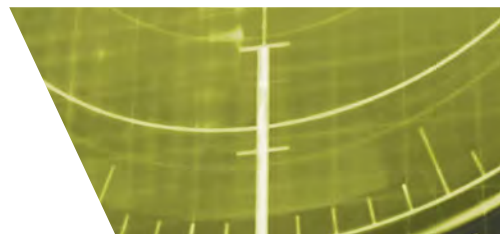


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Risk monitor 2025

Elected! Democracy and the free world



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Elected! Democracy and the free world

Vienna, 2025

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Introduction







Foreword by the Federal Minister of Defence

Klaudia Tanner

In 2024, a multitude of elections took place around the world. In over 60 countries, approximately four billion people were called to cast their votes—about 45% of the global population. For democratic states, an election is one of the most important political moments. Elections represent political decision-making, participation, and something that is still not a given in many parts of the world: the free and fair election of political representatives.

Because of their importance, elections have also become targets for manipulation. The underlying strategy is simple: Undermining trust in election results means that democratic institutions lose legitimacy, and it also weakens society as a whole. It is often sufficient to sow the seeds of doubt. Generating scepticism, questioning official information, spreading rumours, or doubting the news damages democracy as a whole. At the root of these attempts at manipulation—or what, in technical terms, is referred to as disinformation—lies the importance of elections. The elections of 2024 will shape Europe and the world for years to come.

The present volume aims to analyse the effects of the ‘super election year’ 2024 and to inform about emerging developments. The publication **‘Risk monitor 2025—Elected! Democracy and the free world’**, also contributes to psychological national defence, which aims, inter alia, to impart democratic values and to strengthen awareness of security and defence.

This publication seeks to inform about Austria’s current and future security situation and to highlight the relevance of current threats to democracy in Austria. I would like to express my gratitude to the authors of this publication, who have significantly contributed to the discourse on security and defence policy. Their contributions delineate the challenges that Austria faces in the coming years. My gratitude also extends to the experts at the Federal Ministry of Defence for their tireless efforts.



The post-election world

Security and politics

Peter Filzmaier

The year 2024 marked an extraordinary election year, involving more than four billion people worldwide. Global and national trends highlighted the success of opposition and right-wing parties, with economic and social issues such as inflation, migration, and healthcare dominating political debates. Security issues played a role mainly on the European level, while increasing nationalism and the weakening of international organisations shaped political developments. Realist approaches, which emphasise power struggles and conflicts, are displacing internationalist theories, thereby underscoring the long-term risks of renationalisation and an unstable global order lacking adequate democratic control mechanisms.

The year 2024 was a 'super election year', a characterisation often used in journalism. In science, however, such attributions should generally be

treated with caution. However, in this case, this description was objectively accurate. Last year, elections took place in as many countries and their populations as never before, totalling more than four billion people, from India with its 1.4 billion citizens to Tuvalu with 11,000. Voting took place in Russia as well, where this was an election in name only. Elections took place in the United States, and European parliamentary elections were held simultaneously in 27 EU Member States.

In Austria, parliamentary elections as well as state elections in Vorarlberg and Styria saw significant shifts in voter preferences. Additionally, mayoral and municipal council elections were held in Salzburg (city and state) and Innsbruck, and Chamber of Labour elections took place. This leads to the key question whether there were overarching national and international trends beyond the specific analyses of individual cases. Following logically, the question has to be which role security played in these elections and campaigns—whether as a voter concern or as an issue of election security itself?

2024 election results and security as motive for voting

Internationally, the 2024 elections saw a tendency for opposition parties to win, with incumbents performing poorly. Centre-right or right-wing candidates gained votes, or won outright victories. This trend extended to Austria's parliamentary and provincial elections. However, on the parliamentary level, the shifts in voter preferences mostly occurred on the right side of the spectrum, between the Austrian People's Party (ÖVP) and the Freedom Party (FPÖ), rather than between left-wing and right-wing blocs. According to voting analyses, the FPÖ gained approximately 450,000 votes from the governing ÖVP, taking first place in both the European Parliament elections and Austria's national elections.

At the same time, despite the partial inadequacy of a left-right framework for the United States, Donald Trump can clearly be classified as right-wing, not least due to his law-and-order positions. In the Federal Republic of Germany, the far-right 'Alternative for Germany' (Alternative für Deutschland; AfD) achieved significant gains and became the strongest party in a state election for the first time in Thuringia. Since right-wing parties traditionally benefit when security issues dominate

public debates, it would be reasonable to suggest that such issues were a key factor in voter motivation.

Interestingly, this was only the case to a limited extent. In the United States, the focus was more on general questions of democracy. Voters from the very different Republican and Democratic parties—often colloquially labelled as ‘right-wing’ and ‘left-wing’, respectively—shared a common concern: They perceived democracy as being threatened by the opposing side. Overall, those who perceived democracy as somewhat or significantly under threat were, by a significant margin of 57 to 43 percent and of 56 to 44 percent, much more likely to vote for Donald Trump rather than Kamala Harris in the presidential election.

Table 1: Perception of security of democracy in the USA. Vote shares in per cent, rounded. Source: CNN, Exit Polls

| US democ- racy is ... | very secure | somewhat secure | somewhat under threat | significantly under threat |
|--------------------------|---|--------------------|--------------------------|-------------------------------|
| Harris | N/A, under- sized sam- pling rate | 50 | 43 | 44 |
| Trump | N/A, under- sized sam- pling rate | 49 | 57 | 56 |

Aside from that, the principle ‘It’s the economy, stupid!’ definitely applied in the United States. This means that the decision to vote for Donald Trump and against Kamala Harris, as well as in favour of the Republicans in the congressional elections held at the same time, was driven by the economic situation and personal experiences with rising costs. In Austria, too—as shown in Table 2—security, and specifically terrorism, was not the primary electoral motive. Instead, these issues were overshadowed by inflation, immigration, healthcare and care for the elderly as the top priorities. Unsurprisingly, during the EU elections, security and war-related issues played the most significant role and were the second most-discussed topic among voters. However, at the national and regional levels, these issues ranked only fourth and fifth, respectively.

| | EU parliamen- tary elections | Austrian parliamentary election | provincial election Vorarlberg | provincial election Styria |
|--|--------------------------------------|---------------------------------------|--------------------------------------|-------------------------------|
| Top issues | Immigration | Inflation | Inflation | Inflation |
| | Security and war | Immigration | Immigration | Healthcare |
| | Environment and climate change | Healthcare | Democracy | Immigration |
| Ranking (in- ternational) security, war, terrorism etc. | 2 | 5 | 5 | 4 |

Table 2: Security as campaign issue in Austria. Question: "During the election campaign, how often did you discuss the following topics very often, fairly often, rarely, or not at all?" Figures in per cent. Ranking of topics based on the category "very often or fairly often discussed". Source: Institute for Strategic Analyses (ISA)/Foresight. Election surveys commissioned by ORF.

From a political science perspective, it is more difficult to assess to what extent elections themselves are insecure due to unlawful and/or foreign interference. The situation is unclear, as Donald Trump and right-wing parties such as Austria’s FPÖ, who regularly voiced doubts about postal voting and its ballot counting, are now the election winners and naturally seek to convey the impression of legitimacy. However, this provides no insight into whether and to what extent manipulation attempts possibly even involving other nations may have occurred.

What now? Elections as decisions on the future

A detailed examination of election campaigns and results in 2024 revealed that, in particular when international issues were at the forefront, the role of nation-states was perceived more frequently and in a more positive light than in previous years and elections. Conversely, international organisations are losing significance. They are seen as unpopular and ineffective. The political science theory of internationalism is in a phase of decline.

Keynotes

- Over four billion people voted globally in 2024, with opposition and right-wing parties achieving majority successes.
- Economic concerns and inflation dominated many electoral decisions, while security played a central role only in isolated cases.
- Societal divides along urban-rural lines, formal education levels, and income are deepening, in some cases with the potential for violent conflict.
- National interests are gaining prominence over international organisations such as the UN and the supranational EU.
- Power politics and geopolitical conflicts are displacing internationalist and cooperative approaches.
- Democratic oversight mechanisms are under global pressure, particularly due to the rise of illiberal systems.
- Isolationism and unpredictable foreign policies, especially from the USA, are increasing global uncertainty.

Mid and short-term future trends

Bernhard Richter

The results of an analysis of scenarios for the medium and long-term future of Europe and the global system show a shift in the expectation range toward more stable but pessimistic scenarios, characterised by geopolitical uncertainties. The international order is evolving into a confrontational multipolarity, in which rivalries between the USA, China, and other actors dominate. While China struggles with internal weaknesses, the USA remains globally dominant but politically unstable. Europe is shaped by economic challenges, tensions concerning integration, and a renaissance of NATO, but remains vulnerable in terms of security and defence policy. Both medium and long-term prospects are characterised by uncertainty and antagonism between the great powers.

The processes of strategic foresight

Before the Austrian Federal Ministry of Defence starts a risk assessment process, it conducts a long-term analysis of the future based on so-called 'environment scenarios'. These scenarios represent possible future alternatives and serve as a guide for the security and defence policy development of Austria. At the centre of the environment scenarios are 'key factors'. These central system components are continuously monitored in terms of relevant trends and developments to provide indications of future changes in the security-relevant environment. As part of the scenario monitoring process, trends for these key factors are identified. While the focus has previously been on medium-term development perspectives, the current analysis is the first to examine and describe both medium and long-term trend developments.

Medium and long-term trend developments in the expectation range

The scenarios are analysed regarding their proximity to the present and the medium and long-term future. This evaluation is based on both the results of the scenario monitoring process and the assessments of a group of experts. Additionally, the proximity of the scenarios to a desired future was also evaluated. The results show a shift in the expectation range, both in the medium and long term.

Medium-term and long-term scenario assessment

The medium-term expectation range now includes scenarios 1, 2, and 4 (see Figure 1), while the long-term expectation range additionally includes scenario 3 (see Figure 2). Compared to the previous assessment, scenario 5, which involves the failure of European integration, is no longer included in the expectation range. This development shows that the experts no longer anticipate the collapse of the EU. The assessment of the present shows that the current state of the system is perceived as less different from the expected future than in previous assessments. Both the medium and long-term expectation ranges overlap with the assessment of the present, which suggests that the

model is relatively stable. Since both the present and the expectation range differ from the desired scenarios, which essentially represent an ideal future, this finding is rather negative and reflects a high level of pessimism in the model.

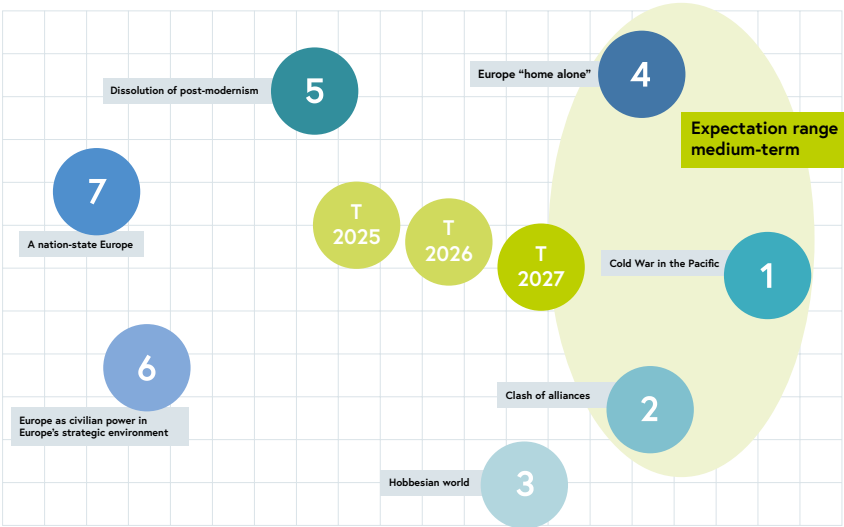


Illustration 1: Scenario monitoring—trend scenario 2027

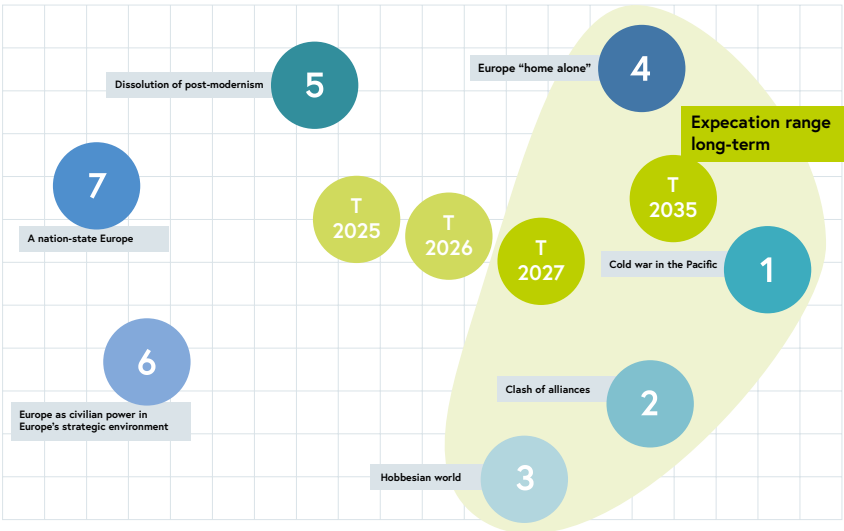


Illustration 2: Scenario monitoring—trend scenario 2035

Confrontational and fragmented international order

The scenarios included in the expectation ranges point to a more confrontational nature of the international system and strong fragmentation. One of the central uncertainties remains the distribution of power in the global system. In particular, the question is whether China can complete its rise to global superpower and challenge the USA, or even threaten its status as the sole superpower. This uncertainty continues to significantly shape geopolitical developments. A second central uncertainty concerns the development of European integration. Here too, the scenarios in the expectation ranges show very different developments, without a clear direction emerging from the trend analysis. This uncertainty reflects the divergent assessments of the future of the EU, with both progress and setbacks appearing possible.

Medium and long-term developments in the security policy environment

The MoD's scenario monitoring process looks at a period of three to five years. Within this period, trend developments are analysed to draw conclusions about the medium-term development of the future. Long-term evaluations are also made if possible. The current analyses show that nearly all trend developments in the strategic environment of Austria and the EU have a negative outlook. There are few trends that indicate a positive counter-development.

The security policy environment of Europe is undergoing a transformation. The observed trends suggest that the unipolar dominance of the USA is coming to an end. Instead, the world is moving toward a multipolar order, where various actors compete for power and influence. This transitional phase is characterised by asymmetry and uncertainty, with the USA continuing to act as the leading superpower, while China faces significant internal and external challenges.

Multipolarity and status competition

The world is moving away from a unipolar order toward a multipolar structure, in which several great powers compete for influence. This development is shaped by the rivalry between the USA and China, as well as the rise of other actors such as India and the EU. A confrontational multipolarity is expected, where power is more diffusely distributed and shifting alliances, as well as tensions, will dominate international politics. This situation is characterised by strong asymmetries, with the USA continuing to act as the only global superpower, while China, despite its ambitions, will still face significant limitations in both internal and external balancing.

China's dual strategy

China pursues a dual strategy that has both international and regional dimensions. Globally, China presents itself as a responsible great power, committed to solving international problems, particularly in the area of green transformation. At the same time, China follows a hegemonic policy in the Indo-Pacific region and, where necessary, uses military means to assert its interests. Domestically, China faces a number of challenges, including unfavourable demographic developments, high debt, and slowing economic growth. These internal weaknesses impact China's external ambitions and make its long-term stability appear uncertain.

USA—unpredictable superpower

Polarised and volatile domestic politics are making US foreign policy increasingly unpredictable. Both major political parties have moved away from a traditionally internationalist policy and instead pursue a reduction in dependencies and a confrontational stance toward China. These developments are impacting transatlantic relations, which are increasingly characterised by tensions.

Global economy and geopolitical tensions

The global economy is facing significant challenges, including the aftermath of the COVID-19 pandemic, the Russian invasion of Ukraine, and protectionist measures that disrupt global supply chains. Economic growth has slowed, and economic inequality is increasing both between countries and within societies. These developments could exacerbate social tensions and threaten global peace. In Europe, while energy security has improved somewhat, dependence on external energy sources remains high, making the region vulnerable.

NATO and European security

The Russian invasion of Ukraine has led to a renaissance of NATO, as the threat posed by Russia forces member states to increase their defence spending. This crisis has brought the importance of NATO as a security guarantee into sharp focus and intensified discussions about a fair distribution of burdens within the alliance. Despite the increased defence spending, NATO's future remains uncertain, particularly in light of the political developments expected in the USA after the elections. In the long term, a stronger assumption of responsibility by European members is anticipated, which could sustainably alter the dynamics within the alliance.

Contradictory developments in EU integration

The political integration of the EU is moving in different directions. On the one hand, there has been progress at the institutional level, such as the initiation of accession talks with Ukraine and Moldova, but on the other, tendencies toward renationalisation and increasing political tensions are growing. The emotional attachment of citizens to the EU remains weak, and the threat of external crises is leading to consolidation but also to the potential division of the Union. In the long term, integration remains unstable and volatile. The Common Security and Defence Policy is making progress, but the long-term military operational capability of the EU remains uncertain. There are positive developments, such as the creation of new missions and increased training of units, but financial and political challenges continue to persist.

Keynotes

- The international system is in a transitional phase from a unipolar to a multipolar order, characterised by confrontational dynamics and shifting power balances among major players such as the USA, China, the EU, and India.
- China is pursuing a dual strategy, presenting itself globally as a responsible power while demonstrating hegemonic ambitions in the Indo-Pacific region; however, China's long-term geopolitical trajectory remains uncertain due to internal and external challenges.
- The USA is increasingly influenced by polarised domestic politics and contradictory foreign policy strategies, undermining the stability of its international relations and leading to unpredictable responses in security matters.
- European integration remains inconsistent: while institutional progress is being made, the emotional connection of citizens and political stability are fragile due to economic and social tensions.
- NATO is experiencing a renaissance in response to the Russian threat, as Europe's security landscape undergoes a fundamental shift, potentially requiring greater responsibility from the alliance's European members.



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Identify, analyse, and combat challenges

Ronald Vartok

The risk assessment of the Federal Ministry of Defence provides the opportunity to identify future challenges and crises at an early stage. It shows that the global security situation is being threatened by the steady decline of the rules-based world order. Primary reasons include the Russian invasion of Ukraine, the escalation of the Middle East conflict, and the destabilisation of the West by the Russia-China-Iran axis. In addition to these escalation potentials, Austria will increasingly be confronted with the growing importance of global supply chains and the consequences of resource shortages, as well as deindustrialisation.

The risk assessment

The past years have been marked by a variety of complex crises, which have not only presented new challenges to European societies but

have also significantly influenced and changed the geopolitical security situation. For the Austrian Federal Ministry of Defence and, by extension, Austrian security, it is essential to identify future challenges and crises early and prepare for them.

The COVID-19 pandemic, the consequences of the climate crisis, and the escalation of geopolitical conflicts, such as in the Middle East and Ukraine, have made it clear that we, as a community, must increasingly invest in the defence and security of Europe. In line with the principle ‘Si vis pacem, para bellum’, or ‘If you want peace, prepare for war’, proactive security preparation is essential.

The risk assessment of the MoD is a tool for statistical forecasting and serves to detect and assess threats at an early stage. It enables a continuous monitoring process that systematically identifies and analyses risks. These risks are categorised based on criteria. On the one side, there is the probability of threat occurrence, and on the other side, the political impact of these threats on the republic. The MoD’s statistical forecasting is scientifically based, providing the empirical foundation for effective crisis management and resilience building.

This shows that the greatest and most dangerous risks for Austria include an escalation of the Ukraine conflict, limited strategic capacity to act, migration flows due to geopolitical crises, the race for control of computer networks and an intensified confrontation between Russia and the European Union.

The global security situation has significantly worsened in recent years, marked by an increasing departure from the rules-based world order. The Russian invasion of Ukraine exemplifies this development, as it not only violates international law but also undermines international stability and cooperation. With military aggression and hybrid warfare, Russia is attempting to shift geopolitical power dynamics and destabilise the international system—with far-reaching consequences for Europe and beyond.

Non-state actors, such as terrorist groups, also contribute to destabilisation. Terrorist attacks in Israel and Europe show how targeted violence creates insecurity and enforces political goals. Such events destabilise entire regions and exacerbate migration movements. These

geopolitical conflicts and asymmetric threats challenge the international security architecture. Organisations like the UN, NATO, and OSCE must increasingly respond to dynamic crises and assert their legitimacy.

The role of a strong security architecture

European security preparedness is facing increasing challenges that require a holistic and coordinated response. Especially in Europe's vicinity, such as the Western Balkans and the Middle East, increasingly unstable situations are emerging. Conflicts, political tensions, and the geopolitical influence of external actors, such as Russia or China, threaten to further undermine the already fragile stability in these regions. These developments directly affect Europe's security, particularly through potential migration movements, economic disruptions, and the risk of local conflicts expanding.

In this context, armed forces play a central role. They are not only guarantors of the territorial integrity and sovereignty of individual states but also a decisive factor for the collective security of Europe. Given the increasing threats, armed forces must be modernised, fully equipped, and strategically oriented to act across the entire spectrum of possible risks and conflict scenarios. Their ability to deter and actively manage crises is crucial for consolidating Europe as a space of freedom, law, and security.

Another core task is to integrate these national efforts into a comprehensive European security architecture. Given the cross-border nature of modern threats—from cyberattacks to hybrid warfare to global power shifts—no single state can manage these challenges alone. Close cooperation within the European Union and with international partners is necessary to build resilience and implement effective security strategies. A comprehensive national security preparation that combines national and European approaches is of central importance.

Challenges create opportunities

Even though the risk assessment paints a bleak future and the multitude of crises seems overwhelming, Austria and the European Union as a community of values and defence are still masters of their own fate. It is crucial to further expand economic and political independence and sustainably strengthen the resilience of our way of life.

Keynotes

- The war in Ukraine remains a central threat to European security, as escalation increases the risk of a large-scale conflict with Russia and places significant strain on the economy.
- Escalation in the Middle East and the threat of terrorist attacks jeopardise stability and security in Europe, impacting migration and energy supply, while demanding enhanced international cooperation.
- Migration driven by climate change and geopolitical conflicts will pose increasing challenges for Austria in the future.
- The global economy faces challenges that will compel Austria to secure strategic resources, promote sustainable industries, and strengthen competitiveness through targeted measures.
- The climate crisis strains societies, endangers lives, causes economic damage, and has far-reaching global consequences.
- Hybrid and digital threats, such as cyberattacks and disinformation campaigns, will significantly endanger the security landscape of the future and require heightened vigilance.



The “return of history”

Moment of truth for Europe?

Arnold H. Kammel

Donald Trump's election as the 47th US President is another piece of the puzzle that presents Europe with new challenges, particularly in terms of security and defence policy. Europe must invest more in its own defence readiness and capabilities, and take on responsibility at the global level. However, this is currently hampered by internal differences and limited political action capabilities. Austria must contribute to strengthening cohesion within the EU and building an open strategic autonomy.

The outcome of the US presidential election presents Europe with challenges that, while not unforeseeable or unfamiliar, indicate a return to historical patterns and challenges. After Donald Trump's election as the 47th President of the United States, transatlantic relations are once again under scrutiny, while Europe's security situation continues to deteriorate year by year. This is partly due to escalating crises and military

conflicts. In addition to the south-eastern crisis arc with instabilities in the Western Balkans and Eastern Europe, Africa is also facing a fundamental reordering due to numerous coups d'état. The Middle East is undergoing similar changes. New alliances are forming, such as the expanded BRICS, which challenge the traditional dominance of the West.

These developments present a stress test for Europe's ability to act, and they also affect Austria's security. Since the European Union is the primary framework for Austria's security and defence policy, Austria is also called upon to contribute to the EU's security and defence policy in a manner consistent with its capabilities and capacities and to actively shape it.

Transatlantic stress test

The re-elected US President Donald Trump, who resumed office in January 2025, is already well known in Europe. Trump's political agenda is expected to mean a return to transactionalism in US foreign policy, with a zero-sum mindset at its core. This means that the advantage of one party, for example in a trade agreement, is automatically seen as a disadvantage for the other party. This transactionalism is diametrically opposed to cooperation as a defence policy principle, and the post-war order is increasingly under pressure. Alongside the existing challenges posed by new alliances like the expanded BRICS, Europe is entering a period of difficult times, even from a transatlantic perspective.

Alliances, whether political or military, work best when they are credible. This also applies to the transatlantic defence alliance. If there are doubts whether all NATO partners will adhere to their commitments under Article 5 of the North Atlantic Treaty (the mutual defence clause), NATO's deterrence and defence capabilities are called into question. Against the backdrop of collective commitments being called into question and the fact that 23 out of 27 EU Member States are also NATO Members, European states face the central question of how to collectively shape their security and defence policy to ensure the safety of their citizens. However, the focus should be less on the institutions per se, as all member states only have a single set of forces, and any efforts within one organisation automatically strengthen the other organisation due to overlapping memberships. Such strengthening requires sustainable investments in defence. The long-standing NATO

dogma of defence spending at 2 percent of GDP now seems outdated, and the current debate within NATO circles is likely to settle around 4 percent. However, these defence expenditures will be of only limited use unless the European defence industry increases its capacities and the common European approach dominates the currently prevailing national approach.

This fact is acknowledged in the EU's new institutional structure, through the creation of a dedicated defence (industry?) commissioner. Additionally, alongside the High Representative for Foreign and Security Policy, another Vice President of the Commission has security in her portfolio, clearly demonstrating the increasing significance of security and defence within the EU.

Institutional changes, however, do not generate the necessary increase in capabilities or the growing willingness to deploy these capabilities in the European interest. With the White Paper on Defence expected from the new Commission in its first 100 days, further decisions are anticipated to deepen the Common Security and Defence Policy in the transatlantic context, at least complementary to the EU's 2022 Strategic Compass. It should be noted that this Commission White Paper will address topics traditionally reserved for member states due to the intergovernmental nature of the former second pillar of the CFSP/CSDP.

Despite the expected challenges in and to transatlantic relations due to the Trump presidency, they remain essential for the security and defence of Europe, and any efforts to further develop the CSDP contribute to fulfilling the American expectation of an EU acting more autonomously, even in matters of security and defence policy.

The world after the elections

The trends that have already existed for a number of years are likely to intensify in a post-election world. The shared space of freedom, security, and the rule of law, which is a fundamental pillar of the European integration process, as well as the values that Europe likes to promote, are increasingly under pressure on the international stage. The return to an America-First policy may appear as a stress test at first glance, but it may also act as a push factor, intensifying European efforts to deepen

questions related to security and defence policy. However, while focusing on the USA, other geopolitical developments that impact the political systems of many countries and regions should not be overlooked.

After numerous elections in the ‘super-election year’, it is evident that the political fringes have gained momentum, making it increasingly difficult for traditional centre parties to successfully distinguish themselves from the escalating political debate. Donald Trump’s election may serve as a symbol of focusing on one’s own constituency and withdrawing from international cooperation and concepts of order. This means new challenges for Europe, especially as Europe itself is confronted with a restricted ability to act due to national developments. The upcoming elections in Germany and France’s politically challenging situation will further weaken this ability. Moreover, international trends also represent a setback for the attractiveness of the liberal-democratic order model that Europe advocates. Last but not least, continued questioning of multilateral organisations and fora, not just by the USA, would lead to the continued weakening of the Western-based rules and values-based world order. The narrative of international relations, shaped by the West for decades, is increasingly losing support, particularly in the countries of the Global South.

Conclusions for Austria

Even in the election year 2024, it has become clear that hybrid forms of conflict, including disinformation campaigns and cyberattacks, are gaining in importance. A more fragmented world increasingly exposes Europe to such risks. The protection of democratic values and structures must therefore remain the focal point. This concerns both the integrity of elections themselves and the resilience of societies. In terms of societal resilience, geostrategic developments must also be considered, as they are making it more difficult for Europe to implement its interests. The call for strategic autonomy may be correct when using backward reasoning, but it requires well-considered measures to approach this noble goal. The first step is to identify dependencies that have arisen, in part, from globalisation, define critical resources, and pay more attention to trade routes in order to allow Europe to follow a more independent path.

For example, it is essential to create a European defence industrial base, reduce dependencies on critical resources, avoid or secure vulnerable supply chains, and pursue reasonable regulations in the area of emerging disruptive technologies like Artificial Intelligence. These efforts are of the utmost strategic importance for Austria as well. Similarly, the defence capacities of European states must be strengthened more quickly than before. This concerns the armed forces, which must gain credible deterrence and defence capabilities as part of a collective effort. However, any new technology and increase in capabilities will be futile if the defence readiness of European societies is not significantly enhanced.

This has been made clear at the European level by the report “Strengthening Europe’s civil and military preparedness and readiness”, presented by former Finnish President Sauli Niinistö. In the context of increasing societal resilience, Comprehensive National Defence, which is defined as a state goal in the Austrian constitution, is also coming to the forefront at the European level. In particular, psychological national defence plays a central role in this.

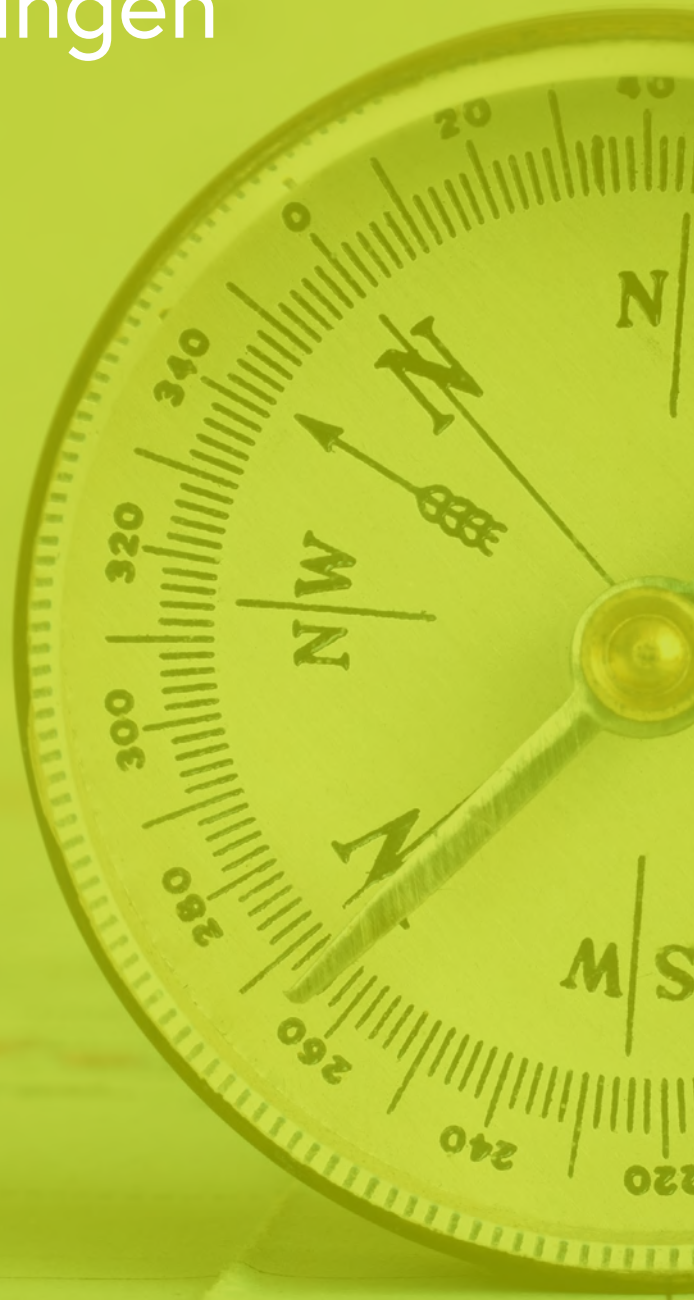
The return to old patterns of international relations, coupled with new phenomena such as hybrid warfare and forms of conflict, requires a comprehensive approach to address the challenges of the present. For Austria, the EU, with its Common Security and Defence Policy, provides the central framework for action. Therefore, strengthening the European dimension is of vital interest to Austria. This is rightly diagnosed in the Austrian Security Strategy presented in 2024. Donald Trump’s election may be another piece of the puzzle in the increasingly complex and diffuse new world order. However, in this context, it also represents a moment of truth for Europe, and for Austria as well, in that they must shape their security and defence policies more autonomously and credibly.

Keynotes

- Donald Trump's election serves as yet another indicator that Europe must take greater responsibility in security and defence policy.
- By questioning international organisations and agreements, the European narrative of a rules and values-based world order is losing influence.
- Hybrid threats such as disinformation and cyberattacks are on the rise, endangering democratic processes.
- Europe must reduce dependencies on critical resources and technologies to become more resilient.
- Europe, as well as Austria, must enhance its readiness to respond comprehensively to crises and conflicts, particularly in the realm of civil-military cooperation.

2

Globale Risiken und Herausforderungen







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Global risks and challenges

Nikolaus Rottenberger

The coming years will be characterised by a complex mixture of opportunities and challenges that will shape the global political landscape and, consequently, the security policy environment. In light of this, the European Union is increasingly striving to develop an independent role as a security policy actor. As a neutral nation within the European community of states, Austria will not be able to avoid addressing the form its contributions to this development will take.

Changed risk landscape

While global interconnectivity opens up numerous possibilities, there is also a noticeable fragmentation of the international community due to geopolitical crises and economic protectionism. In this tension between cooperation and confrontation, the duality of our time becomes evident: on the one hand, there is NATO expansion and the necessity of active multilateralism, and on the other, increasing competition and

conflicts between states. The gap between Western nations and the Global South is widening. While innovative technologies play a decisive role in the fight against climate change and environmental destruction, they also bring challenges such as demographic change and organised crime. We are witnessing both a decline in democracy and a growing demand for transparency and public participation. The threat of disinformation further accelerates these developments. In order to derive security policy imperatives from these complex trends, a differentiated examination of future opportunities and risks is unavoidable.

Future world order

The world order is undergoing significant changes, driven by a variety of influential actors, including states, international organisations, and non-state actors. The current rise in global competition for power already indicates a development towards an increasingly multipolar world. The United States, during the second term of President Donald Trump, may be at a crossroads in its history. Despite a potential decline in its relative influence, the USA will continue to be seen as the leader of a comprehensive network of alliances. US foreign policy will undergo a major shift, increasingly adopting protectionist measures in accordance with the president's stance. The imminent secession of the USA at the defence policy level raises the need to prophylactically reconsider a realignment of shared alliances and cooperations. The US' (alliance) partners and all those affected by the destabilisation of the political order in recent years are encouraged to consider alternative defence alliances and develop their own capacity for self-defence. Particularly, Europe stands to benefit from promoting multilateral cooperation, establishing new strategic alliances, and positioning itself as a reliable and strong advocate for peace in and around Europe in the event of significant defence policy changes under the second Trump administration.

China's economic development and resources have transformed the country into a significant global power. Its ambitions to secure a place in a reformed world order have led to direct competition with the USA for global hegemony. China's reactions to economic and social challenges will be decisive for the global political landscape.

Russia's status will depend significantly on the outcome of the Ukraine war. The outcome of the US presidential elections could have a considerable impact on this, as the USA is an important supporter of Ukraine. While the Trump II administration may provide less financial support to Ukraine than the USA has done so far, it also has no interest in a resurgence of Russia, which makes the future of the war's outcome difficult to predict under Trump II. Moscow's ability to manage the social and economic consequences of the war will shape its future role. The desire to maintain the status of a great power could lead to exponentially more aggressive foreign policies.

The EU in the global tension field

The increasing competition between systems and for power between the great powers is shaping global events and challenging the multilateralism propagated by Western Europe. Russia's war of aggression against Ukraine has shaken Europe's security architecture and highlighted the fragility of previous models of collective security and economic interdependence. This realisation has intensified the EU's need to focus more on its own security and defence policy.

At the same time, the power competition between the USA and China increases the pressure on the EU to define its interests more independently and position itself more precisely. In light of growing geopolitical tensions, the EU is increasingly striving to develop an independent role as a security policy actor. One that goes beyond its previous dependence on the USA. The Union, especially in light of the new political orientation of the USA in the 'new' world order, aims not only to act as part of the Western alliance but also as an independent military actor.

In the midst of the Union: Austria

These EU interests are also reflected in the Austrian Security Strategy and the ÖBH 2032+ development plan for the Austrian Armed Forces. With these ground-breaking documents, Austria shows that it has understood the developments and the direction in which they are heading. Austria must deliver defence capability to its citizens and European partners.

Although the path of neutrality is viable, it is necessary to at least consider the developments of other European actors' neutrality in order to critically and continuously reflect on Austria's position in relation to the geopolitical situation along the crisis arcs. The security interests of Europe and the EU must not be questioned, even in light of the existing tensions, even if adherence to these fundamental interests leads to the further development of security and defence policy measures.

In times of predominantly sub-conventional or not-yet conventional warfare in our region, it is absolutely necessary to prepare the armed forces both for hybrid threats and conventional military warfare, and to understand the EU's external borders, as well as Austria's borders, not only as geographical boundaries but also as zones protecting our understanding of freedom and security.

The constitutionally enshrined system of Comprehensive National Defence and its military, psychological, civil, and economic dimensions must be considered in a wide-ranging and inclusive manner both within Austria and at the EU-level. In addition to new security factors such as ecology and health, psychological national defence must particularly reflect disinformation and destabilisation initiatives, as well as other constantly emerging forms of information warfare.

Europe must take the initiative to adopt a more advantageous defence policy role and grow into a stronger, multilateral actor. As a neutral nation within the European community of states, Austria will not be able to avoid the question of the nature of its growing commitment in this context.

Keynotes

- The coming years will be marked by a complex interplay of opportunities and challenges.
- In times of escalating geopolitical conflicts, the revitalisation of interconnectivity and cooperation is imperative.
- Democratic systems are becoming more volatile in the face of disinformation and destabilisation initiatives.
- The power struggle between the USA and China is shaping the geopolitical landscape.
- As a direct consequence, the EU will need to address the development of an autonomous European defence policy.
- In Austria, the system of Comprehensive National Defence must be further developed in its military, psychological, civil, and economic dimensions.



The age of fragmentation

Hal Brands

The international order is undergoing a fundamental transformation, shaped by geopolitical conflicts and the collapse of old certainties. The post-Cold War era, characterised by democracy, globalisation, and US dominance, is giving way to a world where autocratic powers such as Russia and China dominate the stage. Ideological blocs are hardening, international cooperation is dwindling, and the threat from great power rivalries is growing. Understanding these dynamics is essential in order to confront the challenges of the new era of fragmentation.

From Eastern Europe to the Western Pacific, today's world is convulsed by crises. International cooperation seems paralyzed by strategic rivalry. Techno-pessimism has become pervasive. The sole superpower may be turning inward, as mighty autocracies arm themselves with alacrity. It is a commonplace to say we live in a time of turmoil. Our task is to chart more precisely the contours of the dawning age.

For a quarter-century after the Cold War, the world was structured by several verities—about the advance of democracy against autocracy, the triumph of globalisation and innovation, the promise of major-power peace and the stabilizing role of US influence. Those verities underpinned a world that dramatically favoured the USA and its allies—and one that was enormously propitious for global finance and trade. Today's world seems so disordered because the old truths are crumbling and the features of a new order are coming into view.

Our dawning order is one in which geopolitical blocs are back, and major powers wage sharp ideological and technological battles. The world economy is becoming a battlefield; global governance and problem-solving are on the wane. International violence intensifies, as the threat of great-power war rises higher. Meanwhile, US power remains impressive, but its behaviour grows less stable.

Times of turmoil can still lead to a decent future. But first, we must understand the age of fragmentation that is underway.

The world after the Cold War

The post-Cold War world was never perfect. But the generation after 1989 still regarded this time as one of progress and promise. The number of democracies increased roughly three-fold from the early 1970s to the year 2000. Foreign direct investment grew eight-fold just between 1992 and 2000. Economic openness was a boon to global living standards. It was also supposed to ease international tensions, by creating a common, shared prosperity.

Globalisation benefitted, in turn, from the information revolution, which facilitated trade and productivity. New technology also seemed to favour freedom: Protests ignited by social-media toppled illiberal regimes in Egypt and Ukraine in the early 2010s.

It wasn't all roses, of course. Catastrophic terrorism, of the sort that struck the USA in 2001, showed how weak actors could exploit the new openness to strike with global reach. But still, a world that was supposedly being calmed by economic integration seemed to be growing more conducive to diplomatic collaboration and great-power peace.

At the core of this progress was the United States. US alliances provided stability in Europe and Asia. Washington encouraged the spread of globalisation and democracy; it fostered cooperation against terrorism, nuclear proliferation and other problems. The resulting Cold War order was rooted in US power. It was also a golden age for firms that could exploit globalisation's reach. Nothing lasts forever, though, and now the key elements of the post-Cold War era have all come undone.

