

 Federal Ministry  
Republic of Austria  
Defence

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Risk monitor 2026

The end of order?





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The end of order?

Vienna, 2026

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

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# Table of contents

## 1

<b>Introduction .....</b>	<b>8</b>
---------------------------	----------

### Foreword by the Federal Minister of Defence

Klaudia Tanner .....	10
----------------------	----

### The next chapter for Europe: Security Union

Tinatin Akhvlediani.....	12
--------------------------	----

### 25 years of Women, Peace and Security

Christian F. Saunders.....	17
----------------------------	----

### Austria's security and defence policy environment

Bernhard Richter .....	22
------------------------	----

### Risks in 2026

Ronald Vartok .....	28
---------------------	----

### New order, old principles

Arnold H. Kammel .....	33
------------------------	----

## 2

<b>Global risks and challenges.....</b>	<b>40</b>
---	-----------

### Global risks and challenges

Nikolaus Rottenberger .....	42
-----------------------------	----

### The revival of America First

Rachel Tausendfreund .....	46
----------------------------	----

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

Daniela Schwarzer.....	50
------------------------	----

### Nuclear non-proliferation

Ulrika Möller.....	56
--------------------	----

<b>The Chinese balancing act</b>	
Linda Liang and Sebastian Harnisch .....	61
<b>The South China Sea conflict</b>	
Thomas Eder .....	65
<b>Russia's flexible partnerships</b>	
Sarah Pagung.....	70
<b>India as a global player</b>	
Heinz Nissel .....	74
<b>The threat landscape for Austria's maritime supply chains</b>	
Jan Stockbrügger .....	79
<b>On the danger of a new world economic crisis</b>	
Gabriel Felbermayr.....	83
<b>Militarised seas</b>	
Michael Zinkanell.....	88
<b>Geopolitics in the Arctic</b>	
Kristina Spohr .....	93
<b>The Power of Big Tech</b>	
Johannes Späth .....	99
<b>Current challenges for international law</b>	
Alexandra Duca.....	103
<b>3</b>	
<b>Crises and conflicts around Europe .....</b>	<b>108</b>
<b>Europe's Security environment in 2026</b>	
Günther Barnet .....	110
<b>The War in Ukraine</b>	
Loïc Simonet .....	116

<b>The Western Balkans between Integration and De-Europeanisation</b>	
Marie-Janine Calic.....	121
<b>Destabilisation Trends in South-Eastern Europe</b>	
Florian Bieber.....	126
<b>Reorganisation efforts in the Middle East</b>	
Gudrun Harrer .....	131
<b>Israel's security</b>	
Stephan Stetter .....	136
<b>Regional Power Struggles in the Middle East</b>	
Walter Posch.....	141
<b>Eastern Europe and South Caucasus</b>	
Christoph Bilban .....	146
<b>Security Situation in the Sahel</b>	
Will Brown .....	152
<b>Protracted War in Sudan and the Danger of Regional Consequences</b>	
Sara de Simone and Lucia Ragazzi.....	158
<b>Security Concepts and the Global South</b>	
Oliver Keßler and Siddharth Tripathi.....	162
<b>4</b>	
<b>Risks and challenges for the EU.....</b>	<b>166</b>
<b>Risks and Challenges for the EU</b>	
Klaus Anderle.....	168
<b>Confrontation between Russia and the EU</b>	
Franz-Stefan Gady .....	174
<b>A New Era in Transatlantic Relations</b>	
Josef Braml.....	179

Europe's Post-Colonial Legacy	
Dorothy Makaza-Goede.....	184
Asylum in Austria and Europe	
Judith Kohlenberger .....	189
“Gendered Disinformation” as a Hybrid Tool	
Thilo Geiger.....	194
Cyber defence in Europe	
David Song-Pehamberger.....	198
International Organised Crime in Europe	
Daniela Pisiu .....	202
<b>5</b>	
<b>Risks and challenges for Austria.....</b>	<b>206</b>
Risks and challenges for Austria	
Silvia Angerbauer.....	208
The Return of National Defence	
Bruno Günter Hofbauer.....	213
Austria's Neutrality and the risks of avoiding the debate	
Martin Senn.....	218
A comprehensive strategy for an era of epochal change	
Markus Kornprobst.....	222
Between War and Peace	
Elisabeth Hoffberger-Pippan.....	226
Foreign Military Intelligence Services in focus	
Reinhard Ruckenstein.....	231
Economic National Defence	
Thomas Feßl and Sonja Linskeseder.....	235

Civil National Defence	
Josef Farda.....	239
Intellectual National Defence	
Anna Katharina Obenhuber and Jan Sisko .....	243
The “Preparedness Union Strategy” and Comprehensive National Defence	
Matthias Resch.....	247
6G without Space?	
Robert Toni Pfaffenbauer.....	252
Division as a Strategy	
Roman Schuh .....	256
Marching in step with equality	
Alexander Scheidl.....	260
Securitisation of Climate Change	
Eva Widhalm .....	265
On the Development of Modern Armed Forces	
Martin Dorfer .....	269
Authors	

1

# Introduction



J. TAITENHAYN



BMLV/Daniel Trippolt

## Foreword by the Federal Minister of Defence

Klaudia Tanner

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

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

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

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

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

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



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# The next chapter for Europe: Security Union

Tinatín Akhvlediani

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

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

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

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

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

## **Security as the heart of the European agenda**

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

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

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

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

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

## **Enlargement-Security Nexus**

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

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

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

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

### **Key Messages**

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



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# 25 years of Women, Peace and Security

Christian F. Saunders

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

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

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

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

## **A quarter century of Resolution 1325**

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

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

## Threats to Women, Peace and Security

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

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

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

## The future of the WPS agenda

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

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

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

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

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

## Key Messages

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

# Austria's security and defence policy environment

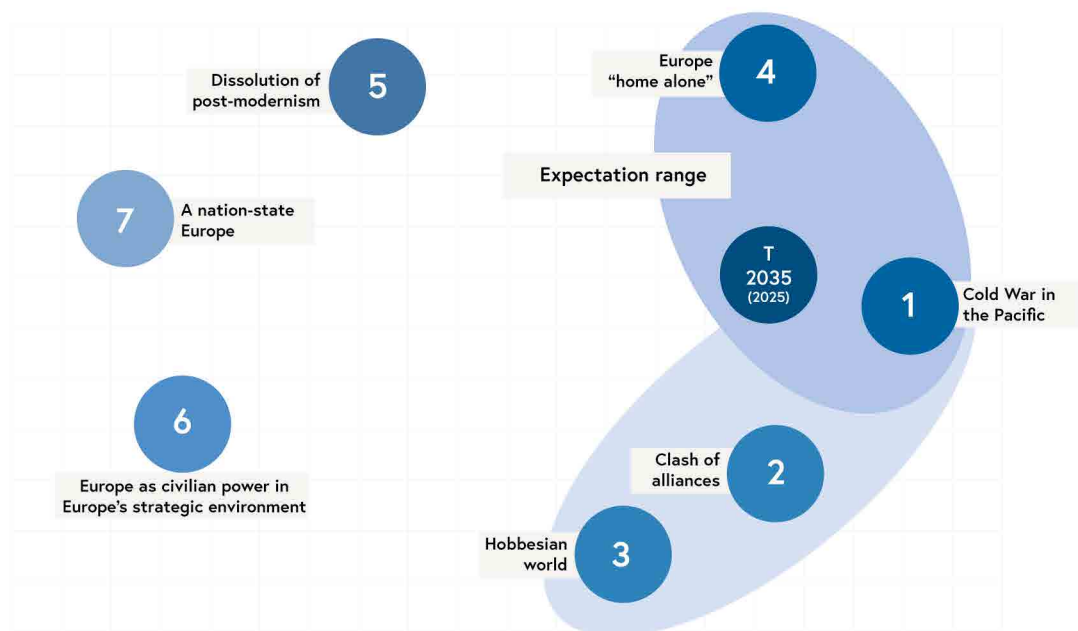
## Developments until 2035

Bernhard Richter

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

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

## Expectation range and trend scenario 2035



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

Illustration 1: Trend scenario 2035

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

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

## **Shifts in the global order**

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

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

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

## **The role of Russia**

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

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

## **The role of NATO**

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

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

## **Geoeconomic fragmentation**

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

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

## **Stability of the Euro-strategic environment**

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

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

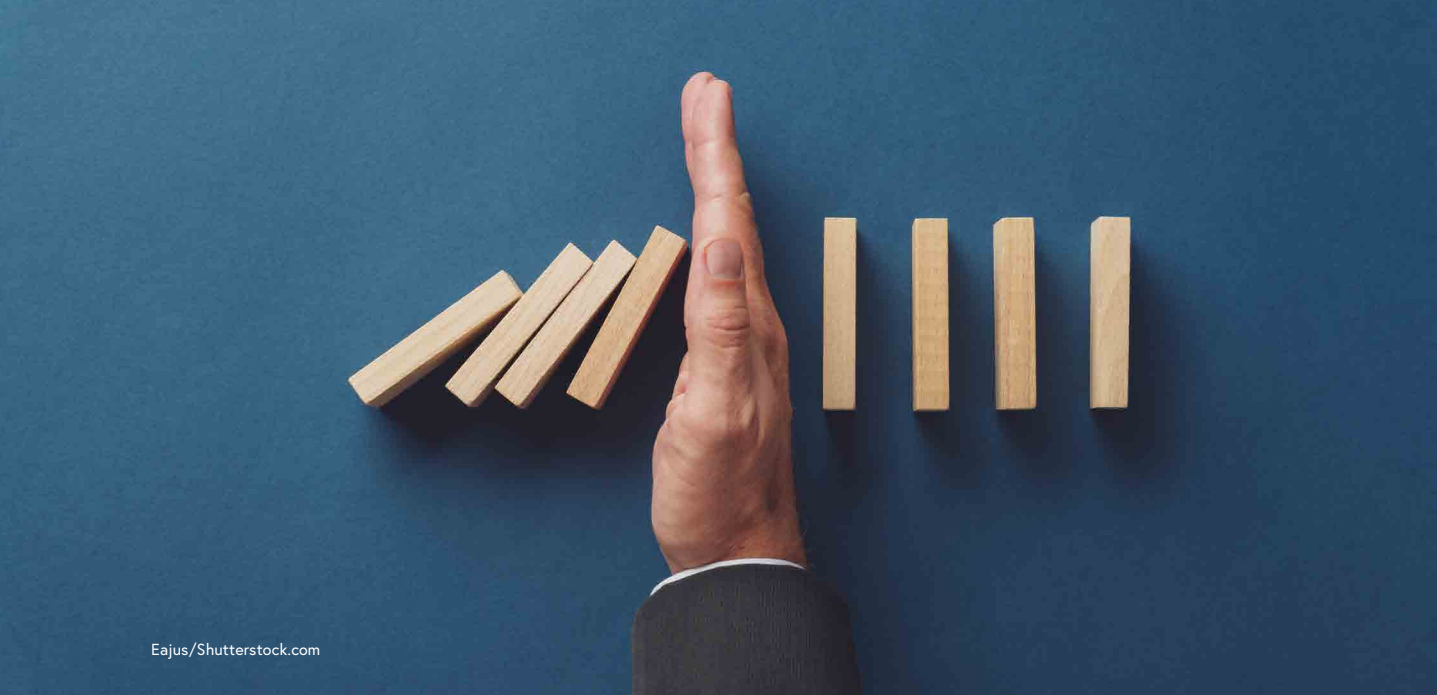
## The strategic development of the EU

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

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

### Key Messages

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



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# Risks in 2026

## The 2026 Risk Monitor

Ronald Vartok

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

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

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

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

## **The Risk Monitor**

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

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

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

## Risks and challenges in 2026

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

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

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

## European and Austrian security architecture

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

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

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

### **Key Messages**

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



# New order, old principles

## Change and continuity in international relations

Arnold H. Kammel

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

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

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

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

## **International system diagnosis**

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

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

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

## **Europe's dilemma**

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

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

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

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

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

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

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

## **In competition with other players**

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

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

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

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

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

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

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

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

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

## **Conclusions**

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

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

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

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

### **Key Messages**

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

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## Global risks and challenges

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# Global risks and challenges

Nikolaus Rottenberger

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

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

## Paradigm shift

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

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

## System conflict

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

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

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

## **Geostrategic races**

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

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

## **Comprehensive system change**

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

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

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

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

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

### **Key Messages**

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



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## The revival of America First

