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Think Tanks Essentials



Think Tanks Essentials

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In a rapidly changing world, think tanks have become key players in shaping international debates and strategies. They not only generate ideas but also define the direction of political decision-making and influence public opinion.

The magazine “ThinkTanks Essentials” was created to summarize and analyze the most important expert research, demonstrating how it shapes our understanding of the global order.

This publication is valuable for anyone seeking to navigate the increasingly complex landscape of international politics. It allows readers to track key trends and explore the arguments of leading experts who influence the decisions of governments and international organizations. For researchers and students, it serves as a convenient source of analytical insights and up-to-date case studies; for diplomats and policy experts, it is a tool for understanding global processes and anticipating possible scenarios; and for a broader audience, it offers an opportunity to look beyond news headlines and grasp the deeper context behind them.

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Foreword

This issue of the journal covers a broader and more diverse range of topics. It brings together studies on the Middle East, EU domestic policy, European defense, the EU's strategic dependencies, energy and climate security, financial risks, new technologies and cybersecurity, China, BRICS+, the European Union's partnerships, and the Russian-Ukrainian dimension of European security. At first glance, these topics may seem very different. However, it is important for us to understand that the modern international order is changing not in a single center, but simultaneously at many interconnected points.

In April, the Middle East, particularly the conflict surrounding Iran and its implications for global security, remained one of the central themes in the research of European think tanks. These materials are significant because they demonstrate that the current conflict has gone beyond the bounds of a classic military confrontation. The Strait of Hormuz and the Bab el-Mandeb Strait are becoming symbols of the global economy's vulnerability, where energy, logistics, insurance, food, and financial markets are becoming parts of a single strategic front.

Another important trend is the gradual expansion of the very concept of security. Materials on climate, the Arctic, Germany's energy transition, and the future of climate negotiations show that climate policy cannot be viewed as a completely separate issue. It is linked to defense planning, energy independence, industrial competitiveness, migration, access to resources, and states' ability to adapt to long-term crises. And there is reason to believe that climate resilience is gradually becoming part of strategic resilience.

This issue also focuses on geoeconomics – a sphere in which power is exercised through capital, trade, currency, raw materials, infrastructure, and market access rules. Studies on U.S. dominance in asset management, critical raw materials, political risks in financial markets, the Middle Corridor, and new opportunities for the euro demonstrate that economic autonomy is no less important than defense autonomy. If Europe does not control its own savings, supply chains, financial instruments, and critical resources, its political agency remains limited.

Special emphasis is placed on technology. Artificial intelligence, particularly the emergence of new AI models, cybersecurity, digital governance, drones, the historic Artemis II space mission, and strategic competition in space are increasingly shaping how states wage war, defend infrastructure, control data, shape the rules of the digital realm, and compete for future spheres of influence. Thus, technological superiority is becoming both an economic advantage and a security imperative.

At the same time, coverage of China, BRICS+, and EU partnerships reveals another significant shift. The global order is not merely polarizing but fragmenting. States are seeking alternative formats of cooperation, new routes, new platforms of influence, and greater freedom of maneuver between major centers of power. For the European Union, this means the need to act strategically through partnerships, infrastructure, defense cooperation, trade instruments, and political coordination.

The concluding section, dedicated to Russia, Ukraine, and the eastern dimension of European security, serves as a reminder that for Ukraine, all these global trends have direct practical significance. Support for Ukraine depends not only on the immediate situation at the front but also on the state of the European defense industry, sanctions policy, decisions regarding frozen Russian assets, the EU's internal unity, U.S. priorities, and the West's ability to respond to multiple crises simultaneously.

Ultimately, the main value of this issue lies not only in the diversity of topics but in the fact that they reveal a common trend: international politics is now increasingly defined by states' ability to manage complex interdependencies. Those who control resources, technologies, routes, financial instruments, and defense capabilities gain an advantage in crises and in shaping the rules of the future. For Europe, this is a matter of strategic maturity. For Ukraine, it is a matter of security, resilience, and its place in the new architecture of power.

Kateryna Nedashkivska
Author and manager of "Think Tanks Essentials"

THE MIDDLE EAST, IRAN, AND THE SECURITY OF MARITIME CORRIDORS

The American War in Iran Is Not a Victory for Russia. Here's Why

Nona Mikhelidze, *Instituto Affari Internazionali (IAI), Italy*
01.04.2026

There is currently a widespread narrative that a U.S. war against Iran would automatically be a win for Russia. The author acknowledges that rising oil prices could theoretically bring Moscow additional revenue, but emphasizes that these benefits are nonetheless uncertain and limited. Ukrainian strikes on Russian energy infrastructure have already significantly disrupted Russia's export capabilities, and the sale of oil at substantial discounts to China and India reduces the real impact of rising global prices.

The study's primary focus has shifted from economics to geopolitics. For the Kremlin, the author argues, the key priority has never been economic prosperity, but rather the recognition of Russia as a great power capable of influencing the global order. It is precisely in this regard that the Iranian crisis demonstrates not Moscow's strength, but its weakness. The U.S. makes decisions without regard for Russia's position, and the loss or weakening of partners important to Russia, such as Syria, Venezuela, and Iran, narrows the scope of Russian influence.

The psychological dimension is emphasized separately. The elimination of the Iranian leader could be a signal of personal vulnerability for Putin, especially against the backdrop of Ukrainian strikes deep into Russian territory.

Thus, Russia is increasingly less of a shaper of international events and more often merely a reactor to them. Even if Moscow derives short-term benefits from the chaos, they do not compensate for its gradual loss of status as a systemic global player.



The bill will come due: The short, medium and long-term consequences of the Iran war

Andréas C. Hatzidiakos, Hellenic Foundation for European & Foreign Policy (ELIAMEP), Greece

08.04.2026

The conflict surrounding Iran is increasingly viewed as an event with delayed systemic consequences for global energy, logistics, food security, and international alliances. The author emphasizes that the current focus on oil prices reflects only the most visible aspect of the crisis at present, while its full cost will become apparent in months, and in some respects, in years.

The first effect of the war is an energy and logistics shock. Partial disruptions to traffic through the Strait of Hormuz, a key route for oil, liquefied natural gas, and fertilizers, have led to rising prices, shipping insurance issues, and disruptions in maritime transport. At the same time, strategic reserves can only temporarily alleviate the situation but do not solve the problem of physical access to the route.

The author considers the food security dimension to be the most underestimated consequence. A significant portion of global fertilizer trade passes through the Strait of Hormuz, so the current disruptions could affect harvests in 4–6 months and escalate into a food crisis in 6–12 months, particularly in South Asia and Africa.

Separately, the study shows that the war is undermining the traditional model of U.S. relations with the Gulf monarchies, built on exchanging energy stability for security guarantees. Gulf states are increasingly shifting toward a policy of multi-vector engagement, strengthening ties with China, India, European nations, and other partners.

Overall, the war demonstrates a transition to a world where energy, food, logistics, and security are becoming parts of a single strategic system.



Hormuz and Bab el-Mandeb: A War Within a War

(fr. Ormuz, Bab el-Mandeb : la guerre dans la guerre)

Jean-Claude Allard, Institut de relations internationales et stratégiques (IRIS), France

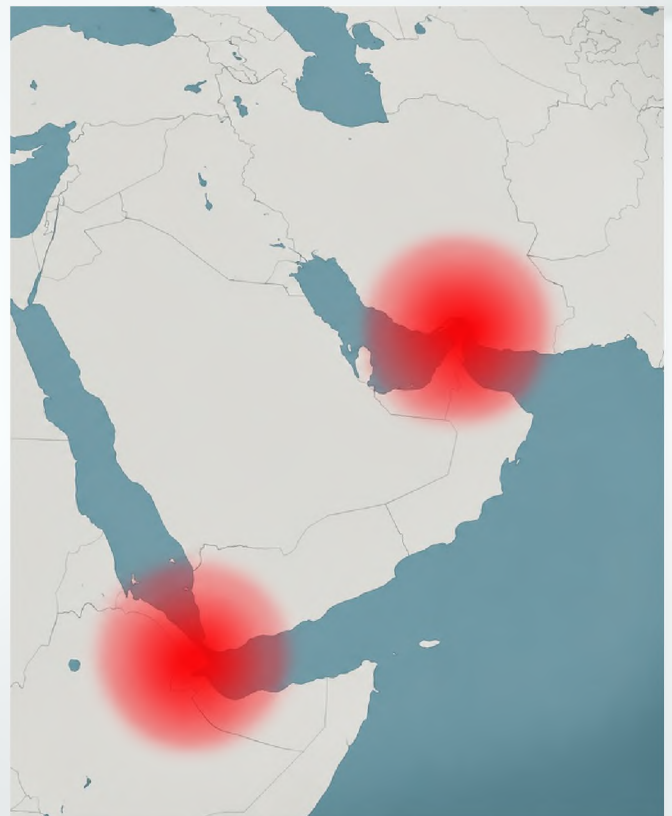
08.04.2026

Following the rapid erosion of some of its defensive capabilities, Iran shifted to an asymmetric strategy: strikes against Israel, U.S. bases, and countries that provide the U.S. with military infrastructure. The goal of this strategy is not so much a direct military victory as it is to undermine the confidence of regional allies in U.S. security guarantees.

The author identifies control over the Strait of Hormuz and the Bab el-Mandeb Strait as Iran's key tools. A significant portion of global flows of oil, gas, fertilizers, helium, and aluminum pass through these narrow sea lanes. Even without a full physical blockade, it is enough to create an atmosphere of risk for insurance companies to suspend coverage, shipping to decline, and global markets to face a sharp rise in the cost of transportation and goods.

In fact, this is precisely why the author uses the term “war within a war,” as there is a parallel front where logistics, insurance, energy, financial markets, and global supply chains become the weapons. It is this dimension that is putting the greatest pressure on the U.S.: domestically, due to inflation, fuel prices, and declining support for the war; and externally, due to partners' doubts about Washington's ability to guarantee stability.

The author considers the most likely scenario not to be a complete end to the war, but rather a freeze. The U.S. may try to present a partial weakening of Iran as a success, leaving the conflict in a state of controlled tension. At the same time, the strategic consequences will be much broader. The crisis is deepening doubts about American leadership, intensifying the debate over NATO's future, and pushing Europe toward a more serious conversation about its own strategic autonomy.