The new age

In hindsight, post-Cold War progress was often overstated: Many new democracies were unstable, which made them susceptible to autocratic reverses. Other post-Cold War phenomena had their dark sides. Globalisation brought prosperity but also inequality, cultural insecurity, and a resulting populist backlash. Information technology may have empowered protests, but it also gave their rulers new repressive tools. And once the US and Western dominance that underpinned the post-Cold War order faded, key aspects of that order began to fade as well. Russia recovered, and China rose dramatically, in the globalised economy the USA promoted. Washington and many allies, especially in Europe, disinvested in their militaries.

Over time, revisionist powers grew more aggressive. Russia invaded Georgia and Ukraine; China expanded in the South China Sea; Iran and its proxies fuelled chaos in the Middle East. This turmoil was rising just as the US' commitment to global activism was starting to slip. Wars in Iraq and Afghanistan led to disillusion and retrenchment. The global financial crisis of 2008-09 weakened the US economy and undermined its strategic energy. The presidency of Donald Trump, when Washington pivoted toward rivalry with China, but also locked horns with many of its allies, revealed how erratic the US trajectory had become. By the time of Russia's renewed invasion of Ukraine in 2022, the post-Cold War era was clearly over.

Blocks and the battle of ideas

So, what are the features of our new era? First, we once more live in a world of blocs. In Ukraine, an axis of Eurasian autocracies—North

Korea, Iran, and China—is aiding Russia's bid to conquer Ukraine and break the norm of non-aggression. They are facing a coalition of advanced democracies, from North America, Europe, and the Indo-Pacific, that support Ukraine in hopes of preserving an international system that has benefitted them so much. These alignments are not all-encompassing, but they are hardening as world tensions grow.

Second, the struggle of ideas has been renewed. Russia and China are trying to remake international norms and organisations so that autocracies will be more secure. They are also coercing and undermining the democracies that oppose them.

Third, the struggle for technological primacy is heating up. China is making large strides in hypersonic missiles and cyberweapons. It is making generational outlays in Artificial Intelligence, quantum computing, and other sectors. If China can dominate the key technologies of this era, perhaps it will dominate the era, as well.

Keynotes

- The post-war order, characterised by democracy, globalisation, and US leadership, is giving way to a new era of geopolitical fragmentation.
- Powers like Russia and China are challenging the liberal world order, strengthening ideological blocs, and intensifying international conflicts.
- Globalisation is increasingly overshadowed by geopolitical rivalries, while economic openness leads to new tensions.
- The ability of global actors to find common solutions is diminishing, as great power conflicts and ideological struggles intensify.
- Despite uncertainties, the era of fragmentation holds opportunities, provided the new global dynamics are understood and actively shaped.



Making sense of the global disorder

Ayşe Zarakol

The 21st century will not be shaped like the late 20th century by the competition between the great powers of the USA and China. There are many other factors causing instability in the global system. Our world could be much more unpredictable in the coming decades than classical theories of international relations would suggest. Much points to uncertainty as the new norm, and politics should adapt to this.

Crises, upheavals and disruptions

Our current decade has witnessed an unusual level of upheaval. As we entered the decade, we were still living with the political repercussions of the US War on Terror on the one hand, and the economic repercussions of the Global Financial Crisis of 2007–8, on the other. Especially since 2016—which was marked by unexpected electoral outcomes and

other political surprises around the world—the sense that world politics is in flux has intensified around the globe.

Accompanying this sense of global malaise is yet another pattern: domestic politics of countries both in and outside the traditional core of the international system are under stress because they are increasingly shaped by leaders sceptical of existing political institutions, both within their specific national context and often also internationally. International institutions — the EU, NATO, Paris climate accords — long thought to be a mainstay of world politics can no longer be taken for granted, even as liberal leaders scramble to shore them up and hold them together in the face of aggression (as well as internal detractors). Western triumphalism of the 1990s has been replaced by a pronounced anxiety about the decline of the USA, the fragmentation of the liberal international order, the rise of China, the aggression of Russia in Ukraine and the unreliability of liminal states such as Türkiye.

Worries about the health of our political and economic institutions are coupled with concerns about looming demographic, environmental and climatological pressures, such as mass migration, global epidemics, climate change or other consequences of the ‘Anthropocene’. Countries around the globe are increasingly turning inwards and erecting walls as they still struggle with the damages wrought by the COVID-19 pandemic as well as other crises such as increasing energy prices and supply chain disruptions. The ongoing war in Gaza has been putting extra pressures on an already beleaguered international legal order and straining the already weakened ties the Global South feels towards the West. Long-standing alliances are now being tested, some falling apart.

Uncertainty to accompany the transition?

The bigger question is what comes next? The discipline of International Relations has some expected answers to this question. International Relations realists—such as John Mearsheimer—believe they recognise familiar patterns in our decade of upheaval. They argue that great power politics are back. The upshot of reading our current disorder through this lens is that it promises the return of stability once a balance-of-power equilibrium is re-established (as was the case in the twentieth century). Such a reading suggests that the current political

turmoil is only due to the fact that we are in a moment of transition and reconfiguration of alliances.

International Relations liberals—such as G. John Ikenberry—also see some familiar patterns. In a recent International Affairs article, Ikenberry argues that we are headed towards a future of ‘Three Worlds’: that of the Global North (where the Liberal International Order survives), the Global East (an alliance of autocracies such as Russia and China) and the Global South, whose future is up for grabs but according to Ikenberry more likely to align eventually with the Global North, whose values are ultimately more appealing. Needless to say, this picture is quite reminiscent of the Cold War years, with its First World, Second World and Third World division. It too is a future scenario that promises a degree of familiar stability returning in a not-too-distant future.

Uncertainty as the new norm?

Our twentieth century analogies promising a traditional great power competition between USA and China, may be leading us astray to be too optimistic in terms of our predictions as to how soon our current period of disorder will be over.

We all have a status quo bias, and it is hard for us to imagine that the twenty-first century may not resemble the twentieth. It is hard for us to consider that the uncertain times we are going through may not be the temporary interlude before the establishment of a new order but the new norm that will be with us for decades. There are three major reasons, however, to think that disorder and uncertainty will be more lasting this time around than it was in the twentieth century.

Firstly, privatisation/personalisation of states (the strongman trend): This makes foreign policy decision making less institutionalised and much more capricious, a subject to sudden unpredictable shifts based on whims of individuals. This is a global trend that not even the strong states of the West have been able to resist. From Xi to Trump to Putin to Erdoğan to Netanyahu to Orbán, we see strongmen everywhere.

Secondly, increasing agency of the so-called Global South: classical IR scenarios assume GS actors either to be irrelevant to world politics

(realism) or a relatively inert monolithic block that will follow either the USA or Russia/China (liberalism). But the countries that are labelled the Global South today are not the Third World of the Cold War years. They have much more autonomy, agency and capacity as well as ambition to chart their own fate. More agents in world politics means more autonomous decision-making, adding to the unpredictability of outcomes.

Thirdly, new structural pressures such as climate change, technological revolutions (AI etc.), financial volatility: These were either not present in the twentieth century at all or not at current scales. A better historical analogy for the twenty-first century may therefore be the seventeenth century which is a period long known to historians as a period of 'General Crisis' that lasted for many decades, due to comparable structural pressures.

For all these reasons, our world may be much more unpredictable in the next decades than classical IR theories imagine. The next decades are not going to be just about USA vs China, or even USA and the EU vs China and Russia. Any policy-making efforts have to consider these new factors as well as the more familiar ones if they are to have reasonable chances of success.

Keynotes

- The great power competition has returned, but it would be a mistake to assume it will dominate global politics in the 21st century.
- The growing dominance of 'strongmen' has made foreign policy more susceptible to unpredictable whims and turns, rendering international relations less predictable.
- The Global South is not a homogeneous entity; it now encompasses many diverse actors capable of influencing developments.
- Structural factors such as climate change will play a significantly larger role in global politics.



The elections in the United States

Jeremy Shapiro

In his second term, we can expect to deal with a US President Donald Trump who is ‘unleashed’ both domestically and internationally. The chaos and constant turmoil of his first term will certainly return, but this time with greater political consequences, both within the United States and beyond. For Europe, and especially for European politics, Trump’s victory could have significant repercussions.

Trump’s election victory

In the end, the US presidential election proved less interesting than anticipated. There was no significant foreign interference, no voting controversies, no prolonged uncertainty about the outcome, and no civil unrest. Of course, much of this was because Donald Trump, the Republican candidate, won a clear, if still narrow, victory.

Theories abound as to why the Trump was victorious, ranging from the democratic candidate Kamala Harris' lack of ability to connect with the working class to the persistent racism and misogyny of the electorate. In the end, given how deeply divided the country is, nearly all the theories have some validity. But looking more deeply, it appears this election continued a global trend of anti-incumbency, reflecting a deep cultural and economic malaise that is sweeping the Western world.

In every democratic election in 2024, the incumbent party lost vote share, the first time this has ever happened according to data by the ParlGov global research project. In the United States, the incumbent party lost the presidential election for the third time in a row, the longest such streak since 1896. The underlying political trend is that in nearly all of the most economically successful and free countries on earth, people are deeply dissatisfied with their elites, their politics and their economic outcomes.

An 'unleashed' Trump

Whatever the reasons, Donald Trump was elected US president and perhaps will be the most powerful one ever. He entered the White House with a Republican majority in Congress and on the Supreme Court. Within his administration, the Trump campaign made clear that disloyal political appointees and an ideologically hostile permanent civil service stymied the agenda of his first administration. They do not intend to allow this to happen again and have indicated that they will make loyalty to Trump and his agenda the overriding qualification for political appointments. They further intend to curb civil service restrictions to allow Trump to lay off any civil servant who obstruct or even slow walks his policy changes. As Trump also recognises few if any normative constraints on his power, there will be fewer checks on his power than at any time in the history of the US presidency.

Given this concentration of power and Trump's long list of grievances and grudges, the second Trump term will probably be even more tumultuous than the first. The public will likely sour on him as they did in first term, but he has at least four years to transform the nation and punish his political opponents.

He will begin with his domestic priorities, particularly the trade and immigration the two issues that were most prominent in his campaign. On the economy more broadly, there is not much that needs be done. The US economy already has strong growth, full employment, low inflation and declining interest rates. Trump will likely pivot almost immediately from his apocalyptic descriptions of the US economy to describing it as 'the best ever', push for further tax cuts, and take credit for improvements that happened under his predecessor.

But some of his other priorities may have more lasting domestic impacts. The Trump campaign promised to introduce massive tariffs, some 60 percent on imported Chinese goods and 10–20 percent on all others. These tariffs could have inflationary and recessionary effects, but likely not quickly. Even more threateningly from an economic and political standpoint, the Trump administration seems intent on proceeding with its plans for mass deportation of illegal immigrants. The Trump campaign was inconsistent on just what they meant by this proposal, but the more extreme versions articulated anticipate rounding up and deporting some 10–20 million illegal immigrants from the United States. If even a fraction of that effort comes to pass, it will have profoundly disruptive cultural and economic effects as communities are gutted by mass arrest and labour shortages roil the economy.

Foreign policy in the second row

Compared to these domestic policy areas, foreign policy will be a bit of an afterthought in the new Trump administration. But candidate Trump did promise to end the wars in Ukraine and in the Middle East, or at the very least to end US involvement in them. He will likely look for early very public victories on those two files that can underline to the public that he can bring peace where Biden only delivered war. On Ukraine, that goal likely means heavy US pressure on Ukraine to accept a ceasefire or settlement of the war mostly on Russian terms. Trump will probably not exert similar pressure on Israel, which has a lot of support within Trump's party and even his inner circle. But his administration will give the Israeli government incentives to wind down the war and declare victory, which it might be willing to do given its recent victories over Hamas and Hezbollah.

The Trump administration's policy toward China and Taiwan is much more difficult to predict. The question of defending Taiwan divides the Republican party, with some of its more 'restrained' factions, often including Trump himself, suggesting that Taiwan is not worth defending. Others insist that Taiwan is central to the geopolitical competition between the USA and China. The Trump team will obviously be hoping that Taiwan does not become a crisis in the next four years, so they do not have to decide. In the meantime, they will probably move back toward the US' traditional ambivalence toward Taiwan, which the Biden administration had partly abandoned as its conflict with China grew more heated.

Impact on Europe

For Europeans, the most important policy consequence of Trump's victory might be its effect on European politics. Various populist leaders in Europe, notably Prime Minister Viktor Orbán in Hungary and President Andrzej Duda in Poland, supported Trump openly during the campaign and celebrated his victory. Populist leaders in Europe will look to Trump's example and his support in their various domestic political struggles, as well as their fights with the European Union over such issues as migration and the rule-of-law. In return, Trump will likely demand to use their influence in the EU institutions to support his efforts to reduce the EU's trade surplus with the United States.

Keynotes

- Trump's election victory reflects a global anti-establishment trend fuelled by dissatisfaction with elites and the economy. In all democratic elections in 2024, incumbent parties lost vote shares.
- Donald Trump will command a Republican majority in Congress and the Supreme Court, potentially making him one of the most powerful presidents in history.
- Trump's priorities for political appointments will focus on loyalty to himself and his agenda. He will also seek to reduce obstacles within the civil service to facilitate political changes.
- The Trump administration could implement significant tariffs and mass deportations of undocumented migrants, potentially causing inflation, recession, and labour shortages.
- Ending the wars in Ukraine and the Middle East will be key priorities. Trump will aim for early successes to demonstrate his ability to broker peace.
- Trump's election victory emboldens and strengthens populist politicians in Europe, potentially influencing the EU's policies on trade and migration.



The Global South

Battle of offers

Ivan Krastev

The global geopolitical landscape is increasingly shaped by the ambitions of Middle Powers such as India, Türkiye, and South Africa, rather than by the grand strategies of superpowers like the USA or China. These diverse nations, often balancing between alliances like NATO as well as Russia and China, have reshaped international dynamics. In this context, Europe faces significant challenges: a decline in its economic power and 'soft power', a reduced attractiveness of its social model, and difficulties in identifying with the postcolonial narrative that shapes the global discourse. Additionally, Europe's role as an ally of the USA complicates its position in the confrontation between the USA and China. To remain competitive in this fragmented world, the EU must adapt its policy and manage complex conflicts of interest, such as balancing climate protection, combating global poverty, and ensuring the prosperity of its middle class.

We live in a world re-shaped by the growing weight of ‘the hedging middle’. Simply put, the insecurities and ambitions of what we might call the Middle Powers, are shaping the emerging geopolitical landscape, rather than any grand strategy of the United States or China. The reaction of the Global South to Russia’s war in Ukraine is the powerful demonstration of this new reality. Observed from a distance, it might appear like a rerun of the Cold War stand-off between the ‘free world’ and Russian (and Chinese) authoritarianism. A closer look reveals a more complicated picture.

Whereas US allies in Europe came together in defence of Ukraine and against Beijing’s tacit support for Vladimir Putin’s war, other states, especially in the Global South, have offered a different response. Western appeals for solidarity with Ukraine have often fallen on deaf ears. The war in Ukraine has shone a spotlight on the activism of the Middle Powers as the major driving force of the reshaping of the international environment. They are a cast of odd bedfellows.

New dynamics of the Middle Powers

South Africa, India, South Korea, Germany, Türkiye, Saudi Arabia and Israel, to name a few, do not have much in common. Some are democracies, some are autocracies and others occupy a grey area in between. These countries have forged their post-Cold War identities in an interconnected world in which one’s major trading partners are often not one’s closest allies, and where technological decoupling between the USA and China can be more consequential than the ideological divide between them.

Some Middle Powers are developing countries with booming populations, others are economic powers struggling with demographic decline. Some earned their Middle Power status thanks to geographic size, others thanks to economic might. Some are constructive and co-operative members of the international community; others can be transactional and suspicious. But they all share one fundamental feature: They are determined to be at the table and not on the menu, since they all have the power and ambition to shape their regions.

They also define sovereignty as having options. Belonging to all clubs (NATO, BRICS) and not just belonging to one of them is the dream of

most of the Middle Powers. Most of them tend to see the dismantling of the US-led international order as an opportunity rather than a risk. Some of them talk about the need to construct a new and more just international order. However, the strategies of the Middle Powers are centred on adjusting to and navigating disorder rather than constructing a new order. The worldview of the Middle Powers is regional rather than global.

As Shannon O’Neil of the Council on Foreign Relations argues in her book, “The Globalization Myth”, in most places in the world globalisation translates to regionalisation. This is the key to the influence of the Middle Powers.

Türkiye’s role in the Russia-Ukraine war is a textbook example of Middle Power activism. President Recep Tayyip Erdoğan has been averse to cold war alliances, ingeniously crafting a Zelig-like ambition to be the bride at every wedding and the baby at every christening. True to form, Ankara has downplayed its identity as a NATO member and US ally in exchange for the role of mediator between Moscow and Kyiv. Middle Power activism can be salutary when identifying global solutions such as EU’s climate initiatives, or sanguinary when countenancing Russia’s invasion of Ukraine. But it is a new normal — the trademark of the emerging international order. One thing is certain: there will be no Bandung conference of 1955; no resurrection of the cold war’s non-aligned movement.

There is no common ideology among the Middle Powers. Indeed, they often have divergent or competing interests. And the movement is not even a movement. Middle Powers aspire to have the global influence of Washington or Beijing, yet they are well aware of how unlikely that eventuality is. Yet, while during the Cold War it was the Middle Powers that had to adjust to the whims and plans of the superpowers, today the USA and China have to manage a world reshaped by their activism.

Challenges for the EU

In dealing with this new fragmented world the European Union will have to deal with two new realities and three major challenges. The first reality is the significant decline of both our economic and soft power. Simply put, in the decade to come Europe will have less money for development

aid. Politically, it will be even more difficult to raise these funds. Rather than European investment in the developing countries, the inflow of migrants to Europe will be at the top of the agenda. The second reality is that the attractiveness of the European social and economic model outside of Europe (but also inside Europe) has declined.

In order to be competitive in this world shaped by Middle powers, the EU has to be able to deal with three major challenges. The first is Dani Rodrik's new political trilemma. In 2000, the famous Harvard economist wrote an article arguing that advanced forms of globalisation, the nation-state, and mass politics could not co-exist. Societies would eventually settle for two out of the three, at the most. He turned out to be right. This year he came out with a new trilemma. Namely, that it is impossible to simultaneously combat climate change, boost the middle class in advanced economies, and reduce global poverty. Under current policy trajectories, any combination of two goals appears to come at the expense of the third. So, to satisfy the legitimate demand of the Global South to reduce global poverty, the EU should give up either on climate or the prosperity of its own Middle class.

Secondly, concerning narratives, the new geopolitical landscape will be shaped by the language of anti-colonialism rather than the language of the Cold War. This puts the EU in a disadvantageous position. In the anti-colonial narrative, the EU is the successor of the old European empires rather than the model of the future.

The dynamic of the US-China confrontation will be the third factor defining EU's difficulties dealing with the Middle Powers. While in the days of Pax Americana many in the developing world perceived the EU as an alternative to the USA, nowadays the EU is primarily seen as an US ally in its confrontation with China. This means hedging between the USA and China does not result in new opportunities for the EU. For Europe, a world shaped by the rising Middle Powers is a brave new world. Navigating in it will require policies very different than the ones we have today. We have a weak card to play and the only chance we have is to play it smartly.

Keynotes

- Middle powers are reshaping the global order.
- Europe's economic and political influence is declining, while other actors are gaining prominence.
- Geopolitical narratives are shifting, challenging Europe's traditional position and altering global dynamics.
- Europe faces the challenge of balancing its priorities. The EU must align climate protection, poverty reduction, and the preservation of the middle class to remain competitive.



BRICS and other regional alliances

A new parallel global order

Miriam Prys-Hansen

The emergence of new institutions, such as BRICS, is increasingly seen as a precursor to the creation of a parallel global order. In fact, today's international politics is characterised by growing geopolitical rivalry. However, this does not necessarily lead to a new systems competition, as most countries in the Global South have significant political and economic interests in maintaining existing relationships with the West.

Since 2024, the golden age of universal international organisations such as the United Nations (UN), the World Trade Organization (WTO), and the Bretton Woods institutions, along with the associated hegemony of a Western-dominated liberal world order, seems to be coming to an end. The blockage of the WTO, the frequently criticised lack of

legitimacy of the UN Security Council, and the inability of the Bretton Woods institutions to carry out reforms have contributed to discussions about the end of the liberal international order. At the same time, new, sometimes parallel institutions are developing or expanding their influence. Examples include new development banks like the New Development Bank and the Asian Infrastructure Investment Bank, but above all, informal institutions such as BRICS.

The BRICS group originally consisted of Brazil, Russia, India, and China. It expanded for the first time in 2010 to include South Africa, and for the second time in 2024, now including Egypt, Ethiopia, Iran, and the United Arab Emirates. BRICS is perhaps one of the most prominent manifestations of the erosion of the liberal world order. Since the start of summits of the heads of state and government of these countries in 2009, they have been united primarily by their dissatisfaction with the Western-dominated world order and their desire for reform of international institutions such as the World Bank, the International Monetary Fund, and the United Nations. For a long time, the alliance was ignored by the West, but this is now changing.

Growing political and economic importance

A clear signal of this shift was the refusal of BRICS and other parts of the Global South in 2022 to support the Western-imposed sanctions against Russia after its invasion of Ukraine. The inclusion of countries like Saudi Arabia and Iran in early 2024 further strengthened the perception of BRICS as an influential force. With nearly half of the world's population (compared to just 10 percent for the G7) and over a quarter of global GDP, the group has gained political and economic weight. The shift from initially informal meetings to increasingly institutionalised cooperation shows how emerging powers are creating a common basis in various political fields. These processes, often barely noticed in the West, are increasing BRICS' attractiveness in the Global South.

BRICS' institutional developments are a symptom of a fundamental shift in power and the growing polarisation in international politics. In particular, the (trade) conflict between the USA and China and the war in Ukraine have highlighted that the Global South does not automatically follow the dictates and expectations of the West. The Global South

has become a battleground, with the USA, the European Union, China, India, and Russia competing for influence. New alliances are forming, which could create parallel orders with different objectives and values.

In some places, it is feared that these developments could lead to the emergence of three relatively coherent blocks—the Global North, the Global South, and the Global East—which would be in increasing competition with each other. However, this view is too simplistic, as it overlooks the internal heterogeneity of these groups. Within BRICS, tensions exist between democratic and authoritarian members, and the interests of the member states often diverge. Democratic countries such as India, Brazil, and South Africa are not keen on being perceived as anti-Western and emphasise their diverse international relationships. The inclusion of autocratic states such as Iran poses a challenge, but this is balanced by the independent multilateral activities of these countries, e.g., in the Quadrilateral Security Dialogue or in the G20. How BRICS handle internal tensions and competing interests will be crucial going forward.

Platform for international collaboration

Nevertheless, it is likely that the BRICS members will continue to expand their influence in the global power structure, especially through their ability to offer emerging powers a platform for cooperation. This means that European partners should strengthen their diplomatic and economic relations with democratic states in the Global South in the future. The promotion and maintenance of international institutions should be pursued more seriously, and targeted bilateral initiatives should support multilateral cooperation. There are opportunities in many policy areas, from climate adaptation and financing to defence, counterterrorism, and the entire spectrum of development cooperation.

Despite political differences, cooperation with individual BRICS countries offers opportunities for all partners. In particular, cooperation with Brazil, India, and South Africa could serve as positive examples. These new dynamics between world regions will shape the coming years, and all actors must adjust their foreign, security, and economic policies accordingly, particularly in light of an increasingly unreliable transatlantic alliance. The prospect of the emergence of clearly delineated paral-

lel orders is still low. Rather, particularly in the Global South, a pragmatic approach to partnerships and alliances with various partners, transcending the boundaries of traditional and new alliances, is to be expected.

Keynotes

- The weakening of universal organisations such as the UN and WTO, along with the rise of parallel institutions like BRICS, reflects the declining significance of the Western-dominated liberal world order.
- With nearly half of the world's population and over a quarter of global GDP, BRICS has gained political and economic influence, particularly through the inclusion of four new members in January 2024 and China's growing geopolitical and geoeconomic strength.
- Despite internal tensions, especially between democratic and authoritarian members, BRICS provides a platform for emerging powers to articulate and pursue common interests.
- Not all BRICS members seek to establish a rival parallel order in opposition to the United States and Europe; some aim for reliable and effective partnerships on all sides.
- Europe should further focus on bilateral cooperation with democratic BRICS members and reform international institutions to strengthen long-term partnerships in the Global South.



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China's dual foreign policy strategy

Susanne Weigelin-Schwiedrzik

China pursues a dual strategy in its foreign policy, based on the 'two-legged approach': On the one hand, it relies on diplomatic de-escalation, particularly in conflicts outside of East Asia, while on the other, it demonstrates military presence on its own doorstep. This strategy is also reflected in China's approach to multilateralism, where it both supports the existing world order and strengthens alternative institutions. Whereas China does not seek to replace the USA as the global hegemonic power, it signals military readiness in close cooperation with Russia, while simultaneously pursuing economic and technological rivalry. The tensions over Taiwan and the South China Sea illustrate its ambivalent stance: diplomatic restraint in global matters versus determined escalation in regional sovereignty claims. Driven by domestic challenges such as economic weakness and potential elite conflicts, China's policy remains a complex blend of maintaining stability and demonstrating power.

In the current global situation, characterised by the increasing escalation of military conflicts, a proven tactic can be observed in China's approach: the 'two-legged approach'. This means that different approaches can be pursued simultaneously, even if they contradict each other. Currently, the leadership of the People's Republic of China is highly interested in diplomatic solutions when dealing with conflicts outside the East Asian region. At the same time, the People's Liberation Army shows a readiness for conflict with military presence right at its doorstep. The link between these two approaches is that China's leadership does not want its de-escalating diplomacy to be interpreted as a sign of weakness.

China's stance on multilateral issues

The 'two-legged approach' is also evident in China's form of multilateralism. In all statements on this issue, China emphasises its adherence to the United Nations Charter. China does not want to be seen as a revisionist in the international relations system.

Nonetheless, China, in collaboration with Russia, has built alternative multilateral organisations that are playing an increasingly important role. During preparations for the BRICS summit in Kazan, Russia, it was decided to temporarily slow the organisation's growth. However, the security advisors of the member states concluded that the activities of BRICS should be extended to the military field as well.

Thus, China's approach is characterised by acting explicitly within the framework of the current world order, while also building alternative multilateral models. The goal of this dual strategy is not to replace the UN with the organisations China has created, but to provide a visible platform for those states that wish to ally more closely with China and Russia.

Does China seek to replace the USA as the Global Hegemon?

Unlike the USA, China is not militarily present worldwide. However, there are already signs pointing in a different direction. For example, at the last meeting between China and the 54 African countries, it was agreed that about 600 officers from Africa would be sent to China

for training. The collaboration between Russia and China also necessitates an expansion of military presence. Recently, Russian and Chinese military aircraft conducted a joint five-hour operation off the coast of Alaska, and the Russian fleet appeared together with the Chinese fleet off the coast of Japan.

This collaboration aims to make it clear to the USA and its allies in the region, particularly Australia, South Korea, and Japan, that if they intervene in military conflicts with the Philippines or Taiwan, they would be fighting against China and Russia. India is being signalled that further rapprochement with the USA could provoke conflicts with Russia. It is clear that China is preparing for a potential military conflict but continues to rely on coexistence with the USA and remains willing to cooperate with the USA in international political matters, as long as it does not directly involve China's own region. It is still far from the point where China would consider replacing the USA as the global hegemon.

Technological competition instead of military rivalry

Military confrontation remains secondary to economic and technological competition with its rival, the USA. It should be noted that China's economic situation has not improved since 2023. Under these circumstances, economic competition with the USA has become significantly more challenging.

Therefore, competition in the technological field has gained increasing importance. Technological and scientific development between the USA and China, as well as between Europe and China, exhibits a high degree of cooperation. In some particularly promising fields, a security-driven reduction in cooperation carries the risk that technological development would no longer keep pace with China, due to personnel limitations, without collaboration with Chinese researchers. This is especially true in the field of Artificial Intelligence. The decision on whether the West can continue to collaborate with China has long since shifted to the question of whether China is still willing to collaborate with the West in the field of technological development.

Tensions over Taiwan and the South China Sea

Tensions over Taiwan and the South China Sea, particularly in relation to the Philippines, remain pronounced. However, since the meeting between Joe Biden and Xi Jinping in San Francisco in November 2023, the situation around Taiwan has initially relaxed. Apparently, the two leaders reached an understanding that they would not seek escalation during the presidential elections in Taiwan that took place in January 2024.

Lai Ching-te, elected with fewer than 40 percent of the votes, initially adhered to this agreement. However, already with his inaugural speech in May 2024, he made the provocative offer to Mainland China to engage in talks on an equal footing, i.e., from state to state. The PRC responded to Lai's statement with a brief blockade of the island.

Philippine President Ferdinand Marcos Jr follows a similar approach. Relying on his close ties to the USA, he also believes he can confront PRC's claims militarily, if necessary. Both politicians expect that the USA would be forced to intervene militarily, directly or indirectly, in case of a sudden outbreak of conflict.

However, tensions in the South China Sea also have domestic political reasons for China. There is a need to maintain the people's willingness to accept a military conflict at China's doorstep, while also preparing a scenario where any potential military confrontation would be presented as having been forced upon China by the adversary.

Conclusion

The current economic weakness of the PRC is particularly precarious. On the one hand, it could lead to challenges to the country's internal stability due to turmoil within the elite. On the other, it could also make a potential military conflict in the East Asian region seem less risky than an internal uprising.

In this situation, the state and party leadership are aware that premature escalation carries further significant risks. Therefore, it tends to advocate for de-escalation and diplomatic solutions in all conflicts not

directly related to its sovereignty claims at its doorstep. However, in the case of Taiwan and the South China Sea, China is not shying away from escalation.

Keynotes

- China combines diplomatic de-escalation on a global scale with military presence in its immediate neighbourhood to demonstrate strength without signalling weakness.
- The People's Republic officially supports the UN Charter but simultaneously establishes alternative organisations like BRICS to expand its influence without directly replacing the UN.
- China remains technologically and economically competitive with the USA, while demonstrating regional military strength to prepare for potential conflicts with American allies.
- The rivalry with the West increasingly focuses on technological advancement, with China bolstering its position in AI and research.
- Tensions over Taiwan and maritime disputes are deliberately managed to ensure domestic stability while exerting external pressure.
- China's economic situation poses risks to internal stability, which could lower the threshold for military conflict.
- Chinese diplomacy continues to seek solutions to global conflicts while adopting a more confrontational stance in regional disputes.



Scenarios for the Taiwan conflict

Tara Prägler

The status of Taiwan is one of the most complex issues in international relations, as it influences the stability in East Asia and global power structures. The Federal Ministry of Defence developed scenarios for possible developments in the Taiwan conflict. The goal of these scenarios is to analyse conflict developments, outline potential paths for the relations between the EU and China, and identify interactions with the risk picture.

Taiwan's importance for China's great power ambitions

In recent years, China has increasingly presented itself as an alternative to the liberal-democratic model, engaged more actively in international organisations, and positioned itself as a responsible great power. Central to this is the concept of the 'Chinese Dream', the goal

of revitalizing the national and international strength of the country. China regards Taiwan as an inseparable part of its territory, and the sought-after 'reunification' with Taiwan is one of China's central political interests. Taiwan is of economic significance due to its leading role in semiconductor production and is closely tied to the rivalry between the USA and China. China's approach to Taiwan threatens the rules-based world order and carries the risk of geopolitical cascading effects that could involve regional actors and military alliances, further highlighting the global strategic importance of the conflict. The diagram on page 74 shows four possible scenario developments.

Military invasion of Taiwan

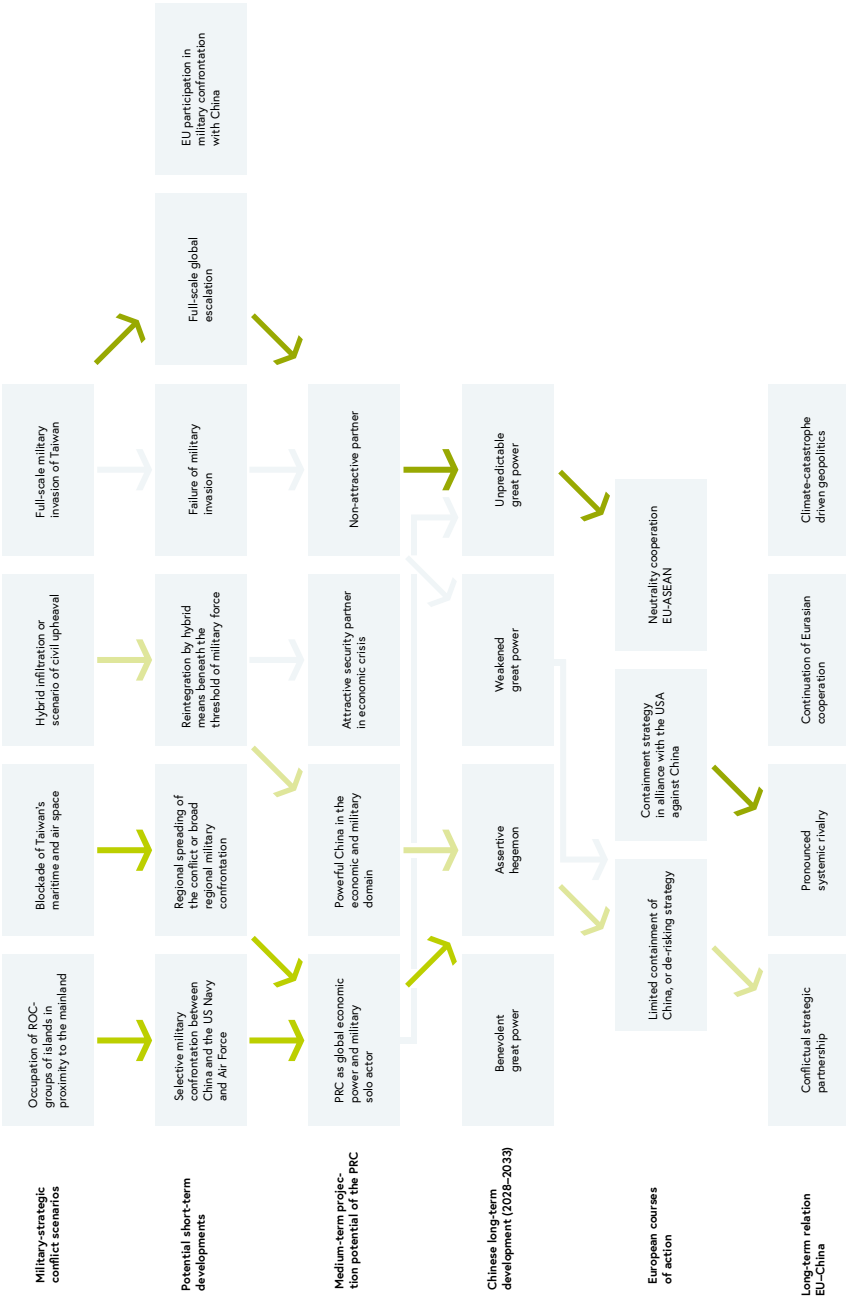
In the scenario of a comprehensive military invasion of Taiwan by China, the USA and its allies could respond with military support and the formation of an international coalition, potentially triggering a global crisis. Economic turbulence, trade disruptions, and issues in supply chains could significantly impact global trade and the technology industry. In the medium term, China could lose attractiveness and influence due to external political isolation, stagnating initiatives like the Belt and Road Initiative (BRI), and economic weaknesses. In the long run, China's unpredictable foreign policy would pose a potential threat to world peace. The EU could distance itself from China, end strategic partnerships, and align its policy more towards containment. Despite this escalation, the hope remains that China could return to a cooperative stance under international pressure, though the future development would remain uncertain.

Occupation of island groups near the mainland

In another scenario, China could strategically occupy important island groups near the mainland, such as Kinmen and the Matsu Islands, with minimal military effort, supported by cyberattacks and rapid amphibious operations. This annexation would be legitimised through diplomatic claims, stating that the action serves to preserve national sovereignty, while limited military confrontations with the USA would remain symbolic. In the medium term, China would pursue a strategy of economic dominance and global influence, supported by initiatives like the BRI,

the digital Yuan, and strengthened partnerships in the Global South. Military restraint would be practiced to de-escalate the ‘China Threat Narrative’ and minimise international tensions. The EU could respond with limited containment, closer cooperation with democratic partner states, and a reshoring of strategic production capacities to Europe, while maintaining dialogue with China to preserve a conflict-prone but strategic partnership.

Illustration 3: Taiwan conflict scenarios



Naval and airspace blockade of Taiwan

In this scenario, China could attempt to demonstrate its de facto control and sovereignty over the region by imposing a blockade of Taiwan's sea and airspace, without fully interrupting Taiwan's supply chains. Such measures would lead to economic shortages and internal instability in Taiwan, accompanied by hybrid tactics below the threshold of open violence. International actors such as the USA, the UK, and Australia might attempt to break the blockade, leading to regional escalations and confrontational incidents that could also involve Japan and South Korea. In the medium term, China would focus on economic strength and global influence, through the expansion of the BRI, the promotion of the digital Yuan, and increased presence in international organisations. Military restraint and the principle of non-interference would be employed to counter the 'China Threat Narrative' and project an image of China as a benevolent economic actor. In the long term, China would aim to establish itself as a global superpower and hegemonic force, which could escalate geopolitical tensions and pose challenges for the international community. The EU would respond with limited containment, increased cooperation with democratic partners, and a diversified trade strategy, while maintaining dialogue and exchange despite tensions. This dynamic between economic cooperation and strategic rivalry shapes the EU-China relationship.

Long-term hybrid subversion of Taiwan

Finally, the fourth scenario is that China would destabilise Taiwan gradually with a long-term hybrid strategy involving disinformation, cyberattacks, economic pressure, and political infiltration, ultimately 'peacefully' integrating it. The five phases of the operation would include: manipulating public opinion, economic pressure, political division and infiltration, international isolation of Taiwan, and a political crisis leading to a China-friendly government coming to power. Ultimately, Taiwan could be de facto annexed through gradual integration into the Chinese system, without an open military conflict. In the long term, China would solidify its status as a global superpower, while the international order would continue to erode. The EU and other actors could pursue a containment strategy, but would continue to focus on dialogue and strategic partnerships. The success of the strategy would

depend on whether Taiwan and the international community resist or adapt to China's influence.

Between military threats and civil coercion mechanisms

Scenario thinking allows for the anticipation of different developments and the identification of commonalities and differences. The most likely scenario for China's approach to Taiwan is seen as a long-term hybrid subversion aimed at peaceful reunification, while direct military escalation is considered unlikely given China's self-presentation as a responsible great power and the far-reaching consequences for the region. However, due to the geopolitical complexity, an unintended escalation cannot be ruled out. In the context of the Taiwan conflict, relations between Europe and China will likely worsen, driven by ideological and political systems competition as well as close economic entanglements.

Keynotes

- The Taiwan conflict impacts stability in East Asia and global power structures.
- The Taiwan conflict exacerbates existing risks and introduces new ones.
- In the context of the Taiwan conflict, a deterioration in EU-China relations is to be expected.
- The EU relies on the USA as a security guarantor; neutrality between the blocs is virtually unthinkable in both the medium and long term.



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India's strategic autonomy

Neither for nor against the West

Waheguru Pal Sidhu

Against the backdrop of the triple threats of growing inter-state conflicts, climate change, and globalisation which is still curtailed post-Covid India's strategic autonomy is both a means and an end to secure its long-term interests and to establish itself as an independent actor in the emerging multi-polar world. This requires New Delhi to build strategic partnerships with the West, with adversaries of the West, and strengthen traditional relations with the Global South through several plurilateral arrangements. Ironically, China poses the biggest challenge but also offers notable opportunities for India's aspirations, compelling New Delhi to pursue a dual-track policy towards Beijing.

India, surrounded by two hostile nuclear-armed neighbours (China and Pakistan)—and in eyeball-to-eyeball confrontation along disputed boundaries—and several fractured polities (Bangladesh, Myanmar

and Pakistan), in addition to internal divisions, inhabits an insecure geopolitical neighbourhood. Additionally, record-breaking high temperatures, cities choked with alarmingly high air pollution, and extreme climate events highlight the growing existential threat posed by climate change. Moreover, despite a robust economic growth, the post-Covid disruption threatens it with geoeconomic uncertainty. Beyond its immediate neighbourhood, the Russia-Ukraine conflict and the even more ominous unfolding poly-conflicts in the Middle East, pose additional challenges to India's global ambitions.

