dependent on US power. It is hard to imagine, but not impossible.

Key Messages

- The return of the America First policy marks a departure from the
  US-led world order, which was based on multilateral cooperation and
  American hegemony after 1945.
- Trump's foreign policy focuses on national interests and burden-shar-
  ing, which weakens traditional security guarantees and unsettles inter-
  national partners.
- In the short term, this course has led to a stronger commitment to
  security policy in Europe, but to growing uncertainty and potential ten-
  sions within the EU in the long term.
- The US withdrawal from development and equality policies has serious
  consequences, especially for women and vulnerable groups who relied
  on USAID programmes.
- Globally, there is a threat of a more unstable, multipolar order in which
  authoritarian powers such as China and Russia will expand their influ-
  ence, whereas democratic cooperation needs to be redefined.

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Europe in a systemic conflict between Russia, China and the US

Daniela Schwarzer

Europe's democracies will continue to face complex geopolitical challenges in 2026, and their security will continue to be threatened, especially by Russia. Russia's war of aggression against Ukraine, which has been ongoing since 2022, is accompanied by hybrid attacks within the European Union, which have intensified since Russia's annexation of Crimea in 2014, as well as by a sharp increase in violations of sovereignty since 2025. This includes incursions into the airspace of other countries and acts of sabotage against critical infrastructures.

It is expected that the intensified threat from Russia on NATO's eastern borders and destabilisation attempts within Europe will remain a relevant issue in 2026. Moscow is pursuing two objectives: to undermine the resilience of the countries supporting Ukraine, and to test NATO's

capabilities. Accordingly, the expansion of deterrence (increased presence, air and missile defence) and the protection of critical infrastructure will remain a central issue in 2026.

Europe should assume that US support for Ukraine and European NATO countries will not be guaranteed to the same extent as in previous years, and will not be permanent. The position of the US government under Donald Trump concerning support for Ukraine has changed several times during his second term in office. In March 2025, US military aid was initially "paused and reviewed", in summer Trump signalled that Europe and Canada should take over the financing, while the US would provide political and logistical support. At the end of August 2025, he again declared that the US would "no longer" finance Ukraine; instead, Washington profited from arms sales to allies.

Perspectives for 2026

It should be assumed that President Trump will carry on trying to maximise burden shifting in favour of the US in 2026. That would mean minimising the flow of US funds and selling weapons to support Ukraine. It is unclear whether the US would continue to provide Ukraine with political support against Russia. Essentially, there are two possible two scenarios.

First scenario: Continued pressure from the US on Russia, focussing on China as Russia's most important external supporter. Beijing primarily supports Russia via trade and dual-use supply chains (including microelectronics, machine tools, navigation and drone components) which are used in Russian arms production. China's energy imports from Russia, particularly oil and gas, provide Russia with additional revenue. The US could respond with stricter export controls (entity list expansions), secondary financial sanctions, and by closing loopholes.

Second scenario: Withdrawal of the US from the confrontation with Moscow and its supporters. In this scenario, the US would largely leave support for Ukraine to Europe and, in the best case, maintain the nuclear umbrella. In the worst case scenario, doubts about the credibility of nuclear deterrence would arise or grow, leading to increased "testing" of European defence readiness. Against this background, the debate

concerning strategic autonomy and a possible European nuclear deterrence has intensified noticeably in 2025.

China's positioning

Since March 2019, the EU has classified China in official documents as a cooperation partner, economic competitor and systemic rival. There are no fundamental changes expected for 2026, although the dimension of "systemic rivalry" has become increasingly important.

China has become a close partner of Russia. Sino-Russian trade has increased tremendously since 2022. The Russian arms industry would be under considerably more pressure without Chinese dual-use deliveries and circumvention channels. China also benefits from cheap Russian oil and gas, and ties up Western resources and attention. Beijing is likely to continue its strategic ambiguity in 2026. Politically, it cooperates closely with Moscow; economically, it is connected with Europe; and technologically and regarding critical basic services, it aims for independence. The EU is therefore likely to continue de-risking rather than de-coupling, which includes export controls to prevent sanctions from being circumvented, technological protection measures, but also selective cooperation, such as in trade or the climate sector.

At the moment, there is little reason to assume that China will break away from its close partnership with Russia in 2026 or use its influence over Moscow to push for peace. Unlike North Korea, which confirmed the deployment of soldiers to Russia and supplied ballistic missiles and ammunition in 2025, it remains unlikely that China will openly deploy its troops in Ukraine.

Global ambitions for order

Only a few days before the start of the Russian full-scale invasion of Ukraine, Chinese President Xi Jinping and Russian President Vladimir Putin published a joint statement concerning "international relations in a new era". It emphasised state sovereignty, underlined the principle of non-intervention, rejected Western alliance expansions and advocated for a "multipolar order" – and included the narrative of a "no limits"

partnership. The common denominator between Xi and Putin is an authoritarian-sovereignist concept of order, centred on regime stability, non-interference, and scepticism towards liberal-democratic universal values and Western-led institutions. The Russian-North Korean mutual assistance pact that was concluded in 2024 intensifies this authoritarian axis; Moscow and Pyongyang are now making their security policy cooperation publicly visible. Iran also provides Russia with a considerable amount of support as part of this axis, including drones, training, and technology transfer.

At the same time, China is pursuing ambitious goals in multilateral bodies. Beijing has developed several initiatives since 2021, for example in the areas of development and security. This was followed up by a Global Governance Initiative (GGI) in 2025. During his speeches at the Shanghai Cooperation Organisation (SCO) summits in Astana 2024 and Tianjin 2025, Xi linked these initiatives to the aspiration of "further developing" global rules and strengthening the influence of non-Western countries. He emphasised sovereignty and development rather than the universalistic enforcement of human rights, and linked security to indivisibility. According to the Chinese president, multilateral forums should reflect these norms. Unlike the US, China makes significant investments in the UN. For example, it is the biggest troop contributor among the permanent members of the Security Council. The combination of contributions, personnel, and active standard-setting increases Beijing's influence in UN bodies.

The US as a decisive factor

The way in which the liberal democracies assert themselves in this geopolitical constellation will, to a considerable extent, depend on developments in the US. What is relevant here is not only how Washington positions itself towards Ukraine, Russia and China, but also the overall development of democracy in the US. Continued setbacks are expected in areas such as the separation of powers and freedom of the media in 2026. Given the increasing restrictions on civil society's scope of action and the weakness of the opposition, stabilisation in the form of a clear victory for the Democrats in the midterm elections is unlikely in 2026.

Should the US continue to slide towards an authoritarian system, this would have far-reaching consequences for Europe. On the one hand, the liberal-democratic reference model of the West would erode, and on the other hand, transatlantic coalitions against autocracies would falter. In 2025, the V-Dem Index noted that there was a continuing "third wave of autocratisation" – 72 percent of the world's population lives in autocracies. It also explicitly warned of a potential "democratic breakdown" in the US.

The effects of this are already visible in some respects: with the US drifting towards authoritarianism the appeal of narratives such as "sovereignty over rights" would increase. "Free-speech" diplomacy is already branding European regulations "instruments of censorship". Transatlantic networking of right-wing conservative actors is also making progress. The targeted spread of illiberal ideas and the intimidation of media and scientists are also increasing in Europe. Advocating for pluralism, equality and civil rights and liberties, targeted protection programmes for threatened groups and the protection of civil society spaces, as well as strategic communication and media literacy are thus becoming more relevant.

Even under these circumstances, maintaining diplomatic channels to Washington and continuing transatlantic cooperation in the security and defence sector remains relevant in 2026. At the same time, the challenge for Europe is to strengthen its democratic resilience, military capabilities and economic and technological sovereignty in order to develop its strategic autonomy.

Key Messages

- The war in Ukraine, hybrid attacks and increasing sovereignty violations will continue to be key risks for Europe in 2026.
- Support from the US is becoming increasingly unpredictable; Washington is pushing for stronger burden shifting to the detriment of Europe.
- 2026 will be shaped by two US scenarios: increased pressure on Russia and China, or a withdrawal from the confrontation.
- China remains a close partner of Russia, strengthening its military capabilities, and relying on strategic ambiguity towards Europe.
- The authoritarian axis of Russia–China–North Korea–Iran is gaining visibility, and is acting in an increasingly coordinated manner.
- China's global ambitions for order are intensifying, particularly in multilateral institutions and the UN.
- A potential drift of the US towards authoritarianism is a threat to Western norms, weakens transatlantic alliances and increases the pressure on Europe's own resilience.

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Nuclear non-proliferation

Disarmament and deterrence

Ulrika Möller

Despite the political intention to abolish nuclear weapons because of their world-shattering destructive power, they have now reached a mature age. The lifespan of nuclear weapons is shaped by both disarmament and deterrence – two competing concepts for managing their immense destructive potential. Dismantling or retention, ostensibly to establish orderly relations of mutually assured destruction?

More than 80 years have passed since the first nuclear explosion in July 1945 and the atomic bombings of Hiroshima and Nagasaki in August 1945. As early as January 1946, a UN resolution established the UN Atomic Energy Commission, which was tasked with developing plans for the elimination of nuclear weapons. However, at the same time, deliberations had already begun on how this destructive power could be harnessed for strategic purposes. With the Soviet Union's

attainment of nuclear weapons capability in 1949, the relationship between the two Cold War superpowers based on nuclear deterrence was established.

Arms control and non-proliferation have become achievable goals in the decades since the beginning of the atomic age. The inherent conflict between disarmament and deterrence not only persisted, but became more pronounced. The majority of nuclear-weapon states have long been parties to the Nuclear Non-Proliferation Treaty (NPT), thereby legally committing themselves to the pursuit of disarmament as a long-term objective. For decades, however, they have continued to rely on nuclear deterrence politically and militarily. This incoherence has caused dissatisfaction among non-nuclear-weapon states, particularly those that sought to reduce the nuclear threat through alternative means, rather than by relying on a nuclear-armed ally.

Problematic patterns

Increasing polarisation has had a negative impact on the quality of nuclear diplomacy. Following decades of regular engagement, the past decade has been marked primarily by the inability to achieve broad and durable agreements. This regressive trend affects all dimensions of nuclear diplomacy: the prevention of nuclear proliferation, the control of existing arsenals and their long-term dismantlement. At the same time, all nuclear weapon states are now focused on improving their respective arsenals.

This means that two problematic patterns currently prevail: the decline of nuclear diplomacy on the one hand, and nuclear armament on the other hand. At present, it lies beyond the capacity of non-nuclear-weapon states to influence the deterrence-based thinking that is driving the current wave of modernisation. Governments seeking to contribute to the de-escalation of the nuclear threat, with the long-term objective of reducing this risk, should focus primarily on reviving nuclear diplomacy.

Non-proliferation regimes and follow-up agreements

The UN Atomic Energy Commission, which existed from 1946 to 1949, was unable to reach an agreement on any of the proposed plans for dismantling nuclear weapons arsenals. This failure necessitated the pursuit of more limited, sub-objectives to address the nuclear threat. Today, all of the negotiations regarding nuclear weapons refer to at least one of three objectives: Non-proliferation, arms control and disarmament. Following the Cuban Missile Crisis in 1962, a phase of steady diplomatic activity marked by the conclusion of new agreements began, the regulation of nuclear explosions and their location with the Partial Test Ban Treaty is only one example. This also included treaties establishing nuclear-weapon-free zones, such as Antarctica (1959) or outer space with the Outer Space Treaty. Eventually, treaties creating nuclear-weapon-free regions were established, notably in Latin America and the Caribbean with the Treaty of Tlatelolco in 1969.

However, the first comprehensive nuclear non-proliferation regime was the NPT, which was established in 1970. Since then, the NPT has constituted the central framework for all other nuclear agreements. Because of its three objectives or "pillars", the NPT has become one of the most widely accepted international agreements. These pillars include promoting the peaceful use of nuclear energy, preventing the proliferation of nuclear weapons, and nuclear disarmament. In the decades after the NPT came into force, there was a certain continuity in the agreement of new regulations.

The series of agreements between the two main nuclear powers was particularly decisive, since they paved the way for a substantial reduction of their respective nuclear arsenals. These included the Strategic Arms Limitation Talks (SALT) in 1972 (SALT I) and 1976 (SALT II), and the Intermediate-Range Nuclear Forces Treaty (INF Treaty) in 1987. These negotiations also led to further agreements during the transition to a post-Cold War order. First and foremost, the Strategic Arms Reduction Treaty (START) should be mentioned here. It raised expectations that the time was ripe for disarmament. Two substantial opportunities arose for this. As part of the 5th NPT Review Conference in 1995, it was to be decided whether this agreement should be extended beyond the

existing five-year interval. At the same time, negotiations on a comprehensive ban on nuclear weapons testing were requested.

Highs and lows

None of these negotiations could fulfil the expectations of civil society and the parties to the NPT, who were dissatisfied with the slow progress in the area of disarmament. The 1995 Review Conference decided to extend the NPT indefinitely, but without specifying disarmament measures. Negotiations on a comprehensive ban on nuclear weapons testing led to the Comprehensive Nuclear Test Ban Treaty (CTBT) in 1996. This includes an effective monitoring system for detecting nuclear explosions, but at the same time, there are no specifications for nuclear disarmament, and the treaty has not yet come into force.

A breakthrough was achieved at the NPT Review Conference in 2000, where an agreement was reached on the 13 steps to nuclear disarmament. Following both successes and failures in the subsequent review conferences, the so-called "Humanitarian Initiative" mobilised supporters for negotiations on a general ban on nuclear weapons. These were completed in 2017. The Treaty on the Prohibition of Nuclear Weapons (TPNW) is a celebrated milestone, which was achieved through cooperation between civil society and countries committed to nuclear disarmament. Nevertheless, this agreement is insufficient to reverse the ongoing decline in nuclear diplomacy.

Current developments

Nuclear negotiations have always had their highs and lows. However, the current lull is particularly concerning, as it affects all areas of nuclear diplomacy. The NPT is under serious political pressure, bilateral arms control agreements between the US and Russia have lapsed, and the diplomatic efforts to prevent a North Korean nuclear weapon have failed so far. Efforts to curtail Iranian production of weapons-grade highly enriched uranium have been equally unsuccessful. One of the most recent indicators of diplomatic decline is the failure of the NPT Review Conference to agree on a final report by consensus in 2022. Likewise, the preparatory committee for the 2026 Review Conference

was unable to reach an agreement on any recommendations. Diplomatic efforts to revive the Joint Comprehensive Plan of Action with Iran were derailed following the military attack on Iranian nuclear facilities.

The only remaining arms control agreement between the US and Russia is New START, which is set to expire in February 2026. The eleventh NPT Review Conference, scheduled for spring 2026, represents a key opportunity to revive nuclear diplomacy. The crucial test is whether the review conference can adopt a final report by consensus. Furthermore, the next conference of the TPNW treaty parties will take place in December 2026, potentially reinforcing ongoing criticism of nuclear deterrence.

Key Messages
- Two trends are contributing to the escalation of the nuclear threat situation. These are the decline of nuclear diplomacy and the rise of nuclear armament.
- The decline of nuclear diplomacy affects all areas, i.e. non-proliferation, arms control, and long-term disarmament.
- The modernisation of nuclear arsenals underscores the current dominance of the concept of nuclear deterrence.
- There are currently no indications of an end to the current lull in nuclear diplomacy. Examples include the failure of the NPT Review Conference to reach consensus on a final report, the military attacks on nuclear facilities in Iran, and the impeding expiration of New START in February 2026.