The strategy Iran built for forty years – and the war the West still doesn't understand

Andréas C. Hatzidiakos, Hellenic Foundation for European & Foreign Policy (ELIAMEP), Greece

23.04.2026

Iran's strategy of asymmetric deterrence took shape over decades, but it acquired a clear logic and was refined only after the United States' swift defeat of Iraq's defenses. Tehran's main conclusion was that a direct conventional war with the U.S. is doomed to failure; therefore, the goal became not to defeat the West on the battlefield, but to make the cost of confrontation politically, economically, and psychologically unacceptable.

The author identifies four pillars of this strategy. The first is the mass use of missiles and cheap drones, which force the enemy to expend expensive interception systems on significantly cheaper targets. The second is nuclear uncertainty. Iran remained close to the nuclear threshold for a long time without announcing the development of weapons. However, the 2026 war demonstrated the weakness of this model, as such uncertainty may deter cautious actors but not those prepared for a preemptive strike.



The third pillar is a network of proxy forces and hybrid operations, allowing Iran to exert pressure on multiple fronts without direct accountability. The fourth is the use of geography as a tool, primarily through the Strait of Hormuz, where even the threat of a blockade can impact energy markets, insurance, and global supply chains.

Separately, the author draws a parallel with the war in Ukraine: both cases demonstrate that mass-produced and inexpensive systems can undermine the advantage of expensive Western platforms. For Europe, this means the urgent need to review defense planning, strengthen countermeasures against hybrid networks, adapt to the risks of nuclear proliferation, and view strategic autonomy not as a distant ambition but as a practical security necessity.

DOMESTIC POLICY, DEMOCRACY, AND PUBLIC OPINION

What the Hungarian election reveals about the European Union

(fr. *Ce que les élections hongroises nous apprennent de l'Union européenne*)

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14.04.2026

The author analyzes Viktor Orbán's defeat in the Hungarian elections as an event whose significance extends far beyond the domestic politics of a single country. The analytical commentary explains that Hungary's influence was quite significant not because of its size or economic power, but because of the decision-making mechanisms within the EU. In particular, due to the principle of unanimity in foreign policy, Budapest was able to block joint EU decisions and gained significantly greater political influence than it would have had based on its actual capabilities.

Under Orbán's leadership, Hungary became both a political obstacle and a normative challenge for the EU. It regularly blocked or weakened decisions regarding support for Ukraine, and the model of "illiberal democracy" contradicted the principles of the rule of law upon which the Union is built. Therefore, a change in power in Budapest could facilitate the adoption of joint decisions, particularly regarding financial aid to Ukraine.

Special attention is given to the international dimension. For Russia, Orbán's defeat means the loss of an important friendly voice within the European Council, which for years helped Moscow weaken European unity. For China, this may also be a blow, as Hungary was one of the key channels for Chinese investment in Europe. At the same time, Orbán's defeat raises questions about the limits of Donald Trump's influence and that of the right-wing nationalist movements associated with him in Europe.

Overall, in the author's view, the problem lay not only with Orbán but also with EU rules that allowed a single member state to gain excessive power to block certain decisions. For Ukraine, this means that removing one pro-Russian actor may simplify support for Kyiv, but a long-term solution depends on a deeper reform of the EU's decision-making mechanisms.



Trump's Geriatric Foreign Policy ¹

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21.04.2026

Donald Trump's foreign policy is a rather paradoxical combination of revolutionary political communication and deeply archaic strategic thinking. The author claims that, despite the image of a president who is dismantling postwar American alliances and actively using social media, the substance of his policy actually takes the U.S. back to the logic of the 19th and mid-20th centuries. This logic manifests itself in several ways. The author links Trump's interest in Greenland to the old American tradition of territorial expansion, following the example of the Louisiana and Alaska purchases. His policy toward Latin America, particularly Venezuela, Cuba, and the Panama Canal, resembles an updated version of the Monroe Doctrine, in which the Western Hemisphere is once again viewed as a sphere of American primacy. Trade wars and tariffs are interpreted as a return to 19th-century protectionism, when high tariffs were a tool for protecting American industry. Trump's immigration policy, according to the author, also draws on an older tradition, when American legislation openly favored migrants from Northern and Western Europe.

Separately, the research examines the war with Iran, which fits into a long history of American attempts at military intervention. The author recalls the 1953 coup against Mohammad Mossadegh and shows that Trump's current threats against Iran echo a long-standing logic: the U.S. supposedly can quickly achieve the desired political outcome through force or airstrikes.

Under Donald Trump, the U.S. may think not in terms of stable alliances and international law, but through deals, coercion, spheres of influence, and unilateral power.



"Constantino Brumidi's fresco "The Cession of Louisiana""

¹Although, at first glance, the title of the article does not fit into the thematic section devoted to domestic policy, democracy, and public opinion, it explains the internal logic behind Donald Trump's behavior on the international stage. – editor's note (here and below).

Geopolitics — an underrated issue for voters ahead of 2027

(fr. La géopolitique est une préoccupation sous-estimée de l'électorat pour 2027)

Marie-Cécile Naves, *Institut de relations internationales et stratégiques (IRIS), France*

30.04.2026

Today, geopolitics is no longer a topic reserved solely for diplomats, military personnel, or a narrow circle of experts. Modern wars and conflicts are not limited to the front lines and the use of weapons, but encompass information attacks, economic pressure, energy dependence, technological competition, migration and climate crises, as well as the undermining of democratic institutions. That is precisely why French voters are far more interested in international processes than political elites often assume.

The author asserts that the 2027 presidential and parliamentary election campaigns in France cannot be built solely around domestic issues. France does not exist in a vacuum, and therefore any serious public project must explain how the country will act in a world of growing conflicts, instability, and the struggle for influence. A policy that ignores these issues simply does not match the scale of the challenges that citizens themselves are already facing.

In the author's view, France should respond to these challenges not with isolationism or brute force, but with a more active foreign policy built around democratic principles, the rule of law, and international cooperation. This involves strengthening French and European sovereignty through investments in science, education, culture, technology, artificial intelligence, digital tools, international organizations, and European defense.



GEOECONOMICS, FINANCIAL RISKS, AND THE EU'S STRATEGIC DEPENDENCIES

Risks for Europe of US dominance of global asset management

Dirk Schoenmaker, Bruegel, EU-level think tank

08.04.2026

The author analyzes the risks associated with the growing dominance of American companies in the European asset management market. Asset management firms manage the funds of pension funds, insurance companies, households, and other investors, and thus influence where capital is directed—toward which companies, sectors, and regions.

American companies are playing an increasingly significant role in the European market, while the positions of European firms are weakening. As a result, Europe risks losing some control over where its own savings are directed. The three largest American asset management firms—BlackRock, Vanguard, and State Street—play a particularly significant role. They manage trillions of dollars in investor funds and thus effectively influence the flow of global capital.

This poses a problem for the EU, as American and European companies differ in their approaches to corporate governance and sustainable finance. European companies are far more likely to support social and environmental resolutions, while American managers are increasingly moving away from them, which contradicts the European ESG² agenda.

The second risk concerns supervision. Large asset management firms operate in Europe through hubs in Luxembourg and Ireland, but national regulators are not always able to see the full picture of pan-European risks. Therefore, the author proposes strengthening the role of the European Securities and Markets Authority as the central European supervisory body.

The main conclusion is that financial autonomy is part of the EU's strategic autonomy. If European savings are increasingly managed by external players, it will be more difficult for Europe to direct capital toward its own priorities: innovation, infrastructure, the green transition, industrial policy, and long-term security.



² ESG stands for: Environmental (climate, CO₂ emissions, energy transition, pollution, resource use), Social (working conditions, employee rights, equality, safety, the company's impact on society), and Governance (corporate governance: transparency, anti-corruption, management structure, shareholder rights, management accountability). Basically, ESG is an approach where investors evaluate companies not just based on profits, but also on how they treat the environment, employees, society, and governance.

Relearning the language of power: how the EU can turn trade into geoeconomic deterrence

Ignacio Álvarez Peralta, Elcano Royal Institute, Spain

13.04.2026

The author calls on Europe to rethink its role in a world where the international order is increasingly defined by power, coercion, and control. In an environment where the United States, China, and Russia use trade, technology, finance, energy, and critical resources as tools of pressure, Europe needs to transform its economic weight into real strategic power.

The main idea of the study is that the EU should shift from a simple policy of defense to a policy of influence. It is not enough merely to reduce dependence on China, the US, or Russia; it is also necessary to have tools that will make economic pressure on Europe too costly for its initiators. The EU has influence in key supply chains, particularly in pharmaceuticals, medical technologies, industrial equipment, and high-tech manufacturing, on which the US, China, and other major economies depend. It is precisely these dependencies that can serve as a tool of geo-economic deterrence for the EU.

In practice, this means that the EU must clearly identify which European goods and technologies are indispensable to other major economies, coordinate export controls, and utilize pre-agreed response mechanisms and compensation funds for states and companies that may suffer from countermeasures. The goal is not a trade war, but to ensure that a potential aggressor or actor exerting economic pressure understands that coercion against Europe will come at a tangible cost.

At the same time, the author does not suggest that the EU build a classic sphere of influence. The idea is to form coalitions with states that also do not want to live in a world divided among major powers. In partnership with Japan, Canada, the United Kingdom, South Korea, and other countries, Europe can significantly strengthen its influence on the United States, China, and other actors.



From Deal to Rules: An EU Offer for TRIPP and Middle Corridor Governance

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16.04.2026

The author analyzes the so-called “Trump Route for International Peace and Prosperity” (TRIPP) as a potentially significant but politically sensitive element of normalization between Armenia and Azerbaijan. This refers to a 43-kilometer route through the southern Armenian province of Syunik, which is intended to connect the main territory of Azerbaijan with Nakhchivan via rail, road, energy, and digital infrastructure. However, the author emphasizes that infrastructure alone does not guarantee peace.

The main problem with TRIPP lies in the lack of rules and governance mechanisms. The existing U.S.-Armenian framework leaves funding, the exact route, customs and transit procedures, the governance model, and the dispute resolution mechanism undefined. Particularly sensitive is the differing understanding of connectivity: Armenia insists on full sovereign control over the route, while Azerbaijan expects the freest possible access to Nakhchivan.

TRIPP is important not only for the South Caucasus but also for Europe, as it is part of the Middle Corridor—a route connecting Europe with Central Asia, bypassing Russia. The map below shows its strategic location between Turkey, Armenia, Azerbaijan, Nakhchivan, and the Caspian Sea.



The author proposes that the EU help transform TRIPP from a bilateral agreement into part of a broader regulatory framework: harmonize customs and transit standards, establish dispute resolution mechanisms, support Armenia’s democratic resilience, prepare the communities of Syunik for the route, and link the project to the normalization of Turkish-Armenian relations.