Against this sombre background India discerns three broad strategic trends: first, a global re-balancing among existing and emerging powers. Second, the advent of a multi-polar world in economic and political, if not military, terms. Third, a preference for ad hoc plurilateral arrangements over either formal alliances or institutional multilateralism. To preserve India's interests through these challenges and to take advantage of these trends New Delhi will seek to enhance its strategic autonomy by building up its economic and military prowess, through multi-alignment (or non-alignment redux) and key strategic partnerships, including, ironically, with its biggest strategic rival: China. Indeed, interdependencies will force New Delhi to both manage and engage with Beijing to advance India's long-term desire to emerge as an independent pole.

Origins and intransience of strategic autonomy

The roots of India's strategic autonomy can be traced back to its first prime minister, Jawaharlal Nehru. Speaking in 1946—a year before independence—and responding to Winston Churchill's 'iron curtain' speech, Nehru categorically stated: "We propose, as far as possible to keep away from power politics of groups aligned against one another which have led in the past to world wars and which may again lead to disasters on an even vaster scale." During the Cold War non-alignment allowed India to launch a green revolution with US assistance, acquire US nuclear reactors, while also getting steel plants and armament from the Soviet Union, as well as acquiring advanced weaponry from Europe. It also prevented the Cold War from spilling over into South Asia, at least until 1979 when the Soviets marched into Afghanistan.

In the post-Cold War era, unfettered by bi-polar tensions and its own economic reforms, India bolstered its strategic autonomy by quickly moving from non-alignment to multi-alignment and establishing strategic bilateral partnerships with the West, notably the USA. India's preference for plurilateral arrangements was evident in setting-up arrangements, such as the Indian Ocean Regional Association (IORA), and its membership of, inter alia, the ASEAN Regional Forum (ARF), the East Asia Summit (EAS), the Shanghai Cooperation Organisation (SCO), Brazil, Russia, India, China and South Africa (BRICS), the BRICS's New Development Bank (NDB), the Asia Infrastructure Investment Bank (AIIB), the Conference on Interaction and Confidence-Building Measures in Asia (CICA), as well as the G20 grouping, and as an observer on the Arctic Council. While India's participation in these organisations was primarily driven by geoeconomic considerations these plurilateral arrangements also serve wider geopolitical objectives.

In contrast, India's membership of the Western-initiated Hague Code of Conduct (HCoC) and the Missile Technology Control Regime (MTCR) was primarily driven by geopolitical considerations; however, its efforts to join the Nuclear Suppliers Group (NSG) have been thwarted by China. India's membership of these arrangements, after New Delhi's nuclear tests in 1998 and self-proclamation as a nuclear weapon state, was clearly aimed at legitimizing India as a responsible nuclear weapon state albeit outside the formal nuclear Non-Proliferation Treaty (NPT). These memberships not only enhanced its strategic autonomy, but also distinguished it from the other states with nuclear weapons outside the regime—notably Pakistan and North Korea.

The China conundrum

The origins of Sino-Indian competition can be traced back to the 1954 Bandung Conference, while the conflictual relationship manifested in the bitter 1962 war. Since then, China has posed a strategic conundrum for India at the bilateral, regional and global levels.

At the bilateral level, after decades of peace and tranquillity, tensions and confrontations revived in the 21st Century along the Line of Actual Control (LAC) starting with the Depsang Valley in Ladakh (in 2012 and 2013), followed by Doklam (in 2017) and Aksai Chin (in 2020) where

scores of troops on both sides were killed in skirmishes—the first fatalities in decades. These conflicts arose despite numerous Confidence Building Measure agreements dating back to 1993 and reflect the ineffectualness of these arrangements.

Significantly, though there is still no de-escalation along the LAC, the bilateral trade has crossed 135 bn. US Dollars and, despite India banning ‘Tik Tok’ and seeking to reduce imports from China, they have, ironically, increased by 21 percent, raising India’s trade deficit to 100 bn. US Dollars.

At the regional level, the robust China-Pakistan alliance dating back to 1963, coupled with China’s transfer of nuclear weapon and missile knowhow to Pakistan in 1980s, and the construction of the China-Pakistan Economic Corridor are perceived as an encirclement by India. This raises the prospect of a two-front conflict. Additionally, China’s growing Indian Ocean presence—traditionally India’s maritime backyard—is also seen as an attempt to constrain India within its own neighbourhood. Moreover, the fact that almost all of India’s neighbours have closer trade and economic ties with China also undermines India’s neighbourhood first policy.

Finally, at the global level, China has consistently blocked India’s efforts to play a greater role in multilateral global governance institutions. After the failed attempt in 1998 by China to spearhead the UNSC efforts to punish India for its nuclear tests, it has been shrewdly blocking India’s bid for permanent membership of the UNSC, while simultaneously promoting the Belt and Road Initiative to enhance Beijing’s economic and political clout over the Global South.

India’s dual-track policy

Given India’s quandary over China, it might be expected that New Delhi would seek a closer alliance with the West and promote itself as a bulwark against China in the Indo-Pacific region. Instead, New Delhi is unlikely to join a formal alliance with the West and is likely to maintain its relations with Beijing through several arrangements, notable BRICS, for several reasons.

First, India believes that neither the USA nor any other western alliance is likely to get involved in any future Sino-Indian imbroglio. Indeed, New Delhi's perception is that the only scenario where the USA might directly confront China is over Taiwan, but even that is not a certainty. Second, India is concerned that a formal alliance with the USA might drag it into a conflict that is not of its choosing or indeed in its interest.

Consequently, India is more comfortable with the Quadrilateral Security Dialogue (or simply the Quad)—an informal plurilateral arrangement between Australia, India, Japan and the United States—with a broad and euphemistic mandate of being a “force for global good”, as the 2024 Wilmington Declaration notes. While, clearly, aspects of the Quad, such as the commitment to a “free and open Indo-Pacific that is inclusive and resilient” and reference to the “2016 Arbitral Award on the South China Sea”, are directed at China, they seek to encourage China to conform to the United Nations Convention on the Law of the Sea (UNCLOS) rather than contain it.

Indeed, the creation of the trilateral security partnership between Australia, the United Kingdom, and the United States (AUKUS) intended to “promote a free and open Indo-Pacific that is secure and stable” in 2021 (with the possibility of Japan joining it) is indicative of the Quad not specifically being designed as a military alliance to contain China.

Simultaneously, India is also likely to remain actively engaged with the enlarged BRICS (which has doubled its membership with the inclusion of Egypt, Ethiopia, Iran, the United Arab Emirates and, possibly, Saudi Arabia) where China is, clearly, the dominant actor, for two reasons. First, like all the enlarged BRICS members, India is concerned about unbridled US-led Western domination in general and the weaponisation of the Dollar through unilateral, non-UN-authorised sanctions in particular.

Thus, the expanded BRICS is not designed to dethrone the Dollar but simply to “strip the Dollar of its hegemony over global trade” and facilitate trade of commodities like oil and gas, which are crucial for both China and India. Additionally, the enlarged BRICS, which represent 45 percent of the world's population and account for 35 percent of the global GDP in purchase power parity terms, are seen as an alternative

to the Western-dominated G7 and is an effort at shaping global financial and trade rules.

Second, India's participation in BRICS (and the SCO) is also to block initiatives like the BRI, which are detrimental to New Delhi both in geopolitical and geoeconomic terms. Moreover, India's presence also serves as a check against the excessive anti-Western initiatives of China and Russia. As one article noted, "...the battle between anti-Western states and nonaligned ones will shape the future of BRICS—with important consequences for the global order itself."

That India is willing and able to 'walk and chew gum at the same time' is evident in the fact that foreign ministry S. Jaishankar actively participated in the sixth Quad leaders' summit in Wilmington, Delaware, which issued a strong statement against China (without naming it), before attending a BRICS foreign ministers meeting in New York (on the side-lines of the 79th UN General Assembly), which stressed multipolarity, global diversity and sustainable development. Clearly, India believes that its strategic autonomy will allow it to maintain this balancing act between the West and the anti-West. It is confident that the non-binary approach of simultaneously confronting and cooperating with China will succeed. But can it?

Keynotes

- India's strategic autonomy served the country well during the Cold War and in the early post-Cold War era.
- India continues to maintain its strategic autonomy to address threats from increasing inter-state conflicts, climate change, and restricted globalisation.
- Strategic autonomy enables India to build partnerships with both the West and its adversaries, while strengthening its ties with the Global South.
- China represents India's greatest strategic challenge but also offers opportunities.



Nuclear weapons and arms control

Günter Greimel and Erwin Toth

The situation concerning nuclear disarmament, arms control, and non-proliferation is deteriorating due to the current security and geopolitical landscape. This undoubtedly has negative, but so far not severe, impacts on international politics. The risk of a use of nuclear weapons, despite the crumbling arms control architecture and threats from Russia in the context of the Ukraine war, remains minimal. Thanks to decades of proven crisis communication between the former two superpowers, the possibilities for escalation are minimised.

The diminishing willingness for arms control can be traced to various developments. Notably, there are nuclear-weapon states that are not subject to any regulations. The existing treaties and agreements on arms limitation have been bilateral, meaning they are limited to the USA and Russia. At present, it seems unrealistic that the two nuclear powers will bind themselves through new treaties. Instead, existing

agreements are continuously being terminated or not renewed in order to gain the greatest possible flexibility during current crises. The last remaining bilateral agreement for reducing strategic offensive weapons (New START) is currently suspended and will expire in early 2026. A renewal or renegotiation seems unlikely at this point.

Renaissance of nuclear deterrence

For over two decades, the fight against terrorism shaped security policy relations. However, nuclear deterrence has been largely ineffective against sub-state actors and terrorist groups. After the end of bipolarity, the seemingly outdated model of nuclear deterrence received limited attention in the military-strategic orientations of global powers. With the return of classical state wars, however, the over-seventy-year-old concept of nuclear deterrence has gained new relevance. Extensive modernisation plans, which have been implemented over the past few years by the five official nuclear powers, not only concern delivery systems and warheads but also the complex infrastructure required for nuclear warfare.

Against this backdrop, multilateral agreements such as the Comprehensive Nuclear-Test-Ban Treaty (CTBT) are increasingly at risk. The relatively new Treaty on the Prohibition of Nuclear Weapons (TPNW) is also rigorously rejected by the nuclear-armed states as well as by all NATO countries. The only remaining multilateral forum in which disarmament, arms control, and non-proliferation of nuclear weapons are discussed is the Nuclear Non-Proliferation Treaty (NPT), which entered into force in 1970. However, little meaningful progress is made during the quinquennial review conferences. Despite this, with its 191 member states, the NPT remains the most extensive and important multilateral agreement in this field.

New and old nuclear powers rearming

All nuclear-weapon states have been modernizing their strategic deterrent arsenals for years. While in the past the focus was primarily on the two former superpowers, attention is now increasingly turning to the so-called 'new' nuclear powers, as well as the previously perceived

'smaller' ones. New and old alliances, along with widespread nuclear sharing, are currently an essential part of global security policy. Countries like China and North Korea pose a significant threat, as there are no communication channels between them and the USA and NATO, unlike between the USA and the USSR during the Cold War. As a result, there are limited opportunities to resolve tensions in a timely manner and engage in effective escalation management.

China's nuclear modernisation over the past two decades appears significant both quantitatively and qualitatively. This indicates that China increasingly views its nuclear weapons as strategic assets in line with its rising global power. The decades-long sanctions on Iran and North Korea, which Russia has consistently supported in the UN Security Council, have now become obsolete. This has given these countries the opportunity to intensify their military-strategic cooperation with China and Russia. The recent bilateral agreement between North Korea and Russia, covering a comprehensive strategic partnership, provides both parties with considerable freedom of action. Therefore, it is likely that the relatively modest nuclear deterrent potential on the Korean Peninsula will increase both qualitatively and quantitatively in the coming years.

In response, existing alliances in the region, led by the USA, with partners such as Japan, South Korea, and the Philippines, have steadily expanded. These military-strategic cooperations involve, in addition to intensified maritime exercises, nuclear strike planning. Also noteworthy is the partnership between the USA, the UK, and Australia, which currently focuses on the delivery of nuclear-powered submarines for the Australian Navy. Iran, due to its involvement in the Middle East wars, is unlikely to reduce its nuclear ambitions. The final return of mutual nuclear deterrence now includes more than just the two familiar actors from the era of bipolarity. Therefore, the concept must now be viewed in both region-specific and multipolar terms.

Effectiveness of nuclear deterrence

The renaissance of nuclear deterrence as a security strategy has led to a worldwide nuclear arms build-up. China, as a new global actor, is not bound by any specific arms control obligations, apart from its multilateral commitments. This has significantly contributed to the discrediting

of existing bilateral agreements between the two nuclear superpowers. The diplomatic efforts led by the USA to conduct strategic arms control talks in a trilateral format with China and Russia will not cease, but the chances of success are currently very low due to existing global fault lines and ongoing conflicts.

Arms control and the implementation of verification mechanisms require a certain level of transparency and trust, but in times of global tensions, these qualities are in short supply among global actors. A change in China's nuclear policy will certainly determine the future of military-strategic relations between the USA and China, with a focus on the Indo-Pacific region. Given the ongoing conflict in Ukraine, it is unlikely that the existing START agreement between the USA and Russia will be extended.

The war in Ukraine has brought the nuclear threat back to the forefront in Europe. Russia's planned deployment of tactical nuclear weapons in Belarus as part of nuclear sharing once again highlights threat perceptions for the EU and NATO members—perceptions that had nearly faded over the last two decades. The use of tactical nuclear weapons as a response to conventional inferiority is by no means new. During the Cold War, NATO's Flexible Response strategy incorporated such a possibility.

Once a nuclear power acts as a party in a military conflict, the theoretical risk of breaking the nuclear taboo that has been in place since 1945 exists. Russia's illegal attack on Ukraine highlights this problem. NATO's militarily restrained behaviour is therefore understandable, and it demonstrates that the effectiveness of mutual nuclear deterrence, 70 years after its inception, remains intact, provided rational actors are involved. It is also likely that, due to current global developments, nuclear deterrence will not lose its significance anytime soon.

Keynotes

- Nuclear disarmament, arms control, and non-proliferation are in a deteriorating state, driven by various global developments.
- Some states, especially China, are not subject to limitations and can therefore expand their arsenals, unlike the USA and Russia.
- Old bilateral arms control agreements aimed at reductions have been suspended or terminated. New agreements are rarely concluded, and when they are, they fail to meet expectations.
- The war in Ukraine has brought the nuclear threat back to the forefront in Europe. The planned deployment of Russian tactical nuclear weapons in Belarus poses new challenges for the EU and NATO.
- Despite the current tense geopolitical and security situation, and despite threats from Russia, the likelihood of nuclear weapon use remains minimal. The possibility of escalation is also significantly reduced due to decades of proven crisis communication between the key actors.



The danger of strategic dependencies

Political risks and dangerous supply bottlenecks

Elisabeth Prosser

Globalisation has created prosperity, but it has also revealed strategic dependencies and geopolitical risks, as shown by the energy and supply chain crises. Autocracies deliberately use economic interdependencies as leverage, while democracies experience conflicts of objectives between economic interests and democratic values. Complete self-sufficiency is unrealistic, but Western states must strengthen their resilience through diversification of supply chains and securitisation of critical infrastructures. Long-term security risks must be more strongly considered in political decisions.

Lessons from the past

The discussion of strategic dependencies is by no means new. Already in the mid-20th century, institutions such as the World Bank and the International Monetary Fund, following John Maynard Keynes, laid the foundations for globalisation. The goal was to secure international stability and prosperity through economic interdependencies. The oil crisis of 1973 clearly demonstrated how economic dependencies could become leverage through political conflicts. The quadrupling of oil prices led to a global recession and exposed the vulnerability of Western economies. A reduction of dependencies and the safeguarding of systemically important supply chains would have been obvious lessons learned from these developments.

Dependencies as geopolitical leverage

In the 21st century, economic vulnerability has been further exacerbated by advancing globalisation and technological specialisation. States and companies face a dilemma: What appears economically efficient can be geopolitically risky. The COVID-19 pandemic revealed Europe's dependence on pharmaceutical products from Asia, while the conflict between the USA and China brought the critical role of Taiwan in chip production into the spotlight.

Furthermore, given the slow progress towards climate neutrality and energy sovereignty, Western economies continue to meet their energy needs with fossil fuels. The energy crisis of 2022 revealed the structural weaknesses of European energy supply. Rising production costs were followed by rapidly increasing consumer prices, which ultimately led to electoral consequences in many European democracies. While Russia was considered a reliable energy supplier even during the Cold War, it became apparent that the associated risks had been underestimated and misjudged in the long term.

Incidents such as the blockade of the Suez Canal in 2021 by the container ship "Ever Given" or widespread economic disruptions caused by pandemics show how fragile global supply chains are. Furthermore, extreme weather events, political instability, or targeted attacks on systemically important infrastructure can have massive impacts on supply

security and the economic stability of entire countries and regions. In this context, it would be naïve to assume that political and economic competitors are unaware of this.

Comparative advantage as political risk

David Ricardo's theory of comparative advantage forms the foundation of the globalised economy: Companies produce where costs are lowest, international networks are established, and global supply chains are created. However, these economic advantages have also created new risks. Low production costs in emerging markets are often based on low labour and environmental standards, thus not reflecting the actual cost reality. Increasing specialisation has also created high barriers to market entry for new participants. This can have potentially serious consequences for dependent economies in a volatile political environment. These dependencies can be deliberately exploited to exert political pressure.

Political risks and the limits of globalisation

The political risks associated with strategic dependencies present challenges, especially for democracies. Relations with countries that do not share values such as human rights and democracy create conflicts of objectives between economic interests and democratic principles. This discrepancy increasingly leads to a credibility problem—both nationally and internationally. Furthermore, as demonstrated by the example of the USA, the commitment of crucial economic policy partners to free trade is not set in stone. The ambiguity of economic interdependence as both a stability guarantee and a security risk becomes increasingly evident in a more conflict-ridden international environment. States deliberately use economic interconnections to pursue their own geopolitical interests. European democracies must confront this reality.

Ways out of dependency: securitisation and diversification

Complete self-sufficiency is neither realistic nor economically sensible. Instead, Western democracies must strengthen their economic resilience by reducing strategic dependencies and securing existing supply chains. Two central measures are therefore necessary: securitisation and diversification.

Systemically important infrastructure and supply chains must, if not otherwise possible, be protected from third-party access. This includes securing trade routes and protecting critical infrastructure, such as undersea cables or energy supply. These measures are essential to counteract geopolitical destabilisation and coercion attempts. To minimise dependence on a few supplier countries—such as in the semiconductor industry—existing monopolies must be broken up through targeted investments. This diversification reduces the risk that targeted attacks by geopolitical competitors or unforeseeable disruptions in supply chains could endanger the economic stability and prosperity of European countries.

A call for more foresight

Globalisation has undoubtedly created prosperity, but it has also brought new vulnerabilities. Political decisions must not only consider short-term economic advantages but must also take long-term security risks into account. Democracies must restore their economic credibility by committing to a more sustainable and diversified economic life. The solution lies in a balanced strategy: securitisation, diversification, and the associated prudence in economic policy. The West must learn from the mistakes of the past and act proactively to minimise the risks of global dependencies. Only then can democracies secure their economic prosperity and political resilience in the long term.

Keynotes

- Globalisation has created prosperity but also generated political risks through unilateral dependencies.
- Autocracies and unstable states deliberately use economic interdependencies as geopolitical leverage.
- Complete autarky is unrealistic, but Western democracies must strengthen their economic resilience through diversification and securitisation to protect against political coercion.
- Political decisions must take long-term security risks into account and should not be driven solely by short-term economic benefits.



Crises in times of climate change

Kira Vinke

The security risks resulting from climate change are increasingly becoming evident. As a threat multiplier, it exacerbates conflicts in fragile states and jeopardises supply chains as well as economic security. In addition to adaptation measures, comprehensive emissions reductions and the decarbonisation of the security sector are necessary to minimise long-term risks. The strategic requirements for foresight, adaptation, and sustainability in the security sector will thus increase significantly.

The effects of climate change are generally considered to be non-traditional security risks. Extreme weather events such as storms, droughts, or floods cause significant economic damage and can threaten livelihoods. However, the consequences of climate change can also affect hard security areas, for example, when territories become uninhabitable due to rising sea levels, or when resource scarcity leads to violent distribution conflicts. In addition, extreme temperatures can limit the

operational capability of troops and environmental disasters can damage both civilian and military infrastructure. At the same time, severe natural disasters frequently require military deployment to provide disaster relief or maintain public order.

The indirect and delayed effects of climate change often hinder the recognition of its multifaceted security risks. Since many climate consequences follow highly non-linear patterns, this can have fatal consequences if action is only taken when the effects are already uncontrollable, causing increasing loss of life and high economic damage.

Changes in the Earth's system

Risk management is particularly inadequate when it comes to changes in the Earth's system with a low probability of occurrence but a potential for significant or even civilisation-threatening damage. This is the case, for example, with a potential climate change-induced collapse of the Gulf Stream, which, according to a 2023 study published in "Nature Communications", could occur between 2025 and 2095. The authors' best estimate for the onset of such a catastrophe is mid-century. The study assumes a continuation of global greenhouse gas emissions. The impacts would be catastrophic, even for Europe and the USA. For instance, this could lead to a rapid drop in temperatures in Northern Europe, rising sea levels in certain regions, and drastically altered rainfall patterns. Although the study itself points to uncertainties and is a subject of scientific debate, the weakening of the Gulf Stream, already documented by other scientists, should serve as a clear warning signal. Because once the circulation system crosses its critical point, there will be no return to its previous state, and the technological and financial means for adaptation will diminish.

Other parts of the Earth's system, such as the Amazon rainforest, the Greenland ice sheet, or the permafrost landscapes in Siberia, could also be irreversibly altered by the crossing of planetary boundaries due to human activity—with global consequences. These are referred to as tipping elements of the Earth's system. These tipping elements are often interrelated, as a change in one large component of the Earth's system does not happen in isolation.

Climate change as a threat multiplier

In addition to such possible radical changes in the future, there are a number of dangers that are already becoming apparent. Notably, extreme weather events have become more intense and frequent. When these natural disasters hit countries with weak state structures, that are highly dependent on agriculture and possibly already polarised among different population groups, the risks of conflict can increase. Due to its far-reaching implications for human security, climate change is often described as a threat multiplier.

There is speculation that a La Niña event could occur in 2025, an irregular circulation anomaly in the tropical Pacific that causes a temperature drop in the upper water layers, thus being referred to as a cold phase. Should the La Niña event lead to a relative cooling compared to the previous two years, it is expected that populist parties might exploit this to sow doubt about the trend of global warming. Furthermore, certain world regions might experience more frequent extreme weather events; for example, the risks of extreme rainfall increase in Australia and southern Africa, while drought periods may occur in East Africa and parts of the USA and Latin America. Additionally, La Niña could contribute to the formation of hurricanes in the Atlantic Ocean.

Extreme weather events, similar to other disruptive, sudden changes, can disrupt supply chains and thus have far-reaching regional impacts. In the worst case, economic security could be at risk, especially when there is a significant dependence on an affected production site, resulting in long-term losses.

Decarbonisation of the security sector

While short-term adaptation measures are still in place to deal with the risks of climate change, the rapid reduction of emissions is required to prevent severe climate consequences proactively. Due to a shrinking global emissions budget, all sectors must be decarbonised—including the security sector.

Globally, the emissions caused by the defence industry and the military account for one to five percent, comparable to international air traffic.

Arms procurement increasingly requires attention to emissions, both in production and throughout the lifecycle of the equipment. Furthermore, the compatibility with civilian infrastructure will become a medium-term issue. For example, if a shift to electromobility were to result in the conversion of fuel stations to charging stations, vehicles relying on diesel and gasoline for deployment would no longer be able to use civilian infrastructure. Particularly when procuring machinery that is used for many years, it is advisable to consider the sustainability transformation.

As a result, the demands on the security sector will grow in several areas due to the climate crisis: in prevention, research and development, as well as in strategic foresight and crisis response readiness. For resilient democracies, a 360-degree view of the future will be essential in the critical year of 2025.

Keynotes

- Climate change is increasingly recognised as a security risk, with its impacts posing threats to economic, social, and political stability.
- Tipping points in the Earth's system could trigger irreversible changes with global consequences, requiring coordinated international responses.
- Climate change acts as a threat multiplier.
- Preventing severe climate impacts will also necessitate the decarbonisation of the security sector.
- The climate crisis demands greater emphasis from the security sector on prevention, strategic foresight, and the adaptation of military equipment to a transformed civilian infrastructure.



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China's subsidies exacerbate the global industrial recession

Peter Obinger

The global industrial recession, which has been exacerbated by the economic turbulence of recent years, is hitting Europe particularly hard. While the global purchasing managers' index for the industry has been below the growth threshold of 50 for 19 of the last 24 months, paradoxically, China's heavily subsidised industrial production is driving this development forward. The extensive support from the Chinese government—from raw material procurement to export—intensifies trade imbalances and presents the global trade-policy multilateralism with its greatest challenge since the Cold War. Particularly, European industry is under pressure.

After the crisis-induced turbulence of recent years, large parts of the global economy are in an industrial recession, which particularly affects

Europe. In 19 of the last 24 months, the global purchasing managers' index for the industry has remained below the growth threshold of 50. Paradoxically, it is the massive rise in industrial production in China that is partly responsible for this development. This is due to extensive subsidies that the Chinese government has injected into the sector since the bursting of the real estate bubble. Through this policy, global trade imbalances are intensified, posing the greatest challenge to global trade-policy multilateralism since the Cold War. The European industry, in particular, is under pressure.

Impacts of China's subsidy policy

China promotes its industrial production through extensive state subsidies across the entire value chain. From raw material procurement to export, Chinese companies receive financial support, tax advantages, and favourable loans. This enables companies to offer products at prices that are far below those of international competitors. Furthermore, businesses can operate internationally with minimal risk, thanks to the sustainably secured inflow of state support, giving them a significant advantage in competing for future markets. As a result, this form of subsidy policy leads to the displacement of industrial production in other countries, thereby exacerbating the industrial recession in the EU.

Deindustrialisation would hit the EU particularly hard

The sheer scale of China's subsidy policy means that the EU is now facing a new 'China shock' that is hitting its key or hoped-for future industries. The so-called 'first China shock' following China's WTO accession was manageable for EU economies because European industries had to adjust to the lower price levels in Eastern Europe in the years prior, and China, at that stage of industrialisation, was still dependent on importing German automobile and machinery products. However, China is now expanding into exactly these sectors, driven by a targeted and massively state-supported expansion of production capacities for electric vehicles and other green technologies. The resulting higher supply at lower prices means both a reduction in exports to China and increased competition for market share in third-party markets for the

European industry. If this development continues, the EU may face a similar fate to the USA, which lost about one million jobs, or nearly six percent of total employment in the manufacturing sector, during the first China shock between 1999 and 2011. In the EU, a similar relative decline would be even more dramatic: With 30.2 million jobs in the second quarter of 2024, a six percent decline would result in a loss of over 1.8 million jobs in the manufacturing sector.

Unity and solidarity are required

To prevent deindustrialisation, the EU must act decisively. The necessary measures include, first and foremost, targeted trade policy actions to protect key industries. The focus should clearly be on (re)establishing fair competitive conditions (keyword: ‘level playing field’). It is especially important to support those sectors where the EU already has significant production capacities and where its industrial ambitions overlap with those of China. What is crucial here is that the EU pursues a common industrial policy, so as not to damage its own growth potential that is its internal market, by conflicting national policy approaches. A confident, active trade policy has the potential to create fair competitive conditions for European companies, while also making protectionist measures by other countries less attractive.

On a global level, enhanced cooperation with international partners—such as through bilateral trade agreements—and a reform of WTO rules are recommended. Cooperative approaches offer the highest chances of success in moving away from unfair trade practices and restoring fair competitive conditions in the long term. Therefore, the EU’s credible use of defensive trade instruments to protect its key industries should also be viewed as a tool to increase trade partners’ willingness to find common solutions. The loss of significant industrial sectors, on the other hand, would further weaken the EU’s relative position in the geopolitical competition and make a reform of international trade rules even more unlikely.

While the US government has already responded with comprehensive economic policy measures, the EU is still struggling with a unified strategy in the face of the competitive challenges posed by China’s industrial policy for the European economic landscape. To prevent deindustri-

alisation in Europe and to preserve the welfare-generating benefits of multilateralism in the long term, unity among member states is crucial. An integrated approach consisting of a common industrial and trade policy, along with the necessary financial policy framework, is currently the most promising approach—not only to protect key industries but also to (re)establish fair competitive conditions. In the long run, only a cooperative effort to reform the existing WTO framework can ensure global trade-policy stability.

Keynotes

- The global economy is experiencing a deep industrial recession, hitting Europe particularly hard, while China is massively expanding its production capacities.
- Extensive subsidies across the entire value chain enable Chinese companies to dominate markets with dumping prices and risk-free international operations.
- China's aggressive expansion in key industries such as electric vehicles and green technologies threatens the competitiveness of European industry.
- The EU must develop targeted industrial and trade policies to establish fair competition and protect key sectors.
- Reforming WTO rules and pursuing bilateral trade agreements with global partners are essential for ensuring a long-term return to fair competition.
- Only a united EU with decisive industrial and trade policies can prevent deindustrialisation and secure its position in global trade.



3

Krisen und Konflikte im Umfeld Europas





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Europe's security environment in 2025

Even more war, suffering and displacement

Günther Barnet

Wars and conflicts as well as hunger and poverty are spreading in the crisis arc surrounding Europe even more dramatically than in 2024. Refugee movements to and terrorism in Europe are direct consequences. The often-unrealistic reactions of the West to these phenomena exacerbate the divisions with the rest of the world, particularly in regions surrounding the EU. As a result, a large number of risks may be rapidly and dramatically stoked to such an extent that they become unmanageable.

Despite attempts at mediation, upheavals and temporary ceasefires, the conflagration in the Middle East that was dreaded already last year remains a possibility. At the very least, chaotic conditions are inevitable unless a balance can be found between the regional and glob-

al powers. Open war between Israel and Iran is, however, limited to a confrontation in the air. In addition, all sides are strategically trying to contain direct and indirect allies on other battlefields or to defeat them locally and operationally. Collateral damage is consciously accepted, if it is not part of the calculation. This affects millions of people in the region, but indirectly also Europe.

From chaos to conflagration?

A transition from chaos to conflagration in the Levant is currently unpredictable. Gaza and Lebanon are particularly affected, as their state order is still effectively non-existent. The greatest risks lie in the spread of the conflict to the West Bank and the uncertain fate of Syria and its border areas in the large triangle with Jordan and Iraq. The withdrawal of US troops from Iraq seems unlikely in light of such developments. This would completely change the balance of power in the region, making it easier for Iran-affiliated groups to operate in the region, and allowing IS and al-Qaeda-affiliated insurgent groups to regain strength. For the Kurdish areas in northern Syria as well as for the control of the Jordanian border region, this poses imminent risks with a high potential for destabilisation.

Whether the West's frozen dialogue with Syria for the purpose of reconstruction and the return of refugees can now be resumed is questionable. The spread of narcotics for the purpose of financing militias remains to be expected, as does the decline in income from tourism and trade. Among other effects, this primarily destabilises Jordan, which, alongside Lebanon, Syria and Egypt, is the biggest loser from the extended course of the war, and secondarily affects Iraq and the Gulf region.

The dramatic decline in revenue due to the fighting in the air, on land and at sea means that fragile states will face unmanageable internal challenges in the medium term. In this sense, the gains made by the pro-Muslim Brotherhood party in the elections in Jordan are also an expression of the public opinion in the so-called 'Arab street'. No government in the region can escape this increasing pressure—the fear of another 'Arab Spring' is too great. For Europe, this means that as long as there is no political solution to the Palestinian issue at hand, many Arab states will have to publicly distance themselves from both Israel

and the West—despite all their resentment towards Iran. The alienation from Europe will bring other states in the region closer to BRICS. In addition to these global changes, the EU faces increasing risks from migration flows, terrorist attacks and negative economic effects, but also the prospect of securing alternative energy supplies. A coherent European policy towards the region in competition with other powers is not discernible.

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

Armed conflicts on both sides of the Red Sea also jeopardise maritime trade between Europe and Asia. This danger became apparent as early as 2024 and is highly likely to continue in 2025. The civil war in Sudan caused the displacement of 12 million people, 18 million more are dependent on food aid. Any hope of recovery has been extinguished. The country is sinking into civil war, mainly due to the influence of regional and global powers.

At the same time, Sudan is a symbol for the development of the entire region. Sudan has good educational opportunities and sufficient resources, but food and resources are shipped to the Gulf States by armed militias rather than being used to supply its own population. The situation is similar in Ethiopia and other East African states. Raw materials are mined under the influence of militias, often contaminating rare water sources and making the surrounding areas nearly uninhabitable.

External powers are constantly fuelling these armed conflicts. The play-out of global rivalries repeatedly has an impact on local conflicts, for example with Russia. This also applies to the war over Palestine, which has made the strait around Bab al-Mandab a theatre of conflict. As a result, attacks are being carried out on local shipping, and it is unlikely that the use of military means in the current quality and quantity will put an end to this. Rather, an exacerbation of the risks is to be expected—so that supply chains are restricted, prices increase and Egypt's income from fees for the use of the Suez Canal, which make up a large part of its GDP, decreases.

The continuation of the war in Yemen means further decline and hopelessness for millions of displaced and starving people. There is an increased risk that they will migrate on a large scale or join armed groups. The situation is similar in Somalia, which is de facto split. Türkiye is acting as a moderator and thus expanding its influence in the region. The impact of jihadist networks is also becoming stronger and extends as far as Mozambique and the eastern Congo. Although the EU's efforts, including military means, do not actually have a conflict-transforming effect due to their small scale, they must be maintained in order to contain a large number of risks. The alternative would be a cascade effect, which would ultimately make these risks unmanageable and have a negative impact on the social and economic situation in Europe.

Chaos in the Sahel and authoritarianism in North Africa

Following the loss of state control over large parts of the Sahel, the risks are increasingly shifting to the neighbouring sub-regions. Both the countries of North Africa and those in the Gulf of Guinea and on the western Atlantic coast are affected. Comparatively stable and democratically oriented states are affected by the upheavals on their peripheries and are responding to the fundamental problems with predominantly security-related answers. At the same time, they are trying to publicly distance themselves from Western partners in order to avoid getting caught up in global conflicts and falling victim to hybrid activities. However, elections in these states tend to be shaped by anti-colonial discourses. The EU is less and less able to respond to this and is forcing these states to make a choice between norms that they cannot fulfil. This plays into the hands of non-European powers, most of which make non-conditional alternative offers in various areas.

The chaos in the Sahel and its consequences are leading fragile states in North Africa to seek strong leadership. Democratic and human rights achievements are being pushed back in favour of stability. Criticism from the EU and individual member states is fuelling alienation and sometimes leaves the governments concerned with no other option but to look elsewhere. These states often find themselves forced to balance between geopolitical poles and accept the best offers for themselves. Europe should become aware of this development and weigh up

its own conflicts of interest and objectives. Whether this will be more successful in 2025 remains to be seen.

Destabilisation and conflicts

Following the withdrawal from Afghanistan, the loss of existing energy supplies from the Russian Federation and the pursuit of diversified suppliers and alternative sources, the Central Asian sub-region is becoming increasingly important. The risk of destabilisation through the spread of terrorist groups is manageable for the time being, both for the region and for Europe, despite individual attack motives with claims of responsibility by the terrorist organisation Islamic State—Khorasan Province. The risk of rivalry with BRICS powers is more tangible and more severe, and requires a coherent policy from the EU and Austria.

In the context of the Russian war of aggression against Ukraine, there are many voices warning of the risk of armed conflicts flaring up again in the wider region around the Black Sea. Particular focus is being placed on the Republic of Moldova, whose rapprochement with the EU and NATO is seen as a justification for hybrid, sometimes even open attacks by Russia, despite the neutrality principle. To date, the military escalation has not manifested itself and will continue to require skilful balancing acts by the country and its Western allies. Russia's ability and intention to actively pursue destabilisation must be assessed as high. Developments are more negative for Georgia and Armenia, both of which are caught up in internal political disputes and are therefore more than ever the pawns of other actors. This is all the more dramatic for Europe as the relevance of the Caucasus sub-region is high both as a transversal and as an energy supplier, which is why the increasing risk of losing influence should not be underestimated.

The progress of the war in Ukraine will largely depend on the intentions of the Trump administration, whose announcements do not necessarily match the actual US measures and their effectiveness. However, the composition of European institutions after the 2024 elections suggests that transatlantic member states in particular are expecting the war to continue or are preparing for it regardless of US decisions. Risks for Central Europe tend to increase, which fundamentally strengthens global rivals and increases their potential impact in all surrounding regions.

Alienation in the Western Balkans

Apart from isolated incidents such as 2023, the Western Balkans, unlike other regions mentioned, are far removed from an armed escalation. However, no substantial progress has been made in terms of an EU accession. Politically enforced accession would be difficult to manage economically, would jeopardise the coherence of internal and external capacity to act and would undermine the rule of law. This tension gives Europe's global rivals the opportunity to bring hybrid measures to bear and to destabilise by means of radical local forces. Even if the EU remains the largest donor and trading partner, its influence is on the wane. A smart integration policy is needed, meaning full integration into the four freedoms of the EU and thus economic prosperity, which could result in political stability.

The alternative is an increasing alienation from the EU, which could lead to an increase in influence and a destabilisation by non-European powers. This development increases various risks in the medium term, including the strengthening of political Islam or ethno-nationalism. At the same time, transformation efforts for diversified, transcontinental energy networks to develop the region and the reduction of the dependency on hybrid attack vectors would be strengthened. For 2025 and beyond in the medium term, however, military risks are significantly lower than in all other regions around Europe. The existing force disposition (including reserves) is therefore sufficient and further capacities should rather be used to stabilise the Middle East

Wars between the poor and armies

In summary, it can be said that armed conflicts, mass exodus or starvation in all regions of the world, albeit to varying degrees, are an expression of the lack of alternatives for large sections of the world's population. Ideological additions promote this and are of little help in containing or ending conflicts. Democracy, reduced to electoral processes, loses its meaning if the only choice is between different corrupt groups or exploitative systems. The result is conflicts between the poor and at the same time against armies. These 'global civil wars' with the influence of supra-regional powers and their proxy militias and mercenaries will come to a head in 2025. We can only speculate as to

whether this will lead to an increase in regular wars between states and groups of states in Europe in the long term.

Keynotes

- A widespread conflict in the Levant remains possible despite occasional ceasefires, which would result in tens of thousands of deaths and the displacement of hundreds of thousands, further reducing the likelihood of their return from Europe.
- Armed conflicts on both sides of the Red Sea exacerbate these phenomena, threaten global trade routes, and destabilise fragile states such as Egypt, Sudan, Somalia, and Yemen.
- Amid these developments, Arab states are becoming increasingly politically estranged from Europe, while mutual dependencies grow. BRICS Plus offers alternative, highly attractive options for states in Africa and the Middle East.
- The EU's influence in Central Asia and the Caucasus is limited and its approach inconsistent. These regions are significant in terms of energy and terrorism but also carry a high risk of destabilisation by non-state actors, with conditional divergences between China and Russia.
- The chaos in the Sahel is spreading to the Gulf of Guinea and North Africa, fostering authoritarian structures. Europe's capacity for action is limited but urgently needed.
- Stagnation in EU integration policy in the Western Balkans strengthens the regional influence of global rivals and poses a long-term threat to European stability.
- State capacities for action in all regions of the crisis arc around Europe are increasingly shaped by wars over resources and trade routes, with non-state actors gaining prominence and operating outside international law.



The security situation in Eastern Europe and the South Caucasus

Stephanie Fenkart

Russia's large-scale invasion of Ukraine in February 2022 has dramatically changed the European security situation. The assumption that conventional wars on European territory are a thing of the past has been proven wrong and a rethinking of how the European Union must shape its security in the future has been initiated. Alongside the increase in spending on European defence and the modernisation of armed forces as well as the expansion of interoperability, a consensus has emerged: In the foreseeable future, there can only be security in Europe against Russia. In contrast to the war against Ukraine, Russia's role in the South Caucasus and in its ally Belarus receives relatively little attention. Russia is pursuing its strategic and geopolitical goals rigorously and is making the prevailing conflicts its own in order to strengthen its influence—as in Belarus—or to influence or force developments in its favour—as in the South Caucasus.

Russia and Belarus

Shortly after the outbreak of the COVID-19 pandemic, mass protests broke out in Belarus in August 2020 following the fraudulent presidential election, which the ruler Alexander Lukashenko, who has ruled the country in an authoritarian manner since 1994, had suppressed with brutal police violence. According to the human rights centre VIASNA, 1,322 political prisoners are still being held in Belarusian prisons as of 24 September 2024. The political opposition and many activists, as well as independent observers, are now abroad.

After a brief period of loose rapprochement between Belarus and the European Union, the latter imposed sanctions, which were further tightened as a result of ongoing repression and the forced landing of a Ryanair plane in May 2021, as well as Belarusian involvement in Russia's military invasion of Ukraine. The fact that relations with the EU are increasingly confrontational due to the events of August 2020 is also demonstrated by the migration crisis fostered by Belarus in 2021, when Belarus issued tens of thousands of visas to refugees and migrants and sent them to the EU border.