The Chinese balancing act

Linda Liang and Sebastian Harnisch

In 2026, the Chinese leadership under Xi Jinping will once again have to balance domestic expectations for growth and stability with foreign policy demands for respect and influence as a great power. The result will probably be a contradictory foreign policy that, although pursuing core interests, avoids open and potentially violent confrontations – particularly with the US. With this robust and resilient approach towards the US administration, China will present itself as a new, more reliable partner to anyone who has been disappointed or humiliated by US policy.

Trade war and calculated strength

The rivalry between China and the United States has increased during the second term of US President Donald Trump, and has repeatedly provoked confrontational outbreaks. The Chinese leadership responded to far-reaching tariff increases and export controls by the US with robust countermeasures, for example regarding rare earths, and na-

tionalist rhetoric at home. Potential economic losses could therefore be attributed to the erratic behaviour of the White House.

However, the trade conflict also revealed the limits of the Trump administration, making this particular success in 2026 a model to be emulated. Shortly before the planned meeting of the two heads of states in October 2025, Beijing demonstrated that it was prepared to use calculated countermeasures to deliberately create tensions in order to increase its negotiating leverage.

Awareness of regional power

Taiwan remains the symbolic core of Chinese sovereignty claims. The tensions are as real as they are diverse: they include airspace violations, military manoeuvres and military presence in general. China has deliberately avoided escalation so far. The threshold for open conflict with Taiwan is not being crossed, while at the same time, the Taiwanese military is arming itself strategically, following the example of Ukraine.

China is also pursuing a strategy of controlled confrontation in the South China Sea. The tone towards neighbouring countries such as the Philippines remained harsh in 2025, and there were frequent clashes and violent incidents. At the same time, the use of force has so far remained below the threshold that would trigger a military conflict. Beijing is pursuing a hybrid-force strategy, which causes the countries bordering the South China Sea to cooperate more closely with Washington, but also with one other.

At the same time, Beijing is granting economic benefits to individual Southeast Asian and Pacific countries such as Vietnam or Malaysia. However, it remains unclear whether its lobbying has led to a definitive positioning in its favour. Only a few Asian countries have openly rejected Beijing's offer, but the majority of them still maintain their distance to China.

Ambivalent relations with Russia

China consolidated its partnership with Russia in 2025. Beijing openly admits that it wants to prevent a Russian defeat in its war of aggression against Ukraine. The joint military exercises and economic cooperation have become closer, but remain asymmetrical. Whereas Moscow speaks of a *de facto* defence alliance, the Chinese leadership maintains a rhetorical distance. At the same time, Beijing is endeavouring to maintain Chinese influence over North Korea – in competition with Russia. It is therefore highly unlikely that China will promise to help Russia to achieve a military victory in Ukraine in 2026, whatever form that victory may take.

China does not want to lose Russia – nor does it want to lose Europe. The European market is too important, and the divide between Washington and Brussels is too crucial for Beijing's geopolitical ambitions. What is not helpful for this ambition is that US tariff policy is forcing China to develop other markets, which in turn are trying to defend themselves against a flood of Chinese products.

Europe in the shadow of economic rivalry

Relations between China and the European Union are therefore strained, and are expected to remain so in 2026. The debate about tariffs on Chinese electric cars is merely a symptom of the structural frictions inherent in China's state-led economic model. Strategic industries are subsidised to outperform the US, and regions and cities are required to follow political directives from Beijing. This results in the misallocation of capital and resources, plus overcapacities, which are unwelcome in both Europe and Asia.

However, Beijing is also competing with Europe by illegitimate means. Cyberattacks are still primarily used for economic espionage, and criticism is met with disinformation campaigns and the digital persecution of opponents. The EU has not yet come up with any robust countermeasures. As a peaceful union of democracies, it only has limited capacity to speak the language of the great powers. This is another aspect unlikely to change in 2026.

The Women, Peace and Security agenda

China officially endorses the United Nations' Women, Peace and Security (WPS) agenda, UN Resolution 1325. However, its implementation requires careful scrutiny. China hosted the fourth UN World Conference on Women in 1995, and hosted another global women's summit in 2025. However, the domestic political reality is shown by setbacks in terms of equality. For the first time in twenty years, there is no woman in the Politburo, the power hub of the Communist Party.

The government is also systematically cracking down on civil society and independent women's rights movements. However, reports of systematic human rights violations against the Uyghur and other Muslim minorities in Xinjiang are even more serious. The forced sterilisations and sexualised violence in internment camps stand in stark contrast to China's official description of itself as a supporter of the WPS agenda.

Key Messages

- In its foreign policy, China will have to balance domestic expectations and foreign policy claims, and present itself to other countries as a new reliable partner alongside the US.
- The trade war has revealed the pain threshold of the second Trump administration. It can be assumed that China will continue to respond to pressure with calculated resistance.
- By means of controlled confrontations in the Taiwan Strait and the South China Sea, China will not cross the threshold into open conflict. At the same time, resistance is growing in the region.
- Relations with Russia are growing closer, but China will not jeopardise its relationship with North Korea or the EU.
- The number of friction points with the EU because of China's state-led economic model are increasing. Europe must also find a solution to the economically motivated cyberattacks, disinformation campaigns and digital persecution of opponents.
- China's support for the WPS agenda should be questioned in view of the setbacks in Chinese civil society and the allegations of human rights violations in Xinjiang.

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The South China Sea conflict

Thomas Eder

As a result of the second Trump administration's trade policy, China sees a favourable opportunity in the South China Sea. Beijing is trying to integrate the South-East Asian states into its new order, and to persuade them of its interpretation of the rules governing the South China Sea. As tensions are likely to persist, Europe may face higher transport costs while the fisheries sector of the coastal countries and the environment in the South China Sea that suffer the most.

In light of the high tariffs and the draft national defence strategy of the second Trump administration, a proverbial "window of opportunity" is opening for China with regard to the South China Sea during the period from 2025 to 2029. Following the US's "pivot" away from Europe and the Middle East towards the Indo-Pacific under President Barack Obama, a new "pivot" is now emerging under Donald Trump, towards the American continent, and even inward, towards the US itself. In-

ternal conflicts threaten to paralyse the US, while Washington's trade conflicts with countries in Southeast Asia are shifting their regional sentiment towards China. At the same time, the United States continues to compete with China for global influence, while remaining a highly unpredictable actor.

China's options and new approaches

In 2026, China will be focussing on new incentives to integrate the member states of the Association of Southeast Asian Nations (ASEAN) into its new order. At the same time, it is trying to convince them of its view regarding the South China Sea and the associated desired code of conduct. In April 2025, Xi Jinping therefore went on a state trip to Vietnam, Malaysia and Cambodia in order to reassure himself of the respective relationships under the pressure from US-imposed tariffs. The first trilateral summit took place between China, the ASEAN member states and the states of the Gulf Cooperation Council (GCC) in May. In June, Beijing announced that it had prepared itself comprehensively for joining the CPTPP trans-Pacific trade agreement. Meanwhile, Indonesia joined the BRICS+ group of nations.

ASEAN is already China's most important trading partner, and with the new incentives, Beijing is sending the message that Southeast Asia can benefit even more economically and diplomatically from cooperation with a Chinese-led "Global South". In view of the changed US policy in this region, this appears to be a convincing argument: The trade volume between China and the ASEAN region increased by 8.6 percent in the first eight months of 2025 compared to the previous year. This helped the Southeast Asian countries to offset the decline in trade with the US.

Sustained pressure

China has three "fleets" in the South China Sea the People's Liberation Army Navy (PLAN), the Chinese Coast Guard (CCG), and the People's Armed Forces Maritime Militia. These are the world's biggest forces in their respective categories, allowing China to operate flexibly within a grey zone and below the threshold of military intervention. The CCG is given comprehensive support from the Navy in terms of training, C2

and equipment, and possesses the biggest coastguard vessels in the world. Although the People's Armed Forces Maritime Militia consists of civilian fishermen, they receive state training and subsidies, and are also integrated into militia structures. Their fishing boats are often of considerable size, with reinforced hulls, modern communication and navigation equipment, water cannon, and, allegedly, even handguns. This allows them to fulfil anti-access and area-denial missions.

According to satellite images, China deployed a record number of its People's Armed Forces Maritime Militia in 2024. However, no major diplomatic incidents occurred, such as the one in 2021 when more than 200 Chinese fishing boats anchored at Whitsun Reef, which the Philippines also claim. Even after repeated clashes between Chinese and Philippine coastguard vessel, which have fundamentally different interpretations of legal bases and responsibilities, this was not the case – unlike the incident at Sabina Shoal Atoll in 2024, for example. The collision of two Chinese ships while pursuing the Philippine coast guard in August 2025 also shows that tensions persist, but major regional consequences have been avoided so far.

Artificial islands, overfishing and food security

In order to assert its interests *vis-à-vis* these Chinese fleets, Vietnam is steadily catching up with China regarding the amount of land reclaimed through artificial island construction. Just like China, Vietnam is causing extensive damage to coral reefs, which serve as food and habitat for thousands of species. The harvesting of endangered species, such as giant clams, further destroys these reefs. At the same time, the neighbouring countries are overfishing this area, which accounts for twelve percent of the global catch.

The reason for this is a lack of agreement on which countries are allowed to fish in which areas. This overfishing jeopardises both the unique marine biodiversity and regional food security. According to climate studies, global warming will also lead to less productive fishing in the South China Sea, which is likely to fuel fishing conflicts even more. However, whereas the value of Philippine fish catches in the South China Sea has already declined sharply, pressure is increasing in China

because of a rapid increase in fish and meat consumption, a limited amount of arable land and an increasing dependency on imports.

Conclusion and consequences for Europe

The situation in the South China Sea is unlikely to cool down in 2026. Reasons for this are the disagreement over whether a code of conduct should be legally binding, how it should, *inter alia*, define "restraint", and which areas are disputed. At the same time, China has no incentive to allow military escalations to take place because of its own economic problems and the new opportunities for deeper relationships with the ASEAN states. It is more probable that pressure on the Philippines will continue below the threshold of military force.

Despite numerous clashes and military exercises, neither side has been interested in restricting commercial shipping by means of military escalation. Nevertheless, marine insurers might assess the risk as higher, and raise premiums, though likely less than in regions such as the Red Sea. Shipping companies then pass these increases on to their customers. As the major European economies carry out approximately eight to twelve percent of their trade in goods via the South China Sea, cost increases such as this may be relevant for inflation. Despite the possibility of limited armed conflicts between neighbouring countries, critical raw materials and industrial goods would remain accessible.

Key Messages

- The second Trump administration is opening up a new opportunity for China by means of high tariffs on Southeast Asian countries and the focus on conflicts within its own country regarding the South China Sea.
- China is attempting to win over Southeast Asia for integration into the Chinese-led "Global South" by offering the possibility of economic and diplomatic benefits.
- At the same time, China maintains pressure in the South China Sea via its three "fleets" – the Navy, the Coastguard and the People's Armed Forces Maritime Militia – without crossing the threshold to military conflict.
- The construction of artificial islands and overfishing, which has been intensified by China and also Vietnam, is destroying coral reefs and jeopardising food security in the region.
- Europe will not be cut off from critical raw materials and industrial goods by conflicts in the South China Sea in 2026, but the higher transport costs could increase inflation.

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Russia's flexible partnerships

Networks beyond Western isolation

Sarah Pagung

Russia has a flexible network of partnerships. These partnerships include close allies such as Belarus, North Korea and Iran as well as strategic partners such as China. These relationships safeguard trade, military cooperation and the circumvention of sanctions – and support an authoritarian counter-agenda that emphasises traditional values and challenges the Western-dominated international system.

With the full-scale invasion of Ukraine in 2022, Russia lost many of its international partners. Moscow, however, is not isolated, but maintains a network of heterogeneous relationships characterised by transactional logic. Rather than having a closed alliance system, Russia has flexible, interest-based partnerships, which can be interconnected

or run parallel. The objective is to erode the US-dominated world order, secure military cooperation, increase trade relations, circumvent sanctions, and pursue de-dollarization. Partnerships with authoritarian countries serve the purpose of the mutual stabilisation of power. Alongside these goals, safeguarding resources for the war against Ukraine will remain Russia's primary objective in 2026.

The intensity of these partnerships varies. Belarus, North Korea and Iran are among Russia's closest allies, with varying degrees of dependence. China is the most important strategic partner, but has considerably more power resources to shape the relationships more independently. This also applies to India, which, although it does not share the authoritarian system, cooperates with Moscow in a similarly interest-based manner.

Authoritarian counter-agenda

The majority of these Russian partners are not only united by an anti-Western narrative, but also by the associated resistance to equality policies, rights for LGBTQIA+ or feminist movements. Countries such as Iran, Belarus, China and Russia see these as a threat to supposedly traditional values and a risk to maintaining power.

The connection between the domestic and foreign policy debate is also evident in the positioning with regard to United Nations Resolution 1325 and the Women, Peace and Security agenda. Although Russia rejects sexualised violence, it refuses to address the social causes thereof, as it views this as a threat to its own system of rule. Russia, Iran and other authoritarian countries represent a reactionary global counter-agenda, which they view as a legitimate expression of cultural values and as an instrument against the Western-dominated international system at the same time.

Russia's strategic partnerships

In 2022, Russia and China deepened their "no limits partnership" with an agreement that establishes political, ideological and economic framework conditions. The cooperation includes joint manoeuvres, technolo-

gy transfer, intensive trade, and coordinated positions in international organisations. Chinese microchip and machine component deliveries are crucial for Moscow's war effort, as is assistance in circumventing sanctions. However, Beijing is acting cautiously so as not to jeopardise economic relations with Europe and the US. The economic imbalance in favour of China has been exacerbated by the Russian trade slump with Europe as a result of the sanctions. China is also catching up militarily, but still benefits from arms cooperation with Russia. Chinese copies of Russian arms technology, as well as increasing economic dependence and competition for influence in Central Asia, represent potential areas of conflict between Moscow and Beijing.

India and Russia have a long-standing cooperation that dates back to the Soviet period. It remains a major purchaser of Russian arms and Russian oil, and is therefore a significant source of revenue. Whether this will also be the case in 2026 mainly depends on the US's tariff and sanctions policy. However, India's close ties with Europe and the US reveal that relations between Moscow and New Delhi are primarily economically motivated, and less ideologically driven.

Dependent allies

Among Russia's close allies, Belarus has a special role because of its integration into the common union state. Minsk is politically, economically and militarily dependent on Moscow, which regards Belarus as an extended workbench and a forward line of defence. With the deployment of Russian nuclear weapons and the use of Belarussian territory as a staging area for the war against Ukraine, Minsk's room for manoeuvre shrank even further. This had already decreased as a result of the mass protests against President Aleksandr Lukashenko in 2020. Both countries consider themselves a part of the Russian World (*Russkij Mir*), and share a decidedly anti-Western policy.

In 2024, North Korea and Russia signed a defence agreement with a mutual assistance guarantee. North Korea is also sending several thousand soldiers to the war against Ukraine, and supplying ballistic missiles and artillery ammunition. Whereas the partnership primarily represents a way out of isolation and a means of technology transfer for

Pyongyang, it relieves the strain for Russia and provides resources for the war.

Iran also plays an important part in Russia's war against Ukraine by supplying drones and weapons systems. Tehran is subject to even more sanctions than Russia, making them both natural allies in evading sanctions and decoupling from the US dollar. The worldview of both countries is shaped by the rejection of the Western-dominated international system and the view of the US as the bogeyman. In spite of this, Russia is showing restraint in some areas of the partnership, including support for the Iranian nuclear programme and supplying arms, so as not to jeopardise relations with other countries in the region.