Rachel Tausendfreund

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

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

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

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

## **Departure from hegemony**

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

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

## **Multipolarisation**

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

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

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

## **Impact on vulnerable groups**

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

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

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

## Conclusion

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

### Key Messages

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



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

Daniela Schwarzer

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

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

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

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

## **Perspectives for 2026**

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

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

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

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

## **China's positioning**

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

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

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

## **Global ambitions for order**

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

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

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

## **The US as a decisive factor**

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

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

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

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

## Key Messages

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



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# Nuclear non-proliferation

## Disarmament and deterrence

Ulrika Möller

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

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

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

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

## **Problematic patterns**

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

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

## Non-proliferation regimes and follow-up agreements

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

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

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

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

## Highs and lows

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

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

## Current developments

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

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

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

### **Key Messages**

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



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# The Chinese balancing act

Linda Liang and Sebastian Harnisch

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

## Trade war and calculated strength

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

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

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

## **Awareness of regional power**

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

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

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

## Ambivalent relations with Russia

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

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

## Europe in the shadow of economic rivalry

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

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

## The Women, Peace and Security agenda

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

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

### Key Messages

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



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# The South China Sea conflict

Thomas Eder

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

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

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

## **China's options and new approaches**

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

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

## **Sustained pressure**

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

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

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

## **Artificial islands, overfishing and food security**

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

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

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

## **Conclusion and consequences for Europe**

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

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

### **Key Messages**

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



# Russia's flexible partnerships

## Networks beyond Western isolation

Sarah Pagung

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

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

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

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

## **Authoritarian counter-agenda**

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

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

## **Russia's strategic partnerships**

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

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

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

## **Dependent allies**

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

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

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

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

### **Key Messages**

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



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## India as a global player

Heinz Nissel

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

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

## India's rise as a global player

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

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

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

## Geopolitical objectives

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

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

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

## Partnerships and conflicts

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

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

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

## **Domestic politics**

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

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

## Outlook

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

### Key Messages

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



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# The threat landscape for Austria's maritime supply chains

Jan Stockbrügger

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

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

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

## **Deterioration of the security situation**

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

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

## **Russia's maritime threat**

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

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

## **Crisis hotspots in the Red Sea and the South China Sea**

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

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

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

## Possible courses of action for Austria

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

### Key Messages

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



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Bid	Ask
40.487	349.1 349.2
58.184	349.0 349.3
35.336	348.9 349.4
160.760	348.8 349.5
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35.029	348.6 349.7

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# On the danger of a new world economic crisis

Gabriel Felbermayr

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

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

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

## **Global debt drivers**

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

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

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

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

## **Debt spiral?**

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

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

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

## Tariffs and Counter-tariffs

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

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

### **Key Messages**

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



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# Militarised seas

## Europe's maritime vulnerability

Michael Zinkanell

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

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

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

## **Maritime vulnerabilities**

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

## **Acts of sabotage**

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

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

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

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

## **Types of hybrid threats**

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

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

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

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

## Outlook

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

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

### **Key Messages**

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



# Geopolitics in the Arctic

## From cooperation to conflict

Kristina Spohr

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

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

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

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

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

## **A look into the past**

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

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

## **The collapse of “Arctic exceptionalism”**

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

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

## **Russian remilitarisation**

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

## Regional cooperation and energy policy

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

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

## The China Factor

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

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

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

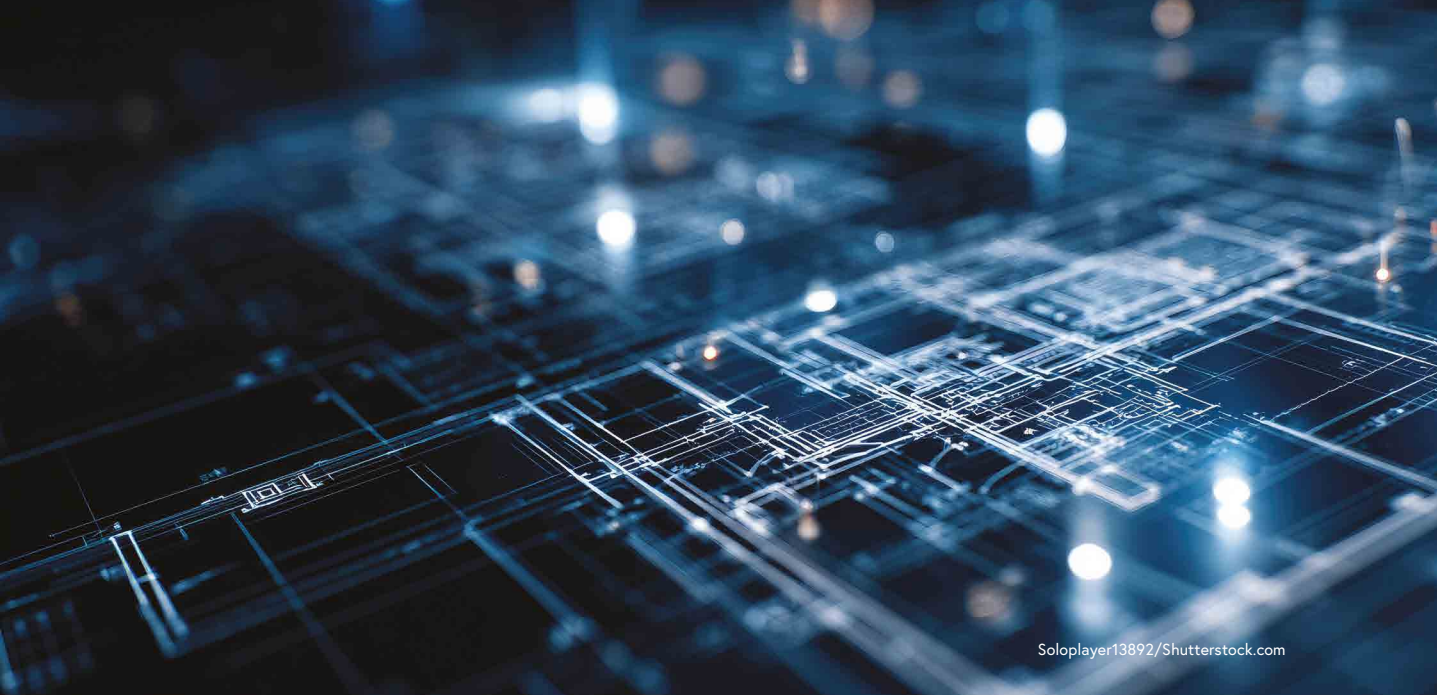
## **NATO's response**

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

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

### **Key Messages**

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



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# The Power of Big Tech

## Risks for state and security

Johannes Späth

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

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

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

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

## **The power of data**

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

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

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

## Implications for Europe

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

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

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

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

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

## Ways out of the sovereignty trap

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

### Key Messages

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



# Current challenges for international law

Alexandra Duca

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

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

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

## **A test for international law**

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

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

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

## **Role of the US**

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

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

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

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

## **Strengthening international law through regional cooperation**

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

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

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

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

### **Key Messages**

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

# 3

## Crises and conflicts around Europe





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# Europe's Security environment in 2026

Günther Barnet

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

## **The Middle East: chaos or conflict resolution?**

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

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

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

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

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

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

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

## **Chaos in the Sahel and authoritarianism in (North) Africa**

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

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

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

## **The eastern arc of crisis**

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

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

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

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

## Key Messages

- Despite the ceasefire, renewed conflict in the Middle East is possible at any time. Chaotic conditions are taking ever deeper hold.
- Israel's strategy includes deterrence, forward defence, the fragmentation of Palestinian-Arab unity, and influencing public opinion. The aim is to prevent Palestinian statehood and to buy time for future military engagements.
- Türkiye is cautiously capitalising on its growing opportunities, while Iran and its allies are attempting to consolidate their position. New alliances are possible.
- Europe is unlikely to develop a coherent policy towards the Middle East and is undermining its own credibility by tolerating violations of international law and applying double standards towards authoritarian Islamist regimes. However, the expected prospect of migrants returns is slim.
- Armed conflicts on both sides of the Red Sea continue to spread, partly due to the influence of regional powers. The disruption of global trade routes persists and destabilises fragile states. Chaos is also spreading in the Sahel, fuelling further upheavals and promoting authoritarian structures in the surrounding regions.
- Europe's loss of influence continues in almost all crisis regions and is exacerbated by economic weakness, strategic dependencies, a low willingness to take risks in deploying robust armed forces, and inconsistency. One measure of the EU's capability to act within the framework of the Common Security and Defence Policy will be, inter alia, the effective support provided to Lebanon following the withdrawal of UNIFIL. Provocations between Europe and Russia will increase in 2026, but not to the point of conventional war.
- The dominance of the US in decisions on conflict resolution or stabilisation remains unchanged. This influence is decisive for the outcome of Russia's war of aggression against Ukraine.



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# The War in Ukraine

## Europe in the age of discord

Loïc Simonet

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

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

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

## **Russia's long war**

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

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

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

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

## Ukrainian surprises are possible

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

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

## The US position

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

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

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

## Europe in the grey zone

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

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

### **Key Messages**

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



# The Western Balkans between Integration and De-Europeanisation

Marie-Janine Calic

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

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

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

## **Geopolitical competitors**

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

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

## **Slow pace of reform**

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

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

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

## **Countermeasures?**

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

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

## Current developments

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

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

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

### **Key Messages**

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



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# Destabilisation Trends in South-Eastern Europe

Florian Bieber

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

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

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

## **Reforms between irregularity and stagnation**

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

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

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

## **Developments in Serbia**

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

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

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

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

## **Relations with Kosovo and Bosnia and Herzegovina**

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

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

## **Geopolitical consequences**

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

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

### **Key Messages**

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



# Reorganisation efforts in the Middle East

Gudrun Harrer

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

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

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

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

## **Obstacles to the Gaza plan**

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

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

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

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

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

## **Current developments in Syria**

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

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

## **(De-)Stabilising factors in the region**

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

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

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

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

### **Key Messages**

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



# Israel's security

## Domestic, regional and international trends

Stephan Stetter

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

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

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

## **Domestic power struggle**

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

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

## **Dynamic regional trends**

This tense domestic situation is unfolding against a backdrop of highly dynamic regional and global trends. Secondly, the ongoing hardening of the Israeli-Palestinian conflict can be observed. Both the terrorist attacks of 7 October 2023 and the Gaza war left marks on both societies, affecting more than just the immediate conflict. Both Hamas' brutal attack on Israel and the dramatic humanitarian situation in Gaza

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

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

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

## **Regional developments**

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

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

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

## **Israel's international position**

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

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

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

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

### **Key Messages**

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



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# Regional Power Struggles in the Middle East

Walter Posch

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

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

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

## Caught in a Dilemma

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

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

## **Between calculation and control**

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

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

## **Main enemy: Iran**

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

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

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

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

## Outlook

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

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

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

### **Key Messages**

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



## Eastern Europe and South Caucasus

Christoph Bilban

Russia's war of aggression against Ukraine that began in 2022 has fundamentally changed the geopolitical situation in Europe. Although a change in dynamics was predicted with the start of Donald Trump's second term as President of the United States, as of the end of 2025 the war's end is still not in sight. An agreement between Russian leader Vladimir Putin and Ukrainian president Volodymyr Zelensky is much more likely to be reached in 2026. The continuation of the Russian war in Ukraine will continue to dominate the situation in Eastern Europe and the South Caucasus in 2026.

Russia's war of aggression against Ukraine, which began in 2022, changed the geopolitical situation in Europe and will remain a determining factor in Eastern Europe and the South Caucasus in 2026. The situation in Ukraine is currently deteriorating due to recruitment difficulties, but also due to declining EU support in the second half of 2025 and the absence of US arms deliveries. It was foreseeable that

Ukraine's situation would deteriorate with the start of Donald Trump's second presidential term.

However, Russia did not achieve any military breakthroughs in 2025 either, although Russian President Vladimir Putin did succeed in initiating negotiations with the United States. Nevertheless, US mediation between Kyiv and Moscow has not yet led to a breakthrough. An agreement between Putin and Zelensky appears much more likely for 2026, as the existing military and economic problems are unlikely to improve on both sides.

## **Russia's non-military attack on Europe**

Russia's full-scale invasion of Ukraine at the beginning of 2022 made it clear that it has both the capability and the will to pursue its goals in international conflicts by military means. According to the definitions of war in Russia's 2014 military doctrine, Russia is engaged in a "regional war" in Ukraine, even though it officially continues to refer to it as a "special military operation". Russia's military and political objectives remain the "demilitarisation" and neutralisation of Ukraine as a security threat, as well as a regime change. Another goal Moscow is pursuing is the creation of a security buffer zone extending to Central Europe, which it will continue to pursue by all means except military force in 2026.

Russia's hybrid measures range from physical attacks on critical infrastructure and cyber operations to sabotage and espionage. Moscow is also committed to influencing both ruling and opposition parties, waging targeted information warfare against the population, and supporting radical groups across the political spectrum – both in Europe and the United States. The question of whether Russia will "attack" EU member states is therefore only relevant to a limited extent. It is already pursuing its goals in three of four categories of power: Diplomacy, economy and information. It is likely that these activities will increase in 2026, particularly in light of recent election victories by pro-Russian politicians.