Using migration as a weapon to extort concessions has far-reaching consequences for the Union and the individual member states. In addition to the humanitarian crisis caused by border closures and push-backs—which are illegal under European law—the vulnerability of the European Union has also become apparent, which is exacerbated by the increasing social polarisation surrounding the issue of migration. Considering that Belarus and Russia have formed a union state since 1999 and that this is also becoming increasingly important for Belarus due to a lack of alternatives (Belarus borders the EU member states Estonia, Latvia, Finland and Poland to the West, Ukraine to the South and only Russia to the East), this does not mean that Belarusian-European relations will ease in the foreseeable future. On the contrary, we see Belarus becoming increasingly dependent on Russia.

The extent to which Belarus can maintain its territorial integrity and sovereignty probably depends on developments in the Russian war against Ukraine. Even if Belarus has so far tried not to become a direct party to the war, it will probably have to continue to make concessions to Russia in view of the unequal balance of power, economic depend-

ence, but also Russian propaganda and the restriction of freedom of movement towards the West. Like the EU as a whole, Austria must continue to expect at least hybrid attacks that threaten European security and order, and it should already be considering scenarios for future relations between Belarus and the European Union, although there is still no end in sight to the Russian war against Ukraine.

Russia and the South Caucasus

While Belarus can increasingly be seen as an extension of Russia, competing actors are clashing in the South Caucasus. Georgia, whose population is overwhelmingly pro-European, is confronted with an increasingly pro-Russian government, although Russia de facto controls two Georgian territories (South Ossetia and Abkhazia) as a result of military operations. In October 2024, elections were held in Georgia, which are suspected of being manipulated by the ruling party ‘Georgian Dream’, which is close to Russia. A rapprochement with the EU and NATO therefore seems unlikely in the short to medium term.

Armenia, which after the lost war against Azerbaijan in 2020 and after the military operation in September 2023, in which Azerbaijan was also able to recapture the autochthonous Armenian-populated region of Nagorno Karabakh, which led to a mass exodus of around 1,200,000 Armenians, is in an extremely difficult geographical and geopolitical situation as a landlocked country with only two open borders (to Iran in the south and to Georgia in the north). In addition, it is dependent on Russia in almost all relevant areas such as transportation, energy, trade and security. The security situation in Eastern Europe and the South Caucasus is perceived as an increasing burden due to Russia’s non-intervention in the war with Azerbaijan.

Azerbaijan, although under authoritarian rule, has put itself in a good geopolitical position thanks to its clever foreign policy and its wealth of natural resources and is dictating the future of Armenian-Azerbaijani relations, not least due to its military strength and good relations with Türkiye, but also with Russia and Israel. In addition to the signing of a peace agreement, the establishment of a connection between the Azerbaijani enclave of Nakhichevan and Azerbaijan through Armenian territory (known as the Zyunik or Zangezur Corridor) is a particularly contentious

issue for the normalisation of relations. Armenia and Azerbaijan would benefit significantly from such a connection, but it would be strategically disadvantageous for Russia and Iran. On the one hand, the route could be used as part of the Central Corridor—a connection from China via Central Asia and Türkiye to the EU, bypassing Russia—and on the other, it would be an alternative to the connection between Azerbaijan and its exclave of Nakhichevan, which currently only runs through Iranian territory on Armenia's southern border. Armenia rightly points out that such a connection through Armenian territory must also be under Armenian control, while Azerbaijan insists on Russian control in accordance with point 9 of the 2020 ceasefire agreement—while all other points of the agreement were broken by Azerbaijan through the 2023 military operation and the previous blockade of the Lachin corridor.

For the European Union and its member states, there is relatively little room to manoeuvre in this region given the traditional geopolitical players and their competition. The EU could focus on supporting the Armenian diversification agenda of its foreign, trade and security policy, but also on strengthening the fragile Armenian democracy. In addition, individual EU states could get involved in dealing with the past between Armenia and Azerbaijan. The difficult historical relations caused by war, expulsion and violence have left deep wounds in both societies to this day.

Keynotes

- Russia pursues its strategic and geopolitical objectives with force in its immediate neighbourhood.
- Russia exploits prevailing conflicts to strengthen its influence, as seen in Belarus, or to shape developments to its advantage, as seen in the South Caucasus.
- Austria, like the EU as a whole, must anticipate at least hybrid attacks that threaten European security and order.
- The EU and its member states have limited influence in the South Caucasus due to the competing interests of regional powers such as Russia, Türkiye, and Iran.
- The EU could focus on supporting Armenia's diversification agenda in its foreign, trade, and security policies, as well as strengthening Armenia's fragile democracy.
- Individual EU states could contribute to reconciliation efforts between Armenia and Azerbaijan.



Ukraine in the fourth year of war

Christoph Bilban

The full-scale war in Ukraine entered its fourth year in 2025. According to estimates, the mark of over one million dead, wounded and missing—including more than 10,000 dead civilians—had already been exceeded by mid-2024. Almost 20 percent of Ukraine was occupied by Russia at the turn of the year. However, after Donald Trump's election victory in the USA, the big question in the fourth year of war is whether the dying will end. Neither side has achieved its military goals, and this also seems unlikely for 2025. An increasing willingness to negotiate in Ukraine and Russia makes a diplomatic interim solution in the form of a ceasefire seem possible.

War of attrition to the advantage of Russia

Russia will probably be able to maintain the military initiative it gained in eastern Ukraine in 2024. With heavy losses of material and personnel, the Ukrainian army was able to steadily push back in Donbas. From September to November 2024, Moscow conquered a good 1,100 km², almost three times as much territory in just three months as in the whole of 2023. The Ukrainian advance into the Russian Kursk Oblast in August 2024 was also partially pushed back again. A comprehensive counter-offensive is likely to take place at the end of 2024. This was certainly indicated by the arrival of 12,000 North Korean soldiers on the Kursk front in November. According to reports, the Kremlin could receive up to 100,000 more soldiers from North Korea in 2025. In addition, more people from Africa and the Middle East will be lured to Russia with false promises in order to force them into military service, just like in 2024. The Russian volunteer pool is becoming increasingly smaller and more expensive. In Ukraine, the existing recruitment difficulties are also unlikely to be overcome by 2025. Although both sides are militarily exhausted at the end of 2024, they will probably still have enough reserves to continue the war in 2025.

The time until Donald Trump took the oath of office was used on both sides to achieve the most advantageous position possible. The delivery of anti-personnel mines to Ukraine was an indication for this, as well as the approval for the use of short-range ATACMS missiles supplied by the USA against military targets in Russia given in mid-2024 in response to the North Korean interference. In addition, the British-French Storm Shadow/SCALP cruise missiles have been approved.

Possible strikes against logistics and command and control facilities in the Russian depth and new Ukrainian minefields could limit the capability for comprehensive offensives in the Donbas in 2025. Russia responded to initial ATACMS and Storm Shadow attacks with the non-nuclear test firing of a new medium-range ballistic missile called 'Oreshnik' (Eng. Hazel tree) at a military target in the Ukrainian city of Dnipro. In a speech after the operation, Russian President Vladimir Putin declared that the "regional conflict in Ukraine [...] has taken on elements of a global nature". With this threatening gesture, Putin wants to undermine Western support by fuelling fears of an unlikely nuclear escalation.

Wild card Donald Trump

Securing Western support will therefore be the second decisive problem for President Volodymyr Zelensky in 2025, the first one being the shortage of personnel in the armed forces. Some Ukrainian observers expect more clarity from the incoming US administration and an end of the timid Ukraine policy. From what we know so far, Ukraine will not be a priority in the next US administration. The scenarios range from a cessation of US aid as a possible worst-case scenario to a conceivable continuation of support. In any case, individual European partners and Kyiv are already preparing for a possible loss of US payments. However, the wild card remains President Trump himself, who has announced that he will end the war on the first day of his presidency. From a Russian perspective, the Trump administration is welcomed for the time being, but is still seen as unpredictable.

Ceasefire as an interim solution

In a recent survey conducted by the Friedrich Ebert Stiftung for the Security Radar 2025, 54 percent of Ukrainians and 57 percent of Russians said they were in favour of negotiations without conditions. However, Putin does not appear to be backing down from his conditions for the start of talks. He is demanding that the four regions of Donetsk, Luhansk, Kherson and Zaporizhia as well as Crimea be recognised as Russian. For a ceasefire, Ukraine would most likely have to renounce its NATO membership and the West would probably at least have to agree to the lifting of sanctions. Kyiv, on the other hand, could more easily propose negotiations without conditions, but has repeatedly called for a halt to air strikes before any talks. Ukraine could probably only agree to a ceasefire with extensive Western security guarantees and a clear path for further peace negotiations in order to avoid falling into a 'Minsk III trap'.

However, since the military situation does not seem ready for a ceasefire in 2025, the decision for or against a diplomatic solution will be made in Washington and the European capitals—as long as the Ukrainian leadership wants to continue fighting.

Keynotes

- Russia and Ukraine likely still possess sufficient military reserves to continue the war in 2025.
- The incoming US administration will likely bring an end to the hesitant Ukraine policy, though the direction remains uncertain.
- A ceasefire as an interim step towards peace negotiations is conceivable in 2025, especially if Western support diminishes.
- Securing continued Western support, alongside the armed forces' personnel shortages, will be the two defining challenges for President Volodymyr Zelensky in 2025.



Russia in 2025

Stable control and the will to wage a long war

Gerhard Mangott

Russia's President Vladimir Putin was re-elected as President in March 2024 in elections that were neither free nor fair. His position is currently undisputed—both among the population and the majority of the political and economic elites. The government reshuffle has brought some surprises. Putin's control of the country is supported by numerous favourable macroeconomic indicators. There are no signs of a peaceful solution to the ongoing war between Russia and Ukraine. There is little overlap between the negotiating positions. The Russian government is currently not interested in freezing the conflict.

Russia after the ‘elections’

Vladimir Putin was granted a fifth term as President of Russia in March 2024. According to official figures, he won 87% of the votes in ‘elections’ that were neither free nor fair. The often-manipulated sham of democratic co-determination has probably resulted in less approval; however, it would be wrong to assume that Putin does not have the support of a majority of the Russian population. This is partly due to the fact that he has ensured that there no longer seems to be an alternative to him in the political arena.

The formation of the government in May 2024 slightly rejuvenated the cabinet, but did not lead to any radical changes in the key positions of power. The dismissal of Sergei Shoigu as Minister of Defence should be mentioned—with a simultaneous purge, especially at the level of deputy ministers. However, Shoigu did not descend in the power hierarchy; he was appointed Secretary of the Presidential Security Council. His visits to China, North Korea and Iran show that he is still in the inner circle of power. The new Minister of Defence was the hard-working economist Andrey Belousov, tasked with improving the ministry’s co-operation with the Russian arms industry and combating corruption in the civilian and military leadership of the armed forces. The dismissal of Nikolai Patrushev, who had been Secretary of the Security Council since 2008 and was considered an eminence grise, is noteworthy. He is now responsible for shipbuilding in the presidential office—a clear demotion or a self-imposed retirement. It was also surprising that the unpopular (and only partially capable) General Valery Gerasimov was able to remain Chief of the General Staff. It is conceivable that he will be replaced in the foreseeable future by ‘General Armageddon’ Sergei Suvorikin or Lieutenant General Mikhail Teplinsky.

Following the presidential election and the government reshuffle, Russian domestic politics have returned to calmer waters. Putin is undisputed. According to the Levada Centre, the approval rate for Putin’s administration has long been more than 80%; in September 2024, it was 84%. Even the tax increases have not visibly increased dissatisfaction among the population. 69% of the population still believe that the country is moving in the right direction, even if this number is slightly decreasing. It should of course be noted that surveys are inaccurate in

a repressive environment and that the majority of the population still obtains its political information through government channels.

Economic situation

The economic situation in Russia is uncertain, but many indicators are positive. In 2024 a GDP growth of 3.9% is expected. This is mainly due to the high government spending on the defence industry, from which both the industry and its suppliers benefit massively. According to a study by the Bank of Finland, defence spending has increased by more than 60% compared to the previous year. At the same time, state transfer payments have also increased significantly. This, together with the high pay for frontline service, is fuelling inflation, which is expected to reach more than nine percent in 2024.

Inflation is also fuelled by a significant labour shortage. In July 2024, the unemployment rate was at 2.5%. This is because of the deployment of Russian men at the front as well as the migration of nearly one million Russian citizens since January 2022. In the meantime, however, many Russians have returned to Russia. The number of those still living outside Russia is estimated at around 600,000. On top of that, there is the demographic crisis of the Russian population. Due to the lack of workers, increasingly higher wages and salaries must be paid, which in turn fuels inflation. Real wages have grown accordingly. Income satisfaction among the Russian population is very high. However, these conditions led to an overheated economy.

The Russian central bank expects the economy to cool down slightly in the coming months. The GDP growth for 2025 could be 2.5% at best. This has less to do with Western sanctions than with the monetary policy of the central bank. The key interest rate is currently at a high 18%, making investment and consumer loans more expensive and thus slowing down the growth rate.

Perspectives for the war against Ukraine

Russia can continue the war against Ukraine financially and with personnel. The budget deficit in 2024 will amount to 1.5% of GDP and

should fall to 1% of GDP in 2025. There are no influential opponents of the continuation of the war within the elite. Without significantly increased support in the form of weapons and ammunition, the Ukrainian army will remain on the defensive. Additionally, the new mobilisation law (2024) in Ukraine has not helped to recruit enough soldiers; the average age of soldiers is high, and the motivation of many is low. The number of desertions is estimated between five and ten percent. The number of forced recruitments is increasing. War-weariness in some Western countries and the election of Donald Trump as US President will increase the pressure on the Ukrainian leadership to back away from the maximum demands of their 'peace formula' of November 2022.

A negotiated solution to freeze the conflict at the existing front lines is possible for 2025, but not very likely. Russia is seeking a conflict solution together with the USA; the EU is an unwanted partner, seen as a vassal of the USA. A peace solution is still far off. If the ceasefire line is frozen, Ukraine would still need strong military support in order to deter possible Russian follow-up attacks in the coming years. The Ukrainian leadership would not need to acknowledge *de jure*, but *de facto* Russian control over the conquered territories of Ukraine. The Ukrainian 'peace plan' presented in September 2024 can only be interpreted as a 'desire for continued war with intensified Western military aid'. However, achieving this goal depends on variables that are not under Ukrainian control. This is contrasted by Russia's ability and willingness to continue the war. This is Ukraine's misfortune.

Keynotes

- Vladimir Putin was re-elected as president for a fifth term in 2024 through manipulated elections and remains unchallenged due to a lack of alternatives.
- The government was slightly rejuvenated, but key positions, such as the defence minister, were reshuffled without altering the power structures.
- Despite tax increases and repressive media control, over 80% of the population reportedly support Putin's course, according to polls.
- Russia's economy grew by 3.9% in 2024, driven by massive military spending, but suffers from inflation and labour shortages.
- Russia has the financial and personnel resources to continue the war, while Ukraine struggles with resource shortages and declining morale.
- A ceasefire in 2025 remains unlikely, as Russia dictates the terms and Ukraine remains heavily reliant on Western support.



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Security and stability in the Western Balkans

Vesna Pusić

Neither politics nor the population of the six countries of the Western Balkans (WB6) are unanimous in their desire and determination to join the EU. Although Montenegro is considered to be the frontrunner in terms of EU accession, in reality, it is the politically most delicate case, with its existence as an independent state being questioned. Russia is the most important foreign actor actively interfering in the internal affairs of the WB6, particularly in Serbia and Montenegro, and to some extent also in North Macedonia and Bosnia and Herzegovina. Russia sees these countries as an instrument for destabilizing the EU. The new US government could play a more disruptive than constructive role in the Western Balkans by supporting local and regional autocrats. Instability in the Western Balkans could increase the flow of refugees into the EU, disrupt current security efforts, and support right-wing populism in the EU.

For many years the six countries of the Western Balkans were united around one important common strategic objective: They all wanted to join the European Union. That was what their respective political leaders kept repeating, what the public opinion overwhelmingly wanted and what the EU repeatedly confirmed. That made their political decisions predictable and foreseeable, at least to some extent. That is no longer the case. In the 11 years since Croatia joined the EU, none of the WB6 have joined or even come considerably closer to joining. On the contrary, most of them seem to be further from meeting the criteria and joining than they were in 2012 or 2014 when Montenegro and Serbia respectively started accession negotiations. The political paths taken by these states are now much more divergent, as are their allies, the dominant political discourses and their foreign policy objectives. Of the WB6 some are still willing and able to join the EU, some are willing but possibly not quite able, and some are neither willing nor able, at least at the moment. That makes the whole region much less predictable and potentially more volatile than it was a few years ago.

There are three main reasons for this new diversity and the fact that some politicians have turned their backs on the EU and, in some cases, taken public opinion with them:

1. Since 2014 and the annexation of Crimea, but especially since the full-scale attack on Ukraine in 2022, Russia has been extremely active in the whole region, adapting their tactics to each individual country and focusing heavily on public opinion and the media;
2. In the past decade some political leaders have become excessively rich while in power and started viewing EU membership as potentially threatening to their personal interests, wealth and impunity;
3. Inconsistencies in EU enlargement policy—unfulfilled promises, long periods of ‘enlargement fatigue’ and changes to the negotiating framework have disillusioned public opinion in many countries, making people believe that EU membership is an unrealistic and unattainable objective. North Macedonia is a case in point here, but it has had an impact on the entire region.

Risks for the EU and Austria

Russia is the international player who probably best understands the importance of the Western Balkans for the stability of the European Union. Since 2014, Russia has treated the EU as an enemy and started to use the Western Balkans as a tool to destabilise the EU. Russia has also been quite active in Romania and Bulgaria to create a buffer zone between them and their immediate neighbours and the EU. Russia's maximum objective is the dissolution of the EU, the optimal objective is stopping any future EU enlargement.

A dysfunctional Western Balkans area, troubled by political conflicts, would not be capable of dealing with a potential future influx of refugees and migrants. It would also increase the already high emigration from the region itself. Since Austria has already taken in high numbers of refugees and immigrants from the region, it would be a primary destination for future potential immigrants. Some countries could increasingly act as Putin's arm in NATO and in future EU defence arrangements. All of this could increase support for right-wing populist parties throughout the EU and greatly endanger the unity and functioning of the EU.

The role of third parties in the Western Balkans and key messages

Russia is the most important and the most actively interfering party in the Western Balkans. Their agencies, state representatives, businesses people and church have a strong presence in Serbia, Montenegro, North Macedonia and, to some extent, in Bosnia and Herzegovina. Their objective is turning the countries of the region against the EU, NATO and the West, and to destabilise the EU itself by destabilising the region. The result of the US presidential election will have a substantial impact on the region. Trump has already shown and declared that he would give Putin free reign in areas that Russia considers its sphere of influence, weaken NATO and generally side with local strongmen wherever possible. That could easily lead to conflict at least in Bosnia and Herzegovina and between Kosovo and Serbia.

The visits by German Chancellor Olaf Scholz and President Emmanuel Macron following the revelation of Serbia's lithium reserves were quite unsettling. They were unpleasantly reminiscent of the European attitude towards some African and Asian countries many decades ago: Secure resources, sell weapons, ignore dictators. Such an approach would be extremely counterproductive not only for Serbia, but for the stability of the entire region.

Russia, Serbia and the Serbian Orthodox Church are in a full-scale attack on Montenegro's sovereignty, identity and political independence. Additionally, there is concern that there is a tacit agreement among European politicians to treat Montenegro as a 'compensation' for Aleksandar Vučić for the loss of Kosovo. This would be particularly dangerous since Montenegro is the only country bordering the Adriatic Sea whose NATO membership would become questionable.

Both Croatia and Serbia have recently bought or agreed to buy twelve French Rafale fighter jets each. Croatia is a NATO member, so this can be viewed as part of the effort to reach the 2% GDP for defence. However, considering the increased volatility of the region, it is a fact that should not be ignored. In contrast to previous EU enlargements, NATO membership is no longer a guarantee of political loyalty and alignment. Both Montenegro and North Macedonia are examples of this.

Keynotes

- The six Western Balkan states do not have a unified stance on the EU accession process.
- Montenegro is perceived as the most vulnerable state in the region.
- Russia acts as a dominant player, deliberately fostering unrest through political and economic means.
- By promoting instability in the Western Balkan countries, Russia undermines not only the region but also the stability and security of the EU.
- US policy could further strain the dynamics in the Western Balkan region.
- By integrating and supporting the Western Balkan states more strongly, the EU not only safeguards their stability but also strengthens its own security and unity.



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International efforts in the Western Balkans

Focus on Bosnia and Herzegovina

Ulrike Hartmann

International engagement in the Western Balkans continues unabated. Against the backdrop of Russia's war of aggression against Ukraine and the de facto termination of the EU integration process with Türkiye, they, and economically China, exploit any vacuum that the EU allows. The EU has now recognised the geopolitical significance of enlargement, but due to the particular interests of regional politicians in the Western Balkans, it is not a straightforward process. EU reforms often only occur under pressure. Increased EU engagement (soft power), however, is not enough for the United States in the security sector in Bosnia and Herzegovina; they advocate for a tougher approach.

Traditionally, international engagement and interest in the Western Balkans has been strong, but the intensity depends on regional or geopolitical developments. On one side, there are the EU and like-minded countries such as the USA and the UK, international organisations like the OSCE, or international financial institutions. On the other side, Russian influence has noticeably increased since the war of aggression against Ukraine, particularly in Serbia and in Serb-populated areas in Bosnia and Herzegovina, Montenegro or Kosovo. China, on the other hand, is trying to increasingly establish itself in the economic sector, thereby creating long-term dependencies—a strategy ultimately aimed at the EU market. Following the freezing of its EU integration, Türkiye has taken on an independent role in the Western Balkans. It wants to be perceived as a political partner and, at the same time, is investing a lot of money to spread its own culture and traditional or religious values, especially in the predominantly Bosniak-populated Federation of Bosnia and Herzegovina.

The war in Ukraine and Russia's growing attempts to influence the EU accession candidates in the Western Balkans require even greater engagement from the new European Commission and EU member states in the region—both in technical terms (support for legal adjustments/training) and with tangible benefits for the population even before full accession (gradual integration). Apart from the level of EU commitment, political and security-related developments in the Western Balkans in 2025 will also depend on future US policy—on the one hand, the direction taken by the newly elected President Trump, but also on the extent to which the USA wants to engage in this region and in the individual countries going forward. The success or failure of the EU will ultimately be measured by whether it succeeds in convincing the political leaders in the region to implement genuine reforms or to promote a political generational change in countries such as Bosnia and Herzegovina in the coming years, which—as is currently the case in Montenegro—will enable rapid progress in the EU process. Lessons for the EU

The political commitment of the EU and its member states has increased in recent years, particularly due to internal developments in the Western Balkans (the rise of ethno-nationalism), but above all due to the stronger influence of external actors. It has been recognised that any vacuum left by the EU is quickly filled by third countries, which at least impairs the alignment of the accession candidates towards the

Union. In the security sector, both in Kosovo (KFOR) and in Bosnia and Herzegovina (EUFOR ALTHEA), visible international commitment is still required to prevent ethnic incidents if possible and to provide the population with a certain level of security. The fragile political situation in Bosnia and Herzegovina has also prompted the USA to demand stronger engagement from EUFOR ALTHEA, particularly to deter secessionist efforts by the Republika Srpska. Even NATO commitment is not being ruled out by the USA in order to counter the growing Russian influence in the country and to secure past international commitment.

EU integration of the Western Balkans

Formally, EU accession is undisputed among the political leaders in the Western Balkan states. This is not only in line with the clear wishes of the population (with less support in Serbia), but the close economic ties of the countries with the EU leave no room for realistic alternatives. For example, Bosnia and Herzegovina conducts about two-thirds of its trade with the EU. However, the concrete integration steps (EU reforms) are significantly lagging behind, despite the fact that the countries have been part of the EU integration process since the EU decision in Thessaloniki in 2003. For too long, the EU underestimated the true interests of the often long-serving decision-makers in the Western Balkans, some of whom have been in power for years, if not decades. As a result, EU reforms were often pushed forward only in areas where they did not entail an internal loss of control. For example, Montenegro, under the former long-term president and prime minister Milo Đukanović, was considered an EU model student for a long time, but reforms in the areas of the rule of law or anti-corruption were not implemented or had no tangible impact. In Bosnia and Herzegovina, the complicated decision-making process and the dominance of ethnically based decisions are further obstacles.

The war of aggression against Ukraine has not only pushed scepticism about enlargement into the background in EU countries, but it has also once again highlighted the geostrategic importance of enlargement in Southeast Europe. Especially geographically close EU states, including Austria, recognise this importance. This was expressed, among other things, by the founding of the informal group of Friends of the Western Balkans (Austria, Italy, Slovenia, Croatia, Slovakia, Czech Republic,

Greece), which primarily focuses on the geopolitical aspect of enlargement, in contrast to the technical processing of accession criteria.

The Friends of the Western Balkans' commitment to the rapid integration of this region is also a response to the pressure from some EU states for the rapid accession of Ukraine and Moldova to the EU. If the Western Balkan states are prepared to make real progress with reforms, it will be important for the EU to reward these reforms accordingly in order to avoid further fuelling the repeated accusations of unequal treatment with Ukraine and Moldova.

Pace of EU-integration of the Western Balkans

As much as geopolitical reasons speak for rapid enlargement, it is equally important to insist on the fulfilment of the criteria in the accession process. After all, the candidate countries must be able to withstand economic pressure after their accession (adapting the relevant standards) or, for example, be capable of ensuring food security along with appropriate controls, in order not to jeopardise the existing regulatory system in the EU.

Due to the necessary approval of all parliaments of the EU member states for enlargement, it is ultimately up to the Western Balkan countries to ensure their readiness for accession and to carry out the necessary persuasion. It will not be sufficient, as in the case of Bosnia and Herzegovina, to refer to the complicated decision-making process and the distribution of competences within the country. The population expects not only material benefits from EU membership but also more rule of law. An EU accession without a noticeable change in the issue of rampant corruption or in transparency regulations would lead to a loss of trust in the EU among the population, which can already be observed in Bosnia and Herzegovina.

Keynotes

- The Western Balkans are increasingly the stage for competing interests from the EU, USA, Russia, China, and Türkiye, all vying for influence through political, economic, and cultural commitment.
- The EU must enhance its support, from technical assistance to tangible benefits for the population, to counter Russian and Chinese influence and advance the EU integration process.
- Political deadlock, ethno-nationalism, and a lack of progress in the rule of law and anti-corruption efforts hinder integration efforts.
- Stability in the Western Balkans requires a continued international military presence to de-escalate ethnic tensions and limit external interference.
- Rapid EU integration is geopolitically desirable but should not come at the expense of reform progress and the fulfilment of accession criteria.



The Middle East

Between further escalation and Trump's peace

Gudrun Harrer

In order to bring a lasting end to the war in the Middle East, which began with the Hamas attack on Israel on 7 October 2023, a new security concept for the region is needed that includes the Islamic Republic of Iran and its regional proxies. Even if Israel manages to rebuild its military deterrence, a mere return to the status quo ante is not in its interest. The development of Israel's normalisation agreements with Arab states (Abraham Accords), particularly with Saudi Arabia, will be pursued by the USA, but it can only be successful alongside a political solution to the Palestinian issue. The election of Donald Trump as the 47th US President introduces a new unpredictable element into the region. His commitment to an unshakable friendship with Israel is counterbalanced by personal interests in the Arab Gulf states.

7 October 2024—the anniversary of the massacre of Hamas and the Palestinian Islamic Jihad (PIJ) in Israel, which triggered the Israeli offensive in the Gaza Strip and a multi-front war for Israel—passed without an apparent solution in the Middle East. The military facts created by Israel, including the almost complete elimination of the leadership of Hamas and the Lebanese Hezbollah, as well as the degradation of Iranian capabilities in the region, are countered at the end of 2024 by the lack of realistic concepts for a new security order for the Middle East.

The overthrow of the Syrian regime at the expense of the ‘Axis of Resistance’ made Israel the clear temporary winner of the strategic confrontation with Iran. However, the influence of Türkiye and of the partly radical Islamic groups dependent on it in Syria increased. The effects of the costly war on Arab and Muslim civilian populations, who feel abandoned by the international community, should not be neglected, as this will, in turn, facilitate the spread of radical and Islamic ideologies even in Europe.

‘Palestine’

The international community continues to uphold the idea of a two-state solution for Israel and the Palestinians and the implementation of UN Security Council Resolution 1701 (2006) for Lebanon, which aims to remove Hezbollah from the “Blue Line” between the two states. Despite this, the dominant political forces in Israel are signalling that even if the restoration of Israeli deterrence is successful, they would not return to the status quo ante, the deceptive calm before 7 October 2023. The creation of new facts includes the degradation of the military strength of the Islamic Republic of Iran, which in 2024 engaged in direct military combat with Israel for the first time, with missile and drone attacks on Israeli territory.

In the case of ‘Palestine’, in addition to Hamas giving in, there is no strong leadership capable of making decisions in Ramallah, where Palestinian President Mahmoud Abbas, long without any democratic mandate, has ruled for twenty years and will be ninety years old in 2025. He has so far failed to mobilise Arab states for cooperation on the future administration of the Gaza Strip. In the case of the failed state Lebanon, there was no political force in sight at the end of 2024 to which Hezbollah would submit. Even though, at the end of Novem-

ber, it agreed to a ceasefire with Israel and a withdrawal behind the Litani River, thereby conceding the failure of its relief war on the side of Hamas. In October 2024, the second anniversary passed without an incumbent in the presidential palace in Beirut, and even Prime Minister Najib Mikati only led an interim government. However, there was hope that Hezbollah's concession could bring movement to the political deadlock.

Donald Trump's Middle-East policy

On 20 January 2025, Donald Trump assumed the office of President of the United States. His future Middle East policy is considered to be highly unpredictable, in line with his character. Officially, Prime Minister Benjamin Netanyahu calls him the best friend Israel has ever had in the White House. However, Trump's self-declared image as a peacemaker and his business interests in the Arab world could potentially conflict with the intentions of the Israeli government. Between US ambitions for a regime change in Tehran, the US-assisted military destruction of Iran's nuclear program and the negotiation of a new nuclear deal with Iran—Trump sabotaged the old one in 2018 by withdrawing—anything is considered possible.

In the monarchies of the Persian Gulf, where the power of the Arab republics has shifted, the election of a Republican president in general, and Trump in particular, may have been welcomed. However, Trump's passivity during his term as the 45th US president, especially during the Qatar crisis in 2017 and in the face of attacks by Houthi rebels from Yemen on Saudi Arabia and the United Arab Emirates, contributed to the Gulf states diversifying their security policies and increasingly orienting themselves towards Moscow and Beijing. The normalisation of relations between Saudi Arabia and Iran, the new Saudi-Iranian détente, which began in 2023 with China's mediation, continued in 2024 despite the escalation between Israel and Iran. Saudi Arabia's trust in Trump will not be strong enough to easily abandon this new course.

Abraham Accords

The Abraham Accords between Israel and the United Arab Emirates, Bahrain, and Morocco also remain intact. Economic exchanges (with the exception of tourism) and security cooperation continue, although they are less visible externally. The Arab Gulf states, in light of the suffering of the civilian population in the Gaza Strip and the aggressive settlement policy in the West Bank, are not willing to reverse their strategic decisions from 2020. Israel is confronting the Hamas and PIJ groups, but also Iran's proxy Hezbollah and its allies, the Houthis in Yemen—groups that the Arab Gulf monarchies would gladly see eliminated.

It seems that Trump's personal ambition lies in drawing Saudi Arabia into the Abraham Accords through a US-Saudi security pact, similar to the one proposed by Joe Biden's administration. A conflict between Israel and Iran that escalates into a large regional war is clearly not in the interest of Riyadh or the other Gulf regimes, whose visions for the future are based on stability and economic exchange. Such a war could, for example, lead to the closure of the Strait of Hormuz, with global repercussions. China, but also Russia, which benefits from trouble spots outside of Ukraine but now has to fight for its influence in Syria, have no interest in this either. In recent years, China has become a major importer of Iranian oil.

Egypt and Jordan

The regional states most affected by the Gaza war are Egypt and Jordan. Both have peace agreements with Israel (1979 and 1994, respectively), which have lasted despite attacks and threats. Cairo resists any plans that would make Sinai a potential refuge and settlement area for the Palestinian population. Regime critics suspected President Abdelattah al-Sisi of possibly opening the borders to the Palestinian population in exchange for debt relief from the USA. However, this could cross a red line set by the military and endanger his own rule. Jordan, with its large US troop presence, plays a significant role in air defence and the protection of Israel from Iranian attacks, but officially does not allow its airspace for Israeli strikes on Iran. The royal family walks a tightrope between the Palestinian majority population and its strategic alignment and dependence on US aid. Both Egypt and Jordan strictly

control their anti-Israel demonstrations. There is a risk that these could escalate into anti-regime protests.

Iraq and Yemen

Although Iran-loyal groups from Iraq, under the collective name 'Islamic Resistance of Iraq', are attacking Israel, the government in Baghdad managed to largely stay out of the conflict in 2024. It still hosts US troops, whose withdrawal is planned to be finalised before the Iraqi parliamentary elections in 2025. The fragile balance between Iranian influence and US presence would collapse with an expansion of the Israeli-Iranian conflict. On the other hand, the rule of the Houthis in the part of Yemen they control has stabilised. Through their attacks in the Red Sea and the Gulf of Aden, they have established themselves as a global actor and solidified their control internally. However, this also means a further entrenchment of the de facto division of Yemen.

Syria

The internal erosion of the Syrian regime was known but underestimated. In December, it imploded due to a push by Turkish-supported Islamist rebels from the Idlib province, through Aleppo to Damascus. Both Bashar al-Assad's sponsors, Russia and Iran, as well as his opponents, particularly Israel and the USA, were surprised by the rapid collapse. After Assad fled to Moscow, a difficult transitional period began in Damascus under the leadership of the group Hayat Tahrir al-Sham (HTS), which originally emerged from al-Qaeda. HTS rebranded itself as Syrian-national and promised to respect religious minorities and women's rights.

It was unclear whether HTS under Abu Mohammed al-Jolani (born Ahmad al-Shaara) had control over all its factions and could prevent them from seeking revenge, especially against Alawites and former supporters of the regime. For the powerful Arab Gulf states, which had excluded Syria under Assad from the Arab League in 2012 and readmitted and normalised relations with it in 2023, the growing Turkish influence represents a political challenge. Israel, which had consistently attacked Hezbollah and Iranian targets in Syria throughout 2024, used the days after the coup to

also degrade the Syrian armed forces and secure its (not internationally recognised) border on the Golan and a buffer zone on the Syrian side.

Keynotes

- In 2024, Israel eliminated large portions of the leadership of Hamas and Hezbollah and degraded Iran's military capabilities. However, there is no sustainable security solution. The escalation bolstered the influence of Türkiye and radical Islamic groups in Syria.
- Israel's peace treaties with Egypt and Jordan, along with the Abraham Accords with the UAE, Bahrain, and Morocco, have lasted despite criticism of Israel's military actions but remain under pressure.
- The process of normalising relations between Saudi Arabia and Iran has been maintained.
- An Israeli-Iranian escalation runs counter to the interests of the Arab Gulf states, as it would jeopardise their economic priorities.
- Regardless of the US presidency, the Arab Gulf states will continue to diversify their security partnerships through cooperation with Russia and China.
- The Syrian regime collapsed at the end of 2024, with HTS, supported by Türkiye, taking leadership. Israel seized the opportunity to establish a buffer zone with Syria, while Turkish influence poses a challenge to the Gulf states.



Israeli security policy in the context of regional and global conflicts

Stephan Stetter

The question regarding the effects of the Hamas terrorist attack on 7 October 2023, on Israeli security policy highlights six key aspects. First, the attack revealed significant weaknesses in Israel's intelligence, political and military foresight and response capabilities. Secondly, the attack underlined that the widespread hope in Israel and the West that Hamas would not cross certain boundaries and that the 'Middle East conflict' could be 'managed' was misguided. Thirdly, Israel is threatened in numerous ways and at the same time, the security of Palestinians is also at risk. Fourthly, the war between Israel and Hamas, which unfolded after 7 October, has become a regional conflict. Fifthly, not only the establishment of a regional security architecture, but even attempts to prevent further escalation in the Middle East, are made more difficult by global political upheavals. Finally, there is a difference in how security risks and the causes of conflict are perceived among

the West, Israel, and Arab states, which complicates deeper security cooperation and conflict resolution.

10/7 and the consequences for Israeli security policy

The terrorist attack by Hamas on 7 October 2023, against Israel—in particular against the Israeli civilian population—has rightly been seen as a pivotal event in the already tense security situation in Israel and the Middle East. The impacts on the Israeli-Palestinian conflict, often referred to as the ‘Middle East conflict’, and the security situation in the region are manifold and cannot be fully covered here. Six central aspects stand out from a security policy perspective.

Firstly, the attack exposed significant weaknesses in Israel’s intelligence, political and military foresight, and responsiveness. Israel’s politics, military, and society were completely caught off guard by the attack. This particularly harmed the concept of deterrence, which has been a cornerstone of Israeli security policy. Many military actions taken by Israel since 7 October seem to focus on re-establishing strong deterrence.

Secondly, the attack highlighted that the hope prevalent in Israel and the West—that Hamas would not cross certain boundaries and that the ‘Middle East conflict’ could be ‘managed’—was misguided.

Thirdly, Israel faces a variety of threats. At the same time, as evidenced by the devastating humanitarian situation in the Gaza Strip following months of Israeli military action, the security of Palestinians is also at risk. A way out of this security dilemma is not in sight, especially since the Oslo peace process has failed. Moderate forces on both sides are in the minority regarding fundamental security policy decisions and their societal backing.

Fourthly, the war between Israel and Hamas (the Gaza War), which unfolded after 7 October has become regionalised due to its entanglement with violent conflicts between Israel and the Lebanese Hezbollah, militias in Yemen, Iraq, and Syria, as well as the ongoing tense

situation in the Israeli-occupied West Bank and East Jerusalem. Iran's role in this is particularly important, not least because Hamas' attack initially torpedoed the conclusion of an agreement between Israel and Saudi Arabia to establish diplomatic relations.

Fifthly, not only the establishment of a stable regional security architecture, but even the attempt to curb the further escalation of the current conflicts in the Middle East is made more difficult by global political upheavals. Security policy alliances in the form of informal alliances can be observed: Russia, Iran and North Korea with China as a friendly observer; the USA, the EU and its member states, the UK, and especially a number of Arab states and Israel. This can be seen clearly in the reaction to the two Iranian missile attacks on Israel in April and October 2024.

Sixthly, this—largely informal—formation of alliances is complicated by a significantly differing perception of security risks and causes of conflict between the West, Israel, and Arab states. For the EU and its member states, the options for action are largely limited, with partial exceptions such as French actions in Lebanon, humanitarian support for the suffering population, or diplomatic activities like the recognition of Palestine as a state by some EU states and Norway. Regarding Israel, the security debate is distinguished primarily by the fact that the USA, the EU, and Arab states see the unresolved Israeli-Palestinian conflict as a central insecurity factor, which, according to most actors, can only be resolved through a peace process that guarantees the security of both Israel and Palestine (two-state solution). In Israel, this is not only regarded critically by hardliners. The dominant view is that an agreement with the Palestinians is impossible and that a Palestinian state would pose a security problem for Israel. Moderate political forces do not offer an alternative to this, while the government led by long-time Prime Minister Benjamin Netanyahu is dominated by nationalist and fascist forces (Kahanists) who pursue much more extensive territorial and ideological goals.

Shift in the political matrix in Israel

Here are two final points to consider, which highlight how security policy issues are closely intertwined with societal developments. First-

ly, the political matrix in Israel has shifted significantly towards the nationalist camp. The term 'West Bank' is no longer used, but rather 'Judea and Samaria', the term 'Palestine' has become largely taboo, and support for the two-state solution has—much like the development on the Palestinian side—strongly eroded. Unlike in previous decades, the collective commitment to Israeli and Jewish hostages no longer seems to carry the same weight. Additionally, the Israeli government does not appear to be interested in a viable regional security architecture for the Gaza Strip involving the USA, Arab states, and especially the Palestinian Authority.