Key Messages

- Despite Western sanctions following the Russian invasion of Ukraine, Russia is not internationally isolated, but has a flexible network of alliances.
- Whereas Belarus, North Korea and Iran are dependent on Russia to varying degrees, China and India largely determine the rules of the game themselves.
- Russia and its partners are united by an authoritarian counter-agenda and an anti-Western narrative that emphasises "traditional values" and actively opposes equality policies.
- The cooperations follow a transactional logic, and act as a pragmatic safeguard for trade, military resources, evading sanctions, and pursuing de-dollarisation.
- Russia uses its relations to maintain its own military capability and break up the Western-dominated international order.

India as a global player

Heinz Nissel

By 2030, India will rise to third position in the global economic and military ranking, though still far behind China and the US. Its political ambitions are likely to be less successful, despite its increasing geopolitical presence. Will the emerging world order be multipolar or bipolar? Can India maintain its "strategic autonomy" as a new world power, or will it have to submit to one of its two opposing powers?

India celebrated 75 years of independence in 2022. Its pride in the uniqueness of its approximately 4,000-year-old civilisation, culture, and tradition is deeply rooted in the collective memory of its population. This exceptionalism of an Indo-centric worldview, which sees itself as superior to other nations, is both an expression of overconfidence and a driving force of India's claim to a leading role in the world. India does not officially seek regional or global hegemony, but emphasises its "rightful place" in the international community. Specifically, it is about recognition, status, and respect for its own path.

India's rise as a global player

India's ascend is primarily based on its economic dynamism. India only opened up to world trade in 1991, and for a long time lagged far behind the development of China. However, India's growth rates have exceeded those of China since 2015, apart from the pandemic period, albeit from a significantly lower starting point. With a GDP growth of 8.2 percent in fiscal year 2023/24 and expected annual increases of 6 to 7 percent, India is regarded as the world's new growth engine. No other G20 country achieves growth rates like this. In nominal terms, India is in fifth place worldwide with economic output of 4.19 trillion US dollars, and third place according to purchasing power parity with 14.6 billion US dollars. India invests 130 billion US dollars per annum in infrastructure. India is expected to overtake Germany no later than 2030, followed by Japan, and generate a full 15 percent of global economic output by 2050.

India's demographics and its military have also contributed to this increase. India overtook China as the world's most populous country in April 2023. India currently has a population of approximately 1.46 billion people, whereas China has approximately 1.42 billion people – three times the population of all 27 EU member states, and more than the entire African continent. The population is also comparatively young. The average age is 28, and 41 percent of the population is under 18 years old. Because of this age structure, the Indian population will remain young until 2050, which represents a "window of opportunity" for the economy. Nevertheless, major problems such as "jobless growth" and "missing girls" persist. Forecasts indicate that India will have a population of 1.7 billion by 2050, whereas China will have only 1.35 billion. The census, which has been postponed since 2021, is now scheduled to take place in March 2027.

With a strength of approximately 1.5 million soldiers, India is in second place behind China, and fourth in the Global Firepower Index. With defence spending of 86.1 billion US dollars in 2024, India ranks fifth behind the USA, China, Russia and Germany. India is a nuclear power and has second-strike capability with approximately 180 warheads and appropriate delivery systems. India is also one of the top five troop contributors to the United Nations, alongside Nepal, Rwanda, Bangladesh and Indonesia.

Geopolitical objectives

For decades, and in the spirit of Gandhi and Nehru, Indian politicians relied on the principles of non-violence, non-alignment, and independent decision-making, which is where India's reputation as a "would-be great power" originated. In the meantime, representatives of *realpolitik* have asserted themselves in New Delhi, and are proactively endeavouring to reshape India's role in the world. Unlike other geopolitical actors such as the US, China or Russia, India still lacks a geopolitical "Grand Design". In accordance with the "Neighbourhood First" policy, increased efforts towards its neighbours in South Asia are particularly evident. However, these countries distrust and fear the power of the hegemon more than they appreciate it.

The main unresolved problem, and one that has remained since partition in 1947, is the relationship between India and Pakistan. Three wars and countless conflicts have been waged with Pakistan, most recently the near-war in May 2025. The main issue has been control over the territory of Kashmir. However, the "eternal friendship" between China and Pakistan is a threat to India's security because of the possibility of a war on two fronts.

India's traditional Western orientation was extended in 1992 to include a "Look East Policy". This was replaced by an "Act East Policy" in 2015, which provides for cooperation primarily with Japan and the countries in Southeast Asia. However, India is undergoing a complete geopolitical realignment shifting from traditional non-alignment policy based on self-reliance to a multi-alignment strategy as a big player in a multipolar world. In this way, it is establishing itself as a leading democratic power of the Global South vis-á-vis China, e.g. at the Global South Summit, through the expansion of BRICS+ and at the 18th G20 summit. In doing so, it adopts a skilful mediating position between the "West" and the "Global South", in accordance with the principle of shared but differentiated responsibilities for global challenges.

Partnerships and conflicts

India maintains a variety of partnerships of varying intensity, but continues to reject legally binding alliances. For decades there has been

a friendship with Russia (or rather the Soviet Union), which was also reflected by abstaining in the resolutions concerning Ukraine, for example. Since the end of World War Two, the country has oscillated between admiration and rejection of the US. The US attempts to set up India as an Asian counterweight to China – without its consent, however. The 50 percent tariffs that were recently imposed by the Trump administration could mark a turning point in the relations between India and the US. This makes cooperation with the EU all the more relevant, whereby the cooperation has recently been intensified by both parties.

The relationship with China, its systemic rival, is particularly difficult. It is multifaceted, complicated, and, regarding problems, polygonal. Confrontations, conflicts, as well as cooperation can be observed at global, regional and local level. In view of the fighting over territories and land borders in the Himalayas and the rivalry in the Indian Ocean and the Indo-Pacific, we can speak of a "Cold Peace". India is a declared opponent of the "Silk Road" project; it considers the Indian Ocean to be India's ocean, and is endeavouring to establish a "Pax Indica" between the Straits of Hormuz and Malacca. The quadrilateral security dialogue between the US, Japan, Australia and India (Quad for short) has been revived in the Indo-Pacific, the goal of which is to contain Chinese ambitions.

Domestic politics

Since 2014, the Hindu nationalist Bharatiya Janata Party (BJP) under its charismatic leader, Prime Minister Narendra Modi, has dominated India's domestic politics. He is both an economic moderniser of the country and a devout advocate of the Hindutva ideology, according to which only a Hindu can be a "true" Indian. To his followers, Modi is already the "Vishwaguru" or "world leader".

However, the "world's biggest democracy" is under increasing pressure due to autocratic tendencies and the eroded rights of religious, ethnic and social minorities. Contrary to all forecasts, the BJP lost its absolute majority in the 2024 parliamentary elections despite its extensive media campaign, which is a strong sign of the vitality of Indian democracy.

Outlook

India's Prime Minister Modi entered Chinese territory again for the first time in seven years on 31 August 2025. The occasion for this was the Shanghai Cooperation Organisation summit. During his welcoming remarks, Chinese President Xi Jinping said that it was only right for the "dragon and the elephant to dance together". Signs of a political thaw? The proverbial Indian elephant has a remarkable long-term memory, and Narendra Modi's motto is: "Let the world know our time has come".

> **Key Messages**
> - India is already the world's most populous country. Its population will remain relatively young until 2050.
> - India is expected to become the world's third largest economy no later than 2030.
> - Geopolitically, India has shifted from "non-alignment" to "multi-alignment", and is seeking international responsibility.
> - The "world's biggest democracy" sees itself as the democratic leader of the Global South, and at the same time as a mediator and bridge builder to the "West".

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The threat landscape for Austria's maritime supply chains

Jan Stockbrügger

Maritime supply chains form the foundation of the global economy. Landlocked countries like Austria are therefore also highly dependent on maritime trade. The erosion of the liberal world order has recently led to an increasingly complex the maritime threat landscape. Some of the most significant security risks are Russian attacks on commercial vessels in the Black Sea, the activities of its shadow fleet in European waters, the Iranian threat to oil shipments through the Strait of Hormuz, and the blockage of key trade routes in the Red Sea by the Yemeni Houthis. Tensions between China and the USA in the South China Sea are a threat to global trade flows. Austria should step up cooperation with its European partners to strengthen the resilience of its supply chains.

Maritime supply chains form the foundation of the global economy. As much as 80 percent of international trade in goods and raw materials takes place across the world's oceans. Even a landlocked country like Austria is therefore deeply integrated into maritime supply chains. Austria is therefore not only dependent on maritime trade with the US, United Kingdom and China, but on maritime commodity and financial markets, such as global trade in crude oil.

In principle, maritime supply chains are highly efficient, and can respond quickly to shipping disruptions. However, their adaptability is not unlimited, and comes at a high cost. Disruptions may, for example, lead to supply shortages and higher transport costs. Experts estimate the total cost of the six-day Suez Canal's closure due to a shipping accident in 2021 amounted to several billion euros. Prolonged disruptions in the maritime trading network can also fuel inflation and destabilise a country's economy – as shown by the effects of the supply chain chaos during the COVID-19 pandemic.

Deterioration of the security situation

In fact, the security situation on the world's oceans – and therefore for Austria – has deteriorated rapidly in recent years. The reason is the increasing erosion of the liberal world order. Until recently, the general view was that all countries benefit from open markets and trade routes. For example, China, Russia and Iran supported European and US efforts to combat piracy off the coast of Somalia and to protect global maritime trade from attacks.

However, little seems to remain of this consensus nowadays. Instead, states are increasingly using the maritime supply chains to pursue their geopolitical goals and interests. The US and the EU are relying more and more on shipping sanctions to make it more difficult for their adversaries to access global markets. Hundreds of Iranian and Russian oil tankers have been sanctioned in recent years. In turn, Iran and Russia have repeatedly attacked important maritime trade routes, and China is increasingly seeking to control its trade routes.

Russia's maritime threat

A major threat to maritime supply chains today comes from Russia's war of aggression against Ukraine. Although Ukraine has managed to break the Russian blockade of its Black Sea ports, Russia continues to bomb Ukrainian port facilities and commercial vessels. These attacks are not only damaging to Ukraine. Ukraine is one of the world's largest grain suppliers, and the Russian attacks have therefore already led to increased food prices, particularly in poorer countries.

Another threat to maritime supply chains comes from Russia's shadow fleet – old, poorly maintained and inadequately insured oil tankers with which the Kremlin attempts to circumvent international sanctions. Ships from the shadow fleet are suspected of having deliberately damaged Europe's undersea energy infrastructure. There are fears that Russia could also use the tankers to cause shipping accidents and oil spills in European waters. Russian warships are also increasingly patrolling the Baltic Sea to protect tankers of the shadow fleet from European security and environmental controls. The risk of an escalation of the conflict between Russia and NATO should therefore not be underestimated.

Crisis hotpots in the Red Sea and the South China Sea

However, perhaps the greatest threat to maritime trade at present is in the Red Sea, where the Iranian-backed Houthi militia is attacking commercial vessels in protest against Israel's war in the Gaza Strip. Since December 2023, four ships have been sunk and several seafarers killed in missile and drone strikes. Many commercial vessels therefore bypass this region and take the longer route around the African continent instead, which increases the trade costs between Europe and Asia.

The wars in the Middle East also repeatedly threaten the Strait of Hormuz, a narrow 55-kilometer waterway off the coast of Iran, through which almost one fifth of the oil that is traded on the global markets flows. The Israeli-US air strikes against Iran in June 2025 led to severe turbulence in the oil markets and a rapid increase in energy prices – particularly after Iran threatened to block the Strait of Hormuz.

The risk of war is also increasing in the South China Sea. Accounting for almost a fifth of global maritime trade, this region is one of the most important hubs of international supply chains. China is heavily dependent on these supply chains, and obtains most of its crude oil imports via the adjacent Strait of Malacca. Beijing is therefore trying to force the US out of the region using military means, and expand its claim to sovereignty over Taiwan and the islands in the South China Sea at the expense of the US and its allies. An escalation of the resulting territorial conflicts and military tensions would have enormous repercussions for maritime trade, and would destroy the global economic system.

Possible courses of action for Austria

As a landlocked country without a navy, Austria only has limited means at its disposal to protect its trade routes from attacks. Austria should therefore primarily collaborate with its European allies to strengthen the resilience of its supply chains and diversify its markets and sources of raw material. It should also seek to support the United Nations and other organisations in reinforcing international and rules-based cooperation to protect the maritime supply chains.

Key Messages
- Austria is a landlocked country that is heavily dependent on maritime trade with the US, the United Kingdom and China, and on maritime commodity and financial markets.
- The collapse of the liberal world order has led to an increasingly complex maritime threat situation.
- Some of the biggest maritime security risks at present are Russia's "shadow fleet" and its attacks on commercial vessels in the Black Sea, Iran's threat to the oil trade routes in the Strait of Hormuz, and the blockage of important trade routes in the Red Sea by the Houthi militia.
- The biggest threat to maritime supply chains in the future could come from a military conflict between China and the US and its allies in the South China Sea.
- Austria should collaborate with its European partners to reinforce the resilience of its supply chains and encourage international, rules-based cooperation to protect maritime trade routes.

On the danger of a new world economic crisis

Gabriel Felbermayr

A new world economic crisis is definitely possible. It could be triggered by exploding global debt, structural trade imbalances, particularly between the US and China, and misguided economic policies – especially tariffs. The whole situation is exacerbated by the lack of political will to implement the necessary structural reforms. Only international cooperation and, in some cases, painful economic adjustments could stabilise the situation. However, that seems unlikely at present.

The price of gold is a reliable indicator of changing expectations of the future. If it goes up, it suggests growing fears about the future. In the last 12 months the price of gold has risen by 54 percent, and by an incredible 150 percent in the last three years. Gold does not generate any actual return as such, and it is cumbersome to store. It does, however, provide the ultimate safe haven for the savings of worried people.

There are certainly good reasons to regard the global economic situation with concern. The most important factor is undoubtedly the amount of global debt: the world is struggling under a burden of debt from states, companies and households, which amounted to approximately 235 percent of global GDP in 2024 according to the International Monetary Fund. That equals an astonishing 251 trillion US dollars, approximately 31,000 US dollars per person, with a global average income of about 14,000 US dollars. These mountains of debt have to be serviced and regularly refinanced.

Global debt drivers

Particularly China and the US stand out because of their enormous debt, with China's debt being largely domestic. The US, however, has accumulated 210 percent of its GDP in foreign debt. Many developing and emerging countries are also heavily indebted. Despite rising national debt, the situation in Europe is comparatively sustainable, as the amount of private and corporate debt is not as high here. However, Europe would still be swept up in the event of a global debt crisis.

The US is a particular cause for concern. In the first quarter of 2025, its current account deficit was almost 440 billion US dollars, or almost 6 percent of GDP. Although the deficit was smaller in the second quarter, the US has been generating ever-increasing foreign debt for 200 consecutive quarters. What is new is that for about two years, the US has no longer been able to generate sufficient returns from its foreign assets to offset the cost of its foreign liabilities. The days when the US was the world's "venture capitalist", borrowing abroad on favourable terms, making high-yield foreign investments thereby generating positive current account returns, seem to be over. This is because of higher interest rates on the ever-increasing stock of gross foreign debt.

The US therefore urgently needs to get its current account balance under control, and particularly the excessive trade deficit. In this light, the tariffs imposed by US President Donald Trump could be regarded as a desperate attempt to bring about an improvement. However, it is doubtful whether this will succeed. Logically, every deficit must be offset by a surplus from another country. In the case of the US, China is the primary example, having generated large current account surpluses

in recent years due to extremely strong growth in industrial production coupled with weak domestic demand. If the world's two biggest economies cooperated to reduce the imbalances, the stability of the global economy would benefit significantly.