## War as an option

An armed attack on an EU member state remains a conceivable option in the foreseeable future. In 2026, Russia's self-perception as a great power will continue to be at the heart of its foreign policy. Donald Trump's attitude towards the war in Ukraine, which can be characterised as increasingly irritated, showed Putin that he can achieve his goals through this "special military operation". This is not just about military victory over Ukraine, but also about Russia's desire to regain influence as a hegemonic power in Europe. A US withdrawal into a new "splendid isolation" would pave the way for Putin.

Since 2025, it has been unclear how the US understands its role in NATO and Europe. Russia's assessment of the United States' role in Europe therefore remains the decisive factor in Russia's willingness to attack an EU member state. As long as NATO's mutual defence clause remains in force and, in particular, the US continues to make its military assets fully available for the defence of the alliance, such an attack would probably only be considered by Russia if it were to achieve a "fundamental objective". This includes, for example, the very survival of the state. For such a situation, referred to as a "great war", Moscow could probably mobilise its remaining economic, military and human resources as early as today – even if the prospects of success may seem slim. There appears to be little motivation for such a "great war" among Russia's military and political leadership, as far as can be discerned. Nevertheless, since 2012 and even more so since 2022, propaganda has been preparing the Russian population for this eventuality. Therefore, the risk cannot be ignored.

## Risk: Dysfunctional NATO

The probability of this risk occurring increases significantly in line with NATO's dysfunctionality, as assessed by Moscow. A withdrawal of the US from defence structures or an increase in pro-Russian governments in NATO member states could reinforce this assessment in Moscow. If a limited attack on an EU and NATO member state did not provoke a military response but instead caused a split within NATO, Russia might consider an attack to be possible as things stand today. In addition to

a limited military operation, nuclear threats and extensive sabotage operations in Europe could be expected.

A collapse of NATO, and possibly as a consequence the EU, would allow Russia to achieve its desired security buffer and political sphere of influence extending to Central Europe. For such a scenario to occur, however, Russia would first have to end the war in Ukraine, at least temporarily, in order to regain its full military threat potential. European and North American experts assume that, following a ceasefire, Russia will need between five and ten years to regenerate and realign its armed forces. It is already apparent today that not all newly produced armaments and ammunition are being used in the war against Ukraine – new reserves are already being built up.

Due to its central location in Europe, Austria would be particularly affected by this risk, as it serves as a key transit hub for military troop movements between southern and northern Europe and between western, central, eastern, and south-eastern Europe. To reduce the likelihood of this scenario constantly, armament and rearmament measures should be continued. In addition, the EU must develop its own defence capabilities independently of the United States. Flexible European military command structures and a comprehensive air defence system are an essential part of this. Diplomatic support measures should also not be disregarded.

## **Vulnerable region between the power blocs**

The countries between the EU and Russia remain particularly affected by the weakness of the rules-based world order. In the South Caucasus, the authoritarian governance in Georgia is likely to be further consolidated in 2026. The Georgian Dream party government has thus denied itself the prospect of EU accession for the time being. This primarily has humanitarian consequences for the unresolved conflicts with Abkhazia and South Ossetia. Together with the disbanding of the United States Agency for International Development (USAID), the discontinuation of aid programmes primarily affects the population impacted by the conflict. Russia's de facto control over these two regions is accepted by Tbilisi. Moscow shows no intention of annexing the territories. Tbilisi is

continuing to strengthen its relations with Moscow, particularly in the economic sphere. This trend is expected to continue in 2026.

The outlook is more positive for the Republic of Moldova. Following the 2024 presidential elections and 2025 parliamentary elections, pro-European President Maia Sandu and her ruling party were able to hold their ground at the ballot box despite Russian influence. The key factor for further development in 2026 will be whether the government can resolve the existing societal polarisation. In 2026, however, a progress could be made towards resolving the conflict with the Transnistria region. The pro-Russian regime in Tiraspol has been under increasing pressure since Russia stopped supplying gas via Ukraine in early 2025. Nevertheless, Transnistria remains a lever for Moscow in its attempts to destabilise the Republic of Moldova. The EU can actively contribute to strengthening the country's resilience through its CSDP mission and the EU accession process.

After the signing of the Washington Declaration in August 2025, brokered by US President Trump, a peace agreement between Armenia and Azerbaijan seems highly likely. However, the timeline for this is not entirely clear. There are positive signs, but difficult issues could still be postponed in 2026. In 2025, Baku achieved its goal of establishing a corridor through southern Armenia to its exclave of Nakhchivan – now known as the Trump Road for International Peace and Prosperity. The corridor is already being implemented.

The biggest uncertainty factor in whether Armenia will be able to accept a peace treaty in the long term is the Armenian parliamentary elections in 2026. Armenian Prime Minister Nikol Pashinyan has indicated his willingness to sign such an agreement, while Azerbaijan may still wait for the Armenian elections. In Armenia, a conflict between the government and the opposition emerged at the end of 2025, which Russia could still exploit to destabilise the country. If a lasting peace were to be achieved in the South Caucasus, Moscow would have to worry about its military base in Armenia. The Armenian elections in 2026 should therefore be observed with particular attention. Consequently, Armenia will continue to expand its multi-vector foreign policy, which is designed to avoid future dependencies. The EU is one of Yerevan's many partners.

### **Key Messages**

- In 2026, the erratic US foreign policy and Europe's ability to continue providing support to Ukraine will be key factors in the outcome of the war in Ukraine.
- It will become increasingly difficult to find a joint EU position on security policy issues towards Russia and Eastern Europe.
- Austria should therefore contribute to strengthening a united European foreign and security policy in 2026 within the scope of its legal and political possibilities.
- In light of the ongoing hybrid attacks in Europe, Austria should further strengthen its cooperation with European partners in 2026 to identify and counter these threats.
- In 2026, EU policy towards most of its neighbours in Eastern Europe and the South Caucasus will be shaped primarily by pragmatic cooperation. Ukraine and the Republic of Moldova will continue to receive special support as candidates for EU membership.



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# Security Situation in the Sahel

## Russia's Imperialist Gambit on Europe's Southern Flank

Will Brown

Russia is exploiting the power vacuum in the Sahel following the withdrawal of the West to create new dependencies through mercenaries, propaganda and economic influence. The resulting instability is threatening Europe's security through migration, disinformation and regional conflicts.

The West's withdrawal from the central Sahel has left a vacuum that Moscow is now filling – with a potent mix of hired forces and information warfare. Libya serves as a gateway and crossroads to the Sahel; meanwhile, Mali, Burkina Faso and Niger have replaced their partnerships with the West by cooperating with Russian contractors and propaganda mills. The result: A belt of fragility stretching across West and

North Africa, reaching as far as Sudan and influencing Europe through migration, transnational organised crime and information operations.

## **Current situation in the Sahel**

The Russian Africa Corps, which consists largely of remnants of the Wagner Group, comprises around 10,000 people and has ambitions to grow. Despite the Wagner Group's formal "withdrawal", around 2,000 Russian mercenaries are still active in Mali. The record is devastating: The massacre in Moura in 2022 claimed around 500 civilian lives, while accidents in airspace and outdated equipment contradict the Malian junta's claims of security improvements. The Tinzaouaten debacle in July 2024, in which a convoy of the Malian army and the Wagner Group was ambushed, resulted in heavy losses for both Mali and Russia. As a result, the junta's cohesion began to weaken, leading to numerous arrests.

In Burkina Faso, jihadist groups have been able to establish themselves in rural areas, while the government is slowly retreating towards the capital Ouagadougou and investing its meagre resources in the creation of online myths. Niger's "pivot" from France and the US meant that it now has to rely on fewer partners and trainers. It is now following the same path as Burkina Faso and relying on members of so-called "patriotic militias", which is likely to result in difficulties in governance and the spread of violence.

## **Regional instability**

Are the regimes in the Sahel stable? They control cities, order air strikes and dominate the internet. Nevertheless, they find it difficult to control roads, markets or the country. Loss-making operations, corruption relating to contract awards and the outsourcing of tasks to militias pose major challenges for the armed forces and undermine them from within. Regional instability is spreading. Togo drew closer to Moscow for support against jihadist groups infiltrating the country across its northern border. It will probably soon allow operations by the Russian Africa Corps. Meanwhile, Guinea is adopting a hedging strategy, whereas Equatorial Guinea is already allowing Russian troops to operate in the country to protect the regime.

At the same time, the Joint Force of the Sahel States Confederation led to an official break with the West African Economic Community ECOWAS and deepened the strategic realignment of the region. Although ECOWAS has lost some of its relevance and credibility, particularly after its failed policy of deterrence following the coup in Niger in 2023, it has not become irrelevant. The organisation still plays an important role in sanctions, mediation and trade. Its biggest challenge is to regain influence among the region's juntas.

The Republic of Chad deserves special European attention. Located between the Sudanese civil war, the Libyan militias and the mercenary corridor of the Central African Republic, the country faces particular challenges. Following France's withdrawal, Chad is courting Türkiye for possible drone deliveries and the United Arab Emirates for financial support. At the same time, it is testing Russian offers. This fragility has recently attracted other European actors as well. Hungary, for example, is considering establishing a presence in Chad, officially for migration control and to support Christian groups. This would be consistent with its tolerant foreign policy towards Russia. Whether this will stabilise Chad or embroil the EU in another questionable security deal remains to be seen.

## **Displacement and propaganda**

Displacement is currently only occurring regionally. Most refugees from the Sahel tend to move within West Africa rather than to Europe. However, the figures are alarming. In 2024 alone, over 127,000 Burkinabés fled to the West African coastal states. Around mid-2025, there was a further influx of refugees from Burkina Faso to Mali. These refugee flows remain intra-regional, mainly due to the costs, community cohesion and the dangers of the northern routes. However, that could change soon. If the capitals and coastal states of the Sahel continue to come under pressure, more people are likely to head for North Africa and Europe. Some reports also indicate that Russia is exerting influence on various migrant smuggling networks in Libya.

In any case, smuggling and jihadism thrive in areas where there is a power vacuum. Libya's ports and desert routes connect the chaos of the Sahel with the Mediterranean, which also affects refugee flows. Arrivals in Italy from the Libyan corridors are already on the rise again. Russia un-

derstands the politics of these refugee flows, and one of its core objectives is to gain influence over coastal hubs and routes in the Sahel. That would give Moscow influence over internal European debates.

## **Discourses on sovereignty and information architecture**

The juntas of the Sahel region follow a discourse of sovereignty, leveraging legitimate African discussions on pan-Africanism, anti-colonialism, and sovereigntism through extensive Russian-trained propaganda networks. These efforts are supported by Russian narratives in various languages, including French, English, Arabic and other widely spoken African languages. These channels have been carefully cultivated to appear organic and local. The impact of this network is difficult to quantify, but it undoubtedly influences perceptions of Western engagement negatively. In turn, it boosts Russia's appeal. Another objective appears to be to influence the Afro-Caribbean diaspora in Europe and North America.

Russia is attempting to use its policy towards the Sahel to orient these countries towards Moscow. Disillusioned by Western conditionality, some governments see the BRICS+ model as a source of financing and diplomatic cover. Moscow's narrative of sovereignty strikes a chord with the respective populations – even where elites remain cautious towards Russia, as the West is perceived as moralising when it comes to human rights and governance. The risk for Europe lies not only in the possibility of further coups, but also in a long-lasting information architecture that firmly entrenches alienation between Europe and Africa.

## **Possible courses of action for Europe**

Europe's credibility can be bolstered by adopting a more robust security response in the region, which would counter Russian influence. The European Peace Facility is on the right track here, but Europe still lacks an effective antidote to hostile State actors. For example, European ammunition can only be used for training purposes in Benin, which has led to criticism of European hypocrisy. Supplies that bring about genuine change on the battlefield are relevant in this regard: Training with

real equipment, enablers for rapid response capability and tracking of harm to civilians – in collaboration with African partners.

Russian influence and financing chains should be treated as transnational criminal enterprises. Those who enable these activities should be consistently sanctioned by the EU, the UK, the US, Canada, Switzerland and Norway. Pressure should be increased on propagandists who operate unhindered on European soil. Furthermore, Europe should begin to defend itself in the information space. Funds should not be spent on conferences, but rather on African media such as local radio stations and trustworthy cable providers. Similarly, trustworthy fact-checkers and local influencers can be funded to expose Moscow's corruption, abuses and security weaknesses in the region.

### **Key Messages**

- The West's withdrawal from the Sahel has created a power vacuum that Russia is attempting to fill with military means and information warfare.
- Moscow is using mercenaries, propaganda and rhetoric about sovereignty to bind governments in Mali, Burkina Faso and Niger and to expand its influence in the region.
- The combination of fragile regimes, militias, migration and Russian influence is destabilising West Africa and affecting Europe through Libya.
- Europe's response must include credible security support, sanctions against Russian networks and an offensive information strategy.