Worldwide polarisation

Secondly, the conflicts in Gaza and the region do not only have global geopolitical but also legal implications, particularly regarding ongoing proceedings at the International Court of Justice and the International Criminal Court against Hamas and Israeli decision-makers. The 'Middle East conflict' has been a conflict that has stirred, polarised, and radicalised many people worldwide for decades; this has increased rather than decreased. In the USA and Europe, especially in the liberal political spectrum, there is a critical view of Israel and its religious-nationalist settlement policy, which has led to noticeable inner-party controversies, particularly within the Democratic Party in the USA. In addition to criticism of Israel's specific policies and military actions, it is also evident that in various political contexts (among right-wing, left-wing, Arab, and Muslim groups), there is deeply rooted anti-Semitic rejection of Israel. At the same time, any criticism of Israel is often labelled as anti-Semitism by others. Ultimately, this underlines the strong polarisation that the 'Middle East conflict' continues to produce and which, from a security policy perspective, makes disarmament, let alone peace, even more difficult.

Keynotes

- The Hamas terrorist attack on Israel and Israeli civilians on 7 October 2023 marks a significant event in the already tense security situation in Israel and the Middle East.
- Resolving the Israeli-Palestinian conflict is currently severely hindered by profound differences in conflict perception and the acute humanitarian crisis following the Hamas attack and the Gaza war. It is not a domestic priority on either side.
- The intertwining of the Israeli-Palestinian conflict with regional tensions complicates stabilisation efforts and obstructs initial steps towards potential conflict resolution.
- Global conflict dynamics, particularly the geopolitical involvement of actors like Russia, increase the complexity of the conflict and impede substantial progress in peace efforts.



The Turkish security and defence calculus

Sinan Ülgen

After Recep Tayyip Erdoğan's electoral victory in 2023, Turkish security and foreign policy remain focused on combating asymmetric threats, such as the Kurdistan Workers' Party (PKK). Türkiye uses modern drone technology for counterterrorism and is establishing a cordon sanitaire in Syria and Iraq. Turkish operations in Syria are in conflict with US support for PKK-affiliated forces, which strains relations between the USA and Türkiye. The Turkish opposition plays a central role in promoting democratic principles and ensuring that security concerns are not used as a pretext for authoritarian policies.

In May 2023, defying expectations, President Recep Tayyip Erdoğan emerged victorious in Türkiye's twin presidential and parliamentary elections, earning a new five-year mandate. However, this is likely to be his last term due to the two-term constitutional limit. The only scenario that would allow him to run for another presidential election would be

an early election decided by Parliament, a decision that requires a qualified majority. As a result, early elections would need the support of the political opposition. The opposition has proposed the end of 2025 as a possible date for early elections. Erdoğan must decide whether to accept this date, potentially shortening his term to run again, or complete his mandate until May 2028, after which he would no longer be eligible to run.

Erdoğan's victory in May 2023 has set the stage for continuity in Türkiye's foreign and security policies. NATO membership remains the cornerstone of the country's security and defence strategy. However, unlike some other NATO allies, Türkiye's foreign and security establishment does not prioritise conventional, state-led threats to its territorial integrity. Ankara seeks to maintain a geostrategic balance with Russia in the Black Sea, making the terms of any eventual settlement in Ukraine significant for Türkiye. The country also aims to sustain its deterrence with neighbouring states, including NATO ally Greece, where longstanding and unresolved disputes over the Aegean Sea could always escalate. Instead, asymmetric threats, primarily the prospect of PKK terrorism, dominate Türkiye's security thinking.

The evolution of Türkiye's anti-terror strategy

The PKK is viewed as the major security threat by Turkish policymakers. Over the past decade, the fight against PKK terrorism has evolved from a primarily internal challenge to a predominantly external one. A significant factor in this evolution has been the political role of the pro-Kurdish HDP party, which has become a visible player in Türkiye's political system. Currently, it is the second-largest political entity within the parliamentary opposition, providing a platform for the expression of demands and grievances from Türkiye's Kurdish population. This political presence helps delegitimise radical tendencies that have historically aligned with the PKK's terrorist agenda.

The emergence of indigenous drone technology has been equally critical, revolutionising the military aspects of combating terrorism. These drones have enhanced Türkiye's capability to monitor its extensive borders with Syria and Iraq, where challenging geographical terrain previously offered PKK fighters an advantage in infiltrating Turkish territory.

Türkiye's reliance on a vast network of domestically produced military drones has greatly improved its ability to conduct aerial reconnaissance, identify targets, and carry out strikes. The widespread availability of these technological resources has significantly strengthened Türkiye's border control regime.

As the domestic threat has been mitigated, Ankara's anti-terrorism focus has shifted across the border to establish and maintain a *cordon sanitaire* in Syria and Iraq. This strategy has been implemented successfully, with the Turkish armed forces setting up military bases across the border. These bases, which are well-equipped militarily, serve as a deterrent against the PKK. The strategy also includes periodic cross-border military operations to weaken PKK presence, complemented by targeted drone strikes against the PKK leadership. The combined impact of these tactics has not only severely degraded the PKK's capacity to plan and carry out attacks in Türkiye but also restricted the movement of its leadership.

Türkiye's cross-border operations in Syria should also be viewed in the context of the strong US support for the PKK-affiliated YPG in Syria. Washington argues that this support is essential for combating the Islamic State. However, even after the IS threat was reduced, US backing for the YPG, including arms supplies, has continued, straining the relations between Türkiye and the USA and eroding mutual trust. Furthermore, Türkiye's cross-border presence serves as political leverage in future settlement negotiations with the Syrian regime. In these negotiations, Ankara's primary objectives will be to ensure that Syrian territory is not used to undermine Türkiye's security interests and to secure agreements for the large-scale return of Syrian refugees with assurances for their safety.

Implications for Europe

Türkiye's successful anti-terrorism strategy could have a positive long-term impact on Europe. If PKK terrorism can be eradicated or at least minimised in Türkiye's security considerations, the country's political landscape may become more conducive to addressing deep-rooted issues related to democratic norms and fundamental freedoms. In Türkiye's recent history, the prospect of democratic reforms has often been

derailed by the rise of terror-related activities. Eliminating this persistent threat could create a more favourable environment for political reforms. Such a development would not only improve the relations between Türkiye and the EU by removing critical political obstacles but it would also have a positive impact on Ankara's bilateral ties with the governments of EU member states.

In this context, Türkiye's political opposition will play a crucial role in championing a democratic freedom agenda and opposing any attempts by the ruling AK Party to exploit domestic security concerns for political advantage or as a pretext to obstruct domestic reforms. By prioritizing democratic principles, the opposition can help steer Türkiye towards a future where security and political freedom are no longer seen as mutually exclusive.

Keynotes

- Following his 2023 election victory, Erdoğan's policies remain focused on NATO membership, the geopolitical balance with Russia, and conflicts in the Middle East, with asymmetrical threats like PKK terrorism as a priority.
- Türkiye has intensified its anti-terrorism efforts through the use of advanced drone technology and the establishment of a cordon sanitaire in Syria and Iraq.
- Turkish operations in Syria conflict with US support for PKK-affiliated forces, straining relations between Türkiye and the USA.
- A successful fight against PKK terrorism could, in the long term, bring Türkiye closer to democratic reforms and fundamental freedoms.
- The Turkish opposition plays a key role in promoting democratic principles and ensuring that security concerns are not used as a pretext for authoritarian policies.



The security situation in the Persian Gulf

Moritz Ehrmann

The security situation in the Persian Gulf is marked by increasing tensions, which are exacerbated by geopolitical rivalries, historical conflicts, and the effects of climate change. After a phase of cautious rapprochement, zero-sum thinking and confrontations have once again come to the forefront, particularly between Iran and the Gulf Cooperation Council (GCC) states, such as Saudi Arabia and the United Arab Emirates (UAE). Diverging perceptions of threats, Iranian threats, potential nuclear escalations, and maritime tensions, such as those over the Strait of Hormuz, are destabilizing the region. At the same time, climate-related risks such as water scarcity, extreme weather events, and environmental problems are increasing pressure on the fragile security architecture. Although regional cooperation would be urgently needed, geopolitical conflicts and a lack of trust are preventing sustainable solutions.

The events in the Levant since September 2024 cast new shadows over the security situation in the Persian Gulf. After signs of regional détente, zero-sum thinking is once again expected to prevail. At the same time, it is likely that the impacts of climate change will increasingly affect the security situation in the region. At the centre of the regional dynamics is the relationship between Iran and the most powerful states of the Gulf Cooperation Council (GCC), Saudi Arabia and the United Arab Emirates (UAE). The fundamentally lacking trust between these states is rooted in historical events such as the Iranian Revolution and the Iran-Iraq War, as well as in fundamental religious-ideological rivalry.

Security risk Iran

The willingness for rapprochement, which has been palpable among all actors in recent years, is being strongly tested by the Iranian-Israeli confrontation. Firstly, Iran has repeatedly threatened that GCC states or US military installations would become targets if military infrastructure on their territory is used for Israeli or US attacks on Iranian territory. These threats also highlight clear differences in threat perception. While Iran, despite the ongoing military build-up of GCC states, perceives US and especially Israeli influence in the region as the primary threat, GCC states view Iran itself, as well as the non-state actors in the region part of the so-called ‘Shiite Crescent’, as the primary threat.

Secondly, the scenario of Iran developing a nuclear weapon is becoming more likely again, with the goal of strengthening its deterrence capabilities against Israel after the significant weakening of Hezbollah, which has been the most important deterrence factor so far. It is likely that, in such a scenario, other states in the Gulf region, such as Saudi Arabia or the UAE, would work on developing similar capabilities to balance their own deterrence capabilities against what they view as the greatest threat—Iran.

Maritime competition in the Persian Gulf

Cautious ambitions to strengthen maritime security in the Persian Gulf are likely to be replaced again by the logic of zero-sum thinking. Despite the strategic importance of this waterway for all neighbouring states,

the waters of the Persian Gulf remain another arena in which Iran might try to assert its deterrence capabilities, as it has in the past through various disruptive manoeuvres or threats of blocking the Strait of Hormuz. The development of Iranian maritime cruise missiles could also play a role here. The increasing economic significance of oil transportation through initiatives like the New Silk Road or the India-Middle East-Europe Economic Corridor is likely to recede at least in the short term. Common challenges such as smuggling, sabotage, piracy, or environmental protection would naturally highlight the need for regional cooperation.

In this dynamic, the following developments are also relevant: On the one hand, the United States has reduced its military capacities in the Persian Gulf in recent years, but at the same time has urged GCC states to increase their own capacities, including maritime ones. The GCC states, among other things, have increased their capacity for detection activities at sea. This aims to deter potential attackers by minimizing the likelihood of successful attacks through improved local early warning systems, sea-based air defence systems, and capabilities for asymmetric warfare.

Regional consequences of climate change

Apart from immediate geopolitical developments and the associated military dynamics, the long-term threat stemming from the drastic effects of climate change is also increasing in the Persian Gulf region. Since temperatures here rise two to three times faster than in the rest of the world, the Gulf region is one of the most climate-vulnerable areas in the world. Temperatures above 50 degrees Celsius, as well as extreme weather events such as flooding, cyclones, or sandstorms, are becoming more frequent. Structurally, the management of increasingly scarce water resources is becoming a central issue, which is also relevant to regional security. In a region that is generally characterised by water scarcity, conflicts have repeatedly arisen in the past between upstream countries reducing the water flow for downstream countries. There are no functioning inclusive regional mechanisms for addressing such conflicts. With simultaneously lower water resources due to climate change and a growing population, it is expected that regional, as well as national and local conflicts over access to water will increase. In more vulnerable countries like Iran or Iraq, there are already con-

crete examples of such dynamics, as agricultural livelihoods are widely threatened.

Technological solutions can at most alleviate water scarcity, and they also have negative consequences. The preferred approach of desalinating seawater has a strong impact on the natural marine habitat, and thus on the important fisheries sector, on one hand, while on the other hand, desalination consumes enormous amounts of energy, which in turn contributes to global warming. While cooperation would be necessary on the issue of climate change due to the shared ecosystem around the Persian Gulf, the signs are once again pointing towards confrontation between the actors in the Gulf region due to external factors.

Keynotes

- Events in the Levant since September 2024 have cast new shadows over security in the Persian Gulf.
- While Iran perceives Israeli and US influence as its primary threats, the Gulf Cooperation Council states view Iran and its allies as the greatest danger.
- The resumption of Iran's nuclear programme and threats to maritime security are further destabilising the region.
- Extreme temperatures, water scarcity, and weather events exacerbate existing conflicts, while there is no regional cooperation to address climate-related challenges.



Pedram Rostamian/Shutterstock

Iran's strategic patience and Western responses

Shoura Zehetner-Hashemi

The defence policy challenges posed by Iran in 2025 are shaped by the question of the succession of the revolutionary leader Ali Khamenei, which could either lead to a consolidation of power by the Revolutionary Guards or internal power struggles. Regionally, Iran continues to rely on proxy forces to pursue strategic goals such as establishing a land connection to the Palestinian territories, while tensions with Israel increase due to the nuclear program and the Abraham Accords. For the EU and Austria, risks arise from nuclear proliferation, proxy wars, and cyberattacks.

In 2025, the Islamic Republic of Iran will continue to represent a central defence policy challenge for the West. However, the unexpected death of President Ebrahim Raisi in May 2024 and the election of Mahmoud Pezeshkian as the new president should not be interpreted as a sign of a fundamental shift towards the normalisation of bilateral relations.

Pezeshkian's election appears to be a tactical manoeuvre by the regime to reduce internal tensions and placate the international community. Strategically significant is the upcoming succession of the revolutionary leader Ali Khamenei. Pezeshkian's presidency is expected to serve as a transitional phase for a change of power. Defence-related scenarios range from a consolidation of power by the Revolutionary Guards, possibly with the removal of some theocratic state elements, to internal power struggles centred around the son of the current revolutionary leader, the potential successor Mojtaba Khamenei, which could lead to unpredictable domestic and foreign policy actions.

Land corridor to the Palestinian territories

A central element of Iran's geostrategy remains the goal of establishing a land connection to the Palestinian territories. However, the implementation of this plan faces significant challenges. The proposed corridor would have to extend through several sovereign states, whose interests do not necessarily align with those of Iran. Especially since the overthrow of the Syrian regime of Bashar Hafiz al-Assad and the resulting political uncertainty, control over Syrian territory has become fragile.

In Iraq, Iran is facing growing resistance to its influence, both from the population and from political actors who reject Tehran's dominance. Hezbollah has considerable but not complete control over Lebanon and it could be significantly reduced after an unpredictable end to the military conflict with Israel.

As a militarily highly equipped and vigilant actor, Israel presents an almost insurmountable obstacle to a direct land connection. The geographical separation between the Gaza Strip and the West Bank also complicates the creation of a cohesive Palestinian territory under Iranian influence.

Nonetheless, Iran has considerable experience in using proxy forces. Its ability to exert influence and move resources without direct territorial control should not be underestimated. In summary, while the complete implementation of a direct, controlled land connection to the Palestinian territories is an extremely ambitious and scarcely achievable goal for Iran in the foreseeable future, the creation of a loose network of

influence and support along this route is well within the realm of possibility and already presents a strategic challenge for the region.

Tensions with Israel

The ongoing conflict between Israel and Hamas in the Gaza Strip has significantly altered the geopolitical dynamics in the region. The conflict provides Iran with an opportunity to strengthen its role as a self-appointed defender of the Palestinian cause (including outside the region through disinformation campaigns and protest mobilisation in the USA and the EU) and expand its military influence in the region.

The increasing normalisation of relations between Israel and some Arab states under the Abraham Accords has caused nervousness in Tehran. This development threatens to further isolate Iran and facilitate the formation of a broad anti-Iranian coalition in the region. In response, Tehran is intensifying its efforts to forge alternative alliances and strengthen its influence over non-state actors such as Hezbollah in Lebanon and the Houthis in Yemen.

In 2025, the military-political situation between Iran and Israel remains tense. The nuclear issue remains a central point of contention, with Israel maintaining its 'Begin Doctrine', which calls for a pre-emptive military strike against potential nuclear threats. Iran, on the other hand, pursues a strategy of 'strategic ambiguity' regarding its nuclear ambitions, making the negotiations for reviving the nuclear deal (Joint Comprehensive Plan of Action, JCPOA), frequently brought up by President Pezeshkian and his foreign minister Seyyed Abbas Araghchi, difficult to assess. This dynamic leads to a precarious balance, where both sides constantly teeter on the edge of potential escalation while simultaneously (still) attempting to avoid open conflict.

The domestic political situation in countries like Iraq and Lebanon, where pro-Iranian forces wield significant influence but also face growing resistance, forces Iran to recalibrate its tactics. Tehran must perform a balancing act between maintaining its influence and avoiding an overreaction that could provoke a backlash from the local population.

Challenges for the EU and Austria

The central security challenges posed by Iran for the EU and Austria in 2025 include the proliferation of nuclear technology, the destabilisation of the region through proxy wars, and support for non-state actors. Iran's missile program represents a direct threat, while cyberattacks and disinformation campaigns endanger internal security. A robust defence position, enhanced cybersecurity, and improved defence against disinformation campaigns are essential when dealing with the Islamic Republic of Iran. The intensification of intelligence cooperation with partner agencies is necessary to monitor Iranian activities and detect threats early.

In dealing with Iran, it is crucial to combine a policy of strength with strategic channels of communication. Every interaction must be based on clear principles and non-negotiable pan-European security interests.

The challenge is to develop a strategy that is as patient and long-term oriented as Iran's, while preserving democratic values and international norms. This requires international coordination, strategic foresight, and the willingness to engage both in deterrence and constructive engagement.

Keynotes

- The death of President Raisi in 2024 and the succession of Ayatollah Khamenei could either lead to a consolidation of power of the Revolutionary Guards or trigger internal conflicts, while Iran continues to leverage proxy forces for regional influence.
- Strategically, Iran aims to establish a land corridor to Palestinian territories, responds to the Abraham Accords by building alternative alliances, and maintains tensions with Israel over its nuclear programme.
- For the EU and Austria, threats arise from nuclear proliferation, proxy wars, Iran's missile programme, as well as cyberattacks and disinformation campaigns.
- A recommended long-term strategy combines military strength with diplomatic channels and enhanced intelligence cooperation, without compromising democratic values.



North Africa

The dangers of autocratisation

Cengiz Güney and Johannes Späth

Thirteen years after the Arab uprisings, North African countries continue to struggle with issues that were seen as the main causes of the uprisings. In addition, numerous conflicts and growing migration flows dominate the region. Extremist Islamist forces, political instability, and rising migration flows have intensified the governments' security efforts. The North African states are experiencing further declines in state sovereignty, rearmament, and the resurgence of the authoritarian security state.

Regional developments at a glance

Thirteen years after the Arab uprisings, North African countries are still plagued by many of the ills that were seen as the root causes of the uprisings: a low average age, high unemployment rates, poor economic

development, inefficient bureaucracies, oversized security apparatuses, and a lack of political representation. In addition to these long-standing factors, the region has been affected by various conflicts and a growing number of migrants. Every state in the region borders at least one crisis or war zone. The (re-)emergence of extremist Islamist forces, political instability and increased migration flows have fuelled the governments' fixation on security. In countries such as Tunisia and Egypt, which were affected by the Arab Spring, the security services and the military are calling the shots. North African states are experiencing a further decline in state sovereignty, rearmament and the resurgence of the authoritarian security state.

Hardening authoritarianism

While the 2010–1 protests were fuelled by young people's hopes for democracy, freedom, economic development and prosperity, these hopes have largely faded by now. Economic development has stagnated throughout the region. Large sections of society have been hit by rising food and energy prices. The middle classes have been economically and politically marginalised. In the last ten years, a more repressive form of authoritarianism has re-emerged in the region.

Even in Tunisia, hailed as the success story of democratisation in the region, President Saed has reversed democratic gains. He replaced the democratic constitution of 2014, side-lined political parties and parliament, isolated civil society and concentrated all executive powers in his hands. In Algeria and Egypt, the military has further strengthened its role as a central pillar of the regime. In both cases, military-related businesses dominate the economy. The armed forces enjoy extensive legal and economic privileges that allow the generals to try any opposition in military courts and to exploit the countries' resources at will.

Compared to the pre-Arab Spring era, opposition forces now face even greater repression. Moderate Islamist movements such as Tunisia's Ennahda and Egypt's Muslim Brotherhood, which dominated the first elections after the uprisings, have been largely marginalised. Their leadership has been either imprisoned or exiled and their organisations dismantled. This includes their social welfare and charity networks, which have traditionally been important social safety nets in improv-

erished neighbourhoods. Authoritarianism has also marginalised other opposition movements and civil society, leaving countries like Egypt, Tunisia and Algeria without political or social safety nets and the regimes without an alternative.

Weakening state capacities

Authoritarianism has weakened rather than strengthened state capacity. The regimes' distrust of their own bureaucracies and fear of any political discontent have encouraged high vigilance, a tendency to keep decision-making within a small elite group, corruption, a fixation on security and detachment from societal needs. Much of the state's capacity has been diverted to security forces to keep the population in check.

The growing instability in and around the region has put additional strain on the state apparatus. Morocco continues to fight the Polisario Front over Western Sahara, although the conflict may be nearing an end, accelerated by France and Spain's recognition of Moroccan sovereignty over the territory. Libya has disintegrated. The state has collapsed into zones controlled by rival factions and militias. The conflict is frozen but continues to glow in the dark. With the involvement of regional and international actors such as Türkiye, the UAE, Egypt, Russia, Italy and France, it is unlikely that the conflict will be resolved in the short term. Egypt also borders two other war zones—Gaza and Sudan.

The prevailing instability is being exploited by the region's authoritarian regimes to legitimise their top-down, militarised rule. Weak statehood and regional instability are mutually reinforcing, creating a self-perpetuating cycle of fragility.

Climate change and migration

Migration and climate change will be further key factors shaping North Africa's future. Temperatures are rising year by year, reaching new records such as 50.4 degrees Celsius in Agadir in Morocco in 2023 or 50.4 degrees in Kairouan in Tunisia. Extreme weather events such as heatwaves and flash floods are becoming more frequent. Not only have they negatively affected agricultural production and tourism, they have

also made life in cities difficult. Climate change is also a key driver of increased migration from sub-Saharan Africa to the north, with Morocco, Tunisia and Algeria increasingly becoming destination countries themselves. Egypt currently hosts some 9 million migrants. The Maghreb countries in particular are responding to the influx of migrants with increasingly repressive and violent measures.

What's next?

While state repression and intelligence services have so far been successful in quelling new uprisings in the region, economic prospects and cost-of-living crises are worrying the region's autocrats. With Egypt second only to Ukraine as the country most likely to default on its debt, Tunisia's economy described by 85% of its citizens as bad or very bad, and Algeria's long overdue diversification away from fossil fuel exports not even on the horizon, the economy may once again prove to be the Achilles' heel of the region's hardening authoritarian regimes. Unlike in 2010–1, however, there are few political forces and civil society organisations left to cushion radical political change.

Keynotes

- North African states continue to struggle with unemployment, economic stagnation, and lack of political representation, which were the primary causes of the uprisings starting in 2011.
- The region is experiencing stronger authoritarianism than before the Arab uprisings, with centralised power structures and marginalised opposition, even in formerly democratic model states like Tunisia.
- Authoritarian regimes prioritise security apparatuses over functional governance, leading to inefficiency, corruption, and a disconnect from societal needs.
- Extreme weather events and rising temperatures exacerbate economic challenges and drive increased migration flows, to which governments respond repressively.
- Unlike in 2010–1, there are now few political or societal actors capable of mitigating demands for radical reform or political change in the region.



The EU and the Sahel

The day after

Loïc Simonet, Angela Meyer and Johannes Späth

The geopolitical dynamics in the Sahel region place the EU in a difficult situation. On the one hand, the anti-Western sentiment in the region and the shift towards new partners limit Europe's ability to exert constructive influence, while on the other hand, it remains in Europe's interest to continue contributing to the stabilisation of the region.

The protracted crisis in the Sahel region, which culminated in four coups between 2020 and 2023 in Mali, Burkina Faso, and Niger, has led to the failure of the EU's ambitious commitment in the region. Of the four EU missions still running under the Common Security and Defence Policy as of 2023, only the civilian crisis management mission in Mali (EUCAP Sahel Mali) remains operational, continuing in a precarious context. The capacity-building efforts for military and security forces in

the Sahel have cost more than one billion Euros, investments that now seem to have been wasted.

Nevertheless, Europe cannot turn its back on the Sahel region. Given the geographical proximity, the geopolitical and economic significance for Europe, and the demographic pressure in the region, it is neither in the EU's interest for the destabilisation of the region to continue, nor can the Union afford to lose any influence as an actor and partner. The loss of reputation and trust in the EU in the region requires a short-term exit strategy and, in the long term, a rethinking and repositioning.

A changing geopolitical landscape

With the regime changes in the Sahel, military governments have come to power, increasingly rejecting old partnerships and instead seeking new partners. In particular, Russia and its paramilitary actors, such as the Africa Corps, have become important security partners. The region is economically and geopolitically significant for Russia, especially as a potential escape from diplomatic isolation by the West. After Niger revoked a law aimed at combating illegal migration, which had been passed in 2015 as part of an agreement with the EU, Moscow could be tempted to use migration as a tool to exert pressure on the EU.

China has also become an attractive partner for the Sahel states. For their governments, the main advantage of relations with Russia and China is that these countries do not interfere in politics or internal affairs, nor do they impose value-based conditions typically associated with European aid. In recent years, Türkiye and some Gulf states have also gained increasing influence.

In light of these shifts and the accompanying crisis of Western concepts of order, Russian Foreign Minister Sergey Lavrov declared in 2022 at the second youth forum 'Russia-Africa: What's Next?' to participants from the region: "We are united in rejecting the so-called 'rules-based order' that the former colonial powers of the world impose." This shows that the region is also undergoing an ideological reorientation.

Cross-border risks

The political and security instability in the region increases the risk for neighbouring countries that destabilizing influences may spread across borders. In particular, Senegal, Ivory Coast, Ghana, Benin, and Togo are threatened by the possibility of cross-border terrorism from extremist groups and the economic impacts of refugee movements. In a context of increasing anti-French and anti-Western sentiment in West Africa, there is also high rejection of Western interference, especially among the younger population, which increases the risk of further loss of influence by the EU in other countries.

Collapse of the regional order

In January 2024, Mali, Burkina Faso, and Niger declared their withdrawal from the Economic Community of West African States and formed a mutual defence pact, the Alliance of Sahel States (Alliance des États du Sahel, AES). This regional crisis, also called the ‘Sahel Exit’, has been accompanied by the dissolution of the G5 Sahel, an intergovernmental organisation founded in 2014 by Burkina Faso, Chad, Mali, Mauritania, and Niger to coordinate regional security cooperation. While the G5 Sahel received financial and material support from the EU, particularly from France and Germany, the AES is now supported by Russia. As former EU High Representative for Foreign and Security Policy Josep Borrell described it, this “new geopolitical configuration” is thus becoming visible at the regional level.

What options does the EU have?

In addition to the unilateral actions of some EU countries, such as Italy, the Union must reposition itself in the new complex context in the Sahel. In the short term, the EU could rely on the idea that the new regimes and their partners will fail sooner or later. Signs of this include the resurgence of intense fighting between government forces, local militias, rebels, and other extremist groups. Particularly in Burkina Faso, the security situation has deteriorated sharply. However, such a development cannot be in the EU’s interest, as its consequences, such as the increase in terrorism and migration, would directly affect Europe.

The EU should navigate between firmness and flexibility with respect to the juntas. It should aim to present a new, independent partnership approach instead of competing with other external actors.

In the long term, the EU should succeed in recommitting itself to the region by considering the complexity of the situation and the actors, restoring contacts, and intensifying cooperation with political actors and local civil societies, with the perspective that, sooner or later, democratisation will take place from below. In this context, initiatives like the Global Gateway Initiative, a strategic investment plan of 300 billion Euros counteracting China's Belt and Road Initiative, could also play a role. Finally, Europe's contribution to stabilizing North Africa, particularly Libya, could have positive effects on the stabilisation of the entire region.

Keynotes

- The EU's ambitious and long-standing engagement in the Sahel has failed.
- It is neither in the EU's interest for the region's destabilisation to continue, nor for Europe to lose all influence as an actor and partner.
- Given the anti-Western sentiment in Mali, Burkina Faso, Niger, and much of the Sahel, alongside the growing importance of other external actors, the EU must reorient its policies if it wishes to maintain a role in the region.
- The EU should reflect on the reasons for its failed commitment, account for the complexity of the situation and its actors, and adopt a new, genuinely partnership-based approach.



The Horn of Africa

A bottleneck within security policy

Jan Pospisil

The instability in the Horn of Africa and the conflicts in the region have significant impacts on global stability and the economy. The attacks by the Houthi militia on container ships in the Red Sea since November 2023 highlight the strategic importance of the shipping route, as the volume of ships in the Suez Canal has dropped significantly. At the same time, Ethiopia's Prime Minister Abiy Ahmed is pursuing an expansive regional policy, leading to tensions with Egypt, Eritrea, and Somalia. The war in Sudan between the Sudanese Army (SAF) and the Rapid Support Forces (RSF) has triggered a global displacement crisis, which is further fuelled by the involvement of external actors such as the United Arab Emirates (UAE), Egypt, Russia, and Iran, exacerbating a humanitarian disaster. Strengthened cooperation with the African Union (AU) and the Intergovernmental Authority on Development (IGAD), as well as a political dialogue with Ethiopia and the Gulf States, are essential for conflict reduction. Additionally, there is

a need for humanitarian and peace initiatives in Sudan and its neighbouring countries to prevent an escalation of the migration and hunger crisis.

The attacks by the Yemeni Houthi militia on container ships in the Red Sea highlight the security-political significance of the Horn of Africa. In October 2024, the ship volume in the Suez Canal was 57 percent lower than the level prior to November 2023, when the Houthis began their attacks in response to the Israel-Gaza conflict. However, this is just one of many security-political challenges in a region that is crucial for Europe.

Conflict in and around the Red Sea

The Houthi attacks have revealed the Red Sea as a chokepoint for the global economy. Container ships are now circumventing Africa around the Cape, which incurs massive costs. Alternatively, insurance costs are rising exorbitantly. The Gulf states are dissatisfied with this situation but are unable to push back the Houthis due to their unfortunate intervention in the Yemeni Civil War, which has left lasting consequences.

There is a number of international operations, including the US 'Operation Prosperity Guardian' with strong British involvement, as well as the EU naval mission EUNAVFOR 'Operation Aspides'. Both are defensively oriented and can prevent the hijacking of ships, but they have limited resources to counter missile attacks. US and British strikes on Houthi positions in Yemen in January 2024 were able to destroy some bases but did not achieve sustainable deterrence.

It is likely that the situation in the Red Sea will remain tense, as no negotiated solution for Yemen itself appears to be on the horizon. The willingness to make far-reaching concessions to the Houthis, who control a large part of the country and the capital, Sanaa, is limited. Therefore, a political resolution of the conflict seems unlikely in the foreseeable future.

War in Sudan

The war between the Sudanese Army (SAF) and the Rapid Support Forces (RSF) in Sudan is entering its second year, with no solution in sight. After a phase of temporary calm, direct support for the RSF from the United Arab Emirates (UAE) has increased again. The UAE's interest not only lies in resources like gold but also in fertile land, which is intended to secure long-term food sovereignty for the UAE.

The SAF receives support from Egypt as well as increasingly from Russia and Iran, which gives the war a geostrategic dimension. Since the balance of power between the SAF and RSF is currently relatively even, international escalation can be avoided for now, though such an escalation cannot be ruled out in the long term.

Currently, this is the largest displacement crisis worldwide. About three million people have fled to neighbouring countries, and there are around eleven million internally displaced persons. Famine is present in parts of the Darfur and Kordofan provinces. Humanitarian aid barely reaches the affected areas, as both conflict parties are using aid and hunger as instruments of war. A restrictive stance by the United Nations, which grants the SAF the right to approve all UN aid deliveries, further exacerbates the situation. Swift measures are required to prevent a further worsening of the migration crisis and a devastating famine.

Tensions caused by the regional policy of Abiy Ahmed

Ethiopian Prime Minister Abiy Ahmed is pursuing an offensive regional policy. Tensions with Egypt over the Grand Ethiopian Renaissance Dam (GERD) have recently escalated significantly. Although Egypt can no longer, as once threatened, take military action due to the advanced filling of the dam, potential proxy conflicts with Egyptian influence remain a danger.

Abiy plans to position Ethiopia as a regional power. A key instrument in this is the establishment of a navy, which presents a particular challenge for a landlocked country. Control of the Red Sea is also of crucial importance to Ethiopia. This has led to tensions with Eritrea, as

Abiy has openly discussed a military reconquest. On 1 January 2024, an agreement was made for the use of the port of Berbera in Somaliland—possibly in exchange for a potential recognition of Somaliland's independence. This immediately led to a deterioration in relations with Somalia, which are already historically strained.

The situation holds the potential for a regional escalation, which could further destabilise the region—already affected by the war in Sudan, in which both Egypt and Eritrea are directly involved—and thus have catastrophic consequences.

Conclusion

Cooperation with regional security mechanisms is of crucial importance. The AU plays a central role that must be supported. The regional alliance IGAD, on the other hand, is weak and functions more as an instrument of the stronger member states than as an effective regional alliance. Nevertheless, cooperation remains important for effective conflict management in the region.

Ethiopian Prime Minister Abiy Ahmed is pursuing an offensive regional policy. Tensions with Egypt over the GERD have recently escalated significantly. Although Egypt can no longer, as once threatened, take military action due to the advanced filling of the dam, potential proxy conflicts with Egyptian influence remain a danger.

Political influence on Ethiopia is of central importance in order to mitigate its aggressive regional policy. A key starting point is involvement in the efforts of EU Special Envoy Annette Weber to promote regional stability. Dialogue with the Gulf states is also crucial in order to support a positive regional policy.

Investments in peace developments in Sudan are essential to prevent a new wave of migration from the region. Austria is well positioned to play a productive role in supporting a civilian platform. Investments in humanitarian aid are crucial, especially in the neighbouring countries of Chad, South Sudan and Egypt.

Keynotes

- Houthi militia attacks on container ships in the Red Sea make the Horn of Africa a critical bottleneck for the global economy.
- Ethiopia's aggressive regional policies, including tensions surrounding the Grand Ethiopian Renaissance Dam (GERD) and its naval expansion, have the potential to further destabilise the region, alongside the heavily internationalised war in Sudan.
- Stabilising the region requires dialogue with Gulf states and Ethiopia's inclusion in EU peace initiatives.
- The African Union and regional alliances such as the Intergovernmental Authority on Development must be strengthened for effective conflict management.
- Humanitarian aid for affected countries and investments in peace efforts are urgently needed to prevent further escalation of the migration and hunger crisis.



The security situation in Central Asia

Nargis Kassenova

The countries of Central Asia are actively settling their border disputes and addressing key challenges, such as water distribution. Unfortunately, they are less forward-looking in dealing with the challenge of Islamic radicalism. The increased interest of the EU in Central Asia creates much needed opportunities for the security and development of the region, but the hurdles are substantial.

Borders and water: growing regional cooperation

The countries of Central Asia are facing moderate security risks. Border disputes used to be a perennial thorn in the relations among Kyrgyzstan, Tajikistan and Uzbekistan, undermining prospects of regional cooperation. In 2021–2, armed clashes flared up on the Kyrgyz-Tajik border, fuelling mutual animosity. However, over the past two years, the

two governments were able to turn the tide around—in July 2024, the parties announced the completion of negotiations on 94 percent of the borderline. Kyrgyzstan and Uzbekistan signed their border deal in 2023.

The successful resolution of border disputes is part of the blossoming of regional cooperation. The much-needed water management reform is at the top of the agenda. The upstream countries (Kyrgyzstan and Tajikistan) and the downstream countries (Kazakhstan, Turkmenistan, and Uzbekistan) need to figure out how to distribute and use water for hydropower production and agriculture in a fair and efficient way. The task is difficult and pressing, since Central Asia is among the regions, which are most vulnerable to climate change.

The regional water sharing agreements do not include Afghanistan. Due to wars and underdevelopment, its water withdrawal from the Amu Darya River was limited. The situation started changing with the construction of the Qosh Tepa canal launched by the Taliban government in spring 2022. It is expected to divert 20 percent of the Amu Darya water. At present, Central Asian governments are trying to bring Afghanistan into the regional dialogue on water. This is part of the effort to normalise relations with the Taliban, based on the pragmatic assessment that no matter how appalling their policies towards women and ethnic minorities are, they are here to stay.

The Islamic State of Khorasan and repressions in Tajikistan

The new friendly approach toward the Taliban is facilitated by the changed perception of threats. Now they share a common enemy—the Islamic State of Khorasan (ISK). In 2024, a string of terrorist attacks linked to the ISK took place in Russia, Iran and Afghanistan (notably, not in the countries of Central Asia). The Crocus City Hall attack in Moscow was the most dramatic and deadly among them. Russian authorities arrested (and tortured) eleven Tajik citizens related to the attack. Several ISK-linked attacks were foiled in a number of Western countries, including Austria.

Experts Noah Tucker and Edward Lemon argue that the recent spike of attacks is the ‘long tail’ of the Islamic State, the result of migration

of fighters from the Middle East to Europe. They note that recruitment and propaganda targeting Central Asians have decreased substantially compared to a decade ago, when more than 4,000 Central Asians travelled to Iraq and Syria. They also note that the Tajik government's crackdown on religion is fuelling grievances that ISK propaganda can take advantage of.

The Tajik government repressions have also targeted minorities of the Gorno-Badakhshan Autonomous Oblast (GBAO) and civil society at large. The degree of tensions is elevated by Russia's tightened migration rules in the aftermath of the Crocus City Hall attack that creates problems for the citizens and governments of Tajikistan, Kyrgyzstan and Uzbekistan.

Growing European interest: promise and hurdles

Growing competition with China and broken ties with Russia increased the interest of the EU and European countries in Central Asia. The countries of the region are endowed with natural resources, such as oil, gas, uranium, and critical minerals, and they want to maintain and deepen relations with the West in the increasingly complex geopolitical environment.

Given the distance between the two regions, the issue of transport connectivity is crucial. In January 2024, Brussels hosted the Global Gateway Investment Forum for EU-Central Asia Transport Connectivity, at which international partners committed 10 billion Euros of investment in the 'Middle Corridor', a route connecting Central Asia, the South Caucasus, Türkiye and Europe, bypassing Russia. The EU has also launched projects to support digital connectivity and green transition partnerships. Notably, it has established partnerships for critical minerals with Kazakhstan and Uzbekistan.

The mutual interests in this partnership are strong. However, there are substantial challenges as well. The demand for Kazakh oil in Europe has increased, but more than 90 percent of it is transported via Russia, which gives Moscow strong leverage. Efforts to increase the capacity of the Middle Corridor are underway, but it cannot serve as a substitute. Transit via Russia is also a hurdle for uranium supplies. The role of

China in the region is that of a partner (in reducing the Russian dominance) and a competitor (for resources and overall influence).

Keynotes

- Kyrgyzstan and Tajikistan are likely to finalise their border agreement, eliminating the risk of inter-state conflicts in Central Asia.
- The strong trend towards regional cooperation will enable progress in water management, with positive effects for Afghanistan as well.
- The Tajik government's harsh crackdown on religious believers increases the appeal of the Islamic State Khorasan.
- Russia's stricter migration policies following the Crocus City Hall attack pose challenges for the citizens and governments of Tajikistan, Kyrgyzstan, and Uzbekistan.
- Progress on the Middle Corridor project will be a key indicator of the potential for partnerships between EU and Central Asia in the new geopolitical landscape.

4

Risks and challenges for the EU





Risks and challenges for the European Union

Klaus Anderle

Tectonic shifts in the geopolitical and security landscape threaten the EU, the Western world, and European democratic values. Russia's war of aggression against Ukraine and the Iran-sponsored terrorist attack by Hamas on Israel highlight an increasing global instability. Authoritarian actors such as Russia and China are pursuing an increasingly aggressive foreign policy to enforce their interests worldwide using political, economic, and military means. This includes the targeted use of disinformation as well as cyberattacks or hybrid attacks aimed at undermining the stability of our democratic societies. Additional conflicts deepen geopolitical fault lines, which simultaneously put our global partnerships to the test. In addition to our eastern neighbours, regional stability is also deteriorating in the Mediterranean, the Middle East, the African continent, and in the Indo-Pacific region overall.

Common security and defence policy

In 2021, the members of the European Council (EU heads of state and government) agreed to strengthen the EU's ability to act autonomously in the area of security and defence. This agreement of the European Council led to the development of the Strategic Compass, which serves as the foundational document for the EU's security and defence policy and aims to enable it to respond better to global geopolitical changes than it has in the past. The Strategic Compass does not only include goals regarding crisis management, but also objectives and guidelines for resilience, capabilities, and partnerships. However, the geopolitical changes require an update or reformulation of the EU's Strategic Compass in order to address the extent of the changing threat landscape. With the Von der Leyen II Commission, the Common Security and Defence Policy of the EU (CSDP) is receiving further impulses to deepen cooperation in the defence sector in the form of an EU White Paper on the future of European defence. The European Parliament had already called for an EU White Paper on security and defence in 2016.