The EU's Strategic Dependence on Critical Raw Materials

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16.04.2026

The study analyzes the EU's strategic dependence on critical raw materials necessary for the green transition, the digital economy, defense, and high-tech industries. Lithium, cobalt, nickel, graphite, rare earth elements, gallium, and germanium are becoming to the modern economy what oil and gas were in the 20th century. They are needed for electric vehicles, batteries, wind turbines, semiconductors, artificial intelligence, defense systems, and space technologies.

The green transition could create a new form of dependency for Europe. An electric vehicle requires significantly more minerals than a car with an internal combustion engine, and the battery of a single electric vehicle contains, on average, about 200 kg of critical minerals. At the same time, the EU's weakest point is not only its limited domestic reserves but also its dependence on processing, refining, and intermediate components, without which the production of batteries, magnets, chips, and equipment for green technologies is impossible.

The greatest source of risk is China, which controls a significant portion of the processing of lithium, cobalt, rare earth elements, and the graphite needed for battery production, and is already using export restrictions as a tool for exerting pressure. In response, the EU has adopted the Critical Raw Materials Act, launched strategic projects in Europe and beyond, and is developing the RESourceEU plan for joint procurement, strategic stockpiling, and supply diversification. At the same time, the author emphasizes that the European strategy remains slow: it is hampered by difficulties in obtaining permits, fragmented funding, environmental restrictions, and resistance from local communities.



The growing impact of political risk on financial markets

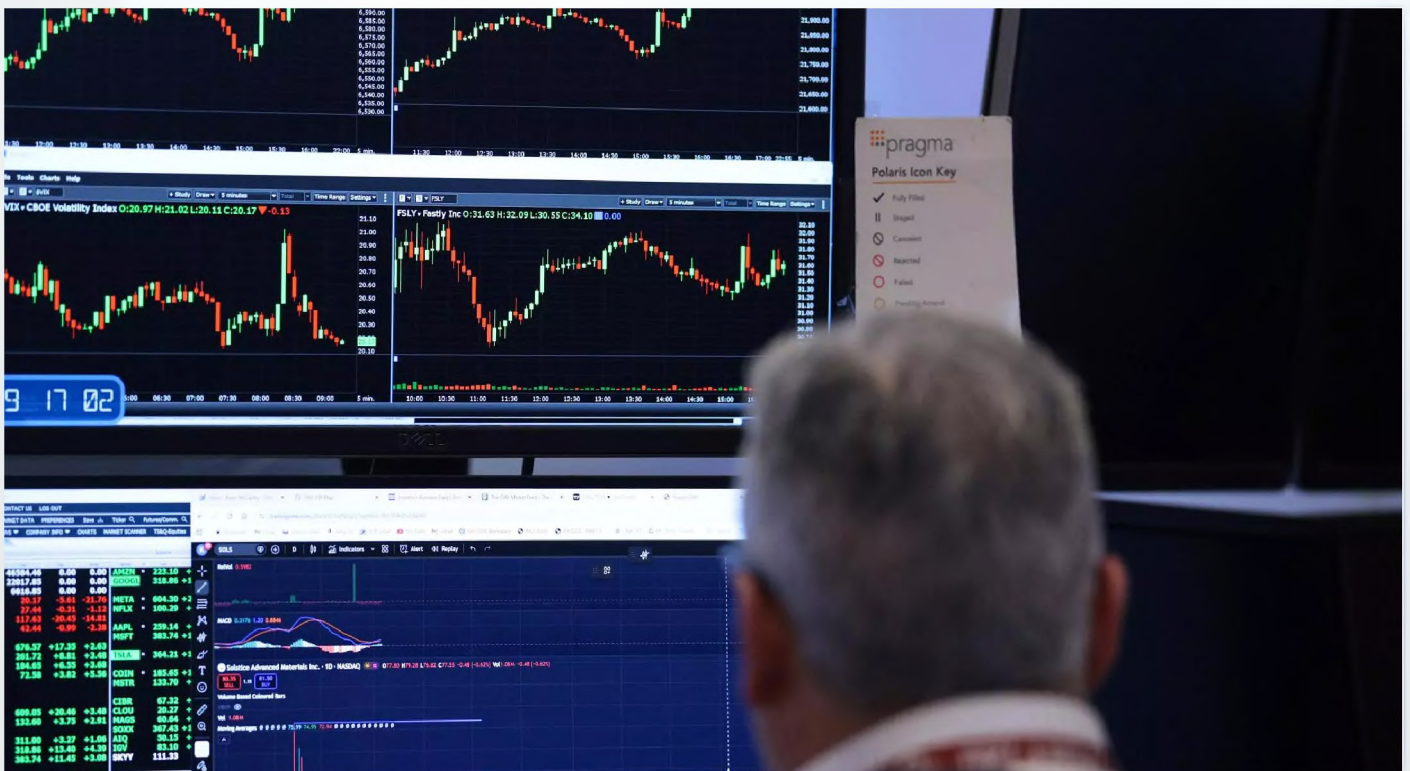
Vito D. Gala, Giovanni Pagliardi, Ivan Shaliastovich, Stavros Zenios, Bruegel,
EU-level think tank

28.04.2026

Political risk is indeed becoming an increasingly important factor in financial markets. The authors demonstrate that this is not just about individual elections, government crises, wars, or trade conflicts, but rather a broader systemic factor that simultaneously affects stocks, bonds, and currencies. Political instability is no longer a secondary backdrop for investors; it has its own price, a risk premium, and can be quantified.

At the same time, political risk is difficult to assess because it is not a single indicator but a combination of various factors: institutional weakness, corruption, government instability, geopolitical conflicts, social tensions, and economic uncertainty. The authors emphasize that these ratings often do not align, especially when political risk rises sharply and an accurate assessment becomes most critical. The key contribution of this study is that the authors demonstrate: political risk also has a global dimension. Individual countries may face their own crises, but a significant portion of political instability stems from shared global trends—the intensification of geopolitical confrontation, populism, fragmentation, and distrust of international rules. This is precisely why political risk does not disappear through simple diversification across countries or assets. It simultaneously affects stocks, bonds, and currencies. The authors show that markets factor this risk into prices, and investors demand a premium for assets that are more sensitive to political instability.

Thus, political instability increases borrowing costs and must be factored into debt sustainability analysis. For Ukraine, the study is significant because war, institutional predictability, the rule of law, and trust in government policy will directly influence financing costs, investment, and future reconstruction.



The US-China Battle of Currencies Gives the Euro a Chance

Nicola Casarini, Istituto Affari Internazionali (IAI), Italy
04.05.2026

The war in the Middle East and the intensifying competition between the United States and China are accelerating changes in the global monetary order. The author argues that the crisis surrounding Iran, in addition to its energy and security implications, also has a monetary dimension: it is increasing the use of the yuan in oil and gas transactions ³, gradually challenging the petrodollar system, which has underpinned U.S. global financial dominance since the 1970s.

China is driving this shift through its own payment infrastructure, notably CIPS, as well as through digital platforms such as mBridge, which involves China, Hong Kong, Thailand, the UAE, and Saudi Arabia. In the context of the Iranian crisis, payments in yuan or cryptocurrency are becoming part of a new logic for energy and transit settlements.

At the same time, the author notes that before the yuan's rise, the euro was considered the main potential alternative to the dollar. However, its international role remained limited due to the weak integration of the eurozone's financial markets, the lack of a common safe European asset, and Europe's dependence on the U.S. in the security sphere.

The current currency competition opens a new window of opportunity for the EU. Europe must develop financial integration, increase the supply of reliable euro-denominated assets, strengthen its defense autonomy, and promote the euro in international payments, particularly in the energy sector. A stronger euro and greater EU financial autonomy could enhance Europe's ability to act more independently of the United States on issues of security, sanctions, and long-term support for partners.



³ Due to the crisis surrounding Iran, the Strait of Hormuz—a route through which, under normal circumstances, about one-fifth of the world's oil passes—has come under threat. Iran is allowing passage only to “friendly” vessels and is attempting to collect payments from them in Chinese yuan or cryptocurrency. Moreover, this is not an isolated case. The yuan is already being used in some energy transactions between China, Saudi Arabia, and other Gulf countries.

ENERGY, CLIMATE POLICY, AND CLIMATE SECURITY

Two Sides of the Same Crisis: Climate, Security, and the Need for Co-Planning

Johann Erik Kukk, Johanna Maarja Tiik, International Centre for Defence and Security (ICDS), Estonia

31.03.2026

Climate policy is typically viewed as a secondary issue in the context of war, energy crises, or defense needs. However, experts argue that climate change has already become an integral part of European security, as it affects military readiness, energy independence, food security, migration, infrastructure, and geopolitical competition.

Climate risks are already having practical consequences for defense capabilities. Extreme heat can damage runways, complicate the operation of military helicopters, and warmer winters can alter combat training conditions in northern countries. In the Arctic, melting ice is opening up new routes and access to resources, but at the same time heightening the interest of Russia, China, and the United States, increasing the risk of the region's militarization.

The authors also emphasize that climate change acts as a factor that exacerbates existing vulnerabilities: weak governance, poverty, food

insecurity, migration pressures, and social conflicts. It does not always directly create crises, but it makes them deeper and more complex.

Particular emphasis is placed on the link between wars, energy, and fossil fuels. Russia's aggression against Ukraine demonstrated that dependence on Russian energy resources was not only an economic but also a strategic vulnerability for Europe. The conflict in the Middle East confirmed the same logic: disruptions in oil, gas, and fertilizer supplies quickly turn into a global security risk.

The main conclusion is that the green transition, which is positioned as a climate project, should also be viewed as a security policy. Investments in renewable energy, energy efficiency, alternative fuels, resilient infrastructure, and "green" defense procurement can simultaneously reduce Europe's dependence on hostile or unstable suppliers and strengthen its strategic autonomy.



From Arctic Exceptionalism to Strategic Confrontation

Center for the study of democracy, Bulgaria
09.04.2026

The Arctic has long been viewed as a region where nations could cooperate despite political conflicts. However, following Russia's full-scale invasion of Ukraine, trust in Moscow as a partner has evaporated, the work of the Arctic Council has been paralyzed, and the Arctic and northern regions of Europe have become part of a military, energy, and geopolitical rivalry.



The strategic importance of the Arctic is growing due to climate change, new sea routes, access to energy resources and critical minerals, as well as Finland and Sweden's accession to NATO. Russia has already turned the region into a military-economic stronghold: it is home to the Northern Fleet, nuclear submarine forces, air defense systems, coastal missile complexes, and the infrastructure of the Northern Sea Route. Arctic resources remain vital to the Russian economy, and the shadow fleet, ship-to-ship transfers, and opaque ownership schemes help Moscow mitigate the impact of sanctions.