Debt spiral?

The focus of the US administration on tariffs is misguided. The US current account deficit primarily results from the fact that domestic production is insufficient to meet consumption. In other words, the USA is living beyond its means. This cannot be directly combated with new tariffs, and if so, not without significant disruption. In order to improve the situation, the USA would need to consume less and save more – not just private households but also the government, which continues to accumulate extremely high budget deficits. However, there seems to be neither a political nor societal majority in favour of taking such a step. If there were a correction such as this, it would be accompanied by a severe recession, which would send shockwaves through the global economy.

What would happen if the US cannot curb its debts? The interest payments of public and private households as well as of companies would continue to increase. In the event of adverse shocks, questions about the capability of refinancing the mountains of debt would become increasingly urgent, which in turn would cause interest rates to rise. The US is almost exclusively indebted in its own currency, meaning that debt servicing with the aid of the central bank would always be possible if it was politically desirable. Even if there were no risk of default, a sharp increase in inflation would be expected. This in turn could only be combated with higher interest rates. A statement by Stephen Miran, board member of the US Federal Reserve, also raises the possibility of a forced exchange of US debt securities at more favourable conditions.

In any case, the US debt spiral is a risk to the global economy, particularly for countries that are highly indebted themselves and are no longer able to meet their governmental responsibilities. This would result in significant political instability in these countries, which could lead to conflicts and uncontrolled migration movements.

Tariffs and Counter-tariffs

US tariff policy, which is intended to reduce the foreign trade deficit and budget deficit, also poses major risks for the global economy. According to the latest economic models, the tariffs are partially borne by consumers in the USA and partially by manufacturers in partner countries, who have adjusted their pricing strategies in response to the tariffs. Trading partners could retaliate with their own tariffs and therefore generate tax revenue at the expense of US manufacturers. An escalation such as this would improve the situation of the affected countries, but it would also intensify global economic turmoil.

It is therefore not a given that the majority of countries will refrain from taking countermeasures. This strategy should make it easier for the US to abandon its fundamentally flawed tariff policy once the disadvantages become evident. A global agreement would be required to effectively address the global debt problem and the macroeconomic imbalances. This would likely need to include the convertibility of the Chinese renminbi – a step that would be difficult for both Beijing and Washington to accept. However, if the major global imbalances remain unchanged, lasting economic disruptions will the result, which always carry security and geopolitical risks.

Key Messages

- The massive increase in the price of gold is an indication of growing distrust in the stability of the global economy. Despite the lack of returns, gold acts as a safe haven in times of crisis.
- Global debt is reaching dangerous levels. With 235 percent of global GDP worldwide and debt of more than 250 trillion US dollars there is threat of refinancing problems, particularly for countries with a weak economic basis.
- Large current account deficits, growing foreign liabilities and a lack of political willingness to consolidate are exacerbating the US debt spiral, with potential global consequences.
- Tariffs are not a sustainable solution to the US trade deficit. US tariff policy does not address the structural causes of the deficit, and jeopardises the stability of world trade instead. This increases the likelihood of economic escalations.
- Systemic risks can only be mitigated through international cooperation and global agreements – such as on the convertibility of the renminbi. If the structural problems persist, there is a threat of economic and geopolitical crises in the long term.

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Militarised seas

Europe's maritime vulnerability

Michael Zinkanell

Approximately 70 percent of the earth's surface is covered by oceans, and more than 80 percent of international trade takes place via sea routes. The oceans are far more than geographical spaces; they form the backbone of the global economy and are fundamentally important for global supply chains, data transfers, energy supplies and trade flows. Their security is therefore inextricably linked to global prosperity and political stability. The geopolitical and geo-economic significance of the world's oceans should therefore not be underestimated, even by a landlocked country such as Austria.

The use and management of the seas under international law and the freedom and security of navigation are primarily grounded in the United Nations Convention on the Law of the Sea (UNCLOS), which constitutes the core framework of the global maritime order. However, the

limited ability of the UN to make and enforce decisions as well as increasing geopolitical tensions are putting the existing norms and legal principles of the rules-based order to a test. The erosion of this rules-based order is particularly evident in the area of maritime law, and is manifested in the shifting of maritime boundaries, the disruption of navigation systems, the sabotage of critical infrastructure, and the growing militarisation of civilian shipping. As a result, the maritime lifelines of global supply chains and connectivity are becoming not only spaces of economic competition, but increasingly arenas of strategic confrontation involving both conventional and unconventional means.

Maritime vulnerabilities

Since the start of Russia's war of aggression against Ukraine in February 2022, the maritime vulnerabilities of EU member states have deepened, particularly in the Baltic Sea. There, hybrid attacks on critical infrastructure, particularly undersea power and data cables and gas pipelines, are on the rise. In most documented cases, these were physical acts of sabotage, deliberately aimed at disrupting or destroying European energy and communication networks. In addition to undersea supply lines, coastal critical infrastructure is particularly exposed, such as the transmission networks of wind farms and port facilities. The disruptions to these systems thereof could have significant security and economic consequences for the entire EU.

Acts of sabotage

Maritime sabotage acts are often deliberately disguised as accidents to make attribution and forensic investigation more difficult, and to complicate the development of protective measures. Some of the most frequently used physical tactics are the dragging of anchors or chains across the seabed to deliberately damage cables or conduits. In addition, there have been explosive attacks involving charges placed on pipelines or cables, the use of unmanned maritime systems both on the surface and underwater, and the deployment of naval mines.

One of the most serious and well-known cases of physical damage to maritime infrastructure is the attack on the Nord Stream pipelines in

2022, which is regarded as a turning point in the perception of Europe's maritime vulnerabilities. In 2023, the so-called "Balticconnector" incident occurred in the Baltic Sea, which damaged a gas pipeline and at least one telecommunications cable. The container ship "Newnew Polar Bear" which was sailing under the Hong Kong flag, was at the centre of this incident, which was classified as deliberate sabotage because of grossly negligent anchor and drag mark damage.

In November 2024, two more undersea cables in the Baltic Sea were damaged almost simultaneously: the "BCS East-West Interlink" between Lithuania and Sweden and the "C-Lion1" connection between Finland and Germany. Both cases triggered investigations because espionage was suspected after the evidence of external physical interference mounted. The focus of the investigation was the Chinese cargo ship "Yi Peng 3". Also at the end of 2024, the high-voltage undersea cable "Estlink 2", which connects Finland and Estonia, suffered severe damage. The cause is suspected to be the anchor of the Russian tanker "Eagle S", which was dragged across the seabed for a distance of about 100 kilometres. This incident led to a temporary interruption of the power supply between the two countries.

Types of hybrid threats

These successive events highlight a systematic vulnerability of the European maritime infrastructure, and suggest a pattern of targeted physical interventions, which increasingly develop into hybrid threats. As well as physical attacks, this damaging influence is increasingly manifested in the systematic reconnaissance and monitoring of maritime infrastructures, which could act as a basis for potential acts of sabotage in the future. Research vessels are often used for this purpose, carrying out detailed mapping, taking visual and acoustic recordings, and collecting position data under the guise of scientific surveys.

At the same time, the use of unmanned underwater vehicles and diving robots increases the effectiveness and efficiency of reconnaissance. These can verify geolocations, inspect cables and equipment, and position manipulative tools. The positioning of sensors also makes long-term monitoring of submarine and ship movements possible, which is

beneficial for the planning of attacks and the exploitation of vulnerabilities.

Playing an increasingly prominent role in those physical attacks and targeted espionage operations is the so-called Shadow Fleet. This is a disguised network of mostly older, poorly maintained, unregistered or reflagged ships, mainly tankers. These ships make it possible to circumvent international control systems. Whereas around 200 ships worldwide fell into this category in 2022, the number has increased to more than 1,000 by 2025, which is estimated to represent almost 20 percent of all oil tankers. Approximately half of all ships in the shadow fleet are operated by Russia, followed by Iran, Venezuela and North Korea. It is evident that these ships not only violate international regulations, but also represent an increasing risk to European security and prosperity.

Outlook

The security of the maritime space in European waters can no longer be taken for granted. Attacks and influence operations within the spectrum of hybrid threats are becoming increasingly directed against maritime targets or include elements which contribute to the gradual militarisation of shipping. The drone sightings over Danish airports are also an indication of a potential maritime component, since the drones may have been launched from ships.

Developments such as these highlight the increasing blurring of operational boundaries and the growing vulnerability of critical infrastructures to hard-to-detect hybrid attacks. The EU and its member states are therefore called upon to expand their maritime surveillance, defence capabilities as well as early warning systems, and to develop comprehensive resilience strategies that integrate military, civilian and technological measures.

Key Messages

- The increasing militarisation of the seas is a threat to global trade routes, data flows and energy supplies, and undermines the rules-based international maritime order.
- There has been a sharp increase in the number of hybrid attacks on maritime infrastructure since 2022, particularly in the Baltic Sea, with the intention of sabotaging energy and communication networks.
- Acts of sabotage such as those involving "Nord Stream", "Balticconnector" or "Estlink 2" show a pattern of systematic physical interventions and deliberate obfuscation tactics.
- The use of unmanned systems, research vessels, and the expansion of the "Shadow Fleet" have increased the amount of surveillance, espionage, and manipulation of maritime installations.
- Europe's maritime security is under serious threat, which is why it is essential for the EU to expand its monitoring, defence and resilience capabilities.

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Geopolitics in the Arctic

From cooperation to conflict

Kristina Spohr

The Arctic has become a geopolitical flashpoint where climate change, resource interests and power politics intersect. The spirit of multilateral cooperation has been lost since Russia's war of aggression and China's growing ambitions for a "Polar Silk Road". Russia is remilitarising, China is advancing northwards with investments and research, and NATO is responding with an increased presence, surveillance, and defence strategies. The region is now regarded as a strategic arena of global rivalry and security policy realignment.

"If we lose the Arctic, we lose the entire world," remarked the former Finnish President Sauli Niinistö in 2017. What he meant was obvious: climate change, which is four to seven times more severe in the northern part of the globe than anywhere else, is going to affect all of humanity. However, humanity remains divided into countries which

increasingly pursue competing interests in the new multipolar world order. This in turn results in intense rivalry for the natural resources of this region.

The relations between the eight Arctic coastal states are currently less harmonious than at any other time since the end of the Cold War. Besides Russia, the US, Canada, Denmark, Iceland, Norway, Sweden and Finland, external actors are also pushing northwards. Particularly noteworthy in this context is China under its President Xi Jinping. Against the backdrop of its close economic and military partnership with the Kremlin, Beijing is increasingly challenging the US-led world order and intensifying existing uncertainties in the region.

There has been a sharp increase in military investment and strategic competition throughout the region in recent years. As a result, the genuinely collaborative spirit that led to the founding of the Arctic Council in 1996 is now being undermined.

A look into the past

The first mapping of the Arctic was carried out by political leaders in distant capitals, and then claimed, controlled, and militarised. The original race to find northern sea routes connecting the Atlantic and Pacific Oceans turned into a veritable gold rush for the region's resources: Furs, whale oil, fish, fossil fuels, precious metals and minerals. Traders were followed by a wave of settlers who established fixed borders. During this process, the semi-nomadic indigenous people became the unfortunate victims of the violent plundering carried out by the foreign invaders.

Whereas the great powers used to regard the Arctic as peripheral, the region took on an essential position in the great game of nuclear deterrence during the Cold War. The growing concerns about environmental protection, sustainable development and scientific collaboration have made the Arctic even more relevant. It has become a special zone for both international political cooperation and the increasingly effective enforcement of indigenous rights.

The collapse of "Arctic exceptionalism"

Despite massive power imbalances, political and ideological divergences and competing interests among the eight Arctic coastal states, multilateral consensus existed at all levels (local, regional and national) from the beginning of the 1990s until the beginning of the current decade. This cooperation, which explicitly excluded defence and security issues, was mediated through both intergovernmental and transnational non-governmental cooperation. The shared commitment to peace and continued dialogue was paramount in the Arctic. The Arctic Council succeeded in keeping this fruitful regional cooperation separate from negative global dynamics.

Since the beginning of the Russian war of aggression against Ukraine, this hallmark of "Arctic exceptionalism" has been hanging by a proverbial thread — if not completely suspended. We also should not forget that US President Trump's obsession with Greenland's rare earths has further undermined mutual trust and the impression of reliability among the seven "western" Arctic coastal states. The era of "Arctic exceptionalism" is a thing of the past. The most obvious reason is the behaviour of US President Trump and Russian President Vladimir Putin, but deeper developments lie behind their actions.

Russian remilitarisation

Russia, which is by far the biggest Arctic state, started to militarise its northernmost regions in the late 2000s. This was part of President Putin's attempt to re-establish Russia as a great power. He systematically used the paradigm of "Arctic exceptionalism" as a smokescreen to outmanoeuvre the West. While he was attempting to achieve a relative military advantage in the region, he also hoped to limit the military build-up of the West. Since 2008, the Kremlin has reactivated more than 50 former Soviet Arctic bases and simultaneously rebuilt its Northern Fleet, constructing airfields and deploying advanced missiles and defence systems at strategic points near the polar region.

Regional cooperation and energy policy

The small Nordic neighbours initially chose quiet diplomacy rather than confrontation. They attempted to minimise tensions and remain as neutral as possible, while maintaining trade and a collaborative environment for their mutual benefit. They also helped Russia to gain access to international research projects and Western funding to improve both infrastructure and living conditions in the Arctic.

This regional cooperation acted as a real catalyst for the energy sector by creating the impression of a stable investment environment. Foreign capital flowed into state mega-projects in the Arctic, such as Novatek's port of Sabetta or Gazprom's gas extraction on the Yamal Peninsula. This allowed Russia to maintain its position as an energy superpower. This must also be seen within the context of its use of energy supplies as a weapon against the West, e.g., against Germany. The last hope of using interdependence as a factor for political stability was dashed in 2022 at the latest, when Putin collectively referred to the West as a "strategic enemy".

The China Factor

However, the People's Republic of China revealed its own northern ambitions and proclaimed itself an "Near-Arctic State" before presenting its "Polar Silk Road" project. China has been an observer state of the Arctic Council since 2013. Beijing has also attempted to manipulate the governmental structures in the Arctic in its own interest by advocating for the "internationalisation" of the region. At the end of August 2022, NATO Secretary General Jens Stoltenberg warned about the threat to regional security that was posed by Beijing's plans in the Arctic. He emphasised that China was investing billions in dual-use energy infrastructure and scientific research projects, while simultaneously planning to build the world's biggest fleet of icebreakers. From NATO's point of view, this is made even worse by the fact that Beijing and Moscow had agreed to intensify their practical cooperation in the Arctic – just before Putin began his war against Ukraine.

Beijing's increasing influence is evident in Chinese commercial shipping along the Northern Sea Route, in addition to its 2.5 billion US dollar

investment to improve the port infrastructure of Arkhangelsk. Its influence is also manifested in increasingly large, joint Sino-Russian military exercises and the cooperation between their two coastguards in the Bering Strait and the Chukchi Sea. Economic governance and security policy are clearly becoming increasingly conjoined in the Arctic region.

NATO's response

The Alliance has recalibrated its Arctic strategy since Finland and Sweden joined NATO after the start of Russia's full-scale invasion of Ukraine. The goal is to increase military capabilities by means of additional exercises and surveillance activities, strengthen partnerships, and secure critical infrastructure such as undersea cables and trade routes. This is taking place against the backdrop of an increasingly hostile strategic landscape and the ever-increasing impacts of climate change, including ever-longer periods of ice-free water in the Arctic. The NATO member states realise that in this case, presence is synonymous with sovereignty.