NATO as the cornerstone of European defence

One of the key necessities within the framework of the Strategic Compass is to advance EU-NATO cooperation in the area of security and defence. In simple terms, this means increased collaboration between the EU and the USA within the framework of NATO, with a European defence as an option to relieve the USA through a partnership based on equal footing. All joint EU-NATO statements expand and optimise EU-NATO cooperation and emphasise that a European defence would make a significant contribution to global and transatlantic security.

After the election victory of NATO sceptic Donald Trump, EU countries and other NATO allies realised that a very likely withdrawal of the USA from European security would need to be compensated. US attention will shift to the Indo-Pacific region, where China is seen as a relevant strategic rival. The EU will need to fill the resulting security gap in order to remain credible in terms of deterrence.

European defence industry

With Russia's war of aggression against Ukraine, the focus of the CSDP also shifted from crisis management to the establishment of a European defence. Against this backdrop, the EU has already initiated measures to strengthen the European defence industry, such as the European Defence Industry Reinforcement through the Common Procurement Act and the Act in Support of Ammunition Production.

However, much more joint procurement and cooperation are needed. Additional EU legal acts in this area are expected, such as the European Defence Industry Programme. This currently negotiated legal act aims to secure defence supply chains, support the Ukrainian defence industry, and ensure that the defence industry is prepared for the future. Furthermore, it is intended to contribute to the implementation of the European Defence Industrial Strategy. The President of the European Commission, Ursula von der Leyen, declared defence as a priority and key sector in the completion of the internal market. An important part of this will be the establishment of a 'European Defence Union'.

Further development of the EU around a defence union

In the political guidelines for the European Commission and in the mandate for the future EU Defence Commissioner, it is stated that a European Defence Union will be built from 2024 to 2029. This will outline a comprehensive approach to EU defence integration, with the aim of strengthening the EU's responsiveness to threats, particularly in connection with Russia's ongoing aggression in Ukraine, combined with developing geopolitical challenges in the South and increased military capabilities of other global actors.

Keynotes

- The EU must become ready for the future in the areas of security and defence.
- Joint procurement and definition of European defence projects will be implemented through the EU Defence Industry Reinforcement Act (EDIP).
- A 'Zeitenwende' means that the Common Security and Defence Policy (CSDP) will no longer be limited to crisis management outside the EU's borders.
- US attention will shift towards the Indo-Pacific region, where China is seen as a significant strategic rival.
- The European Defence Union must be implemented ambitiously to credibly fill an emerging security gap (due to a potential US withdrawal from Europe) and act as the European pillar of NATO.



Europe's security architecture in crisis

Ulf Steindl

Three years after the beginning of Russia's invasion of Ukraine, the European Union is facing a further deterioration of the security situation. The gradual withdrawal of the United States from its defence leadership role in Europe could be rapidly accelerated by the election of Donald J. Trump as the 47th US president. A withdrawal from NATO is not up for discussion, but its ability to act could be severely limited. The deepened cooperation between the EU and NATO can only partially mitigate this, given existing capability gaps and the massive investment needs. In contrast to the need for financial resources and contractual reforms, important reform steps are being delayed by national interests. Europe is thus confronted with a scenario in which it must support Ukraine militarily on its own, without having the required capability and capacity.

Changed security situation

In March 2024, Charles Michel, then-President of the European Council, declared: “It is time to take responsibility for our own security.” While this symbolically represents Europe’s acknowledgment of a rapidly changing security situation, critical integration steps still remain bargaining chips for national interests. With the US presidential elections in November 2024, the third and final pillar of the post-Cold War European model—Russian energy, Chinese labour, and American security—began to falter.

The lack of willingness of the US to continue its central role in the European security architecture and its gradual withdrawal from this role will accelerate rapidly, starting in January 2025. While a withdrawal from NATO is still not in Washington’s strategic interest, concepts like that of a ‘sleeping NATO’ would result in drastic cuts. An end to the expansion policy would allow the Russian Federation to continue to enforce its revisionist policies in Europe by force in the future. As a result, the geopolitically necessary EU enlargement, which, however, does not include credible security guarantees, would remain vulnerable to external influence and would be doomed to failure.

Centrifugal tendencies

The elections to the European Parliament in June 2024 have further strengthened the centrifugal forces in the EU. The reform of the parliamentary committees and a stronger mandate for the Commission in the area of defence have laid the groundwork for further security policy integration. However, the Franco-German engine has been weakened domestically and is divided at Union level. Ambitions to cushion this by reviving the Weimar Triangle with Poland are also failing due to national divergences. With regard to Ukraine, on the other hand, a new axis is emerging between the Baltic states, Scandinavians, Poles and the British, which intends to continue its support for Ukraine even in the event of a radical change in the US position.

The amount of support provided to Ukraine so far—more than 1.8% of GDP from Estonia and Denmark, less than 0.4% from Germany, and 0.2% from France—clearly highlights the divergence of priorities. Eu-

Europe could only secure Ukraine's state survival without the USA if it remained united. It is confronted with an inescapable dilemma. On one hand, a forced ceasefire with Ukraine would completely undermine the existing European security architecture and give the Russian army space to reconstitute itself and continue the war in the foreseeable future. On the other hand, military support for Ukraine without the USA would not only require higher expenditures but is, in certain areas, impossible due to a lack of capacities and capabilities. These capability gaps in intelligence and reconnaissance, as well as in long-range precision weapons, significantly limit Europe's own ability to act. Although efforts are being made to close these gaps through joint industrial programmes, it can only be achieved in the medium to long term.

Division of labour for safety precautions

Such ambitions are often linked to the idea of a European army, which, however, requires the relinquishment of national sovereignty and a common political leadership with decision-making power. The strengthening of interoperability and interchangeability to lead multinational contingents in high-intensity operations is already taking place within the framework of NATO—under whose umbrella more than 96% of EU citizens reside. The EU and NATO are increasingly understood as complementary elements. The Union has the regulatory and financial capacities to implement essential initiatives in strengthening and integrating the defence industry, expanding strategic infrastructure for military mobility and creating incentives for joint procurement. NATO, on the other hand, provides a framework in addition to existing leadership and command structures for joint planning with key third countries in Europe—United Kingdom, Türkiye, Norway—as well as for implementing conventional and nuclear deterrence and defence.

Shortcomings of the CSDP

Nuclear capabilities represent the hardest gap to close in Europe. Neither the EU member state France nor the United Kingdom, which is heavily dependent on the USA for its military nuclear program, have the capacity or credibility to provide a nuclear shield over Europe. A 'European bomb', on the other hand, would require a political union,

but also a credible European nuclear doctrine. European policy would need to learn a new form of strategic planning and communication, in stark contrast to the self-deterrence practiced in some member states since 2022.

Concrete, clearly defined steps to strengthen the EU continue to fail due to the political will of the member states. This also includes the unanimity principle in the Common Security and Defence Policy (CSDP), which significantly limits the Union's ability to act externally. In the medium to long term, a reform of the EU treaties is unavoidable in order to establish military spending in the EU budget. The financing of the EU's Rapid Deployment Capacity (RDC) and EU military exercises via extra-budgetary instruments such as the Peace Facility is too uncertain in the long term. Moreover, the credibility of the mutual defence clause under Article 42(7) of the Treaty on European Union (TEU) needs to be strengthened, for example, through clarification of the interpretation and reporting of national contributions. This particularly concerns the four member states that are not part of NATO. Their position outside NATO makes them vulnerable should Russia attempt to further dismantle the European security structure following a victory against Ukraine. Hybrid attacks against critical infrastructure in Austria (transalpine corridors) or Ireland (undersea cables) could serve as a test of Article 42(7) or as the beginning of conventional operations on NATO's eastern flank.

In the short term, however, the lack of investment is the most glaring issue. This applies to both high technology and the defence industry as a whole. A reform of the existing ESG policy (Environmental, Social, and Governance) of the European Central Bank (ECB) and the mobilisation of additional funds through instruments like bonds are therefore essential. At the same time, a significant portion of defence budgets is lost to third countries and national inefficiencies. The extensive funding of the defence industry program and a massive expansion of joint procurements is accordingly necessary well before 2027.

Keynotes

- The USA is increasingly withdrawing from its role as a central actor in European security.
- Concepts like a European army or joint nuclear armament require a political union with central leadership, which contrasts with the strengthening centrifugal forces within the EU.
- Joint European defence will remain anchored within NATO.
- A robust European security architecture requires significant investments, an EU defence budget, and a reform of the unanimity principle in the Common Security and Defence Policy (CSDP).
- Germany and France are unable to assume a leadership role in European security and defence policy, increasing the relevance of multilateral formats among Eastern and Northern European states.
- Critical infrastructure in the EU's neutral states could become the target of intensified hybrid attacks from Russia.



Neutrality in the EU

About the necessity of adaptation

Franco Algieri

With the accession of Finland and Sweden to NATO, the group of neutral and non-aligned states in the EU has been reduced to Ireland, Malta, Austria and Cyprus. Neutral and non-aligned states are also constantly adapting the interpretation of their defence policy to the changing security policy and geostrategic environment. Participation in the EU's Common Security and Defence Policy (CSDP) and neutrality are not mutually exclusive. However, the willingness to take on more defence policy responsibility in the European context will be measured by deeds and not by political rhetoric.

The debate on current and potential future security policy challenges is becoming increasingly important both in the national context and within multilateral cooperation forums such as the EU and NATO. There is widespread agreement that the complexity of military and non-military threats facing states and societies reveals the limits of national

capabilities to ensure comprehensive security. Linked to this is the recurring call for taking on more security and defence policy responsibility in the European context.

Adaptability

At the latest with the accession of Finland (2023) and Sweden (2024) to NATO, the group of neutral or non-aligned EU states has been reduced to Ireland, Malta, Austria and Cyprus. Of the 27 EU countries, 23 now belong to NATO, making them the largest group of the 32 NATO states. Against this background, the question arises as to how neutrality and non-alignment are to be classified for the security of the concerned states on the one hand and the Union on the other. Are these states, as sometimes argued, free riders in terms of defence policy or are they in search of an adapted defence policy identity?

The security and defence policy positioning of individual EU member states is based on their respective historical and geopolitical conditions that open up opportunities and constraints for action. The decision in favour of a policy of neutrality or of non-alignment does not follow a uniform pattern, but rather reflects domestic debates and national security interests. These, in turn, are influenced by the findings of a changing security policy environment and new threat situations. Consequently, a process of reinterpreting and adapting their own defence policy emerges.

This does not necessarily have to lead to NATO membership. Even active participation in multilateral defence cooperation within the framework of the EU's Common Security and Defence Policy (CSDP) shows that these states cannot and do not want to forgo corresponding means of influence to strengthen their own security. The CSDP demonstrates a certain degree of Europeanisation of defence policy, although, despite the option of a common defence mentioned in the Treaty on European Union (Article 42(2) TEU), it is not about the collectivisation of defence. And due to the intergovernmental nature of the CSDP, each EU state remains sovereign in deciding the extent of its involvement. Defence policy engagement within the Union and neutrality are not mutually exclusive, and the acceptance of the CSDP as an integral part

of the Union's Common Foreign and Security Policy (CFSP) is supported by the EU member states.

Multilevel dilemma

However, with the ongoing destabilisation of Europe's security policy, the remaining neutral and non-aligned EU states are increasingly caught in a dilemma on various levels. At the national level, difficult domestic policy debates cannot be avoided when it comes to maintaining an existing narrative of neutrality on the one hand and having to develop a defence policy that is suitable for guaranteeing comprehensive security on the other. The willingness to take on more defence policy responsibility in the European context is not measured by political rhetoric, but by the actual contribution of corresponding capabilities.

This leads to a dilemma at the European level. For multilateral defence cooperation, reliability and a balanced burden-sharing are essential. If individual members hope or expect that they would receive military assistance from their partners in the event of a security conflict to which they might be subjected, but are themselves unwilling or only partially willing to provide assistance in the reverse case, this can contribute to their own defence policy marginalisation. Such marginalisation is also fostered if military interoperability in the joint defence forum becomes impossible due to a lack of investment.

Five remarks on the outlook

Firstly, neutrality debates are identity debates, which should not be conducted in a romanticised way, but in a sober manner and based on existing security situations. The idea that security can be ensured simply through neutrality and selective disengagement from shared responsibility may turn out to be an illusion. It would also be misleading to assume that a neutral country has no geopolitical interests. The actors from whom security threats might arise, taking their own strategic interests into account, will not consider the concerns of a country acting in such a manner.

Secondly, the commitment to neutrality and non-alignment does not contradict defence cooperation within the framework of the Common Security and Defence Policy (CSDP). However, for the CSDP to provide a security benefit for the participating countries, it must be continuously strengthened by the member states. If there is insufficient support for the CSDP, its relevance as a defence policy forum to promote the security of its member states will diminish.

Thirdly, the member states of the EU and NATO assign specific political, economic, and military security interests to their participation in these organisations and expect corresponding security benefits. If the CSDP loses its relevance, the EU's weight as a credible defence policy actor will also decrease. In this context, NATO will become more important.

Fourthly, NATO, in turn, faces the challenge of balancing potential American demands under President Donald Trump towards its European allies and the resulting transatlantic discrepancies, in a way that does not lead to its own weakening.

Fifthly, the complex array of diverse security and defence policy challenges that all EU states face requires them to strengthen common strategic considerations and actions, so that their own security can be maintained as part of a shared security space.

Keynotes

- With the accession of Finland and Sweden to NATO, the group of neutral and non-aligned states in the EU has shrunk to Ireland, Malta, Austria, and Cyprus.
- Neutral and non-aligned states are adapting their defence policies to a changing security and geostrategic environment, leading to a reinterpretation of their own defence strategies.
- Defence policy engagement within the EU and neutrality are not mutually exclusive. However, the willingness to take on greater defence responsibilities in a European context is measured not by political rhetoric but by the concrete provision of relevant capabilities.
- Lack of support for the EU's Common Security and Defence Policy (CSDP) and selective disengagement from shared responsibilities contribute to the marginalisation of these states.



European elections in 2024

Stability, but limited room for manoeuvre

Sébastien Maillard

The 2024 European elections strengthened the institutional stability of the EU despite Russian interference and geopolitical challenges. A second term in office for Ursula von der Leyen with broad parliamentary support and a stronger role for the European People's Party (EPP) characterise a right-wing orientation of central political initiatives. At the same time, the results show the weakening of the Franco-German engine and the growing importance of Poland and Italy. Far-right parties are gaining influence, but remain institutionally limited. The political tensions and the fragmented EU pose challenges for the ability of the von der Leyen II Commission to act, particularly in budget and enlargement issues, while geopolitical tensions continue.

European elections brought stability without leadership

The European elections held in June 2024 started a full institutional cycle, renewing top decision makers and setting the agenda for the second half of the decade. The respectable turnout (51 percent), the swift appointment of the President of the Commission, Ursula von der Leyen, her significant endorsement by the European Parliament on July 18 (401 in favour out of 720 MEPs) and the inauguration of the new college of 27 commissioners expected by the end of the year, all happened without any major institutional turmoil. These developments signal that the European Union can still manage to act effectively, despite prior concerns and political unrest. The bloc passed its democratic stress test quicker than some member states, which experience political stalemate, such as Belgium, Bulgaria or France.

Resilience and political stability

This demonstrates the resilience of the EU. The European elections as well as recent elections in member states were subject to Russian interference as part of its hybrid warfare against the West. Election campaigns were influenced by scandals such as reports about payments by Voice of Europe to politicians to spread Russian propaganda. Fake news on social media had to be monitored. Slovakia proved to be among the most vulnerable to such disinformation initiatives. Nonetheless, attempts to derail democratic processes failed.

EU elections have not just proven that European institutions function within a geopolitical environment in turmoil. They also made political stability prevail. The unrivalled majority supporting a second Von der Leyen term is made up of the same mainstream forces (Christian-democrats, Social-democrats, Liberals and, to a lesser extent, the Greens) as the support during her first mandate. Yet the elections have changed the power balance within that pro-EU coalition to the benefit of the European People's Party (EPP). The right-wing political group remains the strongest political force in the EU, with an even greater weight in the European Parliament (188 Members of the European Parliament) and in the current Council of the EU. This is reflected in the new Commission, in which EPP holds some of the most coveted and sensitive

portfolios. This will lead to a more right-wing orientation of the Commission's initiatives, without excluding the risk of partisan preference.

Weaknesses and leadership

However, a Commission led by the EPP, ever more dominated by its President, and a stable majority in Parliament cannot overcome the lack of leadership the EU is facing. The European elections have enabled pro-EU forces to assert themselves. At the same time, the position of the bloc's two driving forces, France and Germany, was weakened. The snap elections triggered by Macron straight after his party's defeat at the European elections resulted in an even more fragmented French parliament, weakening the French President's influence in European integration ideas. In Germany, the three-party coalition looked rudderless and more internally divided prior to the general elections in September 2025. With nearly 16 percent of the votes in the European elections, the far-right Alternative for Germany (Alternative für Deutschland, AfD) exceeded the Social-democrats (SPD), the Chancellor's own party. Furthermore, it outperformed Scholz' SPD, gaining nearly 21 percent of the votes in the Bundestagswahl 2025, compared to the SPD's 16.4 percent. The EU thus must learn how to drive through its ambitious agenda focused on competitiveness and security with a stalled Franco-German engine.

This situation may favour other prominent member states. European elections have strengthened Polish Prime Minister Donald Tusk, whose country will take over the EU Council Presidency in the first half of 2025. Moreover, the war in Ukraine has pushed Poland into a strategically important position. Should Tusk's party (member of the EPP) also win the Polish presidential elections expected to be held in spring 2025, Tusk will emerge as an even more respected leader. The head of the Italian government, Giorgia Meloni, also achieved success in the European elections. However, her Eurosceptic stance has marginalised her from the coalition supporting Von der Leyen.

Right-wing populism and Euroscepticism

Elsewhere, the European elections have mostly displayed a fragmented political spectrum, with a surge of populist parties. This happened especially in the Western part of the continent, where the Greens lost many seats. The capacity of far-right political groups to directly shape the European agenda is, however, limited. Deeply divided on Ukraine and on migration policy, the parties have not merged. On the contrary, they have divided into three different groups in the European Parliament. Moreover, a firewall keeps Russian-friendly parties, such as AfD and the French Rassemblement National (RN), out of any key positions in the assembly. Nevertheless, their political influence could overcome their lack of institutional weight. This could lead to watering down the environmentalist legislation of the Green Deal, as well as a more lenient stance towards compliance with the rule of law, tougher policies on migration and border control and the prevention of enlargement.

This especially depends on how the power balance will evolve in the Council of the EU throughout the 5-year cycle. Ministers coming from the new Dutch government, the awaited coalition in Belgium or possibly from the next Austrian government will most likely push this power balance to the right. All the while, Eurosceptic member states, such as Orbán's Hungary and, to a lesser extent, Fico's Slovakia will continue to take advantage of their veto rights to undermine European foreign policy towards Russia.

Because of these trends and divisions among the bloc, the ability of the Von der Leyen II Commission to take bold initiatives appears politically narrow, despite its stable majority. The EU's capacity to act will truly be tested on the multiannual financial framework, which oversees the European budget for the period 2028-2034. The upcoming heated negotiations between member states on issues such as agriculture, cohesion funds and enlargement provisions, as well as those with the Parliament, will measure the true scale of the bloc's ambitions in an increasingly unpredictable multipolar world. This will primarily depend on the US policy towards Europe and the course of the war in Ukraine, and on the political willingness of Europeans to stand united as a sovereign power or not.

Keynotes

- The European elections have brought institutional stability to the EU despite a challenging geopolitical landscape, including Russian interference.
- The European People's Party's leading role in strategic portfolios and the presidency of the Commission will lend a more right-leaning political orientation to initiatives, given the nationalist surge in various member states.
- The election results have weakened the position of the Union's driving forces, France and Germany, while strengthening those of Poland and Italy.
- Divided into three political groups, far-right parties have limited capacity to directly influence the European agenda. However, their growing political influence could offset their lack of institutional weight, particularly in the EU Council.
- Given these trends and divisions, the von der Leyen II Commission's political room for bold initiatives appears constrained.



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Elections in EU Member States

Consequences for European integration

Michael Zinkaneil

The year 2024 was marked by elections in over 60 countries, including parliamentary elections in eight EU member states. Among the biggest winners were parties on the far-right, which share common ground through their EU-sceptical rhetoric and the emotionalisation of the migration debate. The election results are seen as pivotal for the political trend of the Union, serve as a benchmark for EU integration, and highlight the increase in fragmentation and polarisation. As a consequence, potential limitations to European stability and the EU's ability to act can be expected. Key decision-making processes, such as initiatives in the areas of security and defence, as well as EU enlargement, could thus be hindered. Furthermore, disinformation campaigns and information manipulation played a significant role in the context of the elections. It is increasingly evident that disinformation narratives align with the

messages of right-wing populist parties. These developments pose a serious challenge to democracy in Europe and threaten the fundamental pillars of European freedom, values, and interests.

A shift to the right in European elections

The year 2024 was considered an international ‘super election year’, with about two billion people in over 60 countries worldwide being eligible to cast their votes. Alongside the elections in India and the United States, the European Parliament elections were among the most relevant and largest. Beyond the EU-wide elections, numerous parliamentary elections were held within the member states of the European Union in 2024. The results of these elections not only mark a directional trend but also serve as a key test for EU integration—both in terms of consolidating the member states internally and regarding negotiations with candidate countries. Additionally, these elections share another common feature that shakes the foundations of democracy and poses serious challenges to the democratic process: external influence in the form of disinformation and information manipulation.

At the national level, parliamentary elections were held in eight EU member states in 2024: Belgium, Bulgaria, France, Croatia, Lithuania, Austria, Portugal, and Romania. A comparison of the election results reveals a clear trend: parties on the far-right largely made significant gains. In Belgium, the far-right party Vlaams Belang secured second place. The French Rassemblement National (RN) recorded a notable increase. The Croatian far-right party Domovinski pokret gained only one percentage point but is part of the new government. The Freedom Party of Austria (FPÖ) won nearly 30 percent of the vote, securing first place for the first time, and in Portugal, the right-wing party Chega managed to quadruple its parliamentary seats. A similar trend can be seen after the EU Parliament elections: those parties belonging to the group of Patriots for Europe or the European Conservatives and Reformists are among the winners.

Political fragmentation and polarisation

Overall, the results show an increase in political fragmentation and polarisation, which could have potential implications for the stability and ability to act of the Union. In the medium term, this dynamic could have adverse effects on key decision-making processes in security and defence matters, both at the national level and in Brussels, and could hinder EU integration and enlargement. Indicators of this course are reflected in heightened political rhetoric related to the elections, such as intensified scepticism toward EU institutions and the push for more national self-determination. Emotionally charged discourses by right-wing populists, such as the migration debate and support for Ukraine, are central to the domestic political election debates in countries like Belgium, Austria, and France.

Due to its population size and political relevance within the EU, the outcome of the elections in France is of particular significance. The new political situation is marked by increasing complexity. The left-wing alliance Nouveau Front Populaire (NFP), which managed to defeat Macron's Ensemble coalition, and the RN are among the election winners. The simultaneous strengthening of both pro-European and Eurosceptic positions thus contributes to the growing political polarisation in France. While the NFP advocates for stronger European integration, it calls for social harmonisation and higher defence spending before further deepening integration. At the same time, the far-right RN emphasises national sovereignty and tends to oppose EU enlargement. Although domestic issues are likely to dominate in the short term, the results will inevitably influence France's role in the EU—most likely in a negative direction. The election outcome will not fundamentally change President Macron's foreign policy direction, but France's role as a key driver of European integration could be limited, as Macron's weakened domestic position will leave him with less room for European initiatives.

In Portugal and Croatia, the pro-European course remains largely stable. Both countries are likely to continue promoting cooperation in security and defence matters. It can be expected that Croatia will remain a strong advocate for EU enlargement, particularly concerning the accession ambitions of the Western Balkan countries, although internal political changes could lead to a more cautious stance. A similar picture emerges in Portugal: Despite the increasing fragmentation of the

parliament, the consensus on the strategic importance of EU enlargement and a common defence policy remains intact. At the same time, however, the debate over national sovereignty and migration is gaining importance, driven by the success of right-wing populist forces.

Manipulation and disinformation

Another common denominator across all eight parliamentary elections in EU member states is the manipulation of information and disinformation campaigns. In Bulgaria, in the weeks leading up to the election, there was an increase in pro-Russian disinformation campaigns, mainly spread on social media, which pushed nationalist, EU-sceptical, and anti-Western messages to the forefront. By spreading false and distorted information, for example about the role of the EU in Bulgaria or NATO, the nationalist party Velichie appealed to the national identity and portrayed European values as a threat to Bulgarian culture. These narratives linked debates about sovereignty and the threat posed by foreign powers, especially Western institutions.

In the lead-up to the Austrian National Council election, the role of right-wing populist actors and far-right media channels in spreading disinformation has come into focus. Specifically, 'alternative' media outlets like AUF1 and Report24, which are classified as far-right, use platforms such as YouTube and social media to expand their reach. These channels deliberately spread claims of possible electoral manipulation that could undermine trust in democratic processes. In addition to election manipulation, right-wing populist actors increasingly used alarming terms like 'WHO dictatorship' or 'climate communism', targeting an audience that believes in conspiracies.

In the months leading up to the election in Portugal, numerous misleading narratives circulated, linking immigration with allegedly increasing violence and unfair privileges. In social media and public debates, rumours spread that migrants had preferential access to the national healthcare system or that refugees received higher financial support than Portuguese pensioners.

In Romania, targeted false information also circulated before the elections, specifically aimed at further fuelling the loss of trust and insecur-

rities among the younger population. Social media campaigns from the far-right party Alianța pentru Unirea Românilor played a significant role, addressing young voters with politically extreme, anti-European, and NATO-sceptical messages. Anti-Ukrainian narratives, mixed with conspiracy theories reflecting Russian interests, were also communicated. Additionally, deepfake videos, falsely implicating prominent individuals in criminal activities, further fuelled distrust in state institutions.

The 2024 French parliamentary election was particularly marked by disinformation. Misinformation took various forms, including manipulated websites, misleading campaign promises, and AI-generated content. Russian actors played a central role: pro-Russian networks spread polarizing topics, such as the allegedly manipulated Olympic Games or immigration policy, in an attempt to destabilise the political climate. In addition to foreign influence, a significant portion of disinformation also came from political parties themselves. The NGO AI Forensics found that the far-right, particularly the party project 'Reconquête' led by Éric Zemmour, used AI-generated images to spread anti-migrant and anti-European messages. Similarly, during the parliamentary elections in Croatia, disinformation campaigns that used generative AI technology to spread deepfake video and audio material of political leaders played a key role.

Strengthening cohesion and resilience

The results of the parliamentary elections within the EU member states, as well as the increase in the intensity and number of disinformation campaigns, not only present new challenges to decision-makers in the Union but also threaten the foundations of European freedoms, values, and interests. Across the EU, comprehensive societal approaches are therefore necessary to respond to the short-term risks while also developing long-term strategies for strengthening resilience and building trust. In times of increasing global political instability and violent conflicts in the immediate neighbourhood, it is essential to strengthen cohesion and resilience within the EU in order to avoid becoming a geopolitical pawn.

Keynotes

- In 2024, parliamentary elections took place in eight EU member states, the biggest winners being parties aligned with the Patriotic Alliance for Europe and the European Conservatives and Reformists.
- The election results reflect increasing fragmentation and polarisation in the political landscape, which could hinder the EU's ability to act on security and defence matters and slow European integration.
- Signs of this trend are evident in emotionalised debates within member states, marked by EU scepticism and a prioritisation of national sovereignty over European solidarity.
- The elections were also influenced by external interference in the form of information manipulation and disinformation campaigns, posing a growing challenge to the EU's democratic foundations and stability.
- The narratives of many disinformation campaigns often align with the EU-sceptic and anti-Western messages of right-wing populist parties, amplifying their discourse on migration.
- The use of generative Artificial Intelligence, such as manipulated video and audio content, is drastically increasing in the spread of fake and deliberately misleading information.



Foreign influence and the undermining of truth

Daniel Hikes-Wurm

In the super election year of 2024, concerns about the influence of disinformation on elections as a core democratic institution were high. In retrospect, however, the immediate or measurable impact was lower than often assumed. This can also be attributed to the measures taken by the EU and its member states in recent years. The fight against increasingly sophisticated and personalised disinformation campaigns remains essential.

The challenge of disinformation

In recent years, the term 'disinformation' has gained significant attention, especially with European efforts to combat foreign interference, known as Foreign Information Manipulation and Interference (FIMI). The aim of these measures is to defend against hybrid threats in the information space, protect public trust in democratic processes and

institutions, and ensure the ability to project power and enforce interests both within and outside the EU. Disinformation is a form of FIMI, with certain actors using it as a strategic tool in the hybrid struggle against Europe.

The fight against FIMI has become a matter of European security and must be understood within the broader context of the systemic conflict between democracies and autocracies. Former EU High Representative for Foreign Affairs and Security Policy Josep Borrell even went so far as to say that it is “one of the battles of our time.” A good example of this is the 2024 Russian Doppelgänger campaign, which spread disinformation via cloned media websites to deliberately fuel societal conflicts in Germany.

But what is the challenge of disinformation campaigns? The term “disinformation” is not new and refers to the deliberate spread of false or misleading content by both state and non-state actors. However, disinformation is not limited to media content; in the context of FIMI, it involves influencing people’s behaviour, and in the context of state objectives, it also aims to undermine societal unity and, consequently, the willingness to defend. The targeted manipulation of narratives, such as the role of NATO in the Ukraine war, through disinformation campaigns sows doubt and could influence voter turnout or election results. Technological advancements through Artificial Intelligence (AI) serve as a massive amplifier and multiplier in the spread of information and in the content of the discourse.

Algorithms have now become a key factor in the individualised targeting of users (microtargeting) and often lead to a self-reinforcing and self-referential effect, making balanced debate difficult and fostering extremist positions. The quality and limitations of the AI used (e.g., “Large Language Models”) pose an additional problem, as these can themselves be sources of misinformation and, depending on the dissemination method and intent, become disinformation. Online platforms play a crucial role here, as they assume a gatekeeper function between the various participants due to the scalability of information dissemination.

European response

The European Commission takes a comprehensive approach to the issue and has implemented a wide range of measures in recent years to ensure that the necessary tools are available both for prevention and crisis management. Cooperation occurs in conjunction with institutions, national authorities, civil society, and other organisations. The measures cover both the technical and civil society levels. On the technical level, a key element is the Digital Services Act, which must be implemented by all EU member states by 2024. It assigns greater responsibility to large online platforms, which are now accountable for content moderation and evaluation. In addition, there is a voluntary Code of Practice on Disinformation, which includes 44 measures, such as the ambition to demonetise disinformation, meaning reducing the financial incentives for spreading false information. A further step is taken by the legally binding EU AI Act, which aims to ensure that the AI used is trustworthy and protects fundamental rights.

This complex interaction of diverse mechanisms within the framework of hybrid threats is now also acknowledged by the EU within the Common Security and Defence Policy. A good example of this is the EU Partnership Mission in Moldova, which has FIMI as a core task in its mandate. Furthermore, FIMI is also part of the EU sanctions regime against Russia, addressing destabilizing activities against the values and integrity of the EU and its member states. On the civil society level, the EU has implemented various measures, such as the Media Freedom Act, combating disinformation in connection with elections, and working with fact-checking organisations. The goal is to strengthen societal resilience against disinformation through media literacy and awareness-raising. This is always carried out along the narrow line between protecting democratic principles and values and the risk of excessive actions.

What remains to be done?

What else can be done beyond the regulatory approaches already described? The concept of intellectual national defence is an instrument that can provide the ideological foundations for understanding what exactly needs to be protected and why it is a collective concern. This could

include strengthening media literacy, creating conditions for quality journalism, and promoting critical thinking in the education sector.

The fight against disinformation will remain an essential and holistic task within the framework of FIMI and thus in combating hybrid threats, as the methods and means continue to evolve rapidly. The cognitive dimension is increasingly coming into focus for the actors involved, meaning the attempt to directly influence the intellectual abilities that form the basis of human decision-making processes. This adds a new layer of complexity to the struggle for individual and institutional resilience and the protection of human rights and democracy.

Keynotes

- Disinformation remains a significant stress factor for the system of democracy, with long-term effects on undermining trust.
- The scalability and customisability of disinformation are key factors in its effectiveness.
- The cognitive dimension—the battle for the human mind—adds complexity to efforts to strengthen individual and institutional resilience.
- Avoiding excessive and liberty-restricting protective measures is essential.



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Hybrid threats

Teija Tiilikainen

Hybrid threats play an important role as tools for actors seeking to challenge the democratic values and unity of Western states. Their key tactics is to target the vulnerabilities of democratic states to enhance the efficiency of the operations and avoid countermeasures. The more the EU and NATO members can develop common policies and instruments to counter hybrid threats, the stronger will their resilience be. Unity is an asset in a situation where hostile actors consider democratic values to be a major threat to the survival of their own regime and where they seek to divide the West and sow distrust in democratic governments.

Introduction

The global balance of power is in transition. This is partly a consequence of the ongoing power rivalry with states such as Russia and China, seeking to undermine the role of Western powers. The new pow-

er resources, and in particular the competition in technology, form a part of this rivalry by affecting the set-up for international competition.

Hybrid threats refer to the use of unconventional tools and tactics in this global battle of power, which is increasingly dominated by a confrontation between democratic and authoritarian states. This battle takes place at multiple levels by targeting the security and stability of democracies at the national level or the collective bodies such as the EU or NATO, but also the wider international order with its established rules, institutions, and practices. The hybrid threat tools used in this power projection are unconventional or consist of a set of tools used in concert. The key goal of the selection of tools, including tools used to create ambiguity and challenge situational awareness, is to prevent efficient countermeasures and ensure cost-efficiency. That is why any malign activities take place below the threshold of armed attack.

Hybrid threats have proven to be a highly efficient tool for authoritarian regimes to undermine the democratic values and discredit the democratic model. Their use has not only blurred the line between war and peace but has also complicated the application of both national and international rules and practices on hybrid threat incidents. Whilst new technologies create new vulnerabilities for democratic societies, the establishment of legal frameworks is becoming increasingly difficult as it is blocked by the great power competition at the international level and requires careful balancing of values at the national level.

Trends of hybrid threats

The conflict between Western states and powers seeking to undermine the democratic values is currently culminating in the Russian war against Ukraine. By winning the war, Russia would change the global balance of power to its own benefit and take it in a direction where military might weighs more than common rules and norms. A Russian victory would help it reach its goals in Ukraine by limiting the sovereign foreign policy of the latter including accession to NATO. It would equally help Russia consolidate its sphere of interest in Europe in general.

Russia thus uses its hybrid threat tools against Ukraine directly by supporting its kinetic warfare. The indirect means aim at preventing

or complicating Western decisions on aid and assistance to Ukraine or on sanctioning Russia. Its malign activities extend from information operations to cyber-attacks and attacks against key forms of Western critical infrastructures. These together with the diverse acts of sabotage against Western societies seek to sow distrust in the government and steer the attention away from foreign policy-related topics such as Ukraine. Election interference is another tool used for this purpose by influencing favourably the position of political parties that take a more critical view on supporting Ukraine.

Another trend of hybrid threat activities related to the war against Ukraine deals with the constant Russian need to justify the war among its own population but also among broader international constituencies to ensure support for its current regime and for the Russian power globally. Russia thus uses multiple instruments to promote its narrative about the origins of the war, which is presented as a defensive operation against political atrocities in Ukraine or genocide of the Russian minority and an allegedly planned Western attack against Russia. This comprehensive manipulation of the information space is going on at many fronts, from Russian traditional media channels to social media platforms globally or to Russian school books or official policy documents or speeches of high-level politicians or practitioners.

This information war is not limited to Russian activities only as China also engages in it, to a large extent supporting the Russian narrative about the origins of the war against Ukraine. Both countries are promoting an increasingly hostile information campaign against the West by presenting Western countries as imperialist and hegemonic and creating partnerships and loyalties against alleged Western forms of repression and dominance. China has thus maintained its 'no-limits' partnership with Russia against all the odds by refusing to vote in favour of UN security council resolutions condemning Russian aggression and deepening cooperation with Russia also in economic and diplomatic terms. China thus seems to assess its own posture so that it has more to win from a deepened partnership with Russia than from defending the key pillars of the current international order; the prohibition of the use of military force included.

New vulnerabilities emerging for Western democracies

Hybrid threat operations target broad societal vulnerabilities in order to avoid or minimise counter-reactions. This is why the identification of vulnerabilities from technological and economic to diplomatic and political ones must be at the core of Western policies on countering hybrid threats and building resilience.

Vulnerabilities are growing fastest in the technology domain with powerful new forms of disruptive technologies, which in the hands of malign state actors could provide unlimited possibilities to cause harm to Western technology-dependent societies. Improved risk awareness and understanding of the geopolitical framework should therefore be built into the work of tech companies, and their cooperation with governmental security experts should be enhanced.

The aspects of work in limiting economic dependencies, vulnerabilities in supply chains and access to critical raw materials should be made core elements in Western economic planning. Finally, the unity of Western actors reflected in the EU or NATO but also in G7 should be seen as a key political asset, with hostile actors making major efforts to challenge it. The more the West can stay united and use existing policy tools in a coordinated fashion, the more will the hostile actors' room for manoeuvre be reduced.

Keynotes

- Hybrid threats aim to exploit vulnerabilities within Western societies.
- Hybrid threats seek to undermine democratic values, which are perceived as a threat to the survival of authoritarian governance models.
- The tactics of hybrid threats should be considered when developing new disruptive technologies.
- The unity of the EU and NATO is a crucial safeguard for democratic states against hybrid threats.



NATO at a crossroads

Raphael Spötta

Through Donald Trump's transactional foreign policy, the credibility of NATO's collective defence is called into question. In addition to the long-standing disagreement over burden sharing, internal and external challenges as well as global risks and crises are intensifying the situation. Despite this uncertainty, NATO remains an indispensable pillar of the European security architecture.

NATO faces a serious test due to the election of Donald Trump as the 47th President of the United States. In February 2024, he suggested that, if he were to win the election, the USA would only defend other NATO members if they fulfilled their financial obligations. Otherwise, he would encourage Russia to do whatever it wanted. With such statements, Trump dealt a heavy blow to the alliance. The core of NATO's defence strategy is the credibility of its deterrence strategy. If there are doubts about the USA fulfilling its commitments to its allies, this undermines the credibility of the alliance.

Burden sharing and credibility

There has been long-standing disagreement between the United States and the European NATO members regarding burden sharing, meaning the distribution of the (financial) costs of alliance defence. For almost 20 years, the United States has repeatedly urged its Western European allies to invest more in collective defence. In 2023, defence spending by European NATO members increased by 18 percent, and 30 out of 32 members reached the two-percent goal.

However, while Trump's statement may seem ineffective in this regard, it has already caused damage to the credibility of NATO's deterrence. The Article 5 mutual defence commitment of the North Atlantic Treaty leaves open the means by which a NATO member must contribute to alliance defence. This means the USA could entirely forgo defending its European allies, with a mere expression of solidarity sufficing. The fact that a US president has now been elected who prides himself on his unpredictability and is likely to pursue a foreign and security policy based on transactionalism and unilateralism is not conducive to the credibility of the transatlantic alliance. It is possible that the White House would accept the damage to the credibility of the alliance in favour of a supposedly fairer burden-sharing arrangement. A progressively isolationist course for the USA is a medium to long-term potential development.

External challenges

More than 75 years after its founding, NATO is facing both internal and massive external challenges. For example, there are still unresolved conflicts between NATO members, such as between Greece and Türkiye. This leads to differing priorities among the allies, which affect both cooperation within NATO and the weighting of security challenges in Europe's surrounding environment.

The challenges for the transatlantic alliance will not diminish in the foreseeable future. In particular, the Russian invasion of Ukraine stands out, with its effects particularly impacting Europe and NATO. Following Russia's use of the SS-X-34 'Oreshnik' missile against Ukraine, the Ukrainian losses, and Trump's statements on wanting peace in Ukraine, the security situation for NATO is also changing. However, a conflict

resolution is less likely than the freezing of this conflict. In this case, the alliance would face a strengthened Russia, which, by capturing more territory in Ukraine, would be in a strategically better position to pressure other European states. At the same time, NATO is tasked with meeting Ukraine's security needs without risking an open (military) conflict with Russia.

Other challenges include the military confrontation between Israel and Hamas or Hezbollah, as well as the simmering conflict between Israel and Iran. A worsening of the security situation could also touch on vital interests of alliance partners. Lastly, Taiwan is another potential flash-point. While this would not directly affect NATO in terms of alliance obligations, due to the expected impact of a military conflict, tensions in the Taiwan Strait should not be ignored. However, the primary challenge remains Moscow's actions, as it is engaged in a hybrid conflict with the EU. This includes cyberattacks, disinformation campaigns, and nuclear threats.