China poses a separate challenge. Its Polar Silk Road⁴, investments, scientific expeditions, satellite facilities, and participation in Russian energy projects are formally civilian in nature but may pose intelligence, technological, and infrastructure risks to Europe.

The main conclusion is that Europe must stop viewing the Arctic as a periphery. It needs a comprehensive strategy: strengthening sanctions control over Russian Arctic energy flows, protecting undersea cables, ports, satellite stations, and LNG facilities, developing submarine surveillance and detection, air defense, and coordination with NATO. After all, effectively deterring Russia requires pressure not only on the eastern flank or in the Black Sea, but also in the Arctic, where Moscow maintains resources, routes, and tools to circumvent sanctions.

⁴ The Polar Silk Road is a Chinese initiative to develop navigation routes in the Arctic, which is part of the large-scale "Belt and Road" project.

From the Paris Agreement to the future of climate negotiations after COP30

Lara Lázaro Touza, Alina Averchenkova, Andrea Briones, Elcano Royal Institute, Spain

22.04.2026

The authors assess the decade since the Paris Agreement and the outcomes of the UN Climate Change Conference (COP30) in Belém. They note that significant progress has already been made, but the current pace of action is insufficient to keep warming within the limits agreed upon in 2015: preferably to 1.5°C and at least well below 2°C compared to pre-industrial levels. The Paris Agreement established a universal framework for climate governance, introduced regular updates to national climate plans, set a target for climate neutrality, and strengthened the role of legislation, financing, and non-state actors. As a result, the projected warming trajectory has decreased from approximately 4°C to 2.3–2.5°C, provided current commitments are fulfilled. At the same time, the gap between ambitions and actual actions remains critical.

The authors characterize COP30 as a “lifeline” for climate multilateralism amid geopolitical fragmentation, the U.S.’s second withdrawal from the Paris Agreement, and the EU’s weakened ability to advance ambitious solutions. The summit yielded updated climate plans, 59 adaptation indicators, a call to triple adaptation funding by 2035, a new Just Transition Mechanism, and a Gender Action Plan for 2026–2034. However, key issues such as a clear plan to phase out fossil fuels, an end to deforestation, and sufficient funding for vulnerable countries remain unresolved.

The authors conclude that the UN remains indispensable for a legitimate global consensus but is producing fewer and fewer breakthrough results. Therefore, future climate diplomacy must combine universal negotiations with more flexible coalitions, climate clubs, and practical implementation mechanisms.



Germany's energy transition: Building a just and resilient Energiewende amid economic and geopolitical crises

Marco Siddi, *Finnish Institute of International Affairs (FIIA), Finland*
April 2026

Germany's energy transition, or, as it is known, the Energiewende, is seen as one of the key prerequisites for the country's future economic, industrial, and geopolitical stability. After 2022, the old model of the German economy—built on cheap Russian energy, an export-oriented industry, and active trade with China—has lost its stability. High energy prices, the loss of Russian gas, weak economic growth, aging infrastructure, and competition from China and the U.S. are forcing Berlin to accelerate its low-carbon transformation.

The Energiewende has already yielded noticeable results. In 2024, wind and solar power accounted for over 41% of Germany's electricity generation. At the same time, it is worth noting that the transition remains uneven: industry, transportation, and heating still rely heavily on fossil fuels. Replacing Russian gas with liquefied natural gas imports from the U.S. and Qatar helped in the short term, but is neither sufficiently "green" nor a strategically secure solution, as it maintains dependence on external suppliers and leaves the country vulnerable to global energy shocks.



The author devotes special attention to the social justice of the transition. Local opposition to the construction of wind farms and new energy infrastructure is often linked not to a rejection of the green transition, but to a sense that costs and benefits are distributed unevenly, and that local communities have no real influence on decisions.

The main conclusion of the study is that Germany must accelerate the Energiewende, but make it industrially efficient, socially just, and strategically sustainable. If Berlin continues to support outdated energy and industrial models, this will deepen the country's economic lag and weaken the entire European Green Deal.

EUROPEAN STRATEGIC AUTONOMY, DEFENSE, AND MILITARY READINESS

Assessing the damage: What the Iran war really means for Europe's defence

Luigi Scazzieri, Giuseppe Spatafora, European Union Institute for Security Studies (EUISS), EU-level think tank

09.04.2026

The study examines how the war in the Middle East is complicating European rearmament and support for Ukraine. The authors demonstrate that Europe finds itself in a contradictory situation. Even amid doubts about Donald Trump's willingness to defend NATO, European states continue to rely heavily on the U.S. both for their own arms purchases and for the supply of critical systems to Ukraine.

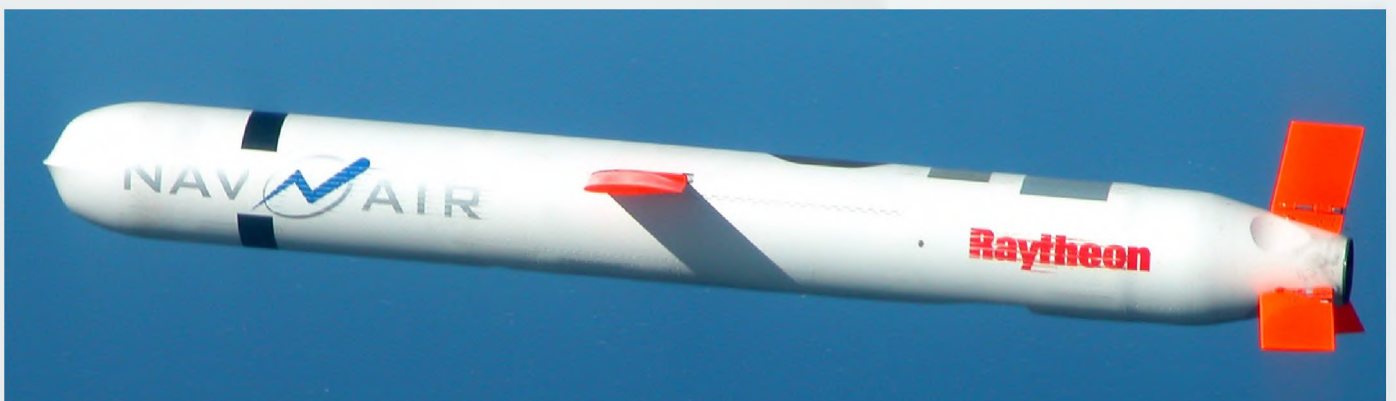
Politically, a U.S.-Israeli war against Iran could heighten tensions between Washington and European allies who do not wish to participate in this military campaign. Practically, it depletes American arsenals and intensifies competition for limited defense resources. A telling example is the more than 850 Tomahawk missiles that have been used: at current production rates, replacing them could take about ten years.



Deliveries of Patriot systems are already being delayed, and the Pentagon has considered redirecting weapons intended for Ukraine to the Middle East.

The main risk lies in Europe's increased vulnerability. Ukraine may receive less support and at a slower pace, while European armies have not yet had time to build up their own capabilities. This could tempt Russia to believe that the balance of risks is shifting in its favor.

The author proposes three responses: increase production of European air defense systems and long-range weapons, integrate the Ukrainian defense industry more deeply into the European defense base, and reduce the risks of dependence on the U.S. by localizing the production, repair, and maintenance of American systems in Europe.



Annual Battle Readiness on the Eastern Flank

Karin Filkászová, Martin Sklenár, Federica Mangiameli, Tomáš Nagy, Dominika Nagyová, Marcin Zaborowski, Anushka Kaushik, GLOBSEC, Slovakia

12.04.2026

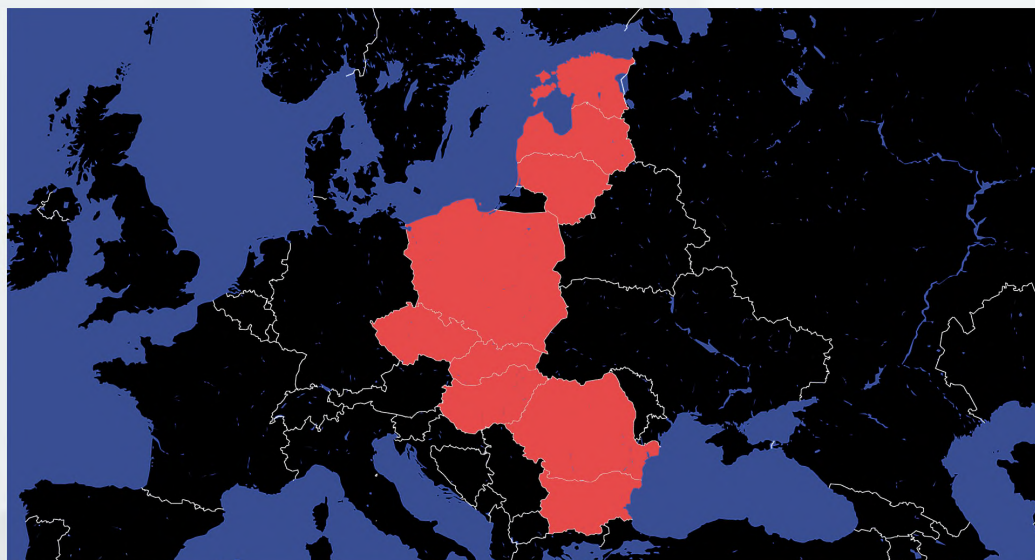
A comprehensive GLOBSEC study assesses the combat readiness of ten countries on NATO's eastern flank—Finland, Estonia, Latvia, Lithuania, Poland, the Czech Republic, Slovakia, Hungary, Romania, and Bulgaria. The authors demonstrate that the region has transitioned to real operational deterrence, yet the level of readiness among these countries remains uneven.

Importantly, experts view combat readiness not through a single metric—such as the share of GDP allocated to defense—but as a combination of three elements: military capability, political decision-making speed, and the defense industrial base. The authors emphasize that large-scale procurements and high defense budgets do not in themselves guarantee combat effectiveness. What becomes decisive is mobilization speed, integration of reserves, ammunition stocks, maintenance, logistics, medical support, military mobility, and the ability to operate under cyber and hybrid pressure.

Poland emerges as the main military “anchor” of the eastern flank thanks to large-scale investments, a large force size, and a significant concentration of tanks, artillery, missile systems, and other key combat capabilities, as well as its role in regional deterrence. Finland and the Baltic states demonstrate other strengths—mobilization depth, territorial defense, and reserve systems. At the same time, integrated air and missile defense remains one of the greatest vulnerabilities, as temporary deployments of Patriot or NASAMS systems do not replace a permanent, multi-layered, and interoperable architecture.