Similarly, in 2024 the US Department of Defense announced a 4.1 billion US dollar plan to increase US security by having a greater presence in the Arctic. In 2025, Denmark announced an investment programme for its navy amounting to 614 million US dollars. At the same time, NATO is developing advanced drone and satellite technology to monitor the "grey zones" in the Arctic. In order to "maintain stability and guarantee freedom of shipping" and ensure that the circumpolar region, i.e. its land, waters and natural resources, remains "governed by international law", the defence of the Arctic has now become a declared strategic imperative of NATO.

Key Messages

- Climate change has an impact that is four to seven times stronger in the Arctic than the global average, and is exacerbating the geopolitical rivalries over resources.
- The former cooperative climate of the Arctic Council has broken down since the start of Russia's war of aggression and in view of increasing great power rivalry.
- Russia has been pursuing a massive remilitarisation of its Arctic territories since the 2000s, and uses energy policy as a geopolitical tool.
- China has declared itself a "Near-Arctic State", pursues economic and strategic interests with the "Polar Silk Road" and is intensifying its cooperation with Russia.
- The increasing interlinking of business, research and security policy increases the strategic importance of the region.
- NATO has realigned its Arctic strategy following the accession of Finland and Sweden with a focus on deterrence, surveillance and protection of critical infrastructure.
- The defence of the Arctic is now regarded as a NATO strategic imperative to ensure stability, freedom of navigation and the international legal order.
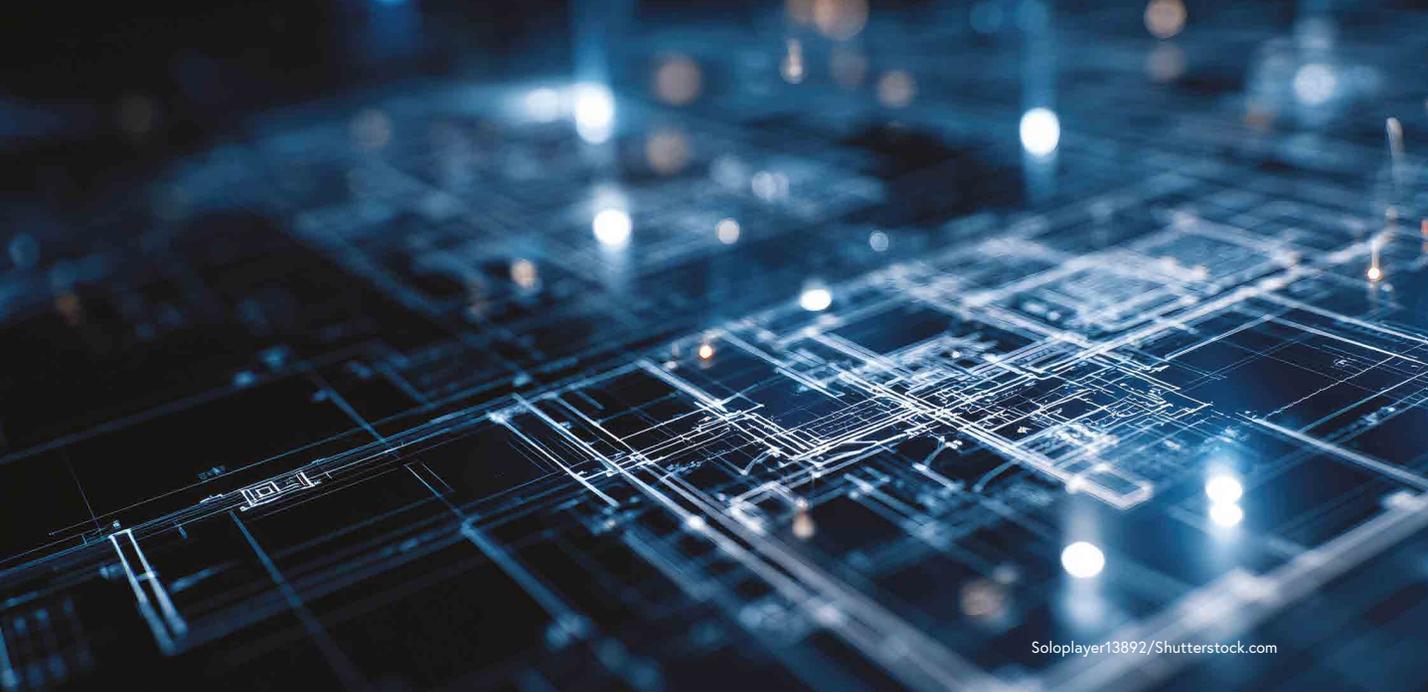
The Power of Big Tech

Risks for state and security

Johannes Späth

The increasing use of artificial intelligence (AI) in government structures, especially in the US, is driving a growing shift of power from governments to private technology companies. This is gradually creating a structural dependency that has a significant impact on political decision-making processes and data control. The transatlantic pressure to deregulate renders Europe doubly vulnerable. One the one hand, dependence on US providers; on the other hand, imported algorithmic biases, which can exacerbate societal divisions and human rights concerns.

In 2025, governments across the globe moved from isolated AI pilot projects to large-scale experiments using artificial intelligence in government operations. This reflected the growing role played by algorithmic systems in key government activities. The US in particular has changed its approach to Big Tech during Donald Trump's second term

as president. While US President Joe Biden's administration focused on antitrust law and regulatory safeguards, the Trump administration has pushed for industry deregulation and for the rapid introduction of AI across all federal agencies. For example, the General Services Administration signed contracts with the AI companies Anthropic and OpenAI to provide all government agencies with leading AI models at the symbolic price of one dollar per year. This is an unmistakable sign of the desire within the industry to gain a foothold in the governance field.

Use of AI is most clearly visible in the recently rechristened Department of War and the Department of Homeland Security, which have awarded contracts worth billions of dollars for the development of "agentic AI" prototypes. These systems are already used for intelligence analysis, automated surveillance, profiling in the field of migration, battlefield analysis, and, increasingly, for the evaluation and weighing of options for diplomatic and military action. Therefore, Big Tech should no longer be viewed solely as a contractor, but rather as a structural component of US decision-making. This trend is expected to intensify in 2026.

The power of data

This interconnection creates potential dependencies and suggests a creeping shift in power from national to private actors. Once government processes are reliant on proprietary systems, change becomes problematic: Retraining employees, reformatting data, and redesigning processes are enormous obstacles. The sensitive information in this system binds institutions even more closely to these providers.

AI models remain the property of private companies, which allows them to exert influence on policy-making through control over software updates and fundamental design decisions. If algorithms become the primary interface for the analysis of possible courses of action and the setting of priorities, the limits of political decision-making will be determined by those who control these algorithms. This not only represents a new tool for governance, but also the creation of a new foundational tier of power: the power of data. An (infra-)structural force that predetermines what states consider rational, possible or relevant, on the way to competing with traditional forms of political authority.

The current political climate seems to be increasing this risk. In order to compete with China in the technological sphere, there is a focus on speed, which, combined with a generally optimistic attitude towards technology, results in decisions favouring the acquisition of immediate abilities over strategic autonomy.

Implications for Europe

Developments in the US are creating immediate challenges for Europe. Washington's Big Tech-friendly policies mean that EU regulations such as the AI Act and the Digital Markets Act (DMA) are increasingly seen as hostile measures against American "national champions". Trump's threats of retaliation underscore the extent to which corporate interests have mutated into both the tools and content of geopolitical pressure. Exporting American AI systems globally has also been declared a strategic priority. The US is urging partner countries to adopt American models, and to minimise regulatory differences.

Due to its striking digital dependence on the United States, the EU finds itself in a poor negotiating position *vis-à-vis* these power projections. Approximately 85 per cent of European governments' productivity software is provided by the US company Microsoft, while critical infrastructure – including military communications – is reliant on US cloud services. Austria and other smaller EU member states are particularly vulnerable to unilateral technology shutdowns or coercive measures.

Furthermore, by importing American AI and US-based social media platforms, Europe is also importing their algorithmic biases. AI models inevitably reflect both the biases embedded in their training data and the design decisions made by their developers. If these AI models were to be used more intensively, these biases would also influence European governance. There are undoubtedly differences in interests between US technology companies and European governments. These companies often favour maximum freedom of expression at the expense of regulating hate speech or discriminatory content, while European standards place greater emphasis on the protection of vulnerable groups.

The critical issue here is that systematic discrimination and polarised opinions caused by algorithmic distortions are not just a human rights

concern. There is a risk that these could be used as a strategic instrument of hybrid warfare by deliberately deepening social divisions and undermining trust in state institutions. Europe is therefore doubly vulnerable due to its technological dependence on US providers and the import of algorithmic biases.

Ways out of the sovereignty trap

Targeted investment in Europe's digital sovereignty is required to address these vulnerabilities and dependencies. To reduce its dependence on US providers, the EU must expand its own AI and cloud industry, strengthen independent data centres, and develop open-source alternatives. The decisions made for example by Denmark or the Austrian Armed Forces to switch from Microsoft digital systems to open-source infrastructures show possible approaches for the future. For smaller EU countries in particular, including Austria, these initiatives are not optional – they are essential to guarantee democratic autonomy and security in the age of algorithms.

> **Key Messages**
> - Big Tech is an increasingly significant structural power factor in government decision-making processes. This creates potential dependencies and indicates a creeping shift in power from national to private actors.
> - The growing influence of Big Tech on Washington is causing a structural fusion of corporate interests and US foreign policy.
> - US technology companies are evolving into tools of geopolitical strategy, putting pressure on European regulations in particular and transatlantic relations as a whole.
> - Europe is doubly vulnerable due to its technological dependence on US providers and the import of algorithmic biases that pose risks to society and human rights.
> - Investments in proprietary AI, cloud and open-source infrastructure offer a way out of the digital sovereignty trap.

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Current challenges for international law

Alexandra Duca

International law is currently under considerable pressure. From a European perspective, there are four main developments characterising the current threat situation and posing new challenges. These include geopolitical power shifts, hybrid forms of conflict and use of new technologies, the exploitation of law for political purposes, and the fragmentation of multilateral structures. The key question is whether existing international law can cope with the new forms of government and intergovernmental action.

Authoritarian states such as Russia and China are increasingly challenging the existing rules-based international order through the selective application of international law. Since the start of Russia's war of aggression against Ukraine, which constitutes a flagrant violation of the prohibition of the use of force enshrined in Article 2(4) of the Charter of the United Nations, there has been a clear trend towards rearmament among European states. This is evident, for example, in in-

creased defence spending, as well as in several countries withdrawing from important international disarmament treaties such as the Ottawa Convention banning anti-personnel mines.

A test for international law

Although EU and NATO member states are not legally involved in any armed conflict, they are certainly confronted with hybrid forms of conflict that increasingly blur the line between war and peace. Cyberattacks, disinformation campaigns and influence operations, as well as airspace violations by drone overflights, challenge states to respond to threats which do not meet the criteria for an armed attack. Therefore, they are not authorised to exercise the right of self-defence according to Article 51 of the UN Charter.

Furthermore, existing international law is being tested by ongoing technological developments. There is broad consensus within the international community that international law applies to new technologies such as AI and cyber activities, but the specific implementation and the possible need for additional rules and standards remain unclear.

In addition, international tensions and geopolitical bloc formation are weakening the capacity of multilateral institutions to act. International organisations such as the UN are increasingly being used as a stage for political rivalries. This also means that decisions are often made solely on the basis of strategic interests and reduced to minimal compromises. The UN Security Council is deadlocked on many issues and unable to act. This not only impairs the international community's ability to respond effectively to global crises and security threats, but also risks that the institution loses its central role in peacekeeping.

Role of the US

Since the end of the Second World War, the US has been regarded as a pillar of the international order. Its economic, military and political power has not only had a significant impact on institutions such as the UN, NATO and the World Trade Organisation, but has also turned the US into the cornerstone of international law. In light of recent events

such as the inconsistent stance taken by the USA in armed conflicts, the resurgence of the "America First" movement and the declining willingness to engage in multilateral cooperation, this role is being questioned.

Without US funding and involvement, many international organisations no longer have the capacity to act. At the same time, it can be expected that other great powers such as China and Russia will exploit the resulting gap to further expand their influence, which would accelerate the fragmentation of the global order. This fragmentation risks causing international organisations to lose their unified basis for action and that conflicts will increasingly be handled bilaterally.

A decline in US participation in multilateral forums could also trigger a domino effect and risk structurally weakening the international legal order. If Washington, as the "guardian of the Western world order", delegitimises international institutions or ignores their decisions, it provides other states with a political excuse to do the same. This could lead to an erosion of trust in both the US and multilateralism as a whole.

Strengthening international law through regional cooperation

However, current developments also show that, beyond hegemonic structures, new avenues are opening up to consolidate the normative and practical effectiveness of international law and the international order itself. International law has a normative authority of its own that transcends power politics. Even states that violate international law often attempt to legitimise their behaviour with legal arguments. This demonstrates that international law remains a common point of reference in international politics. However, in order to ensure its effectiveness even in times of crisis, regional organisations must be strengthened as a matter of priority.

The EU plays a particularly important role in this regard. It can support the defence of the rules-based international order and actively contribute to its continuing development. The EU is characterised by binding legal norms and enforceable obligations and demonstrates in particular

that lasting stability cannot be based on coercion or power, but rather must be based on common rules, institutional control and trust. In times of growing geopolitical tensions, the EU also functions as a mediating force and remains an anchor of stability, insisting on compliance with international law and focusing on diplomatic conflict resolution.

Europe can strengthen the confidence in international law by adopting credible values-based policies. This means that human rights, the rule of law, and transparency should not only be defended rhetorically, but also consistently implemented in trade, development and security policy. Europe can only act as a driving force for a rules-based, multilateral world order beyond its geographical borders if it is perceived as a credible and reliable actor.

Key Messages

- Power politics, technological upheavals and institutional paralysis pose new challenges for international law.
- The withdrawal of the US from international institutions weakens their authority and capacity to act.
- International law remains a common point of reference for the international community and, despite recurring crises, continues to serve as a constant.
- Regional alliances can help to stabilise the situation.
- Europe can be a driving force behind a new rules-based order and strengthen the effectiveness of international law by setting an example.

3
Crises and conflicts around Europe

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Europe's Security environment in 2026

Günther Barnet

In 2026, the "arc of crisis" around Europe continues to be affected by war, displacement, hunger and poverty. The West's substantial withdrawal is worsening both the living conditions of people on the ground and the stability of Europe's security environment. The global uprising of "Generation Z" is drawing nearer, intensifying external risks as well as risks within Europe. Terrorism in and migration to Europe will increase noticeably in the medium term. Due to the more effective power projection of non-European strategic competitors and rising economic weakness, it is becoming increasingly difficult for the EU to contain risks.

The Middle East: chaos or conflict resolution?

Two years of war between Israel and its enemies and the upheaval in Syria have drastically changed the lines of conflict without achieving

lasting peace. The Palestinian question, Lebanon and Syria all highlight the weakness of the international community and the inconsistency of the EU. The withdrawal of the United Nations Interim Force in Lebanon (UNIFIL) by the end of 2027 at the latest, enforced by the US, could, in the worst-case scenario, lead to a return of civil war. The Israel Defence Forces' (IDF) invasion of the Golan Heights, which violates international law, renders the mandate of the United Nations Disengagement Observer Force (UNDOF) meaningless, and despite the involvement of key Arab states, the "Trump Plan" for Gaza is not a viable plan for coexistence for the time being.