## Protracted War in Sudan and the Danger of Regional Consequences

Sara de Simone and Lucia Ragazzi

The consequences feared in the early stages of the war in Sudan are now increasingly materialising, 31 months after the conflict began. Sudan is experiencing one of the world's most serious humanitarian crises, which is also leading to mass displacement. This poses massive challenges for both Sudan and its neighbouring countries. Diplomatic efforts are often limited by developments on the ground. If the conflict continues, its shock waves will be felt throughout the Red Sea region and beyond.

The war in Sudan has escalated into one of the worst humanitarian crises worldwide, the extent of which is underreported. The conflict has spread beyond key regions, turning urban centres and the agriculturally based heartland into a battlefield. In 2025, the UN Office for the Coordination of Humanitarian Affairs (UN OCHA) estimated that a stag-

gering 30 million people were in urgent need of humanitarian aid – over half of Sudan’s population. Around twelve million people have been displaced; eight million are internally displaced and four million have sought refuge in Sudan’s neighbouring countries, particularly Chad, South Sudan and Egypt.

## **Situation on the ground**

The collapse of essential services has led to acute shortages. Health-care has largely ceased to function, and large regions are facing catastrophic food shortages. In the north of Darfur province, a famine has already been confirmed, and other regions are at significant risk. This crisis is intensified by reports of widespread killings of civilians, sexual violence and the destruction of infrastructure.

The fighting between the Sudan Armed Forces (SAF) and the Rapid Support Forces (RSF) began when the fragile alliance between their leaders, Abdel Fattah al-Burhan and Mohammed Hamdan “Hemedti” Dagalo, collapsed. The actual aim of this alliance was to regain control of post-revolutionary Sudan after Omar al-Bashir was removed from power. Since then, the conflict has gone through several phases in which both sides have allied themselves with various local militias. The SAF appeared to gain the upper hand for months at the end of 2024 and beginning of 2025, managing to capture the capital city of Khartoum, for example. However, the RSF launched offensives in Kordofan and the few areas in Darfur that were still not under their control. The most significant of these was the capital of North Darfur, al-Fashir.

After an 18-month siege, the last SAF garrison town in Darfur fell to the RSF. Although access to this area remains strictly restricted, both UN agencies and aid groups reported numerous atrocities, ethnically motivated targeted killings and a mass exodus to neighbouring Tawila. The RSF’s breakthrough strengthens the position of the paramilitary group, which now controls almost all of Darfur. The RSF will now likely focus on consolidating its presence in the region, while the fighting will shift to key areas in North and South Kordofan.

## Partition under consideration

The current distribution of power, with the RSF controlling the west and the SAF controlling both the east and north of the country, is raising fears of a de facto division of Sudan. This is reinforced by the fact that the two sides have formed parallel governments. The SAF has formed a government in Port Sudan, while the RSF has established a parallel civilian government (Tasis) in Nyala, led by Hemedti.

Such a partition would create considerable uncertainty both for the region and for Sudan's already severely affected population. These incidents, including repeated drone strikes in Kordofan and around Khartoum in November 2025, suggest that neither al-Burhan nor Hemedti consider this scenario to be optimal. Both are likely to try to achieve military victory in order to establish their authority over the entire country.

New peace initiatives have been introduced in recent months. Although African-led diplomacy has lost momentum, a quadrilateral group consisting of the United States, Egypt, Saudi Arabia and the United Arab Emirates (UAE) issued a joint statement on 12 September 2025 calling for a ceasefire in Sudan. Indirect negotiations followed, but these were interrupted by military developments at the end of October 2025.

The composition of this initiative reflects the role of regional dynamics in Sudan. Allegedly UAE supports RSF, which Abu Dhabi has repeatedly denied. The SAF allegedly receives security-political support from Egypt and Saudi Arabia. A proposed humanitarian ceasefire, which the RSF accepted on 6 November 2025, did not come into effect due to the SAF's refusal to negotiate directly with the RSF. In this context, and despite repeated attempts to break the stalemate, strong external alliances have created a situation in which both parties to the conflict favour a military solution over a negotiated settlement.

## Implications far beyond Sudan

In light of the ongoing violence, there are concerns about the instability of further developments. The large number of refugees is already putting pressure on vulnerable neighbouring countries, as can be seen in the border areas with Chad and South Sudan. There, the economic

impact of the war has exacerbated an already volatile political situation. Regional neighbours are also concerned about the indirect consequences of continued conflict. Weak governments within such a vast area could foster criminal networks involved in activities such as arms smuggling and human trafficking, and provide a safe haven for terrorist groups. This would further jeopardise regional stability.

Sudan's long coastline gives it strategic importance, both for the countries bordering the Red Sea and for Europe, in terms of security and maritime supply chains. This area is affected by extreme volatility due to its proximity to the Gaza war in the north and Houthi activities in the south. However, the crisis in Sudan also has repercussions for the Mediterranean region, for example due to the large number of refugees seeking refuge in Libya and Egypt, although most Sudanese refugees remain within the region.

In this context, European engagement has primarily been visible through humanitarian aid, particularly through initiatives such as the London Sudan Conference in April 2025. Humanitarian aid is essential, but insufficient. A military solution seems increasingly out of reach due to the lack of clear superiority of either side on the battlefield. A ceasefire agreement is therefore more urgently needed than ever.

### **Key Messages**

- The situation on the ground increases the risk of Sudan partition while the fighting continues.
- New diplomatic initiatives are being developed, although they cannot keep pace with military developments.
- Continued fighting threatens the stability of the entire region and could contribute to the formation of an ungovernable zone in neighbouring countries and across the Red Sea.
- Humanitarian aid and a long-term ceasefire are essential.



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# Security Concepts and the Global South

Oliver Keßler and Siddharth Tripathi

Dominant security concepts in international politics focus on Western experiences and models. In particular, the intensification of geopolitical rivalries, which results in an increasingly fragmented international security order, affects the Global South in different ways. The ambivalent positioning of powers such as Brazil, China, India and Russia reinforces this complexity. Their relationships with other countries combine rhetorical support for transformative change with active participation in the broader geopolitical competition for influence and normative authority in the international system.

The new international constellation, which increasingly includes powers such as Brazil, China, India and Russia, is giving rise to a multitude of ideas and projects. If Western countries continue to follow established patterns of interpretation, these will remain incomprehensible to them. Instead, Western countries must understand and appreciate security concepts from the Global South, even if these may seem foreign to West-

ern experts. This necessity arises not only from the Western aspiration to confront its own past, but also from an interest in securing its own future.

## **Security from the perspective of the Global South**

With the rise of countries in the Global South, independent regional and ideological understandings of security have emerged. For many postcolonial countries, security extends far beyond an absence of military threats and includes agency, autonomy, development and resilience within a structurally unequal international order. From a postcolonial perspective, the Global South's understanding of security reflects historical experiences of colonialism, subjugation, marginalisation and dependence. For example, reference could be made to Tarak Barkawi and Mark Laffey's article "The Postcolonial Moment in Security Studies" or Peter Kragelund's article "South–South cooperation". The persistence of unequal trade relations, debt hierarchies and political conditions imposed by great powers and multilateral institutions is considered a structural form of insecurity.

It follows that security in the Global South has a different focus than is customary in the West. For the US and Europe, global stability is bound up with the preservation of a liberal order based on democratic governance and open markets – an aspiration that is often contested, however (see "Contestation in a World of Liberal Orders", 4(2) *Global Studies Quarterly*). From the perspective of the Global South, however, this liberal order was never truly liberal. There, Western security strategies are often perceived as instruments of coercive influence that subordinate development priorities to geopolitical calculations.

## **Non-Western security projects**

Compared to the US and Europe, China is positioning itself as a partner of the Global South, for example through initiatives such as the Belt and Road Initiative (BRI), which aims to promote infrastructure development and joint development in Asia and Africa. Many developing countries see China's involvement as an opportunity to diversify economic partnerships and reduce their dependence on Western institutions – despite concerns about debt dependency, environmental

standards and asymmetric political influence (see Georg Lammich's article "China's evolving security engagement in Africa").

Russia asserts its influence in a similar way through arms deliveries, energy diplomacy and political support for anti-Western regimes, particularly in Africa and parts of Latin America. India's concept of comprehensive security and its policy of multi-alignment, which encompasses economic growth, energy access, technological independence and maritime stability in the Indo-Pacific, reflect its desire to maintain autonomy and the capacity to act. For its part, Brazil represents the Latin American version of the Global South's understanding of security, which focuses more on peaceful conflict resolution, regional integration and development-oriented sovereignty, and calls for an approach that centres on poverty reduction, climate justice and the equitable management of global commons.

## Conclusions

The Global South's advocacy for a multipolar, inclusive order reflects the broader consensus that genuine security requires the democratisation of global decision-making processes and a rebalancing of institutional authority. If Western countries want to continue to be seen as legitimate partners, they must understand how heightened geo-economic and geopolitical rivalry results in specific repositioning both within countries in the Global South and within international institutions.

At the same time, Western countries must understand that security and the economy are inextricably linked. The colonial past of the Global South is not merely a subject of historical research, but shapes everyday experiences and the region's self-perception – and therefore also the way in which security policy concerns are formulated.

### **Key Messages**

- The accepted liberal order has never really existed outside the West; elsewhere, there are different histories and narratives about world politics and its transformation.
- Geo-economic rivalry is leading to a multitude of internationalisation projects – including from the Global South itself.
- Colonialism is not purely a historical issue, but continues to have a structural impact on security issues.
- Security concerns in the Global South are not only military in nature, but are closely linked to issues of autonomy, development, hierarchies and capacity to act.

4

# Risks and challenges for the EU





# Risks and Challenges for the EU

Klaus Anderle

Since the occupation of Crimea in 2014, which violated international law, and Russia's war of aggression against Ukraine in 2022, the EU has been facing a historic turning point. The war destroyed the illusion of lasting peace in Europe and highlighted the urgent need to strengthen defence and deterrence capabilities. Europe's security can no longer be exclusively reliant on transatlantic guarantees. The EU must be capable of protecting itself.

Just two years after Russia's occupation of Crimea on 27 February 2014, which violated international law, the European Union sought to gradually expand its strategic autonomy in security and defence. The publication of the EU Global Strategy in 2016 created, for the first time, a coherent framework calling on the Union to "take responsibility for its own security". This reorientation was a response to profound geopolitical changes: the increasing withdrawal of the US from its role as guardian of international order, the UK's exit from the EU, which

changed the EU's security architecture, and new threats at the EU's external borders.

Since then, the aim has been to reduce dependence on external security guarantees, develop own crisis management, deterrence and defence capabilities, and meet the required burden-sharing requirements within the transatlantic alliance. With initiatives such as Permanent Structured Cooperation (PESCO), the European Defence Fund (EDF) and the Strategic Compass adopted in 2022, the Union has taken concrete steps to strengthen its military capacity to act and lay the foundations for the European Defence Union in the long term.

## **Return of war**

The start of the Russian war of aggression against Ukraine on 24 February 2022, which violated international law, marked a turning point. War returned to Europe, and with it the realisation that security is neither a given nor free of charge. The Union was confronted with a reality that many had long considered to be a thing of the past: Power politics, deterrence and military strength are once again key parameters of international order. In this situation, the Union had to recognise that peace is not a given, but a project to be constantly defended. In a way, what Virginia Woolf once said applies to the Union: „Growing up is losing some illusions in order to acquire others“. The Union has lost the illusion of an inviolable peace order and at the same time acquired a new, more realistic perspective – the conviction that only determination, strength and strategic independence can preserve peace.

The Union's response was profound and resolute. Within a few weeks, the Union coordinated arms deliveries to Ukraine, mobilised billions to support defence capabilities, strengthened the defence industry and initiated a strategic reassessment of its security architecture. This development marks a paradigm shift. The Union is no longer striving to merely cooperate on security policy, but to achieve genuine autonomy and strategic capacity to act as an expression of its political maturity and responsibility in an increasingly multipolar world. The war in Ukraine became the catalyst for a shift in security policy, the starting point for the establishment of a European Defence Union.

## **From strategic realignment to a European Defence Union**

At the same time, the path to strategic autonomy remains fraught with considerable challenges. The security policy interests of EU member states continue to vary, and military dependence on NATO and, in particular, the United States will remain for the foreseeable future. Industrial and financial fragmentation hamper the establishment of a coherent European defence architecture. Nonetheless, the war in Ukraine clearly demonstrates that political will is growing to redefine the EU's security role and to view the defence union no longer as an abstract goal but as an urgent security policy necessity.

In European capitals, there is a growing awareness of the fragility of peace and the vulnerability of the European security order in a world in which the rules-based international order is increasingly replaced by power politics and military force. The long-standing demand that the Union must become capable of taking action in the area of security and defence, defend itself and deter potential adversaries is now being pursued with renewed vigour by the Commission and the member states.