Separately, this annual review emphasizes political readiness. States with predefined crisis powers, clear legal procedures, and broad consensus on defense are capable of acting within hours, not days. In a crisis, such speed becomes part of deterrence.

Ukraine's security is directly linked to the readiness of NATO's eastern flank. At the same time, Ukraine serves as a source of practical experience in modern warfare. Its defense industry, drones, rapid innovation cycles, and combat feedback can become an important resource for strengthening European defense readiness.



The Circles of Security: The Role of the NB8 in (Northern) European Security

Hiski Haukkala, Kristi Raik, International Centre for Defence and Security (ICDS), Estonia

17.04.2026

This study examines the role of the Nordic-Baltic Eight (NB8)—comprising the five Nordic and three Baltic states—in the new security architecture of Northern Europe. Russia’s full-scale war against Ukraine has drastically worsened the security environment in Europe, particularly in the Baltic and Arctic regions. Finland and Sweden’s accession to NATO has integrated the Northern European space into the common Euro-Atlantic defense system, but at the same time has heightened the importance of regional cooperation.



The main thesis of the study is that NB8, JEF⁵, NORDEFCO⁶, and other regional formats are both a symptom of the weakness of large institutions and part of the solution for how to effectively strengthen security. NATO remains the foundation of military deterrence, while the EU is the key political and economic framework. However, regional formats can act more quickly, better account for local geography, and create additional layers of security. Their value lies in the fact that they complicate Russia’s calculations: Moscow cannot know in advance whether the response to aggression will be solely national, regional, at the NATO level, European, or a combination thereof.

At the same time, the authors caution: if there are too many regional formats, they may begin to duplicate one another and overwhelm states with constant coordination. Therefore, each format must have a clear function, specific added value, and a clear division of roles with NATO and the EU.

In practical terms, the authors propose that the NB8 focus on several areas: promoting a deeper NATO partnership with Ukraine and Ukraine’s full integration into EU defense cooperation; coordination in the field of unmanned systems and countering drones; strengthening maritime security in the Baltic Sea; protecting critical underwater infrastructure and monitoring Russia’s “shadow fleet.”

⁵JEF (Joint Expeditionary Force) is a multinational rapid reaction force established in 2015 under the leadership of the United Kingdom. Its members include the United Kingdom, Denmark, Finland, Estonia, Iceland, Latvia, Lithuania, the Netherlands, Sweden, and Norway. The primary goal of the JEF is to respond rapidly to crisis situations, conduct exercises, and share intelligence.

⁶NORDEFCO (Nordic Defense Cooperation) is a military cooperation framework established in 2009 that brings together Denmark, Finland, Iceland, Norway, and Sweden. Its goal is to strengthen national defense, foster synergy, develop interoperability, and conduct joint arms procurement.

A Grand Strategy for Europe and the End of Pax Americana

Toomas Hendrik Ilves, International Centre for Defence and Security (ICDS), Estonia

20.04.2026

In his speech, Estonian President Toomas Hendrik Ilves (2006–2016) analyzes the end of the Pax Americana—the postwar order in which the United States served for decades as the primary guarantor of European security, international rules, free trade, and liberal democracy. The author argues that even if the U.S. formally remains in NATO, it may reduce its presence in Europe or act unpredictably in crisis situations.

Ilves links the current crisis to a long history of European illusions regarding Russia. Central and Eastern Europe have warned for years about the threat from Moscow, but these warnings were often dismissed as exaggerations. Only Russia's full-scale invasion of Ukraine finally shattered the old logic of cooperation with the Kremlin based on trade and energy interdependence.

The course of the war in Ukraine will determine how much time the EU has to rearm, reform, and prepare for a possible new Russian offensive. A Ukrainian defeat, according to the author's logic, would mean not stability, but a stronger Russia, a massive refugee crisis, and the undermining of European deterrence.

Ilves's main conclusion is that Europe needs its own grand strategy: not just more defense spending, but deep political, economic, technological, and military reforms. This involves abandoning the veto right in the European Council, developing common capital markets, investing in AI, energy integration, and defense technologies, and revising military doctrines to account for how the widespread use of drones, sensors, electronic warfare, and inexpensive high-precision systems is changing the nature of modern warfare.



Public-Private Relationships in European Defence Tech

Noah Sylvia, *GLOBSEC, Slovakia*

23.04.2026

The study analyzes how advances in defense technology are shifting the balance of power between the state, the military, and private technology companies in European defense. The author demonstrates that modern combat effectiveness increasingly depends on digital infrastructure: cloud services, data, AI, communications, sensors, autonomous systems, cybersecurity, and the integration of various military capabilities into a single system. The war in Ukraine has only accelerated this realization, demonstrating the role of drones, rapid adaptation cycles, and private technology services in modern operations.

The main problem is that a significant portion of critical defense technology functions in Europe depends on a small number of private suppliers, often American. This creates not only technical but also political vulnerability: the state may lose control over system architecture, data, integration standards, and access conditions. Particularly dangerous is the risk of dependence on a single supplier, where switching to another company becomes too expensive or practically impossible.

The author emphasizes that Europe needs a clearer understanding of technological sovereignty. A complete rejection of American companies is unrealistic in the short term, but Europe must gradually reduce its dependence on individual technology suppliers through common standards, data protection, localization of production, the development of its own companies, and improved technical expertise in the public sector.

Thus, private technologies may be critical to a state's survival, but in the long term, they raise questions of control, dependence, and strategic autonomy.



Germany's New Military Strategy

(pl. *Nowa strategia wojskowa Niemiec*)

Lukasz Jasiński, Polish Institute of International Affairs (PISM), Poland
28.04.2026

The author analyzes Germany's new military strategy, published in April, which outlines the main directions for the modernization of the Bundeswehr through 2039. The document represents a continuation of Germany's "Zeitenwende" following Russia's full-scale invasion of Ukraine, the creation of a special fund for rearmament, and the adoption of the National Security Strategy. An additional factor was the uncertainty in transatlantic relations following Donald Trump's return to power, which reinforced the need for Europeans to take on greater responsibility for the continent's defense.

A key provision of the strategy is that Russia is identified as the greatest and most long-term threat to European security. At the same time, Berlin acknowledges that the U.S. is increasingly focusing on the Western Hemisphere and competition with China in the Indo-Pacific region. Therefore, Germany plans to gradually strengthen the Bundeswehr: by 2029, to improve existing capabilities; by 2035, to significantly increase troop numbers and the ability to operate across all domains; and by 2039, to create Europe's largest and most modern conventional army.

At the same time, the author highlights the risks. The pace of change may be too slow given the scale of the Russian threat, and the strategy does not provide a clear answer to the problems of bureaucracy, procurement, and a shortage of volunteers. The plan to reach 460,000 active-duty personnel and reservists by 2035 appears ambitious given the current force of 184,000 professional soldiers. An additional weakness is the low level of public readiness for defense.



CHINA, BRICS+, AND THE TRANSFORMATION OF THE GLOBAL ORDER

The BRICS+ Are Still Alive and Kicking

Ernesto Gallo, Istituto Affari Internazionali (IAI), Italy

17.04.2026

The study challenges the notion, common in Western discourse, that BRICS+ is in decline. The author does not deny that the group faces serious internal conflicts. The conflict over Iran has indeed laid bare the divergent interests of its members: Russia and China condemned the U.S.-Israeli strikes but acted cautiously; India avoided condemnation while simultaneously deepening its cooperation with Israel; the UAE found itself in a difficult position as a BRICS+ member that had suffered Iranian attacks. However, these differences, according to the author, do not indicate the collapse of the alliance. Rather, they demonstrate the nature of BRICS+ as a flexible, heterogeneous platform where states are not required to maintain a unified foreign policy line. Furthermore, differences regarding Iran were also evident among Western states; thus, the crisis revealed the complexity of modern coalitions in general rather than any particular weakness of BRICS+.

Particular attention is paid to India. Its cautious stance is interpreted not as a withdrawal from BRICS+ or a “choice of the West,” but as a multi-vector balancing act between different centers of power. New Delhi is developing ties with Israel, but maintains important economic interests in the Gulf states and supports BRICS financial initiatives, particularly instruments that can facilitate settlements among the group’s countries without excessive dependence on the dollar.

The author’s main conclusion is that BRICS+ remains primarily an economic and political forum of the Global South, rather than a military bloc or an ideological alternative to the West. Its future strength will depend on its ability to remain a flexible, non-Western, yet not strictly anti-Western format. At the same time, the group needs a clearer long-term vision focused on peace, development, and a more pluralistic world order.



China's Development Plan for 2026–2030: Continuing the Economic Model and Strengthening Self-Reliance

(pl. Plan rozwoju Chin 2026–2030. Kontynuacja modelu gospodarczego i zwiększanie niezależności)

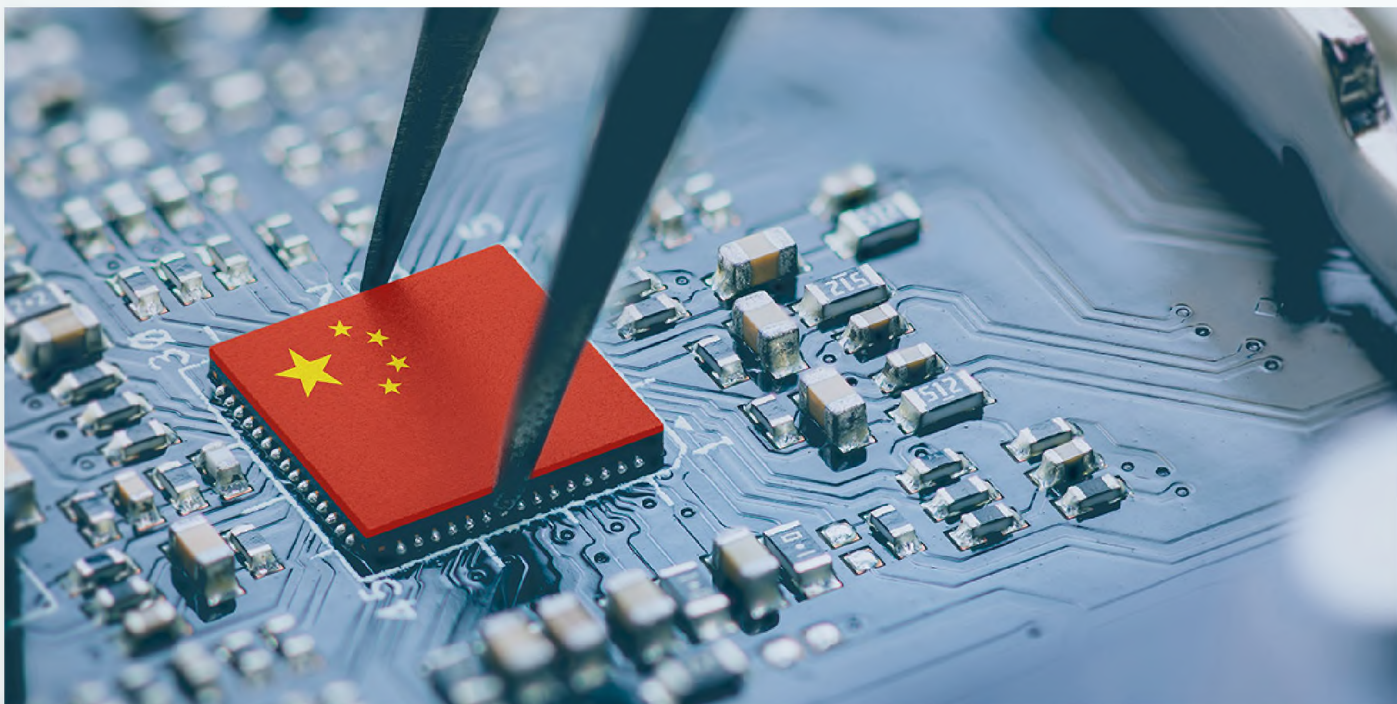
Marcin Przychodniak, Polish Institute of International Affairs (PISM), Poland
17.04.2026