Large sections of the Israeli political establishment are committed to preventing the creation of a sovereign Palestinian state and to annexing all territories. Illegal settlement activity in the West Bank is advancing relentlessly, preventing both a return to the Oslo status quo and reconciliation with and between Palestinian groups. Israel is banking on "clanisation" and armed conflict among the Palestinian population and with possible stabilisation forces. Internal Palestinian-Arab disunity is being used to legitimise Israel's actions, also *vis-à-vis* criticism from Western allies – but above all to buy time before the next armed conflict.

In Syria, forces are irreconcilably and resolutely opposed to each other. Support of the various groups by the regional powers and the US is the determining factor whether the situation will stabilise or escalate. If US support for the Syrian Kurds were to decline significantly, without a trade-off with Damascus and Ankara and to their detriment, this could open up the possibility of new alliances, including with Iran, and a broader resurgence of terrorist forces. The land corridor used to support the former "axis of resistance" has been largely cut off for Iran, and its air defence capabilities have been permanently eliminated. Iran's withdrawal from the nuclear negotiations makes attacks by Israel once again likely. Anything is possible, from de-escalation to renewed conflagration. Türkiye is benefiting from this development and is pursuing targeted repatriation to Syria and the expansion of its influence in the eastern Mediterranean.

Civil wars and power struggles on both sides of the Red Sea

The signs point to uncertainty both for the stability of the anchor states Jordan and Egypt, as well as for the fragile Iraq. In the long term, this also applies to the Gulf States, whose economic expansion is influenced by developments in the region and, in particular, by the Straits, which are equally important for Europe. Their consolidation with Iran and the balanced relationship between China and the US in particular are therefore the determining factors in their actions. Israel's attack on Hamas in Qatar has led to a largely unified stance among the Gulf States on reducing conflict in the Middle East. There is great fear of mass exodus due to war, water shortages and impoverishment.

The pursuit of regional military power projection has contributed to escalation on both sides of the Red Sea. In the Yemeni civil war, in Sudan – currently the world's biggest humanitarian crisis – and in the wars from Ethiopia to Somalia, influence is being exerted in an inconsistent manner, with no end in sight. On the contrary, countless mercenary groups and gangs, whose ties to "terrorist organisations" are often blurred, are fighting in various conflict zones with the help and on behalf of various regional powers. Russia exploits this situation to its advantage and, despite the setback in Syria, maintains good relations with many Arab and African states based on mutual interests. There is a major economic benefit for all sides, which is why pressure from the West is mostly ignored. In most cases, this is counterproductive and drives regimes that gained power in a coup into the arms of Russia, but also China, Türkiye and other powers.

Chaos in the Sahel and authoritarianism in (North) Africa

This also applies to large parts of the rest of Africa. The chaos in the Sahel, catalysed by the military withdrawal of the EU and UN, poses a challenge not only to fragile countries such as Ghana and Senegal, but also to North African countries. The deteriorating rule of law and human rights situation are rightly criticised. Meanwhile, Europe is focusing on managing migration along the southern Mediterranean coast and tackling the conglomerate of organised crime and terrorist net-

works. In doing so, it cooperates with "friendly" regimes. The accusation of "duplicity", used by Russia and others, reinforces the alienation from Europe and reduces its influence.

In the short term, the EU's proposals are less effective than those of Russia or Türkiye. Regimes focused on maintaining power are engaged in a "struggle for survival" against increasingly successful rebel groups, which is why they seek negotiated solutions with them. Unemployment, climate change, large-scale agricultural practices, illegal resource extraction and severe environmental pollution are driving young people onto the streets in all regions – most recently in Morocco, Madagascar and Kenya. Violent clashes between the police, the opposition and protestors is expected to increase. A cross-regional "Generation Z uprising" amplified by social media is a possible new risk; it could topple further regimes and also materialise in Europe through diaspora and ideological solidarity groups.

The eastern arc of crisis

Armed conflicts remain on the agenda in Eastern regions. There is considerable tension between Afghanistan and Pakistan, which could flare up again. The spread of jihadist groups such as the Islamic State in Khorasan Province (ISKP) to other parts of Central Asia has so far been prevented, mainly through China's influence. The threat of war between Azerbaijan and Armenia was largely contained as a result of mediation by the United States and Türkiye and was curbed at Iran's expense through economic efforts. Georgian and Armenian politics are becoming increasingly authoritarian, which also contributes to these two states' alienation *vis-à-vis* NATO and the EU. Russia's unreliability and its dwindling influence could open up opportunities for Europe. However, the focus on energy supplies from Kazakhstan and Azerbaijan determines the behaviour of many EU countries, even if strengthens Türkiye and fosters new dependencies.

A violent expansion of the Ukraine war into the Republic of Moldova has not materialised. The country remains deeply divided after its elections, leaving it vulnerable to continued hybrid destabilisation attempts by Russia. Similar methods are increasingly likely to be directed at European states, and provocative confrontations, similar to those

seen during the Cold War, are likely – partly in order to test the West's response capability and solidarity. Whether a direct attack on the West will be realistically considered in, the medium term remains disputed. The risk increases as Russia fears internal collapse due to exhaustion. The signs of this are difficult to assess, although verbal and actual re-armament on both sides continues and extends even into the Arctic. Russian threats can only be contained from a position of strength. Simultaneously enhancing military capabilities while influencing realistic, negotiated solutions, therefore reduces the likelihood of any form of armed conflict between the West and Russia.

A ceasefire or even peace between Ukraine and Russia will also depend on the level of US commitment. US dominance in conflict resolution decision-making remains unchanged across all regions, for better and for worse. By contrast, Europe's economic weakness and reluctance to deploy its own robust forces in all conflict regions pose the greatest risk.

Key Messages

- Despite the ceasefire, renewed conflict in the Middle East is possible at any time. Chaotic conditions are taking ever deeper hold.

- Israel's strategy includes deterrence, forward defence, the fragmentation of Palestinian-Arab unity, and influencing public opinion. The aim is to prevent Palestinian statehood and to buy time for future military engagements.

- Türkiye is cautiously capitalising on its growing opportunities, while Iran and its allies are attempting to consolidate their position. New alliances are possible.

- Europe is unlikely to develop a coherent policy towards the Middle East and is undermining its own credibility by tolerating violations of international law and applying double standards towards authoritarian Islamist regimes. However, the expected prospect of migrants returns is slim.

- Armed conflicts on both sides of the Red Sea continue to spread, partly due to the influence of regional powers. The disruption of global trade routes persists and destabilises fragile states. Chaos is also spreading in the Sahel, fuelling further upheavals and promoting authoritarian structures in the surrounding regions.

- Europe's loss of influence continues in almost all crisis regions and is exacerbated by economic weakness, strategic dependencies, a low willingness to take risks in deploying robust armed forces, and inconsistency. One measure of the EU's capability to act within the framework of the Common Security and Defence Policy will be, inter alia, the effective support provided to Lebanon following the withdrawal of UNIFIL. Provocations between Europe and Russia will increase in 2026, but not to the point of conventional war.

- The dominance of the US in decisions on conflict resolution or stabilisation remains unchanged. This influence is decisive for the outcome of Russia's war of aggression against Ukraine.

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The War in Ukraine

Europe in the age of discord

Loïc Simonet

The Russian war of aggression against Ukraine is its fourth anniversary. Since the conclusion of the unsuccessful summit between Donald Trump and Vladimir Putin in Alaska on 15 August 2025, the Kremlin has considered it advantageous to prolong the war. At the same time, Russia appears to be gaining momentum.

Putin's regime did not initially expect its war of aggression against Ukraine to be so protracted. However, Russia now has an interest in seeing it continue. The political elites are now more dependent on the Kremlin than ever before. For many Russians, the war has also become an opportunity for social advancement, as it partially compensates for the wealth gap between cities and rural areas. By promoting the military-industrial complex, regional industrial centres are revitalised, at least indirectly. At the same time, hundreds of thousands of men on the

front lines and their families in the poorest regions of Russia receive generous remuneration.

Russia's long war

Since 2022, Moscow has been integrating the knowledge generated by the defence industry, universities and soldiers throughout the entire chain of command. The military institutionalises its expertise, and defence equipment manufacturers and research institutions are focused on supporting the war effort. This "stability" would be jeopardised by the fighting coming to an end – and stability is the guiding principle of Russian President Putin, who has been in power for over a quarter of a century. Nevertheless, the war of attrition is intensifying on all fronts. Russia is constantly attacking Ukrainian civilian infrastructure. Drone and missile strikes reached record levels in September 2025. By causing continuous damage over a longer period of time and wearing Ukraine down, Russia aims to achieve its strategic goals gradually.

However, Russian troops have not succeeded in gaining control of Ukraine. The slow advance on certain sections of the front proved even more difficult than expected, and the losses against the numerically inferior Ukraine are heavier than anticipated. Russia has neither succeeded in capturing the strategically important city of Pokrovsk nor achieved any significant breakthrough. On the contrary: Large parts of Ukrainian territory could not be captured, and at the current pace, it would take approximately 38 months to occupy the territories claimed by Russia. Given the resources deployed and the losses suffered, Russia's inability to advance further is already indicative of a form of defeat.

Although the Russian economy has not been brought to its knees by the 19 rounds of international sanctions, the war effort is a heavy burden. The country is experiencing an economic downturn and has had to slightly reduce its defence budget for 2026. However, it remains at a substantial eight per cent of its GDP. The budget deficit is increasing dangerously. Russia's oil revenues are also shrinking. Despite circumventing international sanctions, they fell by 19 per cent in the first few months of 2025, partly due to Ukrainian drone strikes on Russian refineries. In August 2025, the annual inflation rate stood at 8.1 per cent.

Overall, the Russian economy is on the brink of recession, as Minister for Economic Development Maxim Reshetnikov has also acknowledged.

Ukrainian surprises are possible

Ukrainian forces are holding their ground in Donbas. At the end of September 2025, Ukrainian forces managed to achieve modest successes in the Sumy region, thereby refuting the Russian narrative that its advances were "unstoppable". The Ukrainian drone strikes, such as those on Russian oil refineries, show that Kyiv is prepared to cause a degree of "strategic suffering" that renders the continuation of the war prohibitively costly for its adversary. Without having a large fleet of its own, Ukraine managed to repel the Russian navy in the Black Sea – again thanks to its drone capabilities. *Operation Spiderweb*, a covert drone strike deep inside Russia on 1 June 2025, became a textbook example for special forces worldwide.

Nevertheless, Ukrainian troops are exhausted and the armed forces would need three times as many soldiers to be able to rotate them from the front line. At the current rate of mobilisation, it will not be possible to compensate for losses. Furthermore, Ukrainian cohesion is unravelling. In July 2025, the streets of Kyiv filled with people protesting against Ukrainian President Volodymyr Zelensky's attempt to weaken the country's independent anti-corruption agencies. Ukrainian democracy has therefore entered a fragile state, making it easier for Russia to sow chaos – as a shortcut to victory.

The US position

The policies of the US government during Donald Trump's second term as president are unpredictable. First, the White House stated that Ukraine had "no cards to play", then went on to say that Ukraine could well be in a position to take back all its territory from Russia and perhaps even more. The deadline set by US President Trump for a meeting between Putin and Zelensky passed without success on 1 September 2025. Then came Trump's U-turn. Suddenly, he no longer ruled out the possibility that the US could supply Kyiv with state-of-the-art weap-

ons. Tomahawk cruise missiles would enable Ukraine to strike most military targets in western Russia.

Will Trump's success in Gaza spur him on to bring about a ceasefire in Ukraine? The Gaza ceasefire is reviving hopes for peace in Ukraine, according to Zelensky. Meanwhile, German Chancellor Friedrich Merz has urged Donald Trump to end the war in Ukraine. Without tangible progress, however, it will become increasingly difficult to keep Trump's attention focused on Ukraine. Especially since this issue could cost him a lot of political capital and he would lose credibility if he failed. In this context, Trump's statement from 23 September 2025 in which he wished "both states" all the best and announced that he would supply weapons to NATO, which could do whatever it wanted with them, is worrying. Will Trump ignore the issue in future?

Europe in the grey zone

Tensions on the European continent rose sharply as a result of numerous airspace violations by Russia. In mid-September 2025, at least 19 Russian drones were identified entering Polish airspace. An even more serious incident occurred on 13 September 2025, when three Russian fighter jets entered Estonian airspace for over ten minutes before being escorted out of the airspace by a NATO formation. Similar incidents occurred in Denmark, Finland, France, Germany, Latvia, Norway and Romania. In early October 2025, drone sightings paralysed Munich Airport for several hours. At the same time, Russia conducted an unprecedented disinformation campaign in Poland, claiming that Ukraine or NATO itself was behind these incidents.

Although Moscow denies any involvement, these incidents appear to be Russia testing the readiness of NATO's collective defences. Given the US's ambivalent foreign policy stance, Putin will ask how far Europe is prepared to go in defending Ukraine. Russia knowingly and willingly operates in the "grey zone" of hybrid warfare: the space between peace and war. Germany's Chancellor Merz also emphasised: "We are not at war, but we are no longer at peace either".

Key Messages

- Russia is deliberately prolonging its war of aggression against Ukraine in order to secure political control and stabilise economic and social structures through the military-industrial complex.
- Despite heavy losses, Russia has not achieved any decisive military breakthroughs and is facing an economic recession.
- Ukraine is achieving limited tactical successes and making effective use of drone strikes, but is suffering from exhaustion, personnel shortages and internal political tensions.
- The Trump administration remains unpredictable, wavering between pressure on negotiations and possible arms deliveries.
- Russia is testing Europe's and NATO's response capability through hybrid attacks and airspace violations; Europe finds itself in a "grey zone" between war and peace.

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The Western Balkans between Integration and De-Europeanisation

Marie-Janine Calic

The enlargement of the EU to the southeast has been stagnating for years. The transformative power of the "European perspective" is waning. This has allowed a dangerous security vacuum to develop in the Western Balkans. Although the countries in the region still wish to join the EU, they are also looking at alternatives. Geopolitical competitors – primarily China, Russia, Türkiye and the Gulf States – have gained influence. Reforms, such as the implementation of the Women, Peace and Security agenda, often exist only on paper.

For a quarter of a century, the European Union has repeatedly promised to allow all Western Balkan countries to join the EU under certain conditions. However, south-eastern enlargement has stagnated since Croatia joined in 2013. Serbia and Montenegro have been negotiating

for years, North Macedonia and Albania only began membership ne-
gotiations in 2022, and Bosnia and Herzegovina has been in line for
negotiations since 2024. Only Kosovo has not yet been granted candi-
date status due to not being recognised by five member states. Conse-
quently, the "European perspective" has lost credibility and transform-
ative power. According to surveys, only slightly more than half of the
population in the Western Balkans still feels connected to the EU – in
2024, the figure was 54 per cent.

Geopolitical competitors

Meanwhile, the EU's geopolitical competitors, especially China, Rus-
sia, Türkiye and the Gulf States, have gained political, economic and
ideological influence through cheap loans, media disinformation and
religious missions. Russia stresses Slavic-Orthodox solidarity, but pri-
marily uses the Balkans as a stage to demonstrate its role as a shaper
of world politics and to thwart Western stabilisation efforts, especial-
ly in Bosnia-Herzegovina and Kosovo. Türkiye and the Gulf States are
promoting Islamisation, while China is implementing infrastructure pro-
jects worth billions as part of its Belt and Road Initiative. As these are
financed by loans, dangerous dependencies have developed. The EU
may still be the most important trading partner for the Western Balkan
countries, but in the medium term, China could succeed in reorienting
them towards its market and possibly also its policies.