War has returned to Europe. Currently, a fair peace between Russia and Ukraine or a stable ceasefire are not in sight. There have been no military or diplomatic breakthroughs, while the conflict continues unabated. This once again illustrates that the Union cannot and must not allow itself to be a passive observer. The time to establish an effective, strategically autonomous European security and defence architecture is long overdue – because security is neither a given nor negotiable.

## **Security as a priority**

At the start of Ursula von der Leyen's second term and the inauguration of the new European Commission on 1 December 2024, it was already clear that the EU's security and defence would be key priorities in the coming years. President von der Leyen declared the years 2024–2029 to be the era of European defence and security. In doing so, the Commission made it unmistakably clear that its primary concern is to ensure greater security for citizens – in particular by establishing

a European Defence Union as the basis for preserving and advancing the European way of life and the European model of values and society.

Without a militarily secured peace, i.e., without the ability to credibly deter potential aggressors, this model cannot be sustained in the long term. The Union's defence capability should therefore be fully secured by 2030. This will lay the foundation for the announced European Defence Union, which is intended to enable the EU to protect its own security and contribute credibly to global stability. The creation of the position of the new Commissioner for Defence and Space was an important step. The Commissioner heads the Directorate-General for Defence Industry and Space, which was established in 2019, and coordinates the development of joint European defence capabilities.

One of the first tasks of this new Defence Commissioner, Lithuanian politician Andrius Kubilius, who took office in 2024, was to draft the White Paper on European Defence 2030. This constitutes the strategic basis for establishing a European Defence Union. The White Paper defines the Union's long-term strategic vision in the field of defence. It identifies military capability gaps in key areas and defines the objective that the Union should have the full spectrum of military capabilities at its disposal – to deter aggression and defend its borders on land, in the air, at sea, in cyberspace and in outer space. The € 800 billion ReArm Europe programme is intended to finance the expansion and modernisation of European defence capabilities. The aim is to increase arms production, achieve economies of scale and promote joint procurement.

## **Roadmap for maintaining peace and establishing defence readiness**

On 16 October 2025, the European Commission presented its roadmap entitled Preserving Peace – Defence Readiness 2030. This is a roadmap for maintaining peace and establishing defence readiness by 2030, which translates the strategic objectives set out in the White Paper into concrete operational measures. In addition to the priority capability areas, the roadmap includes four further flagship projects:

- The European Drone Defence Initiative, which envisages the development of an EU-wide drone network for border surveillance and threat detection by the end of 2027,
- Eastern Flank Watch, an integrated surveillance system to protect the EU's eastern border, including airspace defence, ground defence systems and drone defence, by the end of 2028,
- the European Air Shield, an integrated, NATO-compatible European air and missile defence system, with implementation scheduled to begin in the second quarter of 2026, and
- the European Space Shield, a protection mechanism for satellites and communications infrastructure, with implementation scheduled to begin in the second quarter of 2026.

## Outlook for 2026

The year 2026 and beyond will be marked by efforts to strengthen European defence readiness in the military domain. The concrete implementation of the four flagship projects, which will form the basis of the European Defence Union alongside other EU-wide defence projects, will begin as early as the first quarter of 2026. Further significant measures to consolidate the European Defence Union are being pursued as well. These include the EU internal market for defence, the promotion of defence technology alliances, strengthening the role of the Commissioner for Defence and Space, and enhancing military mobility, which remains the Achilles heel of European defence capabilities.

Military mobility will be the backbone of an operational European Defence Union. Without the ability to move troops, materials and equipment quickly and in a coordinated manner across national borders, all efforts to establish credible European defence capabilities will remain incomplete. Strengthening military mobility is therefore a crucial step towards an EU that coordinates and guarantees its security collectively. In this context, military bases and supporting infrastructure should be specifically promoted in order to enable and maintain in the long term an increased deployment and permanent presence of armed forces in EU member states.

To this end, the Commission will present a comprehensive military mobility package consisting of an action plan, a draft EU regulation and

a simplification regulation on military mobility. Its implementation is planned for 2026 and will be supported by the EU's European Competitiveness Fund (ECF) regulation. The ECF plays a central role in the implementation of the roadmap for maintaining peace and establishing European defence readiness by 2030. At the same time, it will contribute to the establishment of a credible European Defence Union. With initial funding of € 131 billion from the EU budget, the ECF will enable the targeted financing of joint defence projects. Furthermore, the promotion of research, innovation and technical superiority, the expansion of industrial capacities, joint procurement projects and the assurance of logistical readiness are being encouraged. The ECF will therefore ensure that the objectives set out in the White Paper are put into practice.

### **Key Messages**

- Russia's war of aggression against Ukraine has triggered a turning point in security policy and highlighted the need for independent European defence capabilities.
- The EU Global Strategy, PESCO, the European Defence Fund and the Strategic Compass have laid the foundations for strategic autonomy and a future defence union.
- The White Paper on European Defence 2030 and the ReArm Europe programme (€ 800 billion) form the strategic and financial basis for the development of joint military capabilities.
- The Preserving Peace – Defence Readiness 2030 roadmap translates strategic goals into operational measures and includes flagship projects such as Drone Defence, Eastern Flank Watch, Air Shield and Space Shield.
- The years 2024–2029 have been declared the era of European defence; by 2030, the EU's defence capabilities will be fully secured.
- 2026 will see the start of the implementation of key projects, including an EU internal market for defence and enhanced military mobility as the backbone of collective defence capabilities.
- The European Competitiveness Fund (€ 131 billion) finances research, innovation, procurement and logistical readiness to ensure the implementation of defence objectives by 2030.



# Confrontation between Russia and the EU

Franz-Stefan Gady

A potential military confrontation between Russia and the EU would expose fundamental weaknesses in EU's unity and defence readiness. Russia is relying on a tried-and-tested "salami tactic" consisting of minor provocations to systematically undermine the unity of the EU and fuel fears of nuclear escalation. The immediate danger in 2026 lies not in a large-scale attack, but in targeted hybrid operations and information warfare that strengthen supposed "peace parties" and movements critical of the EU and erode European solidarity.

Over several decades, Russia has perfected its so-called "salami tactic" – a method of gradual provocation that remains below the threshold of a strong Western response. These tactics were already evident in Moldova, Georgia and in Ukraine in 2014. Recent drone operations, attacks, acts of sabotage and cyberattacks reveal this strategy, although it is important to caution against viewing everything as part of a compre-

hensive Russian military strategy. Every single action must be assessed coolly and objectively and contextualised accordingly.

Each individual provocation, whether it involves airspace violations, cyber attacks or acts of sabotage, appears too minor to warrant a military response when viewed in isolation. However, this systematically weakens the credibility of both NATO and the EU. This method is particularly effective because it exploits uncertainty about the appropriateness of responses and, above all, plays on EU citizens' fears of escalation. It should be emphasised here that Moscow will increasingly rely on nuclear deterrence in the coming years, while the conventional Russian armed forces are being rebuilt and reconstituted.

## **Major threats and minor provocations**

EU policy to date shows a clear pattern. The Union responded with unity to major threats such as Russia's full-scale invasion of Ukraine, but its unity crumbles in the face of minor provocations. Article 42(7) of the Treaty on European Union (TEU) has only been invoked once, following the Paris terrorist attacks in 2015. Although Article 42(7) TEU is considered to be stronger in terms of wording than Article 5 of the NATO Treaty, it is very difficult to apply in practice. For example, the new (and far too weak) EU crisis response capacity, with around 5,000 soldiers, has been operational since May 2025, but its activation requires the unanimous consent of all member states. This institutional weakness makes the EU vulnerable to Russian attempts at division by deliberately exploiting differences between member states.

## **Information warfare**

Russia's information operations aim to deepen these divisions within the EU. This is achieved by supporting alleged "peace parties" and movements critical of the EU in Germany, Austria and other member states. These operations exploit existing social divisions and reinforce them through targeted disinformation about Russia's war of aggression against Ukraine and other issues.

Particular attention is paid to supporting politicians who represent pro-Russian positions – in countries such as Hungary, Slovakia and Czechia, but also in France, Italy and Poland. The documented financing of left-wing and right-wing parties in the EU by Russia serves to weaken liberal democracy and the institutions of the European Union.

## **Increasing threats to Austria**

Russia will pursue a “carrot and stick” strategy towards Austria to create maximum uncertainty. The chairman of the Russian Security Council, Dmitry Medvedev, threatened Austria with both “countermeasures” were Austria to join NATO and the relocation of international organisations from Vienna. On the other hand, Russian authorities emphasise the special relationship between Austria and Russia and the alleged value of Austrian neutrality as a mediating authority and special diplomatic actor. These threats are not coincidental, but part of Russia’s hybrid warfare against Austria. Russia is systematically testing reactions and exploiting domestic debates on neutrality. In the event of a war between Russia and NATO, it is highly probable that Austria would also become a target of Russian sabotage operations and strikes by cruise missiles, ballistic missiles and drones, given its significance in terms of strategic depth and as an important transport hub for NATO forces.

## **Timeframe for Russian military operations**

The pace of Russian military operations in Ukraine is expected to slow down in 2026. It is unlikely that Russia will achieve a decisive victory in 2026. It is likely that economic and military resource constraints will take effect, forcing Russia to slow down. At the same time, it can be assumed that the Russian war economy will be maintained, as structural change will no longer be possible in the coming years.

Russia would need around four field armies to attack the Baltic states, which equates to approximately 80,000 to 100,000 soldiers, 800 to 1,200 armoured vehicles and the corresponding artillery and other support units. The deployment of four field armies could most likely be realised by 2029, although there are no concrete indications that Russia is planning such an operation. However, Moscow is already working to

undermine the legitimacy of both NATO and the EU in the event of a defence scenario involving the Baltic states.

## **European defence readiness**

Contrary to popular belief, surveys show that the European population is highly willing to defend itself. 77% of EU citizens support a common security and defence policy. In Germany, 65% are in favour of higher defence spending, and 54% of men indicate a personal willingness to defend their country. In Austria, the Austrian Armed Forces (AAF) enjoy high approval ratings. 80% of the population express confidence in the Austrian Armed Forces, with 70% of Austrians in favour of retaining national service. However, only between 13% and 25% of Austrians would defend their country. The problem lies in the abstract nature of how military threats are perceived. As long as the threat does not appear concrete and immediate, mobilisation remains difficult. Younger Europeans in particular see the threats as distant, which naturally makes recruitment and public support more difficult.

## **Impact on Austria**

Austria's neutrality is increasingly seen as an anachronism within the EU and isolates the country in terms of security policy. As one of the last neutral EU states, Austria is under increasing pressure to take a clearer stance. From a military perspective, a small country like Austria cannot protect itself optimally, as not being part of a military alliance has operational disadvantages – especially in countering airborne threats, but also with regard to hybrid threats.

The reality is: With the exception of Switzerland and Liechtenstein, Austria is effectively surrounded by NATO countries and continues to rely on their protection. This constitutes security-political “free riding”, which becomes problematic in the event of concrete threats. Russian threats have the potential to intensify the debate on neutrality in Austria, as neutrality offers no effective protection against hybrid threats. Similarly, they could trigger a new wave of support for neutrality, as long as the majority of the political class continues to cling to the myth of “neutrality” as a guarantee of protection for Austria.

### **Key Messages**

- Russia’s “salami tactics” systematically exploit the EU’s inability to respond uniformly to minor provocations.
- Russian disinformation and support for alleged “peace parties” and EU-critical fringe parties are weakening European unity more effectively than purely military threats.
- An absolute military victory for Russia in Ukraine remains unlikely in 2026. However, this increases the risk of hybrid threats and nuclear sabre-rattling, fuelling fears of escalation into a world war.
- Russia would need four field armies to attack the Baltic states. This is moderately likely from 2029 onwards. At present, there are no concrete indications that this is the intention.
- European citizens are certainly willing to defend their countries, but the abstract nature of the perceived threat makes it difficult to mobilise them and gain their concrete support for the armed forces.
- As one of the last neutral EU states, Austria is becoming increasingly isolated and marginalised in terms of security policy.



# A New Era in Transatlantic Relations

Josef Braml

Transatlantic relations between the EU and the United States are at a turning point. Donald Trump's re-election in 2024 and the election of the new German federal government under Friedrich Merz in 2025 mark the beginning of a phase of geopolitical realignment that holds both risks and opportunities for 2026.

## Geopolitical shifts

US President Donald Trump's second term in office has been dominated by a transactional style of politics that prioritises national interests over multilateral commitments and traditional alliances. The US is increasingly orienting itself towards the Indo-Pacific, while Europe is losing strategic priority. The EU must therefore become more autonomous in terms of security policy. Higher defence spending and the modernisation of European armed forces, such as the German Bunde-

swehr, mark a turning point. A massive rearmament programme and a strategic focus on European autonomy are a reaction to the change in transatlantic relations.