The author analyzes China's five-year development plan for 2026–2030 and demonstrates that Beijing is not changing its economic model but rather deepening it. The central priorities remain industrial modernization, technological self-sufficiency, export competitiveness, and reducing dependence on foreign suppliers, primarily the United States. Chinese authorities acknowledge the challenging external conditions but do not make domestic consumption the main driver of growth. Instead, the focus remains on investment, subsidies, state funding for research, support for domestic manufacturers, and tighter control over key sectors.

The development plan places particular emphasis on chips, software, AI, green energy, new materials, hydrogen and quantum technologies, 6G, biotechnology, and modern mechanical engineering. These areas also have security implications for China, as Beijing seeks to control critical technology supply chains and limit its vulnerability to external pressure.

At the same time, this strategy does not offer a systemic solution to the problems of weak domestic consumption, unstable employment, youth unemployment, and high debt, which already exceeds 300% of GDP. This means that China will continue to rely on industry and exports, intensifying competition with the EU.

For Europe, the conclusion is this: China's strategy could displace European companies from key sectors and deepen dependence on China in critical technologies, raw materials, the automotive industry, and software. Therefore, the EU must more actively employ de-risking, investment screening, export controls, and industrial policy to protect its own market and technological base.



From region to world: geographical analysis of China's global presence

Manuel Gracia Santos, Blanca González, Mario Esteban, Cristina de Esperanza Picardo, Elcano Royal Institute, Spain
21.04.2026

Experts analyze the geography of China's global presence using the Elcano Global Presence Index, which measures the economic, military, and "soft" dimensions of a country's external projection. According to the study's findings, China has unquestionably become the world's second-largest power in terms of international presence and has significantly narrowed the gap with the United States: in 2024, the U.S. index was approximately 1.7 times higher than China's, whereas in 1990 it was more than eight times higher.

The key finding of the study is that China remains primarily a regionally concentrated power. In 2024, over 30% of its global presence was concentrated in the Asia-Pacific region, which aligns with Beijing's priorities: leadership in its own neighborhood, economic integration with ASEAN, and reducing U.S. influence in Asia.

The economy remains the core of China's presence, particularly through industrial exports, investments, and services. The military dimension is growing primarily through naval capabilities rather than through the large-scale deployment of troops abroad. China's "soft" presence is also asymmetrical: traditional cultural appeal is weaker, while scientific, technological, and informational ties are growing.

Experts also qualify the thesis of a "pivot to the Global South." China is indeed diversifying its partnerships, but unevenly. Latin America has become the second most important region for China's presence, while Africa and the Middle East are developing more slowly and according to different logics.



NEW TECHNOLOGIES, CYBERSECURITY, DRONES, AND SPACE

Race to the Regolith⁷: Artemis II and the Astropolitics of the New Space Age

Dimitris Kollias, Hellenic Foundation for European & Foreign Policy (ELIAMEP), Greece

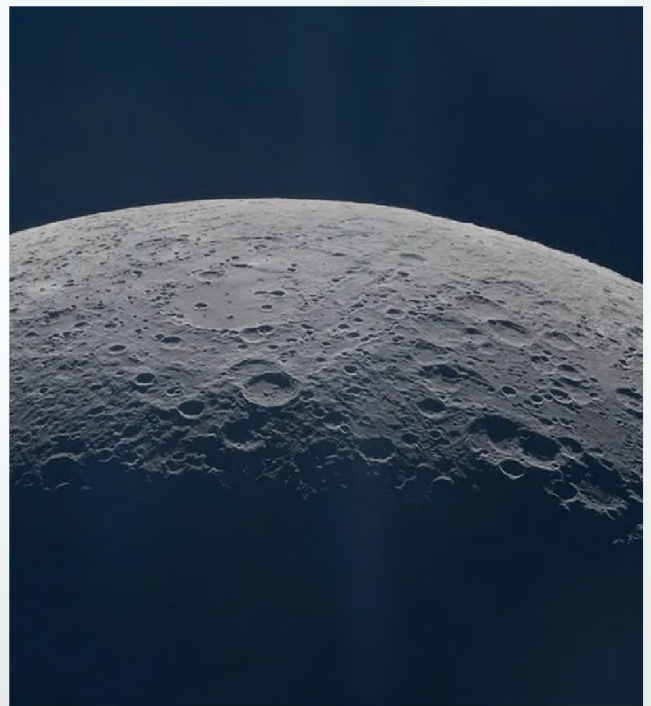
01.04.2026

The author analyzes the Artemis II mission as a symbol of the transition to a new space age, in which space is also becoming a arena for geopolitical rivalry, economic competition, and the struggle to shape the rules of the future order. The new space race is different in nature from the rivalry between the US and the USSR in the 20th century. While landing on the Moon back then was primarily a symbol of technological and political superiority, today the Moon, according to the author, is viewed as a resource, infrastructure, and strategic space where being the first to establish a presence could shape the rules of space activity for decades to come.

Thus, the study focuses on the competition between two models of space governance. The U.S. is promoting the Artemis Accords⁸, which have been joined by over 60 countries, while China and Russia are developing the International Lunar Research Station project⁹, involving partners from the Global South. Thus, the new space race is replaying in orbit and on the Moon the very same lines of rivalry that already exist in Earth-based politics.

Private corporations play a distinct role. SpaceX, orbital data centers, AI computing, and commercial space infrastructure are becoming elements of national security. For Europe, this creates a sovereignty issue: it depends on American cloud services and, at the same time, lacks the speed, capital, and unity to fully compete in the new space economy.

The author takes a critical view of Europe's position: despite the European Space Agency's contribution to Artemis and record funding, Europe risks remaining a technical partner without the right to set the rules. At the same time, it can still strengthen its role through the European Space Act, the European Space Shield, orbital digital infrastructure, and the niche capabilities of individual states in Earth observation, maritime security, civil protection, and satellite communications.



⁷Regolith is a loose layer of dust, rock fragments, and small stones that covers the Moon's surface. In the title, this word is used as a metaphor for the battle for physical presence and resources on the Moon.

⁸The Artemis Accords are a U.S.-led international initiative launched in 2020 that establishes principles for the civil exploration and use of the Moon, Mars, comets, and asteroids for peaceful purposes. They are based on the 1967 Outer Space Treaty and aim to ensure transparent, safe, and sustainable activities, including cooperation in resource extraction.

⁹The International Lunar Research Station is a large-scale lunar base project led by China and Russia, scheduled for construction between 2031 and 2035. The station is being built for scientific research on the Moon's surface or in its orbit, serving as a competitor or counterpart to the U.S. Artemis program.

Trump II vs. Digital Governance: A Crusade in the United States and Europe

Mathilde Velliet, Institut français des relations internationales (IFRI), France
01.04.2026

The author analyzes the Trump administration's systematic campaign against digital regulation in the U.S. and Europe. Broadly speaking, this campaign is framed by three main narratives: regulation allegedly stifles innovation, weakens the U.S. in its technological rivalry with China, and amounts to "censorship" when it comes to content moderation. Within the U.S., this has already led to the dismantling or weakening of frameworks established under the Biden administration in the areas of artificial intelligence, cybersecurity, and countering disinformation.

At the same time, this is not about a complete rejection of government intervention. Rather, the administration seeks to reorient regulation toward its own political goals: to remove rules related to AI risks, disinformation, climate, or diversity, while maintaining pressure on tech companies regarding the "ideological neutrality" of algorithms and the relaxation of content moderation

What matters most for Europe is that Trump's campaign has gone beyond domestic U.S. deregulation and turned into a tool for pressuring the EU. Washington is attacking European rules on digital services, digital markets, artificial intelligence, data protection, cloud services, and cybersecurity, portraying them as censorship, protectionism, and a threat to American tech companies. This pressure is exerted through public statements, social media campaigns, diplomatic inquiries, travel bans, threats of tariffs, export restrictions, and barriers to access the U.S. market. Separately, the author highlights the formation of a transatlantic anti-regulatory network comprising U.S. officials, tech companies, some Republicans, European far-right politicians, and business circles.

Europe should strengthen its digital sovereignty and its own ability to resist external pressure. Concessions by the U.S. would undermine trust in the EU as a regulatory power and demonstrate that European rules can be revised under political blackmail.