Within the EU, there are considerable reservations about accepting
new members until institutional reforms have been implemented. One
example of this would be majority decisions in foreign policy. For politi-
cal reasons, Brussels declared Ukraine, Moldova and Georgia candidate
countries in 2022, bypassing conditionality and thereby raising critical
questions about the functionality and finality of the Union.

Slow pace of reform

However, the pace of reform in the Western Balkan countries has also
slowed. Russia's war of aggression against Ukraine is having a signif-
icant political, economic and psychological impact on the region. The
political class and public opinion are divided into pro-European and

pro-Russian camps, which prevents governments from complying with often painful EU conditions. Energy and food prices have risen sharply. Populist and nationalist forces are taking advantage of people's existential fears by trying to capitalise politically on conflicts with neighbouring countries, for example in Serbia and Kosovo or in North Macedonia.

For all these reasons, a dangerous security vacuum has emerged in the Western Balkans at the crossroads between the EU, NATO, Russia and Türkiye. Interested powers have also opened a gateway for propaganda, disinformation and cyberattacks. Organised crime, illegal migration and extremist networks remain unchallenged. Last but not least, there is a shortage of economic prospects, which is driving many young, well-educated people to emigrate. This brain drain, however, weakens the innovative strength, value orientation and reform capacity of their countries of origin – and thus, in turn, the EU integration process.

Countermeasures?

The EU has identified the problem, but lacks effective countermeasures. More precisely: It lacks political unity. In order to reduce its dependence on Russia and the United States, the EU would have to press ahead with consolidating its structures, for example in Common Foreign and Defence Policy or energy market policy. It would also need to strengthen Common Foreign and Security Policy, which includes a credible neighbourhood and enlargement policy.

Another conceivable option would be to promote the integration of certain sectors, such as energy, transport, the digital market, cyber defence, border protection and educational exchanges, before EU membership is granted. However, if European rule of law and governance criteria are neglected as a result of selective integration, the functionality and credibility of the EU would be called into question even more. But how can pro-European attitudes in the Western Balkan countries be stabilised without sacrificing values and standards to geopolitical constraints?

Current developments

While new citizens' movements such as "Protestiram" in North Macedonia and the "#1od5miliona" protests in Serbia have emerged, the influence of civil society remains limited. These movements have diverse demands. There are also non-governmental organisations in all Western Balkan countries that fight for the rule of law and against corruption, or that promote European integration, democracy, education, regional cooperation, inter-ethnic dialogue and conflict prevention. However, many are dependent on foreign donors, including those who promote anti-European or nationalist agendas within civil societies.

All of the Western Balkan states have adopted at least one National Action Plan (NAP) for the implementation of UN Resolution 1325. This happened in Serbia and Bosnia and Herzegovina in 2010, in North Macedonia in 2013, in Kosovo in 2014, in Montenegro in 2017 and in Albania in 2018. They have committed themselves to increasing the proportion of women in their security forces, involving them in peace missions, protecting them from gender-based violence in conflicts and strengthening their participation in society. The focus on gender is also being incorporated into police training and military operational planning. However, there are still gaps in implementation. Responsibilities are unclear, and there is a lack of funding commitments and clear indicators to monitor the implementation of the NAPs. The gender perspective is often regarded as something imposed by the West, and indeed, many NAP projects are led and funded by foreign donors.

In summary, it can be said that: the EU currently appears ill-equipped to deal with the complex risk situation in the Western Balkans. While the prospect of joining the EU is losing credibility, its geopolitical competitors are growing stronger.

Key Messages

- The EU must restore the credibility of its southeastern enlargement in order to remain geopolitically effective.
- EU reforms and its enlargement policy must go hand in hand.
- Civil society can only bring about necessary reforms with the support of governments and EU member states.
- When it comes to implementing the Women, Peace and Security agenda, the region lacks political will, financial sustainability and social acceptance.

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Destabilisation Trends in South-Eastern Europe

Florian Bieber

Profound political crises in Bosnia-Herzegovina and Serbia are creating considerable uncertainty in the region, which could lead to an escalation of the situation. At the same time, they offer an opportunity for structural improvements. While some countries, including Montenegro and Albania, are making progress towards EU membership, the other Western Balkan countries have no realistic prospects of joining the EU. However, there are no signs that the fundamental challenges the region is facing – authoritarian rule, weak rule of law and unresolved conflicts – are being addressed.

The political situation in the Western Balkans is characterised by instability and an institutional crisis. While Montenegro and Albania are making great strides towards EU accession, the EU expansion process is stagnating in the other countries. However, even if it is feasible for Montenegro and Albania to join the EU before the end of the decade, obtaining the approval of all member states represents a significant and, in

some cases, unpredictable hurdle. Neither does this mean that the rule of law and democracy are progressing equally in both countries.

Reforms between irregularity and stagnation

In Albania, the accession process is being driven by Prime Minister Edi Rama, which explains why the process is being accelerated, but also why Rama's rule is increasingly taking an authoritarian turn. Control of institutions is firmly in his hands, and there is little room for critical discussion. This trend has intensified in recent years, which means that the EU accession process has tended to reinforce authoritarian behaviour.

In Montenegro, too, the reform process is uneven, although no single person dominates the political system as strongly as in Albania. The accession process is therefore currently being driven more by the Commission's conviction that successful accession processes will maintain the EU's credibility in the Western Balkans. Furthermore, geopolitical considerations play a role in the process, which is detrimental to democracy and the rule of law.

In the other countries in the region, the EU enlargement process has come to a standstill. Most citizens no longer believe in the process, even though there is a clear majority in favour of EU membership everywhere except Serbia. North Macedonia is being blocked by Bulgaria because the required constitutional amendment has no support in the country and is a product of nationalist demands from Bulgaria. These events accelerated the takeover of power by the conservative nationalist Democratic Party for Macedonian National Unity (VMRO-DPMNE). This means that, after settling its disputes with Greece, North Macedonia is once again being prevented from joining the EU by the nationalist position of a neighbouring country.

Developments in Serbia

Developments in Serbia have a strong impact on the region. The protest movement that began in November 2024 following the collapse of the station canopy in Novi Sad has gained impressive momentum. Not only because of its duration, but also because it has mobilised hundreds of

thousands of citizens, even in small communities. The protest movement demonstrates the profound dissatisfaction with the regime. According to polls, a clear majority of the population supports the protests, which are calling for new elections in addition to an investigation of the accident.

The regime is increasingly resorting to violence and repression in its efforts to combat the protests, which, in addition to demonstrations, take the form of strikes, blockades and many other daily actions. Serbia has been in a state of emergency since November 2024. Regardless of the outcome of the protests, Aleksandar Vučić's regime is in trouble. If the regime succeeds in ending the protests, a more repressive climate can be expected in Serbia. Belgrade is already trying to bring the remaining critical media and NGOs under its control and destroy even the appearance of political pluralism. This is motivated by the protests and facilitated by the global political climate. The regime is backed by Russia and China.

The EU's position has been ambivalent so far, and the US under Trump is rather distracted, but could serve as a potential prop for the regime, as Trump's son-in-law Jared Kushner has business interests in Belgrade linked to the Vučić regime. The success of the protests is uncertain, and it is unclear what this means for Serbia's political future, as the protest movement is ideologically heterogeneous and there are no clear leaders. At the same time, the majority supports liberal democratic values and seeks closer ties with the EU.

Relations with Kosovo and Bosnia and Herzegovina

Relations with Kosovo pose the greatest challenge for Serbia. The negotiation process between the two countries has come to a complete standstill. Political instability in Serbia, but also in Kosovo following the 2025 elections, means that there is currently no interest or political will for dialogue on either side. Albin Kurti's government has lost much of its credibility due to its confrontational stance *vis-à-vis* the EU and the US, as well as the domestic polarisation in Kosovo since the elections. A breakthrough between the two countries is still a long way off. Kosovo lacks a government with a clear mandate, and in Serbia, Vučić is too weak politically to be able to compromise.

The political crisis in Bosnia and Herzegovina has intensified after Milorad Dodik, the President of Republika Srpska, was convicted and banned from holding public office for six years. An escalation ensued when Dodik attempted to disregard the ruling and further weaken the state. The outcome of the power struggle between Dodik and Bosnia and Herzegovina's national institutions is still unclear, but Dodik has less support than he did a few years ago, and an end to his 20-year dominance in the Republika Srpska is in sight. Even though the other political actors in Republika Srpska are hardly different from Dodik in terms of their nationalist positions, an end to the Dodik era would open up new opportunities for cooperation. For a long time, the dominant Croatian party in Bosnia and Herzegovina has relied on close cooperation with Dodik, which would also be compromised as a result. This could lead to a decline in Russia's influence in Bosnia and Herzegovina and an end to the total blockade of pragmatic cooperation at the national level.

Geopolitical consequences

Given the current developments, Russia stands to lose the most in the region. The end of Dodik and Vučić's rule would mean Russia losing important partners. Even if the relationship were maintained through the church and other cultural ties, Russia's influence and reputation would be damaged. China's influence would suffer most from Vučić losing power. Serbia was the most important target country for Chinese engagement in the region. Without good relations with Serbia, China would remain economically present, but its political influence would wane.

The greatest geopolitical uncertainty is the US under Trump. At present, the Trump presidency has hardly made a mark, but economic interests in Albania and Serbia are encouraging more authoritarian developments in the region. The clash with the EU means that under Trump, the US is not only a negative role model for the region, but could also become a disruptive factor in reform processes.

Key Messages

- Deep political crises in Serbia and Bosnia-Herzegovina are increasing uncertainty in the Western Balkans, but also offer opportunities for reform.
- While Albania and Montenegro are making progress, the other countries lack realistic prospects of EU accession; the rule of law remains weak.
- In Albania and Serbia, the concentration of power and repressions are leading to an exacerbation of democratic deficits.
- Mass protests against Serbian President Vučić are unsettling the regime in Belgrade, which is responding with force and receiving support from Russia and China.
- There is no progress in either Serbia-Kosovo relations nor in Bosnia-Herzegovina; Dodik's loss of power could open up new opportunities.
- If the authoritarian regimes were to come to an end, Russia's and China's influence would weaken, while the US under Trump would be an unpredictable factor.

Reorganisation efforts in the Middle East

Gudrun Harrer

On 7 October 2025, the second anniversary of Hamas's attack on Israel that triggered the war in the Gaza Strip, the old order and certainties in the Middle East had already collapsed. In 2025, Israel began not merely containing Iran and its proxies in the Arab world, but actively striking them. The Iranian uranium enrichment programme was severely damaged by the so-called Twelve-Day War started by Israel, in which the US also became involved. Since then, the US government under President Donald Trump has greatly increased its political involvement in the Middle East. In October 2025, Washington forced Hamas and Israel into a Gaza plan that also actively involves other countries within and outside the region.

In 2026, it will become clear whether the US draft for ending the Gaza war and rebuilding the Gaza Strip, which was still very sketchy when it was presented at the beginning of October, can be further developed.

In this context, contradictory scenarios appear to coexist. One possibility is the restoration of peace to the region by balancing the interests of the United States' partners and opponents with strong economic incentives, including for the internationally active private business community. At the same time, it is also possible that the plan could fail, causing he region to slide into even greater destabilisation.

Israel's serious tactical error occurred unexpectedly on September 2025, when it attacked a building in Qatar's capital, Doha, that housed Hamas officials. Israel, which had risen to become the undisputed dominant military power in the region by 2025, failed to achieve its goal of eliminating the Hamas representatives. This approach also allowed US President Trump to exert pressure on Israeli Prime Minister Benjamin Netanyahu in the interests of his Arab partners. Qatar's role as a safe haven for radical Islamic groups such as Hamas has long been viewed criticised by other Arab states, along with other aspects of Qatari policy. However, Israel's attack on a "major non-NATO ally" of the US, home to the largest US air base in the region at al-Udeid, caused outrage among other Arab US allies, ultimately strengthening Trump's leverage over Netanyahu.

Obstacles to the Gaza plan

As expected, Trump entrusted the work on the Gaza plan not only to US Special Envoy Steve Witkoff, but also to his son-in-law Jared Kushner, who has massive business interests in and good relationships with Arab Gulf States. Several elements of the plan will remain vulnerable to crisis in 2026. For example, the administration of the Gaza Strip, intended to re-establish the Palestinians as stakeholders, the deployment "International Stabilization Force", and the disarmament of the terrorist organisation Hamas along with the dismantling of its infrastructure.

Although the US President had sufficient authority in autumn 2025 to prevent the open collapse of the ceasefire, this did not equate to an end to the violence. Paradoxically, Trump's plan relies on cooperation of UN institutions for its implementation, both in the humanitarian and political spheres, for example through the UN Security Council. The EU, has often appeared paralysed with regard to the Middle East, will also be involved

in 2026 through its missions EUBAM Rafah and EUPOL COPPS in the Palestinian territories. More can be expected as the plan develops.

Should Trump's Gaza plan stall, the Gaza Strip could face a scenario comparable to that in southern Lebanon after the ceasefire agreement in November 2024: deadlock. This would mean that neither the disarmament and elimination of the respective terrorist militias – Hezbollah in Lebanon and Hamas in the Gaza Strip – nor the promised Israeli withdrawal would take place. This bears the potential of regular Israeli "punitive actions", parallel to growing militia activity, and therefore a constant threat of escalation.

This has strongly increased in Lebanon in autumn 2025. Although the government in Beirut made a clear political commitment to restoring the state's monopoly on the use of force and to reducing Hezbollah to a political party, it was barely able to implement this plan. One reason was growing polarisation, which could be regarded as bearing the threat of ethnic-religious civil war. Since the Islamist-led power takeover in Syria in December 2024, Sunni Islamists in Lebanon have also felt emboldened, which in turn makes Shiites from outside Hezbollah susceptible to radicalisation.

Current developments in Syria

Syrian interim president Ahmed al-Sharaa, a former al-Qaeda fighter in Iraq, was received by Trump at the White House in November 2025. One year after taking Damascus, the Syrian regime's situation and future prospects are mixed: On the one hand, Sharaa was well consolidated internationally at the beginning of 2026. The US contributed greatly to this. On the other hand, he has lost trust domestically, particularly due to ongoing problems with rebuilding and stabilising the Syrian economy. These problems are exacerbated by climate change, especially water scarcity. Minorities are apprehensive, following Islamist violence against Alawites, Druze and even Christians. The Kurdish Syrian Democratic Forces (SDF), established by the US to fight the Islamic State (ISIS), can no longer be as certain of Washington's support in their struggle for autonomy. This is partly because Trump is very receptive to Turkish and Arab arguments.

Trump's ambition to reorganise the region involves balancing the interests of external actors and Damascus in Syria, but also balancing their interests among themselves. Following the upheaval in Syria, Israel terminated the 1974 Disengagement Agreement and occupied parts of the south, using the protection of the Syrian Druze as a pretext to enforce its own security interests. Trump is attempting to broker a compromise not only between Israel and Syria, but also between Israel and Türkiye, which is Sharaa's protector, as well as between Türkiye and the Arab States. But Sharaa is also struggling to keep his own jihadist forces in check, who are irritated by his outwardly moderate and Syrian nationalist stance. There is therefore a risk that the exodus from Sharaa's former organisation HTS to ISIS will accelerate. ISIS activities are expected to increase in 2026 in both Syria and Iraq.

(De-)Stabilising factors in the region

The Iraqi parliamentary elections of November 2025 could potentially act as a destabilising factor. Forming a government after elections is usually a difficult and protracted process in Iraq. The Shiite militias in Iraq that are close to Ali Khamenei, Iran's supreme leader, have been weakened by the decline of the Iranian "axis of resistance" and have largely stayed out of the Israeli-Iranian conflict. This could change in the event of a new regional escalation, but also if their internal power claims are called into question after the elections.