NATO and EU

With the Strategic Concept that has been in place since 2022, the alliance is addressing these developments and challenges. The USA, a founding member, has been the cornerstone of the alliance. If this is now in question, the entire collective defence of NATO is also in question. It is hardly possible to compensate for this in the short to medium terms. The closest the NATO institution could come to collective European defence would be the EU and its Common Security and Defence Policy, but this differs significantly from NATO institutionally and procedurally.

We can now expect calls for more intensive cooperation between EU member states. The general sentiment is that Europe must now do more for its security and defence. However, the EU lacks the appropriate decision-making structures and processes, which would need to be established. This should also be considered independently of the political situation in the USA. While the political majority in Washington may change, strengthening the capabilities and capacities of the European NATO members is non-negotiable. Strengthening the EU in the security and defence policy area would also strengthen the European pillar of the transatlantic alliance.

NATO remains, despite the more difficult circumstances, the central international organisation for European security. As one of the longest-standing military alliances in history, NATO is also seen in Austria—at least implicitly—as a protective shield surrounding almost the entire country. And NATO's Standardisation Agreements (STANAG) are still the primary benchmark for interoperability for modern armed forces, even outside Europe. Thus, despite the challenges, NATO remains one of the cornerstones of European security and defence policy.

Keynotes

- The potentially unpredictable behaviour of the next US president raises doubts about the USA's commitment to its article 5 obligations under the North Atlantic Treaty, undermining the foundation of NATO's deterrence strategy.
- A “freezing” of Russia's war of aggression against Ukraine would strengthen Moscow's strategic position, increasing the threat to Europe and presenting greater strategic challenges for NATO.
- While European NATO members have recently increased their defence spending, the EU still lacks decision-making structures for an autonomous security and defence policy.
- NATO remains central to the European security architecture, but strengthening the European pillar of NATO through EU structures is essential.

5

Risks and challenges for Austria





Risks and challenges for Austria

Silvia Angerbauer

Within security and defence policy worldwide, we are confronted with challenges that were unimaginable just a few years ago. This naturally applies to Austria as well. For this reason, on the one hand, the strategic foundations as well as the security-policy calculations and structures must undergo a continuous process of change. On the other hand, comprehensive national strategic security preparedness and future-resilient governance are more important than ever. If risk analyses and strategic forecasts are not taken seriously, it can have serious consequences for the resilience of the state and society.

We live in a time of rapid and sometimes frightening change, as well as of increasing complexity and uncertainty. Climate change, technological revolutions, and geopolitical shifts are having profound effects on our lives. Stability, prosperity, and democracy are no longer a given. To meet expectations of the people living in Austria, future-resilient governance

is required. It must be possible to prepare for the future in an appropriate way, to mitigate major risks and to build up the right capabilities.

Changes are happening at all levels—from global power competition to local politics. However, the triggers for these changes are often the same. For instance, the Arctic—due to climate change—could gain geopolitical significance because of the importance of shipping routes and valuable natural resources. But the effects of climate change can also push communities and families to the brink of ruin, as we were recently reminded by the flooding disaster in parts of Austria and Europe.

Therefore, it seems essential to focus more on precaution and evidence-based forward-looking policy-making. For this reason, the Austrian Federal Ministry of Defence is increasingly incorporating strategic foresight into its foundational work. Strategic foresight is necessary whenever there is a high level of uncertainty regarding changes in the relevant future context. By incorporating foresight techniques into political and strategic decision-making, informed decisions can be made regarding the necessary capabilities and measures for the future.

Strategy alone is not enough

Therefore, the new Austrian Security Strategy, which is discussed separately in this chapter, was derived from the national risk monitor of the MoD. The risk monitor is the forecast of which risks are most relevant. The security strategy is, therefore, the plan for which measures need to be taken in the various areas to prevent these risks from causing harm to Austria. However, the question of whether these measures are the right ones remains unanswered at the time of the strategy formulation. Subsequently, it must undergo constant monitoring.

In Austria, for the purpose of ongoing situation monitoring, the Federal Crisis Security Act, with its structures, was operationalised in January 2024. Seven situational analysis processes in the areas of internal security, health and social affairs, energy, climate and environment, economy, intelligence developments, and defence policy are designed to identify action requirements and assess whether the strategic directives are being implemented. Starting in the first quarter of 2025, a bi-annual strategic overall situation report will be created from all sev-

en sub-situational reports. This report will provide a strategic overview (evaluation, outlook, etc.), based on which conclusions for the future will be drawn and incorporated into national strategic development. The goal is to create a comprehensive and cross-departmental strategic overview of security issues and, above all, to ensure a connection between the operational and strategic levels in crisis management. The intended significant increase in resilience should provide substantial added value compared to the current situation, which seems logically appropriate given the global security situation.

It will be crucial that all participants, especially the leadership of this process, keep the strategic component of the basic and long-term direction in mind. Strategic thinking processes should essentially occur as an overarching perspective at the meta-level and should not directly intervene in operational issues. It is also essential that this functionality does not involve decision-making or directive authority, and that the new structures under the Federal Crisis Security Act do not result in a shift of departmental responsibilities. The responsibilities as outlined in the Federal Ministries Act will, of course, remain within the remit of the respective departments.

Defence is far more than a military task

In view of global developments, the modern adaptation of Austrian security structures includes not only the steps already taken but also the planning for an emergency. During the Cold War, the concept of Comprehensive National Defence was prepared for a possible cooperation in the event of defence. This was operationalised with the National Defence Plan adopted in 1983.

The importance of Comprehensive National Defence, which is anchored in the constitution, is also highlighted in other contributions to this volume. Civil defence, an essential part of it, includes the entire civil protection system as well as the functioning of civil authorities in the event of defence, or the maintenance of internal security through the police. Economic defence includes, among other things, the stockpiling of and supply with food, the storage of energy reserves, and measures to ensure that the economy can continue functioning during crises or wartime. Intellectual defence primarily aims to promote democrat-

ic values and create widespread awareness of democratic freedoms and the civil and human rights enshrined in the Federal Constitution. Intellectual defence is also intended to strengthen the awareness of security and defence policy, as well as democratic resilience, within the population.

These areas of action need to be better coordinated with a new National Defence Plan in order to increase the defence capability and resilience in all fields of security policy at the national level, in line with the EU.

Keynotes

- Security and defence policy worldwide is facing challenges that were unimaginable just a few years ago.
- Austria's Security Strategy has been revised to address new geopolitical challenges.
- New structures have been established within the Federal Chancellery to create, for the first time, a comprehensive overview of national security.
- It is crucial for all stakeholders to consistently focus on the strategic component and avoid becoming entangled in operational issues.
- To implement Austria's Security Strategy effectively, the concept of Comprehensive National Defence must be revitalised.



The new Austrian Security Strategy

Jutta Edthofer and Michael Kugler

The new Austrian Security Strategy responds to changing threats, including geopolitical conflicts, climate change, and hybrid attacks. It follows a comprehensive approach that integrates security policy, economic, and societal aspects. The goal is to establish a preventive, resilient security structure in close collaboration with the European Union. Eight areas of action, including resilience, migration, and economic security, are designed to prepare Austria for current and future challenges.

Development of the new Austrian Security Strategy

Austria's strategic security situation has fundamentally changed in recent years. The unlawful Russian invasion of Ukraine has brought war back to Europe, shaking the foundations of the global security frame-

work and intensifying systemic rivalry and geopolitical competition. The escalation of other conflicts, such as in the Middle East, has also impacted Europe. Consequently, the further development of the Austrian Security Strategy from 2013 was absolutely necessary. The federal government initiated this strategic process with a decision by the Council of Ministers in April 2023; the new Austrian Security Strategy was forwarded to Parliament for debate and resolution on 28 August 2024.

The goal of this project was to develop a long-lasting strategic document at the international level within the framework of a transparent and inclusive process. The crises of recent years have shown that today's threats are more than ever transnational in nature and that security must be considered as comprehensively as possible. At the same time, the global environment has contributed to national security considerations increasingly influencing other areas. Therefore, the new security strategy should not only address traditional security issues but also take into account connections with other policy areas. These include, among others, economic policy, foreign policy, climate and energy policy, health policy, and education policy. Austrian security policy should be comprehensive, integrated, and preventive in nature, to be able to actively shape and contribute to European solidarity within this framework.

Methodology

Initially, the most significant security policy threats and challenges were identified through a threat and environment analysis. Based on this, the key national interests and objectives were defined, and the available capacities in the military, economic, financial, diplomatic, and civilian sectors for achieving these objectives were analysed. Furthermore, options for achieving the objectives were outlined. Eight security policy action areas are considered priorities for the coming years and are expected to significantly contribute to the implementation of the interests and objectives, particularly in light of limited resources.

Through accompanying political coordination, it was ensured that the strategy had wide support and was aligned with other policies. For this purpose, a steering group and a working group from the core ministries responsible for security policy were established under the leadership of the Federal Chancellery of Austria. Depending on the topic, other

ministries were also involved. All political parties represented in the National Council were invited to actively participate in the further development of the Austrian Security Strategy through a steering group. Experts nominated by the parties regularly exchanged views with the steering group on the progress of the work and discussed the contents of the strategy.

After the completion of the process, the Austrian Security Strategy was made public and shared with international partners. Additionally, a continuous monitoring of the strategy's implementation and adjustments to changing circumstances were planned.

The Austrian Security Strategy and challenges of 2025

The new strategy provides a framework for addressing the key security-policy challenges for Austria in 2025 and beyond. The measures and instruments outlined in the eight action areas can be applied to this end. These include, among other things, wars and conflicts in the vicinity of Europe and Austria, the strengthening of Austria's resilience, economic security, climate change, extreme weather events and natural disasters, migration and integration, as well as hybrid threats.

Wars and conflicts

Wars and conflicts in the vicinity and further afield have not only caused suffering for the affected populations but also have direct effects on Austria, such as through refugee flows or economic impacts. Overall, the risk of military escalation has increased. In the Middle East, there is the danger that the conflict could spread beyond the region, with consequences for the economy and a rise in terrorist threats globally, including in Austria.

In response, Austria will continue to advocate for a rules-based international order and participate in international de-escalation and peace efforts. This includes utilising opportunities that arise from Austria's specific position as a militarily neutral country. At the same time, the country is preparing itself nationally for the impacts and threats of these conflicts. This includes, among other things, strengthening com-

prehensive national defence. Further concrete steps to increase overall resilience and defence capability will be needed in the coming years.

The same applies at the EU level. The EU must be able to defend itself in an emergency. Following the 2022 Strategic Compass, the Commission presented an EU defence industry strategy and a related programme, including financial resources, in March 2024. For the first time, the new European Commission will comprise a Commissioner for Defence, besides the High Representative for Foreign Affairs. The European Investment Bank is gradually expanding its lending criteria to include dual-use and defence-related goods. In the coming months, we can expect several initiatives and financial resources in this area, and Austria will shape these developments in line with its security-political interests and in accordance with its constitution.

Economic security

There is currently a global effort to align economic, technology, and energy policies with larger national security needs. Under the term Open Strategic Autonomy, the right mix between security, location assurance, global competitiveness, forward-looking climate-friendly innovation, and a rules-based trade and economic order must be found globally.

To counter foreign economic influence, both nationally and at the EU level, measures and legal instruments are being developed and implemented to protect critical economic sectors from harmful actions. In 2025, the focus will be on their implementation, as well as on analysing the potential impacts of the outflow of critical technologies and know-how and on addressing these issues.

Securing the energy supply while maintaining its affordability and promoting ecological sustainability is another central challenge for the coming years. The measures related to this will be described in the action field “Economic Security and Critical Resources” of the Austrian Security Strategy.

Climate change, extreme weather events, and natural disasters

The regularly recurring extreme weather events and the resulting disasters demonstrate how important preparedness and efficient disaster management are. Equally essential is the absolute implementation of the Austrian Strategy for Adaptation to Climate Change and, as an overarching goal, the continued efforts in combating the root causes of climate change and protecting the livelihoods.

Migration and integration

War, instability, and climate threats lead to the deterioration of living conditions for people and to migration. These will therefore remain a major challenge for Austria in 2025.

In the coming year, intensive efforts will be made in collaboration with the new EU Commission. The European Council has agreed to explore new and innovative ways to combat illegal migration and trafficking in accordance with international law. In addition, the implementation of the new Migration and Asylum Pact is on the agenda. Furthermore, cooperation with origin and transit countries is to be strengthened at both the EU and national levels, and the root causes of migration will be comprehensively addressed, primarily through on-the-ground support and development cooperation.

At the same time, regular and safe migration will be of great importance in light of the labour and skilled-worker shortages.

Finally, the measures addressed in the Austrian Security Strategy in the area of integration aim to include all people living in Austria and make the best use of Austria's potential in a peaceful and prosperous society.

Hybrid threats

The EU has already repeatedly documented the hybrid actions by Russia against Europe, and has implemented, among other things, a new sanctions regime in response. Similar hybrid actions are also being carried out by other states and actors. The range of hybrid threats extends from visible cyber-attacks and sabotage to more subtle manipulation of information (disinformation) and influence campaigns. These

are intended to amplify existing domestic differences and generate uncertainty and instability. In 2025, strategies and measures addressing these threats will be necessary both in Austria and at the EU level.

Implementation of the Austrian Security Strategy

In light of the imminent challenges, the Austrian Security Strategy defines the implementation of the outlined action measures as a nation-wide and society-wide task. Anchoring the strategy in the population and fostering widespread security awareness, social cohesion, and democratic resilience are key objectives in this context.

Keynotes

- The return of war to Europe has intensified global and regional conflicts, altering the security landscape for Europe and Austria. A new security strategy was therefore indispensable.
- The understanding of security in Austria's new Security Strategy is comprehensive and integrates other policy areas, including economic policy, climate change, migration, and integration.
- The new Security Strategy focuses on preventive measures and on strengthening national and societal resilience.
- The strategy also aims to promote social cohesion and to raise public awareness of security issues.
- Austria's goal is to actively participate in European security and defence initiatives.



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Strategic dependencies of Austria

Tina Wakolbinger

The pronounced strategic dependencies of the Austrian economy on individual states for critical raw materials, components, and goods pose a significant risk, especially in light of the tense geopolitical situation. Options for reducing these dependencies include building and strengthening Austrian and European supply chains, establishing strategic partnerships with third countries, joint European procurement, strengthening circular business models, building stockpiles, and substituting affected goods. Many of these measures involve risks from social, ecological, and economic perspectives and can only be implemented in the long term. Therefore, they must be proactively planned based on well-founded analyses of potential risk scenarios and carried out with the involvement of all relevant stakeholders at the national and EU levels.

Complex value and supply chains

Austria, as an export-oriented country, is heavily integrated into international value chains. It has greatly benefited economically from this integration. However, over the years, significant strategic dependencies have developed in many areas because goods, components, or raw materials for industrial production are primarily sourced from one region or country, with alternative suppliers not sufficiently available. This also applies to critical infrastructure and the defence industry, where dependencies exist, for example, in the area of raw materials and semiconductors.

The potential risks of these dependencies have become more apparent due to recent disruptions in supply chains, such as those caused by COVID-19, natural disasters, and interruptions in transportation routes. Particularly Russia's war of aggression against Ukraine, as well as growing tensions between the United States and China and the escalation of the Middle East conflict, have brought the importance of strategic autonomy into sharp focus for many countries. Economic defence, as part of comprehensive national defence, is therefore gaining in significance.

Reduction of dependencies

In 2024, increased efforts were made to reduce these dependencies both at the national and EU levels. A key focus was on critical raw materials. The Critical Raw Materials Act emphasises the crucial importance of such materials for industrial competitiveness, for green and digital technologies, and for security and defence. The measures recommended within this framework include strategic partnerships with resource-rich third countries, promoting circular business models, strengthening European supply chains through expedited approval processes, and improved access to financing opportunities. Additionally, joint procurement, particularly in the energy and defence sectors, has gained prominence.

However, 2024 also revealed that implementing measures to reduce strategic dependencies is often very challenging, with long lead times, high costs, risks, and resistance. Economic policies aimed at reducing dependencies, such as trade barriers and subsidies, can trigger coun-

ter-reactions that weaken domestic export companies. Finding the right balance between long- and short-term goals is a significant challenge, as evidenced by the discussions surrounding the introduction of tariffs on electric vehicles from China.

One way to reduce dependencies is through supplier diversification, such as nearshoring or friend-shoring. Existing long-term contracts, especially in the energy sector, may hinder quick adjustments or lead to high costs for such changes. Another obstacle to diversification is the lack of alternative suppliers or limited access to them. Building additional suppliers often comes with considerable difficulties, as demonstrated by the challenges surrounding the planned lithium pact with Serbia, protests over new LNG terminals in Germany, and opposition to test drilling in Molln. Concerns about the social and ecological impacts of such plans often conflict with efforts to reduce dependencies. Additionally, the long lead times and high costs involved in starting new production facilities, such as those in semiconductor manufacturing, pose significant economic risks. Circular business models, within technical possibilities, offer promising options in some areas.

Another approach to reducing strategic dependencies is to reduce demand for certain goods and to explore substitution potential. While increasing the share of renewable energy reduces dependency on fossil fuels and their supply countries, it simultaneously increases dependency on Green Tech goods, often sourced from China.

The establishment of storage facilities and mandatory stockpiles is another measure to mitigate the risk of strategic dependencies in the short term. This has been pursued in sectors such as energy and pharmaceuticals, as seen with the regulation on pharmaceutical stockpiling. Criticism of this approach often points to the high costs involved, possible negative impacts from a European-wide perspective, and the failure to address underlying structural problems.

Proactive risk management

The year 2024 has shown that measures to reduce strategic dependencies are becoming increasingly important in light of geopolitical developments, but often conflict with other political, economic, ecological,

and social goals. A precise balancing of the various interests is therefore necessary. In this context, there is a risk that measures will not proactively and strategically take future developments into account but will instead focus reactively and short-term on already existing bottlenecks in part of the supply chain, without sufficiently considering the complexity of the supply chains.

In order to identify critical dependencies and to enable a proactive design of measures, the development and analysis of possible future geopolitical risk scenarios and their economic impacts is of utmost importance. For this purpose, a thorough analysis of existing dependencies, which includes the entirety of supply chains, is essential, as often a single missing element is enough to bring an entire supply chain to a standstill. Given the global, complex, and often opaque nature of supply chains in many areas, this presents a major challenge and can only succeed by involving all relevant stakeholders at the national and EU levels.

Keynotes

- There remains a significant risk from Austria's pronounced strategic dependencies on individual states for critical raw materials, components, and goods.
- Opportunities to reduce these dependencies include building and strengthening Austrian and European supply chains, forming strategic partnerships with third countries, joint European procurement, enhancing circular business models, establishing stockpiles, and substituting affected goods.
- Many of these measures carry social, environmental, and economic risks and can only be implemented in the long term.
- These measures must be proactively planned on the basis of thorough analyses of risk scenarios and implemented with the involvement of all relevant stakeholders at both national and EU levels.



Elections and disinformation

Camillo Nemec

Disinformation causes an erosion of trust in democracy, questions the integrity of electoral processes, and contributes to the polarisation of society. It aims to distort or twist the truth, push content, and manipulate polls or discussions. The Super Election Year 2024 has shown that disinformation is happening non-stop and worldwide across all social networks. This occurs in the context of a global media competition between authoritarian and democratic political systems, and in the face of significant challenges for democracy and our pluralistic way of life. Strengthening critical thinking skills will be necessary to create societal digital resilience.

Disinformation online

Disinformation, fake news, and foreign influence in the information space, on social media, and digital platforms are deliberately used in

the run-up to elections to manipulate public opinion, spread false narratives, incite fear, or discredit political parties or individuals. Disinformation causes an erosion of trust in democracy, questions the integrity of electoral processes, and contributes to the polarisation of society. Additionally, through the targeted placement of disinformation on social networks, voter decisions can be influenced.

When external state or non-state actors attempt to manipulate the information space and societal opinion through coordinated disinformation campaigns to achieve political, economic, military, or other strategic objectives, this is referred to as foreign information manipulation and interference.

People believe those who lie online

It is about falsifying or distorting the truth, pushing content, manipulating surveys or discussions, and putting society into a kind of disorientation in order to pick it up again with alternative facts or half-truths.

In the super election year of 2024, more than 70 elections took place worldwide, including the landmark elections for the European Parliament, which are crucial for the European Union, and the globally significant US presidential elections. The Russian invasion of Ukraine, the Hamas terrorist attack against Israel and its regional consequences, Iranian aggression against Israel, and the economic competition between the USA and China, combined with the global reach of the internet, created a perfect setting for the global competition between authoritarian and democratic government systems over control of the narrative on social networks.

The post-factual age

Discourse on social media is not only short-lived, but facts have also largely become irrelevant. The emotional effect of a statement is more important than its truthfulness. Large parts of society, in their rejection of the establishment, are willing to ignore facts and accept half-truths or lies.

Elections are just the tip of the iceberg

In our Eurocentric mindset, we often fall prey to the misconception that disinformation primarily takes place in Europe and the USA, and ahead of elections. Disinformation occurs worldwide, including in Africa, Asia, and South America. It is orchestrated by state or non-state actors, often on behalf of or funded by governments. The Russian Federation, the People's Republic of China, the Islamic Republic of Iran, and the Republic of Türkiye are among the major regional or global players in this regard, offering simple explanations for complex issues or an alternative societal way of life to the West. When it comes to the perception of disinformation campaigns during elections, it is like an iceberg: we only see the tip.

Russia's troll factories had their eyes set on the EU

Ahead of the elections to the European Parliament and the various elections in European countries, it was evident that disinformation campaigns were primarily originating from Russia. These campaigns had the main objective of weakening the support of the European population for Ukraine, dividing the member states, and gaining control over the narrative of the war of aggression against Ukraine. Additionally, there were attempts to support as many pro-Russian parties and politicians with a relaxed relationship with Russia as possible in order to spread pro-Russian narratives. In Russian troll factories, information from Western media was collected, analysed, and recontextualised, mainly to stir up fears about the future in Western society.

New technologies

The increasing use of dynamically evolving new technologies facilitates the spread of disinformation on social networks. AI-generated deep-fakes, fake photos, or videos are no longer distinguishable from the original. Can we still believe what we read or see in the future? In an increasingly complex digital world, it is becoming more and more difficult for individuals to verify what is actually true and what is a lie.

Measures taken by the European Union

The European Union has been fighting against disinformation for years and has already implemented many initiatives. Notable is the Digital Services Act (DSA), which includes measures for digital services such as online platforms and search engines to combat misuse and ensure faster removal of illegal content. Also significant is the Code of Practice on Disinformation, which has been signed by major online platforms, fact-checkers, and technology companies. Both initiatives aim to implement more transparency and accountability on the internet. However, the European efforts primarily focus on raising society's awareness of disinformation. This involves media literacy, media competence, and strengthening independent media.

Implications for Austria

Austria was not, with a few exceptions, the focus of foreign disinformation campaigns during either the European Parliament elections or the National Council elections. A spill over effect, particularly from Germany, was feared but did not occur.

Early measures were taken in Austria to combat disinformation and election manipulation. One such measure is an interministerial core group on disinformation, led by the Federal Chancellery, which deals with domestic and European disinformation bodies and initiatives, analyses disinformation campaigns, and recommends certain actions. In addition, an interministerial election cooperation network, led by the Federal Ministry of the Interior, continuously collects information regarding the overall security of election procedures and conducts an organisational and technical risk analysis for Election Day. For special election preparation, specific training sessions were held in collaboration with the European Centre of Excellence for Countering Hybrid Threats and the Austrian Institute of Technology.

Although the ultimate test did not occur, Austria was well-prepared both structurally and procedurally for potential disinformation campaigns or other influencing attempts. The continuous development of coordinated national collaboration, adapting to new trends and tech-

nologies, and a societal strengthening of critical thinking skills will be necessary to generate nationwide digital resilience.

Keynotes

- Disinformation occurs as a continuous global process—elections are merely the tip of the iceberg.
- Austria was not a major target of foreign disinformation campaigns during the European Parliament and National Council elections, with only minor exceptions.
- Significant segments of society are willing to ignore facts and accept half-truths or lies in their rejection of the political establishment.
- Strengthening critical thinking skills will be essential to fostering societal digital resilience.



Intellectual national defence

The education system as part of comprehensive national defence

Jan Sisko

The education system plays a crucial role in the implementation of intellectual national defence. Political education, together with other curriculum content, provides an appropriate and comprehensive framework that allows for addressing current developments.

Intellectual national defence is a pillar of comprehensive national defence within the meaning of Article 9a of the Federal Constitutional Law and is to be understood as part of political education. A central element is the engagement with security policy in the broadest sense. In light of multiple crises, intellectual national defence primarily aims to raise awareness of threats to democratic values and principles. The wars in Ukraine and the Middle East represent a relevant dimension, which is

further complemented by current impactful issues such as inflation, pandemics, the climate crisis, terrorism, espionage, and fake news.

Curricula and cross-cutting topics

Intellectual National Defence is anchored in the curriculum via the subject of political education and explicitly in the application areas of the 8th grade under the title “Comprehensive National Defence and the Armed Forces”. A new curriculum has been issued for primary education as well as for secondary level I, which will come into effect in stages starting from the 2023/24 school year and includes a fundamental strengthening and renewal of political education. Moreover, the Basic Decree on Political Education from 2015 includes all general and content-related points of reference that enable engagement with the themes of intellectual national defence across all school levels, school types, and subjects. Environmental education for sustainable development contributes to this, as climate change is considered a potential threat to national security and democracy, as well as economic education, since economic national defence is also part of comprehensive national defence. The potential of digital basic education and media education should not be underestimated either, as both aim to enable children and young people to handle digital devices, as well as the information they can access through these devices, responsibly.

Strengthening competencies in schools

To bring the outlined content to schools, the Ministry of Education has been implementing numerous measures. In most cases, these are offers aimed at teachers, providing suggestions for lesson planning. The primary point of contact for political education is the centre ‘polis—the Austrian Centre for Citizenship Education in Schools’. Numerous topics related to intellectual national defence are available in both digital and analogue formats. Support is quickly offered to schools regarding current geopolitical events. The provision of topic dossiers can be emphasised, specifically in the wake of the wars in Ukraine and the Middle East. There was a very urgent need to address media-spread content and the personal references of students in school.

Another focal point is education about Europe. Understanding the processes within the European Union and the European idea is essential for analysing European security policy. The ‘Forum Politische Bildung’ (Forum Political Education) has been publishing information on political education for many years. The 2023 edition titled ‘Wider den Krieg’ (Against the War) is particularly noteworthy due to its relevance for intellectual national defence. The department ‘ERINNERN:AT’ in OeAD GmbH—Agency for Education and Internationalisation is of high importance for intellectual national defence, as the remembrance of the Holocaust, the fight against Antisemitism, and understanding the conditions for the establishment of the Nazi dictatorship and its consequences are key elements for fostering the willingness to preserve democracy.

The ‘Forum Umweltbildung’ (Forum Environmental Education) and the ‘ÖKOLOG’ school network specialise in environmental education for sustainable development. Another avenue is bringing the expertise of the Austrian Armed Forces to schools. Since the 2023/24 school year, a cooperation with the ‘Virtuellen Pädagogischen Hochschule’ (Virtual Pedagogical University) at the Pedagogical University of Burgenland has been established to regularly offer e-lectures to teachers. In cooperation with the Education Directorate for Salzburg, regional courses for information officers are held externally.

Challenges for intellectual national defence

The goal of intellectual national defence must be to develop students’ basic understanding of the general situation at the global, European, and regional levels, as well as their ability to assess Austria’s interests, potential, and options for action within each framework. Understanding the logic of multilateral institutions and defence alliances, as well as the concepts of neutrality and collective defence, are some of the prerequisites for this. Overcoming Eurocentric thought patterns and stereotypes regarding other world regions is just as important as combating racism, Antisemitism, anti-Romani sentiment, and other forms of group-related hostility and discrimination. As with many other topics, the application of the ‘controversy principle’ is a challenge for schools when imparting content on intellectual national defence. This includes the engagement with terms, concepts, and prerequisites of peace. At

the same time, raising awareness of security-related issues at school must be one of the goals of intellectual national defence.

Outlook

A research project of the Austrian funding programme for security research (KIRAS) started in December 2024, with the aim of using various methods and cooperating closely with schools to determine what perceptions of intellectual national defence exist in schools. At the same time, the target is to identify and document best practice. The objectives also include the creation of materials and methods for imparting knowledge and strengthening democratic resilience and piloting with students and teachers.

Keynotes

- Civic education provides a strong framework for addressing the concept of intellectual national defence.
- Curricula offer numerous opportunities to incorporate aspects of intellectual national defence.
- Specialised institutions, commissioned by the Ministry of Education, address various aspects of intellectual national defence.
- Teaching the basic principles of intellectual national defence is a prerequisite for introducing more complex topics.
- The Ministry of Education collaborates with the Ministry of Defence to provide valuable expertise to the school system.
- A study examines the implementation of intellectual national defence in school practice.



Migration flows to Austria

Gerald Tatzgern

Austria is facing a significant increase in irregular migration and organised human trafficking, particularly along the western and central Mediterranean routes and the Balkans route. Despite international efforts such as intensified border protection, faster asylum procedures, and cooperation with North African countries, combating human trafficking remains a major challenge. Criminal networks benefit significantly, while migrants take life-threatening risks. At the same time, political and humanitarian tensions exacerbate the situation, as transit countries like Italy and Tunisia struggle with growing pressure and insufficient solutions.

For years, Austria has seen a massive increase in the apprehension of irregular migrants and the associated human trafficking. In 2022, a new record was set with over 120,000 apprehended individuals—never before had so many people in illegal residence been detected.

Nearly ten years ago, on 27 August 2015, employees of the Motorway and Expressway Financing Joint-Stock Company noticed a refrigerated

truck without a driver parked in a breakdown bay on the A4 motorway near Parndorf. A company employee then alerted the police. When the first police patrol arrived shortly afterward, they detected decaying fluids leaking from the cargo area of the truck. Upon opening the truck, a horrifying scene unfolded: 71 people, including women and children, had suffocated on their journey from Hungary to Austria in this truck. After years of investigation, it was revealed that this single human trafficking transport had generated a profit of about 100,000 Euros for the criminal organisation.

To combat professionally organised trafficking networks, it is necessary to conduct intensive national and international investigative and coordination efforts at all levels. The situation along the central Mediterranean route and the Western Balkans route has also made it necessary to strengthen the expertise and capabilities within the police. The associated tasks present new challenges for law enforcement and criminal police.

On the Eastern Mediterranean route/Western Balkans route, mainly migrants from the Middle East are trafficked. This route leads from Pakistan and Afghanistan through Iran to Türkiye and continues through various countries along the Balkans towards Central and Northern Europe. On the Western Mediterranean route, migrants are primarily trafficked from Morocco and other West African countries like Senegal and Ivory Coast to Spain. The Central Mediterranean route originates in North African countries, especially Libya. Migrants, primarily from Nigeria, Algeria, and Tunisia, attempt to reach Western Europe via Italy by sea.

Western trafficking route in the Mediterranean

The migration routes from Africa to Europe are very diverse. The Western Mediterranean route, via Morocco or Algeria to Spain or Portugal, was considered a well-known trafficking route. Some criminal groups repeatedly attempt to smuggle migrants through the Spanish enclaves of Ceuta and Melilla in Morocco over the border fences. The past has shown that human traffickers prepare the people they are trafficking to use violence against the police or put themselves in great danger when attempting to climb the fences, which can be up to ten meters high.

Central trafficking route in the Mediterranean

In recent years, the Central Mediterranean route has increasingly turned out to be the main migration route from Africa to Europe. The Central Mediterranean route mainly runs through Algeria, Tunisia, Libya, and Egypt to Europe. Italy is by far the most popular destination for migrants. Although the number of cases in which migrants lose their lives on this route has been rising for years and traffickers lead people to their deaths every day, no effective countermeasure has yet been implemented.

The trafficking groups in the Mediterranean and in North Africa closely cooperate with their cells in Italy. There is ongoing debate about whether so-called NGO ships, which actively search for migrants in the Mediterranean, collaborate with trafficking organisations, or whether they are used by human traffickers to help migrants complete the long journey across the Mediterranean.

The procedure is relatively simple. All ships operate with a transponder that indicates their position in the waters. This information is public and can be accessed through various websites or mobile apps. Traffickers seem to wait until a “rescue ship” is nearby. The official international maritime border is rarely crossed. The seaward border of the territorial sea is an assumed line 12 nautical miles (approximately 22 km) from the baseline. The sum total of different coastal sea zones is referred to as the “Coastal Waters.”

These so-called NGO ships, whose operations incur very high costs, are funded through hard-to-trace channels. Thus, the operators of these ships are under financial pressure to rescue migrants from the Mediterranean as often as possible and in as large numbers as possible. The following NGO ships were active in the Mediterranean in 2023: ‘Jugend Rettet’, ‘Louise Michel’, ‘Mediterranea Saving Humans’, ‘Mission Lifeline’, ‘Proactiva Open Arms’, ‘Salvamento Marítimo Humanitario’ (SMH), ‘Sea-Eye’, ‘Sea-Watch’, and ‘SOS Méditerranée’. In 2023, more than 100,000 people were trafficked on this central Mediterranean route. In comparison, around 50,000 people were trafficked during the same period in 2022, which still represented a significant increase compared to 2021. The conclusion is that Africa, as a continent of origin, will become increasingly significant considering the strong population growth and various crises in fields such as the economy, the

environment, nature, and politics. Human trafficking organisations in various African countries, particularly in Morocco, Tunisia, Libya, Egypt, Niger, Nigeria, and Somalia, are seeing a steady flow of migrants willing to be trafficked, which results in enormous criminal profits running into billions of Dollars.

In the summer of 2023, a significant increase in trafficking via this route was noticeable. Just one weekend in September saw more than 100 ships simultaneously bringing around 5,000 migrants to Lampedusa, Italy. The Italian Island of Lampedusa is only 144 kilometres from the Tunisian coast and is one of the ports most frequently targeted by trafficking organisations and NGO ships. A state of emergency was declared shortly afterward in Lampedusa, and the situation was on the verge of escalating.

This situation clearly shows that the prevention of migration and the “rescue” of migrants from the Mediterranean only seem to be contradictory. Only the trafficking organisations profit and stir up political discussions among the population through their activities. Some governments, with Austria as a leader in this case, have started to sign agreements with North African states. These agreements aim to reduce irregular migration and human trafficking through enhanced police cooperation, to ensure faster asylum procedures and repatriations, and ultimately to create legal pathways for migration to the EU.

Interesting migration developments show that Italy is increasingly becoming the focal point for trafficking organisations — as the first EU country where migrants can be well prepared for further trafficking. Although the Italian government is considered very right-wing conservative, the first female head of government, Giorgia Meloni, has not been able to stop the influx of migrants into Italy. Instead, she is asking other EU states for more solidarity and for the acceptance of migrants.

In North Africa, some countries are facing significant challenges in the field of migration, which always also involves the fight against organised human trafficking. Morocco is seen as both a transit country and a country of origin. Algeria has played a lesser role in recent years. Tunisia is a very popular transit country for trafficking groups. However, due to the difficult political situation in Tunisia, many Tunisians have been leaving the country since 2023 and using organised trafficking to reach

Illustration 4: Migrant smuggling routes to Europe



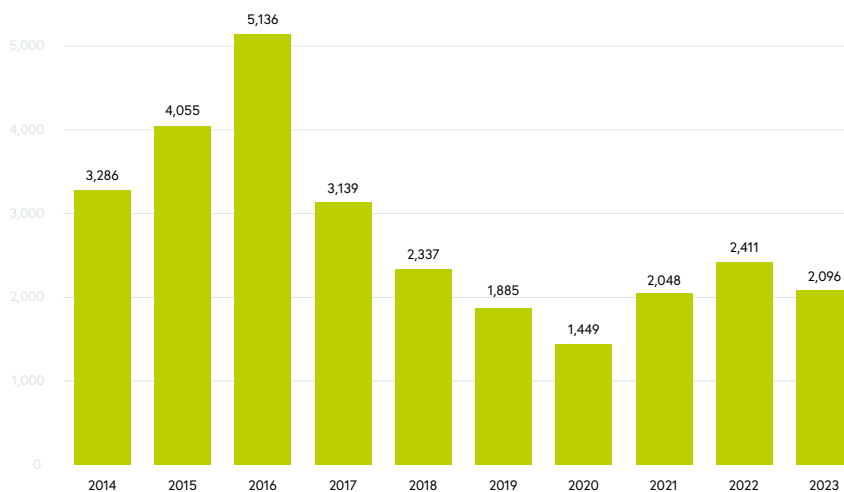
Europe as well. The European Union is now trying to improve its migration issue by providing substantial financial support to Tunisia. Better combating of illegal migration and human trafficking, faster repatriations to Tunisia, and several economic projects are intended to significantly improve cooperation with Tunisia. After two months of signing this migration deal, doubts are growing as to whether this agreement can still work. The exodus from Tunisia is increasing, and trafficking organisations are spreading further in Tunisia.

To meet the demands and counteract the pressure, the Tunisian authorities are now trying everything they can to adhere to this deal. As recently as September 2023, hundreds of arrests were made. With a large-scale operation against illegal migration, security forces targeted trafficking organisations in Tunisian coastal cities to prevent illegal immigration to Italy.

Together with Italy, Austria is now attempting to intensify cooperation with Tunisia through a Joint Operational Office. This office will provide the transfer of know-how, technical support, and training and education for border and criminal police in Tunisia.

The assessment is that the trafficking routes through North African countries via the Mediterranean will continue to be heavily used. The deaths in the Mediterranean are unlikely to end soon, as human trafficking organisations continue to hope for high profits.

Illustration 5: Estimated number of drowned asylum seekers in the Mediterranean 2014–23



Eastern trafficking route or Western Balkans route

Austria has been focusing on this route for years. At the end of 2022, the European Commission presented an action plan for the Western Balkans Route, with the goal of curbing irregular migration along this route. It highlights five pillars: improving border management, accelerating asylum procedures, combating human trafficking, intensifying returns and readmissions, and harmonising visa policies.

Although trafficking groups operate very covertly within their structure, it is evident that there is also cooperation between these groups. When migration pressure is particularly high, the demand for trafficking to the “promised land” can hardly be met. Orders are passed between groups, but at the same time, there is strong competition between them. Especially in northern Serbia, at the Hungarian border, several trafficking organisations have divided the territory along the border with Hungary. Migrants are assigned to a particular organisation, which they are then obligated to use for their trafficking services. If migrants try to cross the Hungarian border on their own, they often face violence. In the first months of 2023, several migrants and traffickers were injured or even killed by gunshot wounds inflicted by other traffickers.

Another significant challenge is that children are often trafficked separately from the adults. Trafficking organisations take the children in separate transports and bring them further along the trafficking route. Par-

ents or other relatives try to prevent this but often have no other choice. The goal of this practice is to ensure full payment for the entire trafficking operation, as the children are only handed over to the parents in the destination country once the trafficking fee has been fully paid.

On social media platforms such as 'Tik Tok', 'Instagram', or 'Telegram', trafficking organisations actively advertise their services. They use the stories and experiences of migrants to build a good reputation. This is comparable to how travel agencies or hotels are rated.

Keynotes

- In Austria, 2022 saw a record high with over 120,000 detections of irregularly present individuals.
- Organised smuggling networks benefit significantly from migration, often exposing migrants to life-threatening risks.
- Despite intensive cooperation between EU states and North African countries, combating smuggling remains a major challenge.
- Countries like Italy and Tunisia face increasing pressure to control migration, while the situation continues to escalate politically and humanitarially.



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Foreign intelligence service activities in Austria

Omar Haijawi-Pirchner

The significance of the Republic of Austria for intelligence services is evident due to its geographical location, the headquarters of multilateral organisations, its role as an EU member, its cooperation with NATO as part of the Partnership for Peace, and its function as an economic and research centre. While other EU member states have already implemented numerous legal reforms, Austria is not only a hub but also a refuge for foreign intelligence services due to the lack of a legal framework—with potentially long-term and serious consequences. A high level of activity by foreign intelligence services in and from Austria can also be expected in 2025. In order to safeguard Austria's international reputation and security, it is necessary to bring about a change in the current status (legal basis, strategies, and powers).

Austria as a hub and refuge

The significance of the Republic of Austria for intelligence services is evident due to its geographical location, the headquarters of multilateral organisations, its role as an EU member, its cooperation with NATO as part of the Partnership for Peace, and its function as an economic and research centre. Due to its neutral foreign policy and the lack of legal frameworks, Austria has been considered easy operational ground for years. Additionally, the Austrian counterintelligence service, while largely able to monitor the high number of intelligence activities as regards quality, can only do so quantitatively to a limited extent. This is simply due to the very large number of diplomatic representatives present in Austria, who are frequently used as cover for intelligence officers.