NATO continues to play a central role in European security and defence policy, but the US is calling for greater financial contributions from European member states. Germany has committed to spending two per cent of its gross domestic product (GDP) on defence and is investing heavily in modernising its armed forces. The German government presented a comprehensive armament and procurement plan worth up to € 83 billion. A total of 154 major armament projects are planned between September 2025 and December 2026.

A key feature of the plan is the clear prioritisation of European manufacturers: Only about eight per cent of the funds are to go to the United States, e.g., for Patriot missiles and torpedoes for Boeing aircraft. The majority of orders go to companies from Germany and other EU countries – a deliberate step towards strengthening the European defence industry and reducing dependencies on the United States. France is also focusing on European armament projects and has warned against excessive dependence on US technology. Nonetheless, US President Trump will continue to exploit Europe's military and intelligence dependence in order to secure concessions on economic and trade policy issues.

## **Economic tensions and protectionism**

The economic policy agenda of the United States under Trump 2.0 is focused on self-sufficiency and protectionism. Punitive tariffs on European products and import restrictions are straining transatlantic trade relations. At the same time, pressure is mounting on German companies to bring their supply chains in line with US requirements. The EU must prepare for tougher international trade negotiations and realign its industrial policy.

Despite its common trade policy, the EU has hardly used its market power and has given in to US President Trump. On 27 July 2025, the US and the EU announced a provisional trade and investment agreement in Turnberry, Scotland. While the US unilaterally imposed tariffs on EU

imports, the EU was expected to increase its investment in the US and purchase US energy.

Agreements with President Trump are unlikely to last long, given his history of broken contracts. Shortly after the “deal”, Trump made another threat, this time over EU digital laws (Digital Markets Act, Digital Services Act) designed to ensure competition and content moderation on digital platforms. US tech companies continue to wield excessive market power, exercise too little content control and disregard data protection rights – with serious consequences for European society and democracy.

## **Technology and digital sovereignty**

In terms of technology policy, the US is focusing on national standards, innovation and technological leadership by large companies, while the EU emphasises data protection, digital sovereignty and ethical rules. Differences are particularly evident when it comes to AI, big tech and cloud policy: The US relies on proprietary solutions, while the EU suffers from fragmentation and a lack of hyperscalers. With the Quantum Act, the EU aims to pool research and infrastructure in order to become more competitive, and is reinforcing this with legislation such as the Digital Services Act and the Digital Markets Act.

However, there are opportunities for cooperation, for example in the development of common standards in the field of cyber security or quantum computing. Cyber security threats, such as “harvest-now-decrypt-later” attacks, are forcing both sides to develop quantum-secure encryption systems. The EU is working on its own cybersecurity strategy for quantum threats, while the US is already testing initial commercial applications.

## **Climate policy and energy issues**

New technologies such as AI and quantum computing are energy-intensive and require a change in thinking on energy policy. While the US is increasingly turning to nuclear energy, Europe faces significant tensions regarding the assessment of nuclear power and electricity

market reforms. The transition away from Russian gas and the search for new energy partners such as Qatar illustrate Europe's geopolitical reorientation. Indeed, in Scotland, the EU committed to increasing its purchases of US energy sources, particularly liquefied natural gas, to the tune of 750 billion US dollars over three years. However, due to a lack of capacity on the US side and the resulting costs, further transatlantic disputes are inevitable.

In addition, Trump's climate policy is causing tensions with the EU. While the US wants to withdraw from international climate cooperation and pursue its own interests, the EU is committed to its climate targets: By 2040, emissions must be reduced by 90 per cent, the use of renewable energies must increase and fossil fuels must decline – even under pressure from the US. The US, on the other hand, is pushing ahead with exporting fossil fuels to Europe.

## **Between adaptation and autonomy**

The transatlantic relationship is more than an alliance of interests – it is a reflection of different political cultures. Europe's normative, often moralising foreign policy clashes with a US strategy that, under Trump's transactional logic, focuses on bilateral deals and power projection. Europe must learn to represent its interests in a united manner, develop strategic autonomy and, at the same time, maintain dialogue with the US. The coming year will be crucial for Europe's role in the world order – and for the future of transatlantic relations.

### **Key Messages**

- The re-election of Donald Trump as US President and the election of the new German Federal Government mark a period of geopolitical realignment that presents both risks and opportunities for Europe.
- Europe must become more independent in terms of security and defence policy and continue to invest in its own defence and arms industry.
- Under Donald Trump, the US is pursuing a protectionist economic policy, which is leading to trade conflicts and pressure on European companies.
- Transatlantic relations are currently characterised by differing approaches to data protection, AI and cloud policy, as well as climate policy and renewable and fossil fuels.
- Europe's normative foreign policy clashes with the transactional US strategy. Europe must learn to defend its interests in a united manner.
- 2026 will be crucial for Europe's role in the world order and for the further development of relations with the US.



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# Europe's Post-Colonial Legacy

## Between Partnership and Colonial Continuities

Dorothy Makaza-Goede

The next few years will be crucial with regard to Europe's global position, as changing global dynamics result in a shift in centres of power. Renewed demands from the Global South are redefining the post-colonial order. Europe's relations with Africa, Latin America and Asia are being recalibrated under pressure from climate change, debates on reparations and geopolitical realignments. These developments will put Europe's credibility to the test and shape future policies – this also applies to smaller EU member states such as Austria.

## Global shifts and the return of the colonial question

The trend identified by Nelson Maldonado-Torres in 2017 in his book co-edited with Robert Cavaoris, as the “decolonial turn”, continues and is transforming the global landscape. He used this term to describe political, artistic and epistemic movements that seek to dismantle colonial power structures and knowledge systems. From a regional perspective, the expansion of the BRICS and efforts to de-dollarise through new credit systems and trade in national currencies mark a shift in the economic centre away from the West. Countries across Africa are asserting their historical agency. On 9 October 2025, Mali removed the French Revolution from the curriculum and replaced it with Malian and African history. This represents a clear expression of epistemic sovereignty within the broad context of decolonisation in the field of education.

At the same time, the debate on reparations and restitutions has intensified. April 2025 marked the 200th anniversary of Haiti's forced payment of reparations to France. This fuelled global debates on colonial debt. In 1825, France forced Haiti to compensate former slave owners, plunging the country into a debt spiral. The Caribbean Community and Common Market (CARICOM) ten-point plan gained traction at the CARIFESTA XV Caribbean arts festival on 27 August 2025. Finally, some European museums accelerated the return of looted artefacts.

These developments show that colonial injustices are no longer merely abstract parts of history, but sites of contention that shape diplomacy and soft power. Europe's credibility will now be measured by its willingness to address these concerns and demands transparently. For Austria and the EU, this means a reassessment of material restitution and intellectual practices that continue to propagate Eurocentrism. In this context, the Women, Peace and Security (WPS) agenda is an important starting point. Women from formerly colonised societies, who are often the guardians of cultural and ecological knowledge, must be recognised as key actors in reparative processes. Their continued marginalisation reproduces gendered colonial patterns of silence that weaken and delegitimise reconciliation and efforts towards restorative justice.

## Climate change and new frontiers of justice

Three legal opinions issued by the International Tribunal for the Law of the Sea, the Inter-American Court of Human Rights and the International Court of Justice in 2024 and 2025 reveal an unprecedented consensus. Countries are legally obliged to prevent damage caused by climate change and to remedy any damage that may occur. Largely initiated by countries and groups in the Global South, these reports highlight the colonial origins of CO<sub>2</sub> injustice – where Europe's industrialisation was based on extractive economies. They also repositioned the Global South as standard-setters in the field of international environmental and climate law.

This trend also strengthens claims for climate reparations and is likely to influence the structure of the Loss and Damage Fund. European credibility will depend more on concrete and equal contributions and on the transfer of technology than on mere declarations of intent. For Austria, proactive engagement in equitable climate finance as well as gender and intersectionality-sensitive climate change adaptation would strengthen its legitimacy.

## EU's credibility and continuity of power

EU's self-perception as a normative power is increasingly at odds with external perceptions. Colonial legacies persist through asymmetrical trade, paternalistic security partnerships and migration regimes that externalise borders to third countries. The joint agreement between the United Kingdom and Mauritius of 22 May 2025 concerning the Chagos Islands embodies these contradictions. This agreement cemented the 99-year British lease of the Diego Garcia base, including an option to extend it by 40 years. While Europe debates the right of return for displaced Chagossians, though not for those from Diego Garcia, it is consolidating its own borders and denying migrants from formerly colonised territories similar dignity. Freedom of movement therefore remains a privilege reserved for the metropolis, not a universal right.

Further discrepancies in credibility arose in October 2025, when the Democratic Republic of Congo accused the EU of double standards. The reason for this was the continuation of a minerals agreement with

Rwanda, despite accusations that Rwanda was supporting armed groups in Congo. This is in sharp contrast to the EU's comprehensive sanctions against Russia. In the context of the new race for rare earths, from lithium in the Sahel to cobalt in Central Africa, this demonstrates a replication of extractive colonial patterns, this time under the banner of the European "green transition". Europe's weak response to the Gaza war has also undermined its moral authority, as fundamental principles of international law appear to be applied selectively depending on geopolitical convenience.

For smaller EU countries such as Austria, such contradictions pose both risks and opportunities. The risk is that they may appear to be complicit in replicating and reinforcing structural inequality. The opportunity is that they can act as credible bridge builders in terms of intersectional inclusion, equitable governance and decolonial partnerships.

## **Outlook**

Europe today is not truly post-colonial. The end of imperialism did not abolish the hierarchies of power or knowledge, even if Europe's global relations are presented as equal partnerships. As the Global South reclaims its narrative, economic and normative space, Europe's credibility depends on transforming historical privileges into equal cooperation. In 2026 and beyond, legitimacy will have to be based not on rhetoric but on reciprocity, on recognising unequal histories, supporting intersectional restorative justice – including WPS, climate action and more. In addition, mutually beneficial security architecture should be established. Austria can serve as an example of what a truly decolonial Europe could become.

### **Key Messages**

- EU's global role is changing in the wake of a worldwide decolonial shift.
- EU's credibility is undermined by colonial continuities.
- Reparations and restitutions remain contentious issues shaping Europe's soft power and legitimacy.
- The WPS agenda offers transformative starting points for gender-equitable, restorative cooperation.
- Climate justice is a new frontier of global legal responsibility.
- By carefully weighing up opportunities and risks, Austria can become a model for decolonial global partnership.



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# Asylum in Austria and Europe

Judith Kohlenberger

Granting asylum in Europe must be based on clear responsibilities, the rule of law and the sharing of responsibility. Instead of national jurisdiction and instrumentalisation, it would therefore be more effective to transfer responsibility for asylum procedures to the EU-level, supported by an expanded asylum agency and a Union-wide right of residence. When distributing refugees, both European and nationwide needs-based matching models and incentives for local governments can be used to promote integration and reduce secondary migration. Finally, gender-specific vulnerabilities must be taken into account.

## **Asylum as a European responsibility**

Within Europe, certain asylum-related responsibilities have been transferred to the EU: It determines the criteria for asylum and, through the

Dublin III Regulation, establishes which member state is responsible for the process. However, this leads to a paradoxical situation. While member states and their citizens increasingly feel that they are losing sovereignty when it comes to asylum matters, the EU establishes rights and standards but is unable to ensure that these are implemented.

A key challenge is therefore to establish clear responsibilities. This also involves changing the political discourse from the interests of individual nation states to a federal structure of responsibility between the EU and its regions. To this end, new social welfare, residency and legislative powers must be developed and implemented at the EU-level. Consequently, the goal must be to relieve the burden on member states and transfer responsibility for asylum procedures entirely to the EU-level. This would, to a certain extent, deprive national actors of the opportunity to exploit the issue; debates on “burden sharing” or quota distribution would thus become obsolete.

To support pan-European responsibility, the European Union Agency for Asylum (EUAA) should be developed into an efficient, centralised authority that brings together the expertise and experience of national asylum authorities. Robust digital infrastructure is essential to enable the EUAA to act efficiently and in a timely manner across the EU. The EUAA should therefore be given greater powers to determine asylum status, which would mean that both legislative and executive responsibility for asylum procedures would lie with the EU. This would contribute to the effective standardisation of asylum procedures and quotas in the EU. At the same time, an EU-wide right of residence must be established that is independent of national regulations and applicable throughout the EU.

## **Fair distribution?**

The EU continues to rely on the territories of its member states for the accommodation and care of asylum seekers during the asylum process. However, this distribution does not necessarily have to focus on nation-states, but could focus on a level below, i.e., cities, municipalities or regions – where integration actually takes place. This would rule out both a system modelled on the Dublin III Regulation and a “free choice” model, which is only practicable to a limited extent for regulatory and administrative reasons. If asylum seekers are unable to cover their own

living expenses, either through sufficient personal funds or sponsorship by third parties, access to social assistance may be subject to a residence requirement.