In 2026, US President Trump is likely to intensify his efforts to bring more countries into the Abraham Accords, with Saudi Arabia remaining the main target. Even a comprehensive US-Saudi security agreement, possibly including F-35 fighter jets and certainly a civilian nuclear programme, will not satisfy Riyadh if the matter of Palestinian statehood vaguely mentioned in Trump's 20-point plan is not credibly pursued.

As long as Trump sticks to his plans, he will continue to categorically oppose Israeli annexations in the West Bank, which would at least jeopardise the existing normalisation agreement between Israel and the United Arab Emirates (UAE). Such a step by Israel would threaten the Jordanian royal family, while Egypt's regime has been somewhat strengthened by the role Trump envisaged for it in the Gaza plan. However, Egypt shares a concern with Saudi Arabia, the UAE and Israel:

irritation at Türkiye's growing influence in the Middle East. Specifically in Syria with Sharaa and through the leading role that Trump has assigned Ankara in the implementation of his Gaza plan.

> **Key Messages**
> - US President Donald Trump not only wants to enforce a solution to the Gaza war, but also to reorganise the entire region. This includes the official integration of Saudi Arabia into a security architecture with Israel.
> - Israel's direct attacks on Iran and its proxies did not damage or destroy its uranium enrichment programme.
> - If the points on the administration and security of the Gaza Strip, which have only been vaguely outlined, are not developed and implemented, the Gaza ceasefire could turn into a stalemate with the potential for escalation, comparable to the situation in southern Lebanon in 2025.
> - ISIS benefits from Syria's internal fragility and could gain further support in 2026 from frustrated jihadists who consider the interim president Sharaa too moderate. This could also have an impact on the region and beyond.

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Israel's security

Domestic, regional and international trends

Stephan Stetter

Two years after Hamas's attack on Israel and the war that Israel has been waging in Gaza ever since, the situation in the Middle East remains unstable and highly dynamic. Israel continues to be dominated by a power struggle between the government and parts of the Israeli population, while no lasting solution to the Israeli-Palestinian conflict is in sight. The Gaza war remains a key issue, as does the global polarisation caused by the terrorist attacks of 7 October 2023 and the Gaza war. Europe's role remains diplomatically important, but limited.

Two years after Hamas's attack on Israel and the start of the war in Gaza, which Israel has been waging ever since, the situation in the Middle East remains unstable and highly dynamic. At the end of September 2025, US President Donald Trump unveiled a plan to end the war, although at the time of writing, it is uncertain how some aspects

of the plan will be implemented. This proposed plan may also fail, as many peace efforts have before. With regard to Israel, four key security policy trends are emerging.

Domestic power struggle

First, a domestic power struggle has been ongoing for years between the nationalist-religious fundamentalist government and parts of the Israeli population. The initial popular protests were against judicial reforms which questioned the separation of powers, and subsequently for an end to the Gaza war, an end to the deployment of Israeli soldiers, and, above all, for the return of the hostages captured by Hamas. Israel's domestic politics have been deeply affected by the attacks of 7 October 2023 and their aftermath. This is because, as a result of the expansion of fighting to the north with Hezbollah in 2023 and 2024, tens of thousands of Israelis had to leave their homes and seek temporary shelter in the interior of the country, some of whom remain there to this day.

Surveys show that dissatisfaction with and distrust of the Netanyahu government is high among large sections of the population. At the same time, however, the political opposition lacks a clear message and has failed to outline any alternative (security) policy options. This domestic power struggle is expected to escalate in 2026, when elections to the Knesset are due to take place – not least because the government and the Prime Minister personally have reason to fear a loss of power. There is the threat of corruption trials, an investigation into the failures surrounding 7 October that could be detrimental to the government, and the loss of political power to enforce the territorial ambitions of the government and its supporters in Gaza and the West Bank.

Dynamic regional trends

This tense domestic situation is unfolding against a backdrop of highly dynamic regional and global trends. Secondly, the ongoing hardening of the Israeli-Palestinian conflict can be observed. Both the terrorist attacks of 7 October 2023 and the Gaza war left marks on both societies, affecting more than just the immediate conflict.t. Both Hamas' brutal attack on Israel and the dramatic humanitarian situation in Gaza

caused by the way Israel wages war have traumatised large sections of both populations.

This has further deepened mistrust between the two sides. Neither in Israel nor in the Palestinian territories is there any domestic debate about the parameters of a potential peace process and reconciliation with the other side. Hamas undoubtedly continues to pose a strategic threat to Israel, even if it has been weakened. With regard to the Israeli-Palestinian conflict, therefore, there is little prospect of change on the ground in 2026 – even under the ideal scenario of an externally imposed end to the war and the return of the hostages.

Israeli settlement of the Gaza Strip, which is supported by many members of the current Israeli government, appears to be off the table for now. However, this does not apply to the further escalation of the conflict with regard to territorial claims in the West Bank. Without a comprehensive peace process, which is not expected in the near future, the security situation is likely to remain tense even in the best-case scenario – the end of the Gaza war. In this situation, Israelis often feel threatened by the Palestinian side, and Palestinians often feel threatened by Israel, and rightly so.

Regional developments

Thirdly, in terms of the regional situation, Israel has achieved some military successes. Iran was weakened by the war in 2025, and Hezbollah in Lebanon was weakened even further by Israeli attacks. Despite Arab criticism of the Gaza war, no country has severed diplomatic ties with Israel. On the contrary, Arab States have worked together with the West in a "fluid alliance" to repel two Iranian missile attacks on Israel and have shown interest in the Saudi-French initiative for a two-state solution. One reason for this is that Israel's regional strategic position has improved significantly due to the weakening of Hezbollah and the fall of Syrian President Bashar al-Assad at the end of 2024.

The question will be whether Israel will be able to convert this primarily military-based consolidation into political and diplomatic capital. Without the end of the Gaza war, however, this would only be possible to a limited extent; in this case, it is more likely that coordination between

Israel and the majority of the countries in the region will continue, albeit below the threshold of close cooperation. All these countries share a geopolitical interest in ensuring that the Israeli-Palestinian conflict does not turn into an international regional conflict.

Israel's international position

Fourthly, this will also determine the future development of Israel's international position. The Gaza war is also a key element here. Israel is at the centre of often polarising protests around the world. These are driven by human rights concerns – which are justified – about the people in Gaza, but are also sometimes underpinned by a fundamental rejection of Israel and even anti-Semitism. Israel's government, in turn, is attempting to brand any criticism of its actions anti-Semitic, which is ultimately part of this strong global trend towards polarisation.

Without an end to the Gaza war, this polarisation is likely to increase. However, in terms of international politics, the situation is somewhat different: Criticism of Israel's actions in Gaza is also evident, for example within the region, but so is the desire for stability. There are strong geopolitical and geoeconomic interests in continuing to cooperate closely with Israel, including expanding relations within the framework of the Abraham Accords. The role of the US will be particularly important in this respect, as will the question of whether, as suggested in the security agreement between the US and Qatar signed in September 2025, it will align its strategic interests more closely with other countries in the region, such as Türkiye, Saudi Arabia, Qatar or the United Arab Emirates. Although this does not represent a fundamental shift away from Israel, it does indicate certain tensions between the US and Israel, which can even be observed within the Republican Party.

The EU occupies only a limited yet potentially significant role in the diplomatic landscape. France, in alliance with Saudi Arabia, has succeeded in making its voice heard. This underlines the importance of close strategic cooperation between Europe and the Gulf States. In the event of an end to the Gaza war, the EU and its member states can play a role primarily in financial and security policy niches, for example in the international coordination of the planned and extremely important disarma-

ment of Hamas and the destruction of the tunnel systems in Gaza. The question of recognising a Palestinian state will remain on the agenda.

Key Messages
- Two years after Hamas's attack on Israel and the war that Israel has been waging in Gaza ever since, the situation in the Middle East remains unstable and highly dynamic.
- The domestic power struggle in Israel is expected to intensify in 2026, when elections to the Knesset are due to take place.
- Both the terrorist attacks of 7 October 2023 and the Gaza war have left deep scars both on Israeli and Palestinian society.
- Without a comprehensive peace process, which is not expected to materialise in the short term, the security situation is likely to remain tense.
- Israel has had numerous military successes, for example against Iran and Hezbollah.
- The US will have a central role in the future. Whether the US will align its strategic interests more closely with other countries in the region is equally important.
- The EU occupies only a limited yet potentially significant role in the diplomatic landscape.

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Regional Power Struggles in the Middle East

Walter Posch

Following the fall of the Assad regime, the balance of power in the Middle East is shifting. Iran is losing influence, Türkiye is strengthening its position in Syria, while Israel is taking an ambivalent stance and maintaining pressure on various actors in the region. The regional conflict remains unresolved and complex.

The fall of the Assad regime in Syria changed the strategic equation in the Middle East. Iran's influence has declined, while Türkiye's influence now extends to Damascus and thus to Israel's sphere of influence. The new Syrian government under Ahmad al-Sharaa was recognised without hesitation – despite its jihadist roots and its inclusion on all international and national terror lists of Western countries, Türkiye, Russia and the Arab states. Even the Islamic Republic of Iran is attempting to maintain normal diplomatic relations with Damascus.

The new Syrian government is unable to address the country's major challenges on its own. Support comes primarily from Qatar and Türkiye. Türkiye is acting as a protective power and is seeking to consolidate its economic and political influence in Syria. At the same time, Ankara is trying to contain the Kurdish entity "Rojava", with the aim of peacefully disbanding it and integrating it into the Syrian state. The peace process with the Kurdistan Workers' Party (PKK) in Türkiye should also be understood in this context. Above all, however, Türkiye is committed to building up the new Syrian army. However, Israel, which eliminated Syria's strategic weapons systems immediately after Assad's fall, is opposed to this.

Caught in a Dilemma

Israel's stance towards the new leaders in Syria is ambivalent. On the one hand, there is the not entirely unfounded hope that jihadists from Sharaa's circle will assert their influence in Lebanon and open up a new front there against Hezbollah, Iran's most important ally. On the other hand, Israel has annexed the strategically important Golan Heights and is claiming southern Syria as a permanent buffer zone. Conscious of its weakness, the Syrian government avoided confrontation with Israel, for which it was criticised by its supporters. It was only after the outbreak of violence against the Druze and the subsequent Israeli intervention in the summer of 2025 that Sharaa criticised Israel and called for unity in the country.

Sharaa's attempt to portray himself as the president of all Syrians and as the protector of minorities failed. The government that emerged from jihadism is struggling to protect the rights of the Christian, Druze and Alawite minorities, as clearly demonstrated by the massacres in Latakia in the spring of 2025 and in Suwaida in the summer of 2025. Sharaa is therefore facing a dilemma: For economic reasons, he must present himself as minority-friendly to the West, a stance rejected by his base, which equates Alawites with the Assad regime. It can be assumed that the necessary reconciliation and reform processes will be delayed or obstructed by underlying and eruptive identity conflicts.

Between calculation and control

For Israel, Syria does not pose an immediate threat at present. That may change if Israel decides to intervene with ground troops. Despite the ceasefire, Israel will maintain military pressure on Hezbollah and, with international assistance, attempt to disempower and perhaps even disarm the organisation in Lebanon. At the same time, Gaza and the West Bank remain at the centre of Israeli politics. Despite at times sharp international criticism, Israel is continuing its harsh policy against Palestinians in Gaza, hoping that they will leave the country "voluntarily". So far, potential host countries have been unwilling to take them in, despite images of famine and mass misery.

Militarily, Hamas and its allies are still capable of attacking Israeli forces in the Gaza Strip, although they are unable to achieve a decisive victory on the battlefield. In addition to Gaza, the situation is escalating in the West Bank, where radical Israeli settlers, in alliance with right-wing extremist groups, regularly attack Palestinian villages and do not shy away from confrontation with Israeli security forces when these intervene. The constant pressure of the settlement movement will manifest itself politically in the annexation of further territories in the West Bank. This means that the Palestinian Authority (PA) is becoming increasingly irrelevant for both the Palestinian and Israeli populations. This explains why Israel is considering replacing the PA with smaller, regional authorities led by influential clans and tribal leaders.

Main enemy: Iran

At the strategic level, Iran remains Israel's main enemy. The military exchange between Israel and Iran in June 2025 did not lead to a decisive outcome. Israel accepted the deaths of over a thousand innocent Iranian casualties in order to destroy important nuclear facilities and kill the entire leadership of the Iranian armed forces as well as leading nuclear scientists. Iran, in turn, targeted key elements of Israel's critical infrastructure, such as refineries, military installations and research facilities. However, thanks to Israel's efficient civil defence system, less than 30 people were injured. The exchange concluded after the United States intervened, destroying three nuclear facilities, and Iran retaliated by striking the US air base al-Udeid in Qatar, with no fatalities reported.

Preceding the Israeli attack, the US and Iran had been engaged in talks about Iran's nuclear programme. The possibility of reviving the Joint Comprehensive Plan of Action (JCPOA), which was adopted in 2015 at the EU's initiative and unilaterally terminated by the US in 2018, was being considered. This plan regulated the implementation of easing sanctions; in return, Iran allowed inspections by the Vienna-based International Atomic Energy Agency (IAEA).

The background to this is Iran's civilian nuclear programme, which is being operated with Russian support under the Nuclear Non-Proliferation Treaty. The main point of contention is the uranium enrichment programme, which, according to international experts, is not required to this extent for a purely civilian programme. There are fears that this programme could be the technological gateway to the development of nuclear weapons. The Israeli – and later American – attack on Iran's nuclear facilities was intended to nip the development of a potential nuclear weapons programme in the bud.

From Israel's perspective, Iran must remain internationally isolated. Above all, important economic partners such as the EU should limit their relations with Iran. Thereby bringing the country one step closer to collapse. The nuclear issue is only one element here. Equally relevant is the fact that Iran is the last remaining country that supports the Palestinians fighting against Israel. The other regimes in Iraq, Libya and Syria have been neutralised over the last 20 years, following a strategy dating back to the 1990s – often at the cost of the collapse of the state.

Outlook

The Iranian-Israeli conflict will remain the dominant factor for the foreseeable future. However, it remains unclear how jihadism will evolve, i.e., whether it will remain confined to Syria or whether IS will return with global ambitions. This also means that the chapter of "irregular" or ideological actors is far from closed. This also applies to the Yemeni Houthis, who remain capable of exerting strategic influence and threatening both international shipping and Israel for ideological reasons.

Political and ideological actors in the Middle East are noticing the decline in the West's (including Israel's) ability to project power. Oper-

ations such as Israel's invasion of Beirut in 1982 or the liberation of Kuwait in 1991 would no longer be possible in in the same way today. This is not to mention the strategic disaster of Iran-friendly groups now in power in Iraq after 20 years of war and the Taliban once again controlling Afghanistan. Finally, strategic planners will also need to take into account demographic changes and the close ties between their own populations and the Middle East.

Key Messages

- Following the fall of Bashar al-Assad, the balance of power in the Middle East is shifting. Iran is losing ground, while Türkiye is gaining influence as far as Damascus.
- The new Syrian government under Ahmad al-Sharaa is internationally recognised despite its jihadist roots. While he presents himself as minority-friendly to the West, the necessary reconciliation and reform processes are likely to be delayed or prevented by identity conflicts.
- Israel's goal is to weaken Hezbollah and Hamas on the one hand, and to establish and secure buffer zones on the other.
- Iran remains Israel's main adversary, and the regional conflict remains complex and unresolved.

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