Preparedness can't wait: AI pushes cybersecurity into a new era

Paweł Świeboda, European Policy Centre (EPC), EU-level think tank

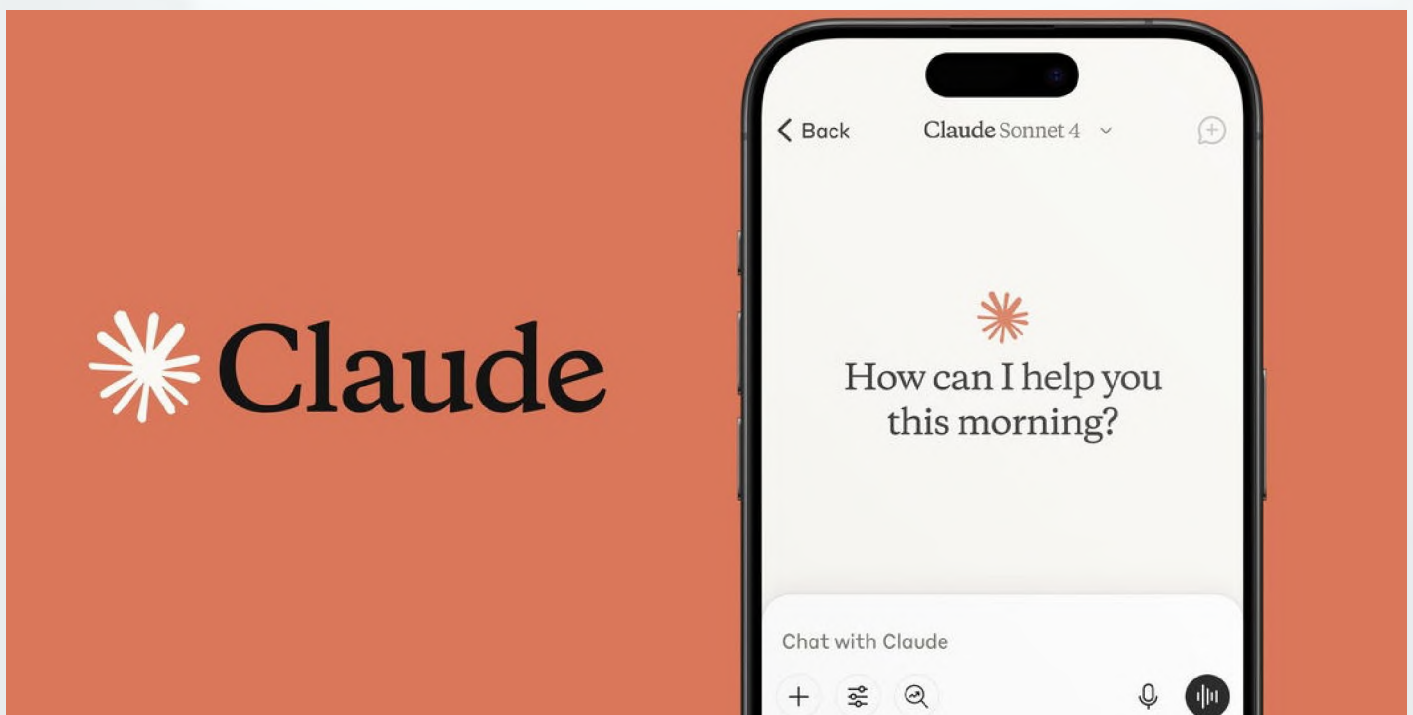
28.04.2026

The study examines how today's most powerful artificial intelligence models are ushering cybersecurity into a new era. The author cites Anthropic's Claude Mythos model as an example, which, according to the company, is capable of identifying and helping to fix a large number of serious software vulnerabilities, including bugs that went unnoticed for years during routine audits. At the same time, the author remains cautious, as there is currently no comprehensive technical report or independent verification of these capabilities. Nevertheless, the overall trend is clear—each new generation of AI models performs complex cybersecurity tasks better.

The main challenge is no longer just whether artificial intelligence can find a vulnerability, but whether companies and government institutions can quickly verify, prioritize, and fix it. If such systems begin to detect thousands of vulnerabilities simultaneously, the key advantage will be the speed of fixing vulnerabilities, not the mere fact of their detection.

The author emphasizes the dual nature of this technology. For defense, AI can serve as a tool for rapidly auditing legacy code, reducing accumulated unresolved issues, and strengthening cyber resilience. But in the hands of criminals or states with offensive cyber programs, it can make complex attacks cheaper and faster.

Separately, the study criticizes the EU's slow response. The European AI Office has limited resources and has not yet conducted risk assessments, unlike the UK's Institute for AI Safety. Therefore, the author recommends not banning such models, but rather implementing independent pre-deployment assessments, controlled access, new cybersecurity standards, and closer cooperation between the government and industry.



EU PARTNERSHIPS, REGIONAL DIPLOMACY, AND EXTERNAL RELATIONS

The EU and Australia are strengthening their partnership in the areas of trade and security

(pl. UE i Australia zacieśniają partnerstwo w dziedzinie handlu oraz bezpieczeństwa)

Patryk Kugiel, Polish Institute of International Affairs (PISM), Poland
02.04.2026

The successful conclusion of the eight-year negotiations between the EU and Australia on a free trade agreement, along with the signing of a security and defense partnership, demonstrate that both sides are seeking to diversify their economic ties, reduce their dependence on China, and strengthen their resilience against U.S. protectionism.

In terms of trade, the agreement is expected to eliminate tariffs on 99% of trade, increase EU exports to Australia, reduce costs for European exporters, and open new opportunities for industry, the agri-food sector, and investment. At the same time, the critical raw materials sector is particularly strategic. Australia is a major producer of lithium, manganese, and aluminum, essential for batteries, wind energy, and green technologies, but a significant portion of these resources is currently processed in China. A partnership with Australia does not eliminate the EU's dependence on China immediately, but it creates the conditions for its gradual reduction. This involves more direct EU access to Australian critical raw materials, investment in their extraction and processing in Australia, as well as the development of alternative processing routes outside of China.

The security dimension is no less important, as the new partnership covers maritime and digital security, hybrid threats, disinformation, artificial intelligence, and defense sector cooperation. Australia's strong support for Ukraine and the EU's readiness to act more actively in the Indo-Pacific region could strengthen coordination regarding the Russian threat, the defense industry, and countering hybrid challenges. Overall, the EU-Australia partnership emerges as part of a broader coalition of democratic partners interested in free trade, multilateralism, and a rules-based international order.



Rethinking the EU-UK Reset in a Shifting Global Context

Luca Cinciripini, Istituto Affari Internazionali (IAI), Italy

10.04.2026

The author analyzes how the crisis surrounding Iran and Donald Trump's more unpredictable policies are accelerating the UK's rapprochement with the European Union. It is important to note that this process did not arise suddenly, but is a continuation of a deeper structural trend. Following Brexit, Russia's full-scale invasion of Ukraine, rising tensions within NATO, energy risks, and global trade upheavals, the interests of London and Brussels are increasingly converging on the economy, security, and defense.

The crisis in the Middle East was a telling example of this shift. Keir Starmer's government refused to automatically support U.S.-Israeli strikes against Iran and permitted the use of British bases only for limited defensive operations. This caused tension with the U.S., but at the same time showed that it is becoming increasingly difficult for London to reconcile its special relationship with Washington with its own legal, political, and European interests.

The most realistic progress in EU-UK relations is possible in practical areas: the agricultural agreement, the electricity market, climate policy, energy security, critical infrastructure protection, investment screening, supply chain security, and defense cooperation. At the same time, the potential for rapprochement remains limited. Brussels does not want to create a model of selective participation in EU policies for London, where the UK gains access to advantageous areas of cooperation without broader rules and obligations. The British government, for its part, is not yet ready to return to the customs union, the free movement of people, or the single market. Therefore, the new phase of relations may improve practical cooperation, but its depth will depend on whether both sides are willing to find a certain compromise.



Could defence cooperation generate a spillover effect for Türkiye–EU relations?

Demir Murat Seyrek, European Policy Centre (EPC), EU-level think tank
15.04.2026

Could defense cooperation between Turkey and the EU serve as a catalyst for a broader rethinking of their relationship? The author argues that Europe needs to strengthen its own defense capabilities in light of Russia's war against Ukraine and the uncertainty surrounding long-term U.S. guarantees. In this context, Turkey is an important potential partner, as it has the second-largest army in NATO, a strategic geographic location, and a rapidly growing defense industry.

At the same time, the author emphasizes that defense cooperation cannot develop solely on the basis of pragmatic benefits. It requires trust, predictability, political compatibility, and long-term planning. And this is precisely where the main obstacles arise: the democratic backsliding in Turkey, EU concerns regarding the rule of law and fundamental freedoms, the unpredictability of Ankara's foreign policy, its ties with Russia and China, low alignment with EU foreign policy, as well as the Cyprus issue.

Despite this, the potential for cooperation is significant. The Turkish defense sector is developing rapidly, becoming increasingly integrated into European production chains, and is interested in the new European defense architecture, particularly in mechanisms such as SAFE—a tool for financing joint defense procurement and developing European defense capabilities. Importantly, support for this course exists not only within the government but also among the Turkish opposition, which links deeper cooperation with the EU to democratization and a return to a pro-European course.

Thus, defense cooperation alone will not transform EU-Turkey relations, but under favorable political conditions, it can strengthen trust, deepen strategic interdependence, and help reframe Turkey as an important player in European security, rather than merely a complex political problem.



The First Polish-French Intergovernmental Summit in Gdańsk

(pl. Pierwszy Polsko-Francuski Szczyt Międzyrządowy w Gdańsku)

Amanda Dziubińska, Polish Institute of International Affairs (PISM), Poland
24.04.2026

On April 20, the first Polish-French intergovernmental summit took place in Gdańsk, and the author views it as a practical implementation of the Treaty on Enhanced Cooperation and Friendship, signed in Nancy in May 2025. The meeting between Donald Tusk and Emmanuel Macron marked the launch of a permanent mechanism for annual consultations between the governments of Poland and France.

The most important agreements concern defense, industry, and nuclear energy. In the security sphere, the parties confirmed their intention to strengthen European defense readiness, develop the EU's defense-technological and industrial base, and reinforce NATO's European pillar. Cooperation in the field of satellite communications, joint military exercises, and modern communication systems is of particular importance, notably through an agreement between the Polish company RADMOR and the Thales and Airbus groups.

The second key area is nuclear energy. Poland and France view it as a tool for decarbonization, security of supply, and industrial competitiveness. Cooperation is to cover not only the construction of nuclear power plants but also engineering services, operation, safety, research, small modular reactors, and the development of the European nuclear value chain.

The summit also demonstrated that the Polish-French rapprochement fits into a broader European course toward economic security and technological resilience. This involves cooperation in semiconductors, the protection of transport and energy systems, cybersecurity, critical infrastructure, and countering hybrid threats. In this context, the partnership is also significant for Ukraine, as closer coordination between Poland and France could strengthen the EU's ability to align positions on support for Ukraine, sanctions against Russia, and the security of NATO's eastern flank.