Former best practice examples from Europe, such as Norway and Sweden, show that incentive models for host communities linked to private accommodation and social integration have positive effects and can increase the population's willingness to accept refugees. Matching models can play a role here, bringing together the structural, demographic and economic requirements of regions with the skills and needs of refugees. Urban networks that are particularly committed to taking in refugees can be specifically supported and promoted through EU funds and programmes.

Within Austria, a fair distribution of asylum seekers would entail adherence to the federal state quotas established under Article 15a of the Federal Constitutional Act (B-VG), combined with the effective enforcement of sanctions for non-compliance. This would ensure an initially balanced nationwide distribution. The matching models mentioned above can then be applied. One example would be the algorithm-based mechanism "Match'In", developed by scientists at the University of Hildesheim and Friedrich-Alexander University Erlangen-Nuremberg. Models such as these enable better matches to be made between the individual circumstances of those seeking protection and the resources available in local communities. This will enable the potential of migration for local and regional communities to be better utilised, improve integration and reduce secondary migration, for example to the federal capital.

## **Gender-equitable access to asylum**

Female refugees face gender-specific risks that increase their vulnerability compared to men. Women and girls may experience violence and coercion from border police, smugglers, camp staff and other refugees, but also from their own partners, acquaintances or relatives. Healthcare for women refugees is also precarious, for example in terms of access to toilets, menstrual hygiene and pregnancy care. In the autumn of 2015, during the refugee crisis, the aid organisation CARE International reported that adult women in refugee camps on European soil wore nappies or refrained from drinking enough fluids so that they

would not have to use the toilet at night. Both on the way to and in the unprotected wet rooms themselves, they were exposed to an increased risk of sexual assault and violence.

Due to gender-specific vulnerabilities, protection of women centres on their “membership in a particular social group” which makes them subject to persecution in their country of origin. Social discrimination and gender-based persecution (mostly female) are therefore grounds for granting asylum. In January 2023, the EUAA also argued that women and girls under the Taliban were generally at risk of persecution and could therefore be granted protection in the EU, meaning that individual case assessments were not necessary. This conclusion should be understood not only as a response to factual changes following the Taliban’s power takeover in 2021, but also as an expression of foreign policy interests, as it denies the regime its legitimacy and reinforces the Western emphasis on human and women’s rights.

However, before protection can be guaranteed, access to protection must be ensured. In general, it is clear that legal and safe escape routes disproportionately benefit women and children. In addition to resettlement and humanitarian admission programmes, family reunification plays an important role. Due to the demographic (self-)selection effect of those who enter the country independently, it is primarily female and underage family members who can be rescued from crisis and conflict regions in this way. In order to make migration to Europe more gender-equitable, family reunification for persons entitled to protection, which is currently suspended, should be made possible again.

### **Key Messages**

- Responsibility for asylum procedures should be transferred to the EU-level in order to avoid countries acting unilaterally, to establish clear responsibilities and to achieve standardisation of approval rates.
- The European Union Agency for Asylum (EUAA) could be expanded into a central, efficient authority with legislative and executive powers to ensure uniform and efficient asylum procedures across the EU.
- Cities, municipalities and regions could be more involved in the distribution and integration of refugees, supported by matching models and targeted EU funding.
- At the national level, a more balanced distribution of refugees can be achieved by complying with and enforcing the basic care agreement and, once the asylum process has been completed, by imposing residence requirements tailored to local needs.
- The special protection needs of refugee women and girls must be taken into account by providing safe access to asylum, for example through humanitarian asylum programmes and family reunification.



# “Gendered Disinformation” as a Hybrid Tool

Thilo Geiger

Hybrid threats target the internal stability of Western democracies by exploiting societal fault lines. A key instrument for this is exerting influence in the information space. One particularly effective form of this is ‘gendered disinformation’, which refers to targeted misinformation that seeks to discredit women in public roles, reinforce traditional gender roles, and ultimately undermine women’s political participation. Such strategies contribute to the fragmentation of European societies and are deliberately promoted by Russia. The safeguarding of democratic stability in the long term requires a holistic security strategy that promotes information sovereignty, critical media consumption, and societal resilience.

Hybrid threats represent an integral part of the contemporary security reality. They target not only military structures, critical infrastructures and economic dependencies, but also the leadership capacity of

states. In democracies that means they target the substance of the political system: the trust in institutions and the willingness to participate in the political process.

Key actors in hybrid actions aimed at weakening Western democracies are Russia and China. Particularly in autocratic systems, the line between state and non-state actors is blurred. The latter rarely act independently in such contexts. They are generally integrated into networks of state control that ensure their effectiveness in terms of achieving strategic goals.

## **Influence in the information space**

One mechanism of hybrid influence is foreign information manipulation and interference (FIMI). FIMI is effective where specific target groups can be reached. This may sound trivial, but in practice it has an enormous reach. Different generations form their own echo chambers with specific information channels, interests and vulnerabilities.

Media consumption has shifted from traditional formats to digital platforms and social media. Parts of the Baby Boomer generation, Generation X and the Millennial generation are already moving between these two worlds and are therefore susceptible to hybrid forms of credible information and subtle disinformation. Social media dominates among Generations Z and Alpha, and can be used specifically for manipulation.

## **Patriarchal gender roles as a tool**

FIMI is not a one-dimensional tool. It unfolds via multi-layered approaches and targets areas where social fault lines exist. One form of this is “gendered disinformation”. It aims to use targeted disinformation to exclude women, especially those in politically and socially relevant positions, from the public discourse and thus exclude them from political participation in the long term. Personal qualifications or the motives behind political actions are questioned, as is their identity as women themselves – as was the case, for example, with former First Lady of the United States, Michelle Obama, and former New Zealand Prime Minister, Jacinda Ardern. A democracy that structurally excludes

women and other gender perspectives loses legitimacy and thus a core element of its stability.

A growing area of tension is particularly evident among the younger generations. In parts of Generations Z and Alpha, exaggerated notions of masculinity and a return to “traditional” gender roles are becoming apparent. In these discourses, people perceived as female are reduced to “traditional” roles. This is happening within the “manosphere”, a sprawling, male-dominated online milieu. FIMI is therefore also exerting an influence in the context of a broad and seemingly ever more irreconcilable culture war.

This development is by no means coincidental and builds on socially learned, established role models that suggest security. Nationalist, reactionary movements in Europe are using this foundation, supported by targeted Russian influence, to consolidate a counterpoint to a liberal social model characterised by diversity. Russia benefits from the resulting multifaceted fragmentation of European societies, because democratic nation states with populations divided by conflict appear less threatening to its own geopolitical ambitions than closed alliances of stable states.

These trends are supported by content from the US, which, at the latest since the Trump administration, has been combating non-traditional gender identities. Such narratives find resonance in parts of the bourgeois-conservative milieu in Europe. Once this resonance is achieved, the effectiveness of disinformation increases significantly, because it is no longer perceived purely as external influence, but as a legitimate part of the social debate.

## **Stability in democracies: a challenge for the future**

These developments are affecting a young generation that is growing up amid multiple crises: war in Europe and the Middle East, the dynamics of the AI revolution, the tangible effects of climate change, and the transformation of the world of work and social welfare systems driven by demographic change. When it comes to gendered disinformation, the content is effective regardless of the gender identity of the target

group, as everyone has been socialised with the same gender roles and the associated expectations and promises.

Young people are aware of the existence of disinformation, but it is difficult for them to recognise and classify individual narratives. This is precisely where FIMI develops its influence. Not through open contradiction, but by deliberately sowing doubt and insecurity and presenting simple, reassuring narratives. This presents a clear mandate for social and state institutions. Information sovereignty, critical media consumption and a vigilant public are also part of a state's defence capability. The hybrid dimension of this threat forces us to now consider security in holistic terms and no longer purely in military terms.

The strategic message is clear: security in the 21<sup>st</sup> century means safeguarding democratic stability internally as well as the capacity to act externally. Those who divide society promote nationalism and thus weaken international cooperation and alliances in the long term. And that is precisely the goal of such hybrid influence operations.

### **Key Messages**

- Hybrid threats target the trust in and legitimacy of democracies.
- The influence in the information space is multifaceted and target group-oriented.
- “Gendered disinformation” aims to push women out of political and social participation.
- Russian influence amplifies social division.
- National stability in democracies calls for a high degree of information sovereignty.



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# Cyber defence in Europe

## The current threat scenario

David Song-Pehamberger

The growing digitisation of society also enables threats in cyberspace to continue to increase rapidly. Cyber-attacks on EU member states have increased dramatically, especially since the start of the Russian war of aggression against Ukraine. Russian cyber actors are primarily targeting those states that show solidarity with Ukraine.

## Threat actors

In recent years, numerous acts of cyber sabotage and cyberattacks have been attributed to the Russian state actors. In 2025, for example, France published an official attribution assigning several serious cyberattacks, including attacks against French institutions involved in hosting the 2024 Olympic Games, to the Russian military intelligence agency, GRU. However, Russia also uses a number of state-affiliated

and non-state cyber actors for sabotage and espionage networks beyond its state networks. This makes it considerably more difficult to find clear evidence and to attribute responsibility.

However, Russia is not the only threat actor. Chinese actors have been known for decades for their espionage campaigns in cyberspace. In addition, an increasing number of cases of malware being planted in critical US infrastructures, presumably with the intention of sabotaging energy supplies and telecommunications in the event of a future conflict, have become known in recent years.

China has also repeatedly attacked public institutions in European cyberspace. In May 2025, for example, the Czech Republic attributed a cyber espionage attack on its Foreign Ministry that had been going on for three years, to the Chinese Ministry of State Security. China's obvious cyber-espionage-campaigns continue to increase in the EU, while the estimated number of unknown attacks is probably also enormous. Unlike Russian actors, who have become increasingly ruthless in recent years, Beijing continues to attach importance to remaining undetected in its espionage activities. China is striving to assume a global leadership role in cyberspace as well. To this end, it exploits the grey areas of cyberspace to a large extent and rejects any attempts at attribution by Western states, condemning them as politically motivated.

North Korea is another prominent threat actor whose ransomware campaigns and crypto thefts have already brought in several billion euro for the authoritarian regime. According to estimates, it probably earned over USD 1.3 billion in 2024 from crypto thefts alone. In February 2025, the North Korean hacker group "Lazarus" stole another USD 1.5 billion from the crypto exchange ByBit, the largest crypto theft to date. Unlike Chinese cyber actors, North Korean actors are relatively indifferent to whether they are caught in the act. North Korea is already largely isolated internationally and subject to heavy sanctions, which is why state-sponsored cybercrime is a significant source of income for Pyongyang.

## **Cyber defence at Union level**

Countering this multifaceted threat posed by cyber sabotage, espionage and crime requires a multi-layered approach that goes beyond

the capabilities of any single state. Recognising the need for EU-wide cooperation, the 27 EU member states have decided to tackle the cyber threat situation together.

In March 2022, shortly after Russia launched its full-scale invasion of Ukraine, the Strategic Compass for Security and Defence was adopted, setting out the strategy for establishing joint defence measures. Cyber defence was also taken into account. To this end, the EU Cyber Defence Policy was drafted subsequently, setting out the strategic framework for capacity building in this domain.

## **Strengthening European cyber defence**

The Cyber Defence Policy connects and expands existing strands of cybersecurity and defence in the EU. New initiatives include the establishment of a network of all military cyber emergency response teams (CERT), the creation of a joint cyber situation and coordination centre (EU Cyber Defence Coordination Centre) and the development of a framework for regular cyber emergency exercises (CyDef-X). In addition, further measures are planned to improve joint interoperability, protect critical infrastructure and increase investment in cyber defence capabilities. As part of all the initiatives, both civil and military measures have been identified to ensure cross-sector implementation.

The strengthening of existing structures has also been taken into account, such as the existing attribution mechanism of the EU member states, the “Cyber Diplomacy Toolbox”. Under this mechanism, cyberattacks on EU members have been attributed and sanctioned with increasing frequency in recent years. This included both the Russian cyberattack on 24 February 2022, which marked the start of the full-scale invasion of Ukraine, and the joint condemnation of the aforementioned cyberattack on the Czech Republic.

The EU Agency for Cybersecurity (ENISA) has also had its competence strengthened. In addition, the EU Cybersecurity Competence Centre was opened in 2023 and tasked with the strategic management of EU funding to strengthen national cybersecurity initiatives. Furthermore, a number of legislative initiatives are also worth mentioning, such as the revised Network and Information Security Directive (NIS-2), which extends regu-

lations for cybersecurity in all EU states and thus strengthens cyber resilience across the Union. NIS-2 is currently being implemented at national level. There is also the Cyber Resilience Act, which introduced strict cybersecurity requirements for digital products, and the Cyber Solidarity Act, which provides for a joint EU “cyber shield” and the establishment of a cyber reserve.