Austria is not only seen as a hub for intelligence activities but also provides a sanctuary for foreign intelligence services. Other EU countries have already implemented numerous legal reforms, equipping their own services with effective powers, tightening penalties for espionage, and enforcing harsher foreign-policy consequences for diplomatic cover operations. As a result of these offensive and effective measures by neighbouring states, the activity of foreign intelligence services has shifted to Austria. This displacement subsequently leads to these services operating from Austrian territory to other EU states. Since the fight against foreign intelligence services can only be successful in a pan-European context, such measures from other EU states are thus weakened.

Lack of authority and low penalties

Other disadvantageous factors include the low number of expulsions, which consequently leads to large and operational intelligence residencies. Due to the lack of appropriate countermeasures, high activity of foreign intelligence services in and from Austria is still expected in 2025. The limited legal powers of counterintelligence make any in-depth investigation difficult. Additionally, Austrian substantive criminal law, when compared to other European countries, is only partially applicable to intelligence-relevant offences and is characterised by low penalties.

Low social awareness

Not only is the lack of adequate authority critical, but the understanding of society regarding this issue must also be improved. The activity of foreign intelligence services is often evident only indirectly and, as such, difficult to grasp, but it can have long-term and severe consequences. These can range from destabilising political and democratic systems and significant economic and scientific losses to the outbreak of wars and the suppression of large populations. Furthermore, state-terrorist acts, occasionally carried out by intelligence services, can indeed pose an immediate threat to life and limb.

Requirements for effective counter-espionage

In order to ensure Austria's international reputation and security, it is necessary to bring about a change of the current status. The establishment of an effective counterintelligence system requires several steps: First, it is imperative to tighten the criminal liability for the activities of foreign intelligence services. This alone would already make a significant contribution to effective counterintelligence. Furthermore, a strategy should be developed to take effective measures against diplomatically protected persons while safeguarding the foreign-policy interests of the Republic as best as possible. A functioning interplay between these partially divergent interests would at least restrict the hitherto full freedom of action of foreign intelligence services.

The most important element of a functioning counterintelligence system is the effective handling of foreign intelligence services by the Austrian intelligence services, who must be given appropriate methods of intelligence gathering. Here, the analysis of modern electronic communication, such as messaging services, and the tracking of travel movements through flight-data collection within the Schengen Area or number-plate checks at border crossings, should be particularly emphasised.

What should we expect for 2025 and beyond?

Current global political events are further intensifying the already high baseline of intelligence activity in Austria. Of particular importance

here are the Middle East conflict, Russia's war of aggression against Ukraine, and the tensions between China and the West. Austria hosts a number of international organisations, which play a significant role in diplomatic negotiations regarding the Russian invasion and the Middle East conflict. These organisations are consistently defined as relevant intelligence targets for foreign intelligence services. Therefore, in 2025 one can expect intelligence activity to remain at the same level or potentially to increase, depending on the future developments of these conflicts. In contrast, the conflict between China and the West is characterised by the issue of proliferation. Chinese intelligence services are actively gathering know-how in both the academic and private sectors. In both areas, Austria is at the forefront of technological development, which means that it can be assumed that such intelligence activities will continue at least at the same level of intensity in 2025.

Keynotes

- Austria serves as both a hub and a safe haven for foreign intelligence services.
- Effective offensive measures in neighbouring states have led to a shift of foreign intelligence activities to Austria.
- The current limitations for legal powers regarding counterespionage could have long-term and severe consequences, such as the destabilisation of political and democratic systems.
- Due to a lack of adequate countermeasures, high levels of foreign intelligence activity in and originating from Austria are expected to continue into 2025.



HBf/Daniel Trippolt

The development of European armed forces

Implications for Austria

Bruno Günter Hofbauer

The Russian war of aggression against Ukraine has led to comprehensive changes in the armed forces of Europe. As a result, security preparedness within the Union will continue to be split among the EU member states. The European Union will continue to focus on security issues, while NATO will handle collective military defence. NATO remains the dominant military organisation where matters of armed forces development, mission planning, and interoperability are addressed. Austria must prioritise the restoration of its defence capabilities at the centre of its efforts in the further development of its Bundesheer.

Changes in the European armed forces

The shockwave of the Russian war of aggression against Ukraine has led to comprehensive changes in the armed forces of Europe. The effects of this war are being felt in all major military areas. In the states of the Western alliance, the goals of building enhanced military capacities are being massively advanced. In the short term, the goal is to increase deterrence against Russia, while the long-term objective is to restore comprehensive defence capabilities within the framework of the North Atlantic Alliance.

Russia is in the process of strengthening its military posture, especially in the strategic direction towards the West. It is pursuing an equipment programme in the military-industrial complex and expanding its connections with countries such as Iran, North Korea, and China. However, it will take time to bring the armed forces back to their pre-invasion state and to eliminate the weaknesses that have emerged in this war. This backlog in the conventional field, however, has no impact on capabilities for operations below the level of open hostilities or on nuclear capabilities.

As a result of the war on European soil, Austria has begun a reconstruction programme for its military national defence. The Austrian Armed Forces 2032+ development plan aims to enable the Bundesheer for national defence in all domains and to make high-quality capacities available for operations within the framework of the international community.

Security provision based on division of labour in the EU

For Europe, NATO will remain the dominant military organisation over the next decade. The idea of an independent, common European defence framework within the European Union has been exposed as an illusion by geopolitical realities. Almost all EU member states are part of NATO and handle matters related to the development of armed forces, operational planning, and interoperability via NATO. The division of roles, where the EU focuses on security issues while NATO manages common military defence, will become an even more defining factor in the coming years.

The armed forces of Western European states are currently investing and will continue to heavily invest in military goods over the next years, primarily in order to increase their conventional capabilities. In the land forces, the revival of the division and corps levels in a central leadership role is evident. However, it will take years before these new structures function smoothly, new capabilities are integrated into the armed forces, and full operational readiness is achieved. Therefore, European states face the challenge of making the right decisions today for warfare in the 2030s, while also having to respond to the current threat.

The central issue for the armed forces of Western Europe is the small scale, which cannot be compensated for in the short term. The role of reserves is gaining importance in all armed forces, as the war in Ukraine has clearly demonstrated that endurance can only be achieved through mobilisation and a corresponding reserve component in all branches of the armed forces. Strategic decisions will have to be made here that are not based solely on voluntariness. Operational command will increasingly be supported by advanced technologies and AI-based autonomous systems in their deployment. However, these new technologies will still not reach the maturity level in the medium term to compensate for the lack of scale. Overall, in light of the next decade, there is an increasing risk of a conventional confrontation due to the growing military potentials in the East, which could arise from initially latent but subsequently escalating waves of hybrid warfare.

Challenges for Austria

For the further development of the Austrian Armed Forces, it can be concluded that the restoration of defence capabilities must be placed at the centre of efforts. Austria cannot assume that a military escalation in Europe would have no military consequences for itself. Its armed forces will have to manage sub-conventional and conventional attacks of varying intensity in the information environment, in cyberspace, in airspace, and on the ground. In the event of a military conflict, the Austrian Armed Forces will face the challenge of operating against a highly dangerous, unpredictable, and initiative-driven adversary. With the current mobilisation strength, a simultaneous, nationwide deployment across the entire country is not possible. This requires the distributed use of forces, which must evade enemy reconnaissance across all domains, engage in

deception and counterintelligence measures, and have access to a comprehensive situational picture. This is the only way to take the initiative and quickly concentrate troops in the right place.

By increasing combat power, leadership and responsiveness as well as endurance, the capability of the Austrian Armed Forces to defend against military attacks on Austria will be restored. To achieve this, it is necessary to push for the cooperation of all elements of the armed forces at all levels in order to ensure the operational capability of the armed forces as a whole. New equipment will be integrated into modern-structured units, with particular emphasis placed on threats from the air and the electromagnetic spectrum. At the same time, existing systems will remain in use in the medium term, though their interior will be regularly upgraded with new technologies to expand existing or to build new capabilities.

Especially for Austria, as an EU member outside of NATO, it is crucial not to present an easy target in the heart of Europe, but to deter adversaries from launching an attack through strong military response and defence capabilities.

Keynotes

- The division of responsibilities, with the EU focusing on security issues and NATO handling collective military defence, is expected to solidify further in the coming years.
- NATO remains the defining military organisation for Europe, managing force development, operational planning, and interoperability.
- Restoring the Austrian Armed Forces' defensive capabilities must be a central focus of its development efforts.
- Enhancing combat power, command and response capabilities, and endurance will restore the Austrian Armed Forces' ability to repel military attacks on Austria.



War and the state of war

When is an attack an attack?

Ralph Janik

The consequences of the Russian war of aggression against Ukraine can be felt by the whole of Europe. A direct confrontation with Vladimir Putin's regime seems far more realistic than it did just a few years ago. However, from the perspective of international law, it is not always clear when a war is deemed to be a war. It focuses on conventional military attacks, whereas numerous grey areas exist for atypical or hybrid manifestations of war.

Restrictive interpretation of the right of self-defence

The rules regulating when states are allowed to go to war (*ius ad bellum*) and when not (*ius contra bellum*) date back to the time of the two World Wars. They are, at least at first glance, unambiguous: any form of

use of force is prohibited, (only) self-defence is permitted. In addition, the United Nations Security Council can authorise states to intervene in other countries' affairs or to come to the aid of victims of an attack.

However, there is some legal confusion here: Article 2, Paragraph 4 of the United Nations Charter prohibits—without exception—the use of force. Article 51, on the other hand, enshrines the right to self-defence against an armed attack. However, these terms are not synonyms. Force is “less” and, therefore, does not necessarily trigger the right of self-defence. As the International Court of Justice emphasised in the Nicaragua case (which concerned the role of the USA in the civil war there during the 1980s), an “armed attack” is the “most serious form of the use of force.” This results in a gap: Financial support for rebels, insurgents, or terrorists constitutes an (unauthorised) intervention. Their arming and training even amount to (indirect) violence but not to an attack. In other words: Governments—formally speaking—do not have the right to take military action against those countries that support their adversaries.

This is a restrictive interpretation of the right to self-defence, but it has an understandable background: International law seeks to limit (legitimate) warfare to clear and severe cases. The brutal interplay between attack and defence only begins at a certain (intensity) threshold. An attack must either be of a military nature or at least have comparable effects to military means.

Below the threshold of an “armed attack”

Isolated border skirmishes, unauthorised border crossings, or unauthorised overflights are not meant to trigger a war. This applies even to targeted killings of individuals, such as the Russian helicopter pilot who was likely murdered in Alicante in February 2024, just a few months after his desertion, by the Russian intelligence service. It is a criminally relevant case, and Spain can arrest and convict the murderers based on the principle of territoriality—but Spain was not attacked (in terms of international law). The violence was directed against a person who was on Spanish territory, but not against the Spanish state itself.

It is needless to say that, in practice, countries do not always adhere strictly to the requirements set by the International Court of Justice. A particularly striking historical example is the British response to three attacks by the Yemeni Air Force in 1964, in which no people were killed, but two camels were. In the Security Council, there were no fundamental objections to the British retaliatory strikes—instead, there was an emphasis on keeping things in perspective.

This contrast between theory and reality also plays a role in the Russian-European escalation dynamics. Russia has so far avoided an open and direct confrontation with the EU or with individual countries. Instead, it targets the democratic Achilles' heels of the West: freedom of speech and elections, which are actively exploited by those who want to abolish both or otherwise misuse them for their purposes. Liberal democracies cannot produce the elements necessary for their survival by themselves (at least not in accordance with their principles—the Böckenförde dilemma).

It is clear that influencing elections, spreading perhaps crude but effective propaganda, or providing financial and other support to political parties may constitute unfriendly acts, sometimes in violation of international law, for example when inciting revolutions. However, they are not attacks within the meaning of the right of self-defence. This also applies to sanctions, which, despite their sometimes-devastating impact on the target countries, do not count as attacks due to their civilian nature. On the contrary, the General Agreement on Tariffs and Trade explicitly allows its signatories—both the EU and its member states as well as Russia—to impose sanctions based on security interests.

The “accumulation of events” theory

As long as Russia continues to pursue a strategy of small-scale attacks against the EU and its members, it will remain difficult to determine when the threshold to war has been crossed. However, another ruling by the International Court of Justice should be noted, i.e., the decision regarding the destruction of three oil platforms in the Persian Gulf by the US Navy. In this case, the court at least seemingly supported the theory that several small, strategically and temporally linked attacks

could be aggregated and treated as a “larger” attack, thus triggering the right to self-defence.

According to this widely accepted line of thought, an increase in Russian sabotage acts, even in cyberspace if their effects can be compared to kinetic attacks, could mean that Russia would eventually be classified as an aggressor in the legal sense. Once this happens, the EU, NATO, and their members could invoke the right to self-defence—but they would not be obligated to do so. There is a right, but no duty, to defend.

Keynotes

- According to the UN Charter, all use of force is prohibited, but the right to self-defence under Article 51 requires an armed attack.
- Not every act of violence crosses the threshold of an “armed attack.” International law deliberately maintains a high threshold for legitimate warfare.
- Actions such as election interference, propaganda, sanctions, or cyber-attacks are considered unfriendly or unlawful acts but do not typically qualify as force under the UN Charter.
- Russia deliberately employs pinpricks and hybrid attacks to destabilise Western democracies without provoking open confrontation. Only when such acts collectively reach the intensity of an armed attack could the right to self-defence be invoked.
- The boundary between war and merely unfriendly acts is often blurred in practice, complicating the responses of affected states and creating legal and political uncertainties.



HBF/Daniel Trippolt

Conflicts with implications for Austria

Michael Grafl

The growing instability in conflict regions such as the Western Balkans, Eastern Europe, the Middle East, and Africa has far-reaching consequences for Austria's security, economy, and society. Ethnic tensions and unresolved conflicts in the Western Balkans, as well as geopolitical tensions in Eastern Europe particularly due to the Russian war of aggression against Ukraine, are increasing the threat level for the entire European environment. At the same time, instability and the threat of terrorism in the Middle East, as well as political and economic upheavals in Africa, are intensifying migration movements that also directly affect Austria. These developments require Austria actively to participate in international stabilisation operations and to strengthen its security-policy capacities in order to effectively contain the effects of global conflicts on the country.

In recent years, conflicts worldwide have drastically escalated. In an increasingly unstable global security situation, conflicts in the regions

of the Western Balkans, Eastern Europe, the Middle East, and Africa are not only of regional importance but also directly relevant to Austria. The current developments in these regions affect not only Austria's security situation but also its economic and societal stability, despite Austria's neutral position.

After the rapid withdrawal of international stabilisation forces from various areas—from Afghanistan to the Sahel zone—the trend continues toward the deployment of armed forces from a coalition of the willing and able. At the same time, there is a noticeable decline in multinational stabilisation missions of the United Nations as well as in robust operations under the EU's Common Security and Defence Policy (CSDP), in favour of training and, subsequently, advisory missions.

Western Balkans

The Western Balkans are marked by ethnic tensions and unresolved territorial issues. The events of recent years, both in Kosovo and in Bosnia and Herzegovina, show that the fragile stability could collapse at any time. For Austria, as a neighbouring country with political and, especially, strong economic ties to this region, there is a potential threat through migration flows and a destabilisation of the regional environment. The tense situation could affect Austria, particularly due to the ethnic connections and the diaspora in Austria. Austria has been heavily involved in stabilising the region for decades, including its participation in EUFOR ALTHEA in Bosnia and Herzegovina and in KFOR in Kosovo. A renewed escalation could necessitate an intensification of these engagements.

Eastern Europe

In Eastern Europe, the conflict between Russia and the West continues to intensify, with serious consequences for Europe's security. The war in Ukraine is currently the most severe threat to European security. Russia's aggression against Ukraine has led to a shift in thinking in Europe. The economic impacts of the conflict with Russia and the threat of further escalation of the conflict present serious challenges. In response, both the EU and NATO have initiated measures to increase their de-

fence capabilities. Despite its military neutrality, growing tensions between Russia and NATO or the EU could, due to Austria's geographic location, have repercussions for Austria's security. A military attack on an EU member state would represent a special challenge. This would require Austria to make a corresponding contribution due to the EU mutual assistance obligation under Article 42(7) of the Treaty on the European Union, taking into account the so-called "Irish Clause."

Middle East

The Middle East also remains unstable. The destabilising role of Iran and its allies was once again made clear during the conflict in Gaza and Lebanon. Terrorism, as well as regional conflicts in the Near and Middle East, will continue to have major impacts on Europe in the foreseeable future, primarily through the threat to maritime supply routes, ongoing migration movements, and the further spread of terrorist ideologies. Austria must continue to contribute to the stabilisation of the region within the framework of international missions.

Africa

Africa is affected by political upheavals, economic stagnation, and the spread of extremist ideologies. Many African states are distancing themselves from Europe and moving closer to Russia and China. The Sahel region is suffering from state failure, terrorism, and an increasing number of armed conflicts. The continued instability in these states has far-reaching consequences, not only for migration flows across the Mediterranean but also for security in Europe. Terrorist groups could use these unstable areas to reorganise and plan attacks in Europe. Austria, although geographically distant, is affected as part of the EU. In this region too, Austria must continue to try to contribute to stabilisation through international missions in order to contain the aforementioned threats on the African continent.

Conclusions

The impacts of the conflicts on Austria as outlined are diverse. The risk of terrorist attacks and other types of asymmetric threats is increasing. Inter alia, Austria is affected by the consequences of uncontrolled migration flows triggered by the conflicts in these regions. The Austrian economy would be severely impacted by a potential destabilisation of Europe. Further intensification of the competition between the major powers, especially between the USA and China, could lead to a new era of the Cold War, with severe implications for global security.

Efforts for a stable Europe are supported by Austria's active participation in stabilising the European environment. Austria must contribute within its capabilities and within the legal framework conditions. The military plays a special role in this. The Austrian Armed Forces must be capable of contributing to regional stabilisation in cooperation with other states, while taking into account Austria's military neutrality.

Keynotes

- Increasing instability in regions such as the Western Balkans, Eastern Europe, the Middle East, and Africa directly impacts Austria in terms of security, economy, and migration.
- Ethnic tensions and unresolved conflicts in the Western Balkans threaten regional security, potentially triggering migration flows and disrupting Austria's economic connectivity.
- Russia's war of aggression against Ukraine and tensions between Russia and the West pose a serious challenge to European security.
- Conflicts in the Middle East heighten the threat of terrorism, migration flows, and the insecurity of supply routes.
- Instability in the Sahel and other African regions fosters uncontrolled migration and the spread of extremist ideologies.
- Active participation in international stabilisation missions and strengthening the Austrian Armed Forces are essential to ensuring Austria's security and economic stability.



Austria in missions and operations

Martin Dorfer

Russia's large-scale invasion of Ukraine in 2022, which violated international law, led to a reorientation of the Austrian Armed Forces with a focus on military national defence. The Austrian Armed Forces contribute to European security by participating in missions such as EUFOR, KFOR and UNIFIL. Deployments abroad ensure peace and cultivate conflict prevention without jeopardising Austria's neutrality. Geopolitical tensions, climate change, and a weak will to defend require further strategic development in order to ensure long-term defence capabilities.

The unlawful Russian invasion of Ukraine in February 2022 marked a turning point for the Austrian Armed Forces. With the new military force profile 'Unser Heer' ('Our Army'), the foundation was laid for the alignment of the armed forces with military national defence and a clear focus on international deployments. The established military strategic goal is to make the Austrian Armed Forces capable of defence

again by 2032, with concrete implementations taking place through the Austrian Armed Forces 2032+ development plan.

The Austrian Armed Forces always maintain forces for military operations both domestically and internationally. The tasks assigned to the Bundesheer range from military national defence and the protection of constitutional institutions to safeguarding the democratic freedoms of citizens and maintaining internal order and security, as well as providing assistance in case of natural disasters and emergencies. Thus, the armed forces ensure comprehensive security for the Austrian population. Furthermore, the armed forces are involved in international operations for conflict prevention and international crisis management within the United Nations, the European Union, NATO, and the OSCE, making a significant contribution to European security preparedness. Despite the reorientation of the Austrian Armed Forces with a focus on domestic military tasks, the high-quality contribution to ongoing international operations remains the focus of operational military leadership.

The Bundesheer participates in several international missions to implement political and strategic objectives, with a focus on the Western Balkans and the Middle East. The largest contingents are located in Bosnia and Herzegovina under the leadership of the European Union (EUFOR), in Kosovo as part of the NATO-led KFOR mission, and in Lebanon—the Middle East—within the framework of the United Nations (UNIFIL). In addition, Austrian soldiers are deployed as staff officers, experts, and military observers in the extended crisis arc. Additionally, elements for comparable commitments in Austria are maintained by the armed forces within the framework of Operational Reserve Forces, as NATO reserve forces, or as Intermediate Reserve Forces within the EU, which could be deployed to reinforce contingents in Kosovo or at EUFOR. A significant contribution is made by the Bundesheer to the EU Battlegroups (EUBG), where it will assume the logistical command role in the 2025 Germany-led battlegroup. Austria also engages in several civil-military operations and humanitarian missions, particularly in the field of disaster protection. Participation in these missions documents that Austria also plays an active role abroad in non-conventional conflict situations.

Objective and purpose of international operations

Austria's engagement in international operations generally serves external and internal political objectives, a long tradition of neutrality, and the expected contribution to peacekeeping and peace maintenance within the European security structure. The participation of the Austrian Armed Forces in international operations is seen as an active engagement to promote peace, security, and stability in the mission areas, and thus also for the EU. The desire to make a direct contribution to international peacekeeping can be seen, from a state perspective, as both a political and moral obligation. By stabilising conflict regions and reducing the causes of migration, Austria takes an active role without calling into question its neutrality.

The Federal Constitutional Act on Cooperation and Solidarity in Deploying Units and Individuals Abroad specifies the purposes for which units and individuals may be sent abroad and the legal modalities that must be adhered to in order to implement Austria's strategic goals. In the context of providing assistance in case of natural disasters abroad, elements of the Bundesheer may be deployed upon request by a state, the United Nations, or the European Union for support, as authorised by the Minister of Defence.

Deployments for peacekeeping operations take place only within the framework of an international organisation, preferably as part of a UN Security Council-mandated operation or in the implementation of EU decisions under the Common Foreign and Security Policy. Deployment then occurs through a decision by the federal government, in agreement with the main committee of the National Council. After the political decision to participate, the Ministry of Defence processes potential deployment options of the Bundesheer, with the preferred option being presented to the Minister by the Chief of Defence Staff for the final decision. After approval, the military strategic planning directive is created, which forms the basis for the development of an operational deployment concept.

Challenges of future operations

To address the challenges of future operations, the Austrian Armed Forces must prepare today to ensure that the strategic objectives can still be achieved in the future. The development of the future international ambitions of the Austrian Bundesheer will be ground-breaking. This includes efforts toward a deployable unit under the EU's Rapid Deployment Capacity, the 2027 EUBG, the creation of a pool of experts, and the expansion of military advisory capabilities. As part of international humanitarian and disaster relief, the portfolio of capabilities of the Armed Forces Disaster Relief Unit will be structured into six specialised modules by the end of 2025, each undergoing a three-step certification process in accordance with the guidelines for the European Civil Protection Mechanism, to be integrated into the pool of capabilities available for international humanitarian and disaster relief.

However, security-policy challenges cannot be solved by the armed forces alone; they must be addressed in the context of a whole-of-government approach. Geopolitical tensions, the effects of climate change, and the low willingness within the population to serve in the military pose significant challenges to the armed forces regarding their future deployability. It will be crucial to continue developing military capabilities, strengthen the willingness of the population to serve, and intensify international cooperation to effectively counter the diverse threats of the future. Without a comprehensive rethink and strategic realignment, Austria's defence capability may diminish in an increasingly unstable global environment.

Keynotes

- Russia's unlawful attack on Ukraine in February 2022 marked a turning point for the Austrian Armed Forces.
- The new force profile 'Unser Heer' establishes the foundation for focusing the armed forces on national military defence and clearly defined foreign deployment priorities.
- The ÖBH 2032+ development plan aims to ensure Austria's defence capability by 2032.
- The Austrian Armed Forces' foreign deployment priorities include the Western Balkans and the Middle East.
- Participation in international operations such as EUFOR, KFOR, and UNIFIL is complemented by contributions to EU Battlegroups.
- Geopolitical tensions, climate change, and a lack of willingness to serve require strategic development and comprehensive national security measures to ensure Austria's long-term defence capability.



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Artificial Intelligence and autonomy in the military

David Song-Pehamberger

Artificial Intelligence enables revolutionary and already rapidly advancing developments in all areas of national defence. Particularly in Ukraine, enormous technological leaps are currently being observed, which have already significantly changed the nature of the battlefield. EU member states face the challenge of remaining capable of defence in the geopolitical race for new technologies. This is to be achieved through long-term collaborative initiatives.

Armed forces worldwide are currently undergoing a process of technological transformation, driven by increasing digitalisation, networking, and the enrichment of sensor networks. Artificial Intelligence (AI) is the catalyst in this process. AI enables the fusion and analysis of massive data streams in software applications as well as the widespread use of robotics. In this context, processes are increasingly automated and gradually made autonomous. AI systems are revolutionising the traditional command-and-control systems of armed forces. The growing

interconnectivity facilitates the gradual breakdown of domain boundaries through multi-domain operations. This means that the domains of land, sea, air, space, and cyber increasingly work together, enabling integrated mission planning and execution. Moreover, new methods of effective data processing offer far more efficient possibilities in strategic planning and enhanced reconnaissance. In the area of software applications, the relevance of cybersecurity and defence is also significant, as AI models are increasingly used for both generating malware and improving the defence against cyber-attacks.

The use of AI, however, extends far beyond the software aspect and involves fundamental changes in hardware, including maintenance and logistics, as well as unmanned systems, such as those used for reconnaissance, operating in danger zones, and mine clearance. The most controversial area, however, is that of autonomous weapon systems. Developments in this field are advancing at the fastest rate, as demonstrated by the extremely short innovation cycles in the context of the Russian invasion of Ukraine.

Developments on the battlefield

The battlefield in Ukraine is developing rapidly. Within a few months, technological leaps have been made that would have taken several years in a peacetime setting. Developments are being observed that were not expected until a decade from now, such as the widespread use of unmanned systems and complete battlefield transparency, which have fundamentally changed the strategic environment.

With relatively inexpensive drones and missiles, Ukraine managed to neutralise the once-powerful Russian tank fleet and the Black Sea fleet. Ukraine already has production capacities for four million drones annually, with most of these devices costing only a few hundred Euros to manufacture. Due to the extremely high production capacities and rapid development cycles, massive technological advancements are occurring there in a very short period of time. At the beginning of the war, primarily remote-controlled weapon systems and guided missiles were deployed. This led Russia and Ukraine to permanently disrupt the electromagnetic spectrum on the battlefield through jamming and spoofing, thus rendering mobile positioning as well as radio and other communication meth-

ods useless. This, in turn, made it necessary to increase the autonomy of weapon systems. Increasingly automated systems can perform their functions even without existing communication channels, and they have response times that sometimes exceed human capabilities.

The use of such autonomous weapon systems naturally raises a number of ethical questions, particularly regarding the dehumanisation of armed conflicts. As a result, several small states have been calling for a comprehensive ban on autonomous weapon systems that do not operate 'in the loop' at the United Nations for several years. This primarily concerns systems that perform lethal functions without human intervention. Costa Rica is often cited as a role model by proponents, as it was the first country to completely ban autonomous weapon systems nationally. However, it is worth mentioning that Costa Rica does not have a military and would be defended by the United States, its treaty ally, in the event of an armed attack. The USA, however, like all major military powers, rejects a comprehensive ban on autonomous systems. The current developments on the battlefield mean that in-the-loop systems are increasingly becoming unusable, and the only ethically questionable alternative would be to send humans to the front lines instead of machines. This is precisely what is happening on the Russian side, where over 1,000 soldier casualties are recorded in Ukraine per day.

Europe's catch-up

It has been widely recognised since the beginning of the Russian invasion of Ukraine that European armed forces have to catch up significantly in terms of national defence. The fact that Europe is also lagging behind in several emerging technologies exacerbates the situation. This includes the development of AI models and the necessary semiconductors.

The USA and China continue to be the frontrunners in the research and development of military AI systems and robotics, as they are in a geopolitical race for dominance in high technologies. In terms of application, Ukraine and Russia are currently the leaders. Europe is lagging behind, which is partly due to the fragmented defence industry in European states. The newly established EU Defence Commissioner aims to address this and promote collaboration among the 27 EU Member

States. Additionally, the EU Defence Agency launched the Autonomous Systems Community of Interest (ASCI) in 2024. The ASCI brings together relevant specialists and institutions from all member states in the fields of national defence, research, and the private sector at various levels effectively to coordinate and advance the necessary developments. This is intended to facilitate collaboration in developing common systems (hardware) and platforms (software) to support national defence. Furthermore, the development of largely absent ethical and regulatory frameworks, including the inherent dual-use nature of many AI applications, is expected to be pushed forward. Although the EU is already a pioneer in AI regulation with its AI Act, it explicitly excludes the areas of national security and defence from its scope.

Implications for Austria

Austria must also face these new developments. The high-tech and rapid development of AI systems and robotics presents a challenge that no European state can master alone. The EU provides a suitable framework for a holistic development and addressing of these challenges. The level of ambition among the member states is high. Austria can also benefit from this, not only in strengthening its own defence capabilities and capacities and in contributing to research and development, but also in creating balanced ethical norms and standards.

For this purpose, in early 2024 the Austrian Ministry of Defence issued its first strategy on AI, which envisions a step-by-step implementation of AI as part of the digital transformation of the armed forces and the ministry's administration. This will be done within a ten-year implementation timeframe. The ethical framework and careful certification of AI systems is also a focus. Another key area is cooperation with EU partners within the framework of the Common Security and Defence Policy, as the challenges of the new battlefield and the technological environment of disruptive technologies require wide, cross-sectoral cooperation within the European framework.

Keynotes

- Artificial Intelligence is a significant factor in the technological transformation of modern armed forces.
- Autonomous weapon systems are rapidly advancing in response to the modern battlefield, as demonstrated in Ukraine.
- Developments in Artificial Intelligence and autonomy raise complex ethical questions.
- EU member states aim to catch up in this critical technological field and address issues of standardisation and regulation.



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Current cyber threats and Austria's countermeasures

Sylvia Mayer, Caroline Schmidt, and Julian Vierlinger

Crimes and conflicts are expanding into and within cyberspace. The threat landscape is becoming more complex as actors such as states, hacktivists, and cybercriminals increasingly cooperate. Forms of attack include overload attacks (DDoS attacks), data theft, and disinformation. New technologies like Artificial Intelligence (AI) and quantum technology increase the risk: AI enables more precise attacks and disinformation, while quantum computers could potentially break future encryptions. At the same time, monopolistic structures and supply chain risks heighten vulnerabilities. Countermeasures in Austria are based on a holistic approach involving networking, infrastructure security, and awareness-building. This strengthens resilience against the dynamic challenges in cyberspace.

ICT systems have become indispensable in the spectrum of human activity. Digital identities and processes are merging with the physical

world, and large parts of once-physical realities are shifting into cyberspace. As a result, security-relevant phenomena such as crime and conflicts are also expanding into cyberspace.

New actors, patterns of behaviour, and technologies

The threat landscape in cyberspace is undergoing a transformation—specifically due to the blurring of boundaries between cyber actors, constantly changing patterns of behaviour, and the emergence of new technologies. Traditionally, three main actors are discussed in the cybersecurity space: first, the state, which uses its cyber capabilities not only in the security domain for defence but also for espionage and warfare; second, the private sector, which commercially offers cybersecurity services; and third, cybercriminals, who use cyberattacks for unlawful enrichment.

These distinctions are dissolving: The global black market for offensive cyber activities is growing and being exploited by various actors. These dynamics complicate attribution and threat assessment, and they raise difficult legal and diplomatic questions.

In the run-up to the 2024 Austrian parliamentary elections, widespread but short-lived disruptions occurred in cyberspace. They were caused by targeted overload attacks (Distributed Denial of Service, DDoS) against websites of political institutions and critical infrastructure. Various pro-Russian and pro-Palestinian groups were identified as the perpetrators, who sought increased media visibility for their geopolitical agendas through these attacks.

For example, state actors are operating alongside politically or ideologically motivated private individuals ('hacktivists') in cyberspace. Both groups generally act independently, but there are also instances of overlap where state actors influence the hacktivists' actions. State actors usually focus on long-term cyberespionage and significant cyber sabotage attacks, while hacktivists primarily employ DDoS attacks. These are complemented by simple data thefts ('hack-and-leak') and the virtual equivalent of graffiti ('defacement').

In recent years, significant changes in hacktivist behaviour patterns have been observed. Initially, their activities were targeted against individual companies to punish perceived political or social misconduct. With the beginning of the decade, however, the choice of targets has changed, and institutions whose failure is perceived by many people are now increasingly being attacked by hacktivists, which can then be linked to their demands in a media-effective way. The aim is no longer to apply pressure on specific companies but rather to irritate or deeply unsettle the population, with the intention of forcing a behavioural change from political decision-makers.

In the area of new technologies, particularly in the cybersecurity sector, attention must be paid to developments in the field of AI and AI-supported technologies. The growing availability of AI, especially Large Language Models (LLM), can make attacks faster, more precise, and scalable. AI systems that generate images and sound are increasingly becoming a threat to identity theft and disinformation, particularly in the human-machine nexus.

In the foreseeable future, quantum technologies could also pose a serious threat if misused. Quantum computers, with significantly higher computational power than conventional systems, could potentially render current cryptographic standards obsolete. Asymmetric encryption protocols, which are used to secure both civilian internet communication and confidential governmental communication, could be easily cracked by quantum computers. Additionally, the combination of quantum computing and AI could lead to new challenges. As the market for new technologies becomes more monopolistic and supply chain opportunities become scarcer, vulnerabilities related to cybersecurity in the context of new technologies will increase.

A society-wide approach to increasing cybersecurity

To ensure widespread cybersecurity, a comprehensive societal approach based on networking, infrastructure security, and awareness is necessary. Regarding operational networking, domestic, European, and international hubs must be maintained to detect cyberthreats early, communicate transversally, and effectively counter them. Since at-

tacks by state actors often exploit unknown security vulnerabilities, the international sharing of information is an essential part of effective defence. Strategies must be developed with the involvement of key stakeholders from the state, research, private sector, and particularly critical infrastructure, and must be kept up to date.

In Austria, this networking is actively pursued through the National Coordination Structure for Cybersecurity. This structure includes relevant federal ministries such as the Chancellery and the Ministries of the Interior, Defence, and European and International Affairs. It is enriched through partnerships with the private sector, civil society, and research.

Regarding infrastructure security, cybersecurity depends on the availability and application of state-of-the-art technologies and high expertise. The research and education sectors play a crucial role here, where the state can provide guidance and support.

Awareness-building is a task for society as a whole. On the micro level, cybersecurity hygiene standards and cognitive resilience against cyber-based manipulation must be adopted and practiced by individuals. Whether in educational institutions, traditional media, or social networks, low-threshold information offers must reach all citizens. On the macro level, society as both a producer and consumer of network and information technology must maintain an awareness of the value of securing these systems.

The Directorate for State Protection and Intelligence Service, under the Cybersecurity Centre brand, plays an important role in awareness building. Through specialised lectures and consultations, IT leaders are sensitised and integrated into a community, enabling them to warn and support each other in the event of an attack.

Keynotes

- Actors such as states, hacktivists, and cybercriminals are increasingly interconnected, with new technologies like AI and quantum computing making cyberattacks more precise and dangerous.
- Austria adopts a comprehensive approach to cybersecurity, including international networking, securing critical infrastructure, and raising societal awareness to detect and counter threats early.
- Countermeasures in Austria include collaboration between the state, research, business, and international partners to identify and respond to threats. Additionally, infrastructure security is enhanced through the use of modern technologies and the promotion of expertise via education and research.
- By fostering cyber-hygiene and enhancing resilience at both individual and societal levels, awareness of the risks and threats is being strengthened.



The tension between innovation and security in defence research

Christian Resch

The balance between scientific progress and the assurance of security requires a high level of responsibility from researchers on the one hand and institutions on the other. A comprehensive, interdisciplinary, and cooperative approach can help with minimising the risks. In an increasingly complex security-political landscape, the discussion on research security will be crucial for the future of science and the security of Europe.

Challenges

In a world characterised by asymmetric threats, cyberattacks and new security-policy dynamics, with conventional warfare returning as an instrument of state policy in Europe as well, national security faces a

multitude of challenges. At the same time, continuous innovations and technological breakthroughs are taking place, making it increasingly difficult for armed forces to stay up to date and possess proper defence instruments.

Defence research is of essential importance for the Austrian Armed Forces and thus also for the security of Austria. The needs of the Austrian Armed Forces, due to their constitutional tasks, are extensive and require them to be able to respond appropriately to threats in real time. This calls for scientific and technical support in various areas such as capability development and procurement. Anticipating future threats is also crucial.

Risk awareness

Another important aspect of strengthening defence research is promoting the awareness and self-regulation of science regarding research-security-related issues. A broader awareness of the risks that research is increasingly exposed to should be created and embedded within the scientific system. These threats include, in particular, the misuse of research, foreign influence, espionage against employees, and the outflow of know-how and technology abroad. These challenges require not only stronger cooperation between research institutions and security authorities but also active participation by scientists to recognise potential risks early and to take appropriate actions.

The responsibility for research security lies not only with the institutions but also with individual researchers. They must develop an awareness of the potential applications of their work and be willing to make ethical decisions. To effectively manage risks in this area, close cooperation between researchers, institutions, and governments is essential. Regulatory authorities should issue clear guidelines governing the handling of specific materials and technologies. These guidelines must be flexible enough to account for technological developments, but also stringent enough to minimise security risks.

Risk assessment

Furthermore, the challenges in research are even more multifaceted. It is crucial to continuously evaluate in order to identify and minimise potential risks of misuse. A central aspect of research security is risk assessment. Institutions should develop systematic procedures for identifying and assessing dual-use risks. This includes evaluating the potential applications of research results and developing targeted strategies to counteract possible misuse.

Strategic defence research agenda

The Austrian Defence Research Strategy 2032+ represents a comprehensive, long-term concept designed to help address the diverse challenges. An interdisciplinary and cooperative-interoperable approach is indispensable. In particular, joint research projects between EU member states offer access to research and development results that could not be achieved with national resources alone. Defence research investments lead not only to macroeconomic effects but also to positive spill-over effects in the civilian economy.

In the context of the upcoming European Union Research Framework Programme (FP 10), which will come into effect in 2028, a future-oriented design is especially important. The Austrian Council for Science, Technology and Innovation has identified five central thematic areas, including defence research. In this context, it is recommended to increase the FP 10 budget to 200 billion Euros to ensure Europe's competitiveness against the USA and China. Additional special funds should be provided to respond appropriately to crises. The geopolitical tensions of recent years have made it clear that the EU needs proactive security-policy and defence research. Close coordination between civil security and defence research is necessary, with the term "dual-use" in the research sector clearly defined and communicated. Research projects with low Technology Readiness Levels (TRL) should be funded within FP 10, while separate instruments for defence research should be established for projects with high TRLs.

Future-robust approach

Ethical and legal considerations in defence research are complex and require the careful weighing of security requirements against fundamental values. A transparent and responsible approach is essential to ensure that advancements in defence research are in line with ethical principles and international law. To guarantee the fundamental security of the state, research on future threats must begin today.

Keynotes

- Research security preparedness will be crucial for the future of science and Europe's security.
- Recent geopolitical tensions have underscored the need for the EU to pursue proactive security policies and defence research.
- Austria's Defence Research Strategy 2032+ aims to address the diverse challenges in the field of defence research security.
- Balancing progress and security demands a high degree of responsibility from researchers and institutions.

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Brigadier General **Gerald Tatzgern**, BA MA, born in 1967, is the head of the Central Office for Combating Smuggling, Human Trafficking, and Cross-Border Prostitution at the Austrian Federal Criminal Police Office. He also teaches at various universities and organisations such as UNODC, OSCE, and FRONTEX and has specialised in academic work on issues like smuggling, human trafficking, and child trafficking.

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Em. Univ.-Prof. Mag. Dr **Susanne Weigelin-Schwiedrzik**, born in 1955, is a German sinologist and expert on modern history and politics of China. In 2022, she was elected Vice President of the Council of the Austrian Academy of Sciences. She was previously a professor of Sinology at the University of Vienna.

Prof. **Ayşe Zarakol** is a Professor of International Relations at the University of Cambridge and a Fellow of the British Academy. Most recently, she has been the author of “Before the West: The Rise and Fall of Eastern World Orders” (2022), which won six international book awards.

Mag. **Shoura Zehetner-Hashemi**, born in 1982, has been a member of the management board of Amnesty International Austria since 2024. Previously, she worked as a diplomat in the Austrian Foreign Service from 2008 to 2023. From September 2022, she documented events related to the protest movement “Women, Life, Freedom” in Iran and

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