RUSSIA, UKRAINE, AND THE EASTERN DIMENSION OF EUROPEAN SECURITY

The Russian Way of Ceasefires and the Traps It Sets for Europe

Valeriy Akimenko, Keir Giles, *International Centre for Defence and Security (ICDS), Estonia*

31.03.2026

The authors analyze Russia's practice of ceasefires and clearly demonstrate that Moscow often views such agreements not as a path to peace, but as a tool for continuing the war in a different form. The study uses the concept of "non-negotiability"—a deliberate inability to negotiate in good faith and to implement the agreements reached. Russia agrees to a ceasefire when it believes that freezing hostilities will give it more advantages than continuing them, but this does not mean it is abandoning its military objectives.

Using the examples of Chechnya, Georgia, Ukraine, and Syria, the authors demonstrate a recurring pattern: Russia seeks vague, asymmetrical, and poorly enforced agreements that restrain the victim of aggression but impose no real constraints on Moscow. Typical pitfalls include vague wording, the absence of enforcement mechanisms, weak monitoring, and the potential to manipulate concepts such as "peacekeepers," "special status," "terrorists," or "security measures."

The most important conclusion for Ukraine concerns the Minsk Agreements. The authors emphasize that these agreements did not eliminate the root cause of the war—Russian aggression—but in fact accepted Russia's fiction of an "internal conflict." The lack of border control, the weakness of the OSCE mission, and the demand for political concessions before the actual restoration of security created a political trap for Ukraine.

The main lesson is that any future ceasefire with Russia makes sense only if it includes clear language, a real enforcement mechanism, secure monitoring, and guarantors capable of inflicting tangible military or economic costs on Moscow for violating the agreements. Without this, a poorly drafted agreement may turn out to be worse than no agreement at all.



Belarus has tested its armed forces

(pl. Białoruś sprawdziła swoje siły zbrojne)

Anna Maria Dyner, Polish Institute of International Affairs (PISM), Poland
01.04.2026

This study examines the longest and largest combat readiness exercise conducted by the Belarusian army in recent years. The author demonstrates that these maneuvers also served as a political signal to Ukraine and NATO's eastern flank. Unlike in previous years, Minsk did not conceal the exercises but widely covered them in official media, demonstrating the army's growing combat capabilities.

The exercise consisted of two interconnected parts: one was conducted by direct order of Lukashenko and under his control, while the other followed the plans of the Ministry of Defense and the General Staff. The exercises involved mechanized, artillery, engineering, and anti-aircraft missile units, as well as aviation, special operations forces, electronic warfare, unmanned systems, and territorial defense. The ability to rapidly mobilize reservists was tested separately.

The key motivation for the exercises is to learn the lessons of the war in Ukraine. The Belarusian army is paying increasing attention to drones, air defense, reconnaissance, electronic warfare, and the coordination of various branches of the military. The likely participation of Russian instructors confirms Minsk's deep military integration with Moscow.

Unfortunately, Belarus not only provides Russia with territorial and infrastructural support but also aids its military efforts through the deployment of systems related to drone attacks and corporate cooperation with the Russian defense sector. In the author's view, NATO must closely monitor changes in the Belarusian army, as in the event of a conflict, it may no longer perform merely auxiliary roles but undertake broader combat missions.



Russia's Frozen Assets: A Litmus Test for the EU

Francesco Giumelli, Istituto Affari Internazionali (IAI), Italy
03.04.2026

The author examines the fate of approximately €210 billion in Russian state assets frozen in the EU following Russia's full-scale invasion of Ukraine. To some extent, this issue has become a test for the European Union: is it capable of simultaneously supporting Ukraine, upholding the rule of law, maintaining financial stability, and acting strategically in the context of war?

The EU is not yet confiscating the frozen Russian assets themselves, but is using only the additional income generated from their holding and reinvestment within the European financial system. This approach allows funds to be directed to Ukraine without resorting to the direct seizure of the Russian Central Bank's sovereign reserves. Direct confiscation remains legally and politically complex, as it could set a precedent in international law, undermine trust in European financial institutions, and expose Belgium and Euroclear to significant legal and financial risks.

In December 2025, the EU chose a more cautious path—joint borrowing to support Ukraine instead of directly using frozen assets. However, the author emphasizes that this is only a temporary compromise. Ukraine's needs are growing, U.S. support remains uncertain, and Russia is already attempting to turn the issue of assets into a subject of geopolitical bargaining.

The main conclusion of the study is that inaction also comes at a cost. How the EU handles frozen Russian assets will determine both the scale of support for Ukraine and trust in the Union as a legal, financial, and strategic actor.



Ukraine Has the Cards Now

Tetiana Fedosiuk, Taras Kuzio, International Centre for Defence and Security (ICDS), Estonia

13.04.2026

In an interview, political analyst Taras Kuzio assesses the current negotiations regarding Ukraine as a process that has no real substance without a change in Russia's objectives. In his view, when the Kremlin speaks of "eliminating the root causes of the war," it does not mean neutral security conditions, but rather the de facto subjugation of Ukraine: prioritization of the Russian language, the influence of the Russian Orthodox Church, acceptance of Russian historical myths, and a rejection of European integration. In other words, the Russian vision of "peace" effectively means the destruction of Ukraine's political, cultural, and European identity.

Kuzio sharply criticizes the Trump administration's approach, which, in his view, puts pressure primarily on Ukraine rather than on Russia, and partially replicates the Kremlin's logic of great powers and spheres of influence. He also rejects the idea of "territory in exchange for peace," emphasizing that concessions to the aggressor will only create new risks for Europe.

At the same time, the political analyst notes that the positions of Ukraine and most of its European partners have converged significantly: the Eastern European perspective on the Russian threat has gained greater influence in Brussels, and support from the EU, the UK, and Norway is strengthening Ukraine's position. Separately, Kuzio highlights Ukraine's transformation from an aid recipient to a strategic partner: about 60% of military equipment is already produced domestically, and the Ukrainian defense sector, particularly hundreds of drone companies, is helping the West adapt to 21st-century warfare. Thus, Ukraine has its own levers of influence, and real pressure on Russia today is being exerted primarily by the Ukrainian army.



The Bear's Sharp Claw or a Soft Underbelly? Russian Armed Forces in the Far East

Yu Koizumi, International Centre for Defence and Security (ICDS), Estonia
14.04.2026

Russia's full-scale war against Ukraine has altered the military situation in Russia's Far East and affected Japan's security environment. The ground forces of the Eastern Military District have been significantly depleted: a large portion of combat-ready personnel and equipment has been redeployed to the Ukrainian front, and the losses of Far Eastern units may be comparable to the pre-war strength of the district's entire ground component. This means that the rapid restoration of Russian ground forces in the region will be difficult and protracted.

At the same time, Russia is not disappearing as a military factor in Asia. Its air force, Pacific Fleet, and strategic nuclear forces remain active. The Far East is currently being used more as a rear area for the war against Ukraine. Following Ukrainian strikes on Russian airbases, Moscow began relocating strategic bombers further east, specifically to the Amur Region and Kamchatka. At the same time, the importance of nuclear deterrence, the submarine fleet, and naval signaling in the Pacific Ocean is growing.

The most significant geopolitical shift is the deepening of Russia's military ties with North Korea and China. North Korea supplies Russia with ammunition, missiles, and even military personnel, while China provides dual-use technologies, industrial components, and some financial support through energy purchases. Thus, it can be concluded that Ukraine is exhausting Russia both locally and at the opposite end of Eurasia, while simultaneously pushing Moscow toward deeper dependence on authoritarian partners.



Estonia and the Donbas Scenario: A Misleading Analogy

Igor Gretskiy, International Centre for Defence and Security (ICDS), Estonia
23.04.2026

People often draw parallels between Ukraine in 2014 and modern-day Estonia, fearing a repeat of the “Donbas scenario.” The author acknowledges that Russia will continue to wage a hybrid war against Europe, but emphasizes that applying the Ukrainian experience to Narva or Estonia as a whole is analytically flawed.

The key argument is that Russia does not launch military operations suddenly. Before using force, Moscow typically spends years preparing the political, informational, institutional, and military conditions within the target state. In 2014, Ukraine was vulnerable due to a combination of several factors: part of society still harbored illusions about Russia, state institutions were largely infiltrated, the army remained underfunded and unprepared for war, and there were no real allied security guarantees.

Estonia, in the author’s assessment, faces a fundamentally different situation. It has long been aware of the Russian threat, possesses a high level of public readiness for defense, a political consensus on security, combat-ready armed forces, a reserve, and NATO support. Therefore, even the mere presence of a Russian-speaking population does not create conditions for a repeat of the Crimea or Donbas scenario.

However, Russia may use the fear of a “new Donbas” in the Baltics as a propaganda tool to divert Europe’s attention and weaken the focus on supporting Ukraine.



Putin's troubles: Facing mounting economic and military pressure, the Kremlin may try to muddle through – or escalate

Ondrej Ditrych, European Union Institute for Security Studies (EUISS), EU-level think tank

27.04.2026

Economic and military difficulties are gradually narrowing the Kremlin's room for maneuver in the war against Ukraine. The author believes that the Russian economy has not yet collapsed and the army is still capable of fighting, but Moscow is increasingly spending the country's future resources to continue the war today. The temporary surge in oil revenues following the U.S. campaign against Iran does not address the deeper problems. The budget deficit has already exceeded the projected level for the entire year, the National Welfare Fund's assets have shrunk significantly, expensive loans are holding back business and consumption, and the labor market is operating near capacity due to an acute labor shortage.

On the front lines, the situation for Russia is also becoming more complicated. Ukraine has stabilized its defenses, is regaining the upper hand in the drone war, is striking deep into Russian territory, and is receiving new resources thanks to European funding. At the same time, it is becoming increasingly difficult for Russia to compensate for personnel losses. The promised financial bonuses for signing military contracts likely no longer have the same effect as before.

The author describes two possible reactions from the Kremlin. The first is an attempt to hold out without drastic decisions: stalling for time, relying on oil revenues, direct state intervention in the economy, and counting on fatigue in Ukraine and Europe. The second option is escalation, which includes a new open mobilization and a more rigorous shift of the country toward a wartime model. The author does not even view a possible ceasefire as true peace, as it could serve as a pause for Russia to regroup. In short, the Kremlin must be contained not by waiting for it to significantly weaken, but by accelerating defense readiness and providing stable support for Ukraine as a key element of broader European security.





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EEYES is an environment where young voices are heard and ideas turn into real actions.



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ENERGY, CLIMATE POLICY, AND CLIMATE SECURITY

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EUROPEAN STRATEGIC AUTONOMY, DEFENSE, AND MILITARY READINESS

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CHINA, BRICS+, AND THE TRANSFORMATION OF THE GLOBAL ORDER

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