## Outlook

In 2026, these and other legal norms will be gradually implemented at national level, and initiatives to improve cyber resilience and defence will be implemented and expanded. The EU Cyber Defence Coordination Centre will also enter its first phase of implementation at the beginning of 2026. European cyber security and defence is thus on a positive path towards joint, EU-wide cyber resilience. Implementation will take several more years, and it remains to be seen whether it will progress quickly enough, as the threat situation continues to grow rapidly and malicious cyber actors exploit any vulnerability that arises within increasingly digitised societies.

### Key Messages

- Cyberattacks on EU states have increased significantly since Russia’s attack on Ukraine, with pro-Ukrainian countries being the particular focus of Russian, Chinese and North Korean actors.
- Russia uses a network of state, state-affiliated and criminal groups, making a clear attribution and countermeasures difficult.
- China relies on covert, long-term espionage in cyberspace to secure geopolitical and economic advantages and consolidate its global leadership role.
- The constant threat posed by cyber sabotage, espionage and crime requires a comprehensive solution that goes beyond the resources of individual states.
- The EU member states have agreed on a multi-layered approach to increase cyber resilience across the Union.
- The goal is to achieve joint, EU-wide cyber resilience, but implementation will take several years yet, while threats continue to evolve dynamically.



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# International Organised Crime in Europe

## Focus on youth

Daniela Pisoiu

European networks in the area of organised crime are increasingly involving minors in low-threshold, high-risk and sometimes violent activities. Recruitment takes place openly via social media, through coercion of vulnerable groups and via age-based hierarchies. At the same time, areas of crime are shifting to the digital space. These include cyber fraud, grooming and sextortion. The latter functions as an independent criminal economy and as a lever for recruitment, control and monetisation. Multidimensional, evidence-based strategies that combine early intervention, school and community-oriented measures, digital resilience and the targeted disruption of recruitment chains are effective.

The involvement of young people in organised crime structures is growing in several fields of crime simultaneously. These include violent and knife crimes, drug-related offences, including darknet procurement and party drugs, damage brokered online and exploitative recruitment via various platforms. European situation reports point to the targeted recruitment of first-time offenders, in some cases as part of violence-as-a-service models. Key geographical hubs are ports on the North Sea and Atlantic coast, nightlife areas and urban fringe locations, where logistics, sales premises and digital contact initiation are concentrated. In all settings, digital blackmail through sextortion is increasingly becoming a factor in entry or acceleration.

Push factors such as poverty, dropping out of school and family pressure meet pull factors such as status, quick profits and group affiliation. In terms of perpetrator economics, minors are considered “low risk”, facilitating recruitment and shielding hierarchies. Loosely connected but hierarchically controlled networks have been observed where older youths train and supervise younger ones, binding them through economic incentives or blackmail (including sextortion). Growing drug markets, competitive pressure and the availability of weapons are increasing the severity of offences and reducing the opportunities for exit.

## **Digital vectors and data landscape**

In terms of individual trajectories, platform affordances such as direct messaging, recommendation algorithms and anonymous payment methods lower the barriers to entry. Recruitment takes place in social media, messenger and gaming environments, accompanied by gamification, influencer mimicry and supposedly legitimate “jobs”. Sextortion has a cross-cutting effect: compromising content is used to extort payments, further material or operative cooperation. Control and payment are increasingly encrypted; overlaps with extremist and misogynistic online milieus reinforce the normalisation effects of violence and devaluation.

In terms of data collection and analysis, comparability suffers from heterogeneous definitions, age limits and data protection requirements. Data evaluations often underestimate the dark areas, especially in the case of online exploitation. Evidence-based control would require mixed-method approaches, front-line surveys and integrated data pools across police,

justice, education, social services and health. Helpline and platform data on sextortion can be used as early indicators, but must be transferred to monitoring and evaluation systems that map the development (entry, retention, exit) and the effects of measures.

## **Prevention, policy and outlook**

Effectiveness is particularly evident in early-intervention, multidimensional programmes. These include high-quality early fostering, family-based support, social and emotional learning in schools, multi-component community approaches and the development of digital resilience. Co-responder models between the police, health and social services, diversion instead of imprisonment for first-time offenders, and local alliances at hotspots reduce harm, but require stable funding and consistent evaluation of outcomes.

At the EU level, platform responsibility and child protection online are growing in importance; priorities include disrupting digital recruitment, expanding protection architectures at ports and hubs, specific sextortion prevention (education, reporting channels, rapid takedowns) and indicator-based longitudinal monitoring for the scaling of effective models.

Three priorities are central to the situation in Austria. First, the prevention of digital recruitment channels and the securing of logistical corridors through administrative requirements, platform cooperation and the situation-based presence of interdisciplinary teams. Sextortion cases must be systematically recorded and processed via helplines, schools and youth welfare services. Secondly, the expansion of early prevention in schools and open youth work, including digital resilience and specific modules on grooming and sextortion, flanked by diversion and graduated alternatives to imprisonment. Thirdly, the institutionalisation of the cooperation between law enforcement, public health and social services (LEPH). This requires standardised interfaces with child and youth welfare, migration and the labour market, as well as the introduction of harmonised indicators, longitudinal monitoring and consistent evaluation of outcomes for the reliable scaling of municipal models.

### **Key messages**

- Across the EU, minors are increasingly being drawn into risky and violent activities. Ports, nightlife areas and urban peripheries are central hubs.
- Recruitment takes place digitally, through coercion and within age-graded structures. Sextortion acts as a lever for recruitment, control and monetisation.
- Early, multidimensional interventions, cooperation between law enforcement, health care and social services, and administrative and situational barriers at hotspots are effective.
- Data gaps require integrated data systems, longitudinal designs and consistent results evaluation for scalable prevention.
- Political priorities are shifting towards prevention, rehabilitation and platform responsibility – with a focus on digital resilience and practical application.

5

# Risks and challenges for Austria





BMLV/Daniel Trippolt

## Risks and challenges for Austria

Silvia Angerbauer

The Western-influenced, liberal world order has come under severe pressure. The global security and defence policy is characterised by a veritable vacuum of authority. Europe must succeed in positioning itself as a powerful actor that is capable and willing to act. The stronger the EU's comprehensive defence capabilities, the greater the security gains for Austria. Decisive, nationwide measures will therefore have to continue to be taken in order to strengthen Austria's own security in this complex situation, to make a credible contribution to European security and thus to be taken seriously.

The era of the Western-dominated liberal world order seems to be coming to an end in the medium term; hopes for its continuation are unlikely to be fulfilled in the longer term. Major powers are vying for the prerogative of interpretation, strategic advantages and coalitions. International organisations, above all the United Nations and the OSCE, are virtually

incapable of acting due to the unwillingness of the great powers to accept them as authorities and in view of the need for global policy-making.

Against this backdrop, the strategic deficit of Europe is also becoming particularly critical. The “change through trade” model that is now proving to be ineffective, coupled with the EU’s inability to exert geopolitical influence, reduces the Union’s capacity to react and act and only reinforces its loss of credibility. If the US implements its plans and withdraws around half of its troops from Europe, the EU will be forced to turn words into actions. Tedious consensus-building processes in line with the rules, political conclusions and strategy documents will then no longer suffice. In order to survive the current power constellation unscathed, investment in comprehensive defence readiness and effective military capabilities is no longer an option, but a necessity. Austria will also be called upon to contribute to this system of collective security in Europe.

## **Paths to success**

In conceptual terms, the EU continued its presentable strategic work in the field of security policy in 2025. At the target level, the strategy for establishing a “Preparedness Union” to strengthen the general crisis response capabilities of citizens, society and state institutions was adopted. On the other hand, the White Paper on Defence – Preparedness 2030 was accepted that aims to expand Europe’s defence capabilities and military autonomy.

The European Defence Readiness Roadmap 2030 adopted in autumn 2025 now sets out measures for how the EU intends to achieve its defence readiness goal by 2030. This roadmap (including targets, indicators, deadlines, etc.) aims to ensure that the EU Defence White Paper of March 2025 is implemented in a structured manner over the next five years. An annual report to the Council of Europe underlines the commitment of the member states to its implementation. The focus of this document is on closing critical capability gaps in nine priority areas, for which, among other things, four flagship projects have been proposed: an initiative on drone defence, protection of the Eastern flank, an air shield and a space shield. The sovereignty of the EU member states regarding national defence will of course be preserved – the

move towards European defence, although enshrined as a possibility in the Treaty on European Union, is not being actively pursued.

Finally, the “ReArm Europe” resource initiative is intended to mobilise up to EUR 800 billion for the expansion and modernisation of European defence. The aim is to close structural gaps and strengthen Europe’s strategic autonomy in order to reduce its dependence on external security guarantees. To this end, the EU budget will provide member states with secured loans, for example, and enable the coordinated activation of the national escape clause by all member states in order to create additional flexibility for higher defence spending. In addition, the European Investment Bank now also finances military equipment, infrastructure, services and technology to make the EU secure and more resilient. Weapons and ammunition, however, will not be financed.

## **And Austria?**

Austria has shown solidarity in supporting all EU decisions. Accordingly, “active participation” in the “development of the European Defence Union” is also enshrined in the 2025-2029 government programme. In April 2025, the Council of Ministers further emphasised Austria’s EU orientation in joint foreign, security and defence policy issues.

The new Austrian Security Strategy should therefore firstly set out the national objectives regarding the implementation of the EU resolutions. Secondly, concrete measures to achieve Austria’s overall national “readiness” should be laid down in sub-strategies and other planning and implementation documents, such as a new resilience plan. Thirdly, budget planning and resource allocation for achieving European and national security preparedness and defence readiness should be secured in the Federal Finance Framework Act and the Federal Finance Act.

It will also be particularly important to educate the population in a low-threshold and target group-oriented manner about existing risks, correct behaviour in crisis situations and the need for comprehensive defence. An assessment in the context of the COVID-19 crisis leads to the basic assumption that organisations that have already dealt intensively with diversity and inclusion, and the associated challenges and opportunities, may have been better prepared for the crisis and de-

veloped a higher degree of resilience – and that this advantage could perhaps also prove its worth in other future crises.

## **Economic opportunities**

For the European and national industrial sector, too, geopolitical and European-political change is much more than a theoretical concept. In future, strategic decisions will have to be assessed more in the light of geopolitical developments – whether they concern the choice of location, the procurement of raw materials or cooperation partners. Anyone investing in new tooling lines today, for example, should not only assess economic factors, but also keep an eye on secure access to raw materials and supply chains.

The geopolitical shift also brings opportunities, both for the economy and for security policy. In terms of security policy, greater independence in Europe offers a higher degree of strategic autonomy. A reasonable degree of open strategic autonomy would in turn offer the opportunity to “act independently whenever and wherever necessary, and to act together with partners whenever possible”, as laid down in the Council Decision of November 2016. With regard to the industrial sector, comprehensively planned, resilient value chains can bring economic advantages. Similarly, the expanding requirements in the security and defence sectors are also increasing demand. This can help to boost the German automotive industry, which is in crisis, and hence the Austrian automotive supply industry.

## **Conclusion**

The Western-dominated international order is undergoing a profound transformation. National security policies as well as companies are facing enormous challenges. Long-winded strategies and entrenched structures and processes must be replaced by agile models that are forward-looking and can cope with unpredictability, political crises and upheavals – in other words, resilient. Anyone who wants to survive internationally today needs a deep understanding of geopolitical dynamics and must recognise that political stability within the EU can no longer be taken for granted. It is clear that if the US policy continues,

the responsibility for security policy will weigh more heavily on European shoulders. Austria will also be called upon to make an appropriate contribution to the changing European security model.

#### **Key messages**

- The era of the Western-dominated liberal world order has come under severe pressure.
- For the EU, comprehensive defence readiness and effective military capabilities are no longer an option, but a necessity.
- The stronger the EU's comprehensive defence capabilities, the greater the security gains for Austria.
- The geopolitical and European-political change presents challenges and also opportunities for security policy, but also for the industrial sector.
- Austria is called upon to make an appropriate contribution to the changing European security model.



BMLV/Daniel Trippolt

# The Return of National Defence

Bruno Günter Hofbauer

The Russian war of aggression has again shown the importance of conventional warfare and credible deterrence. With its AAF Development Plan 2032+, Austria is effectively focusing the Austrian Armed Forces on military national defence. This requires greater combat capability, rapid mobilisation, a strengthened ready reserve and whole-of-nation defence readiness. In order to counter threats ranging from the cyber sector to conventional threats, adaptations to the legal system and a defence budget of two per cent of GDP by 2032 are necessary.

The list of buzzwords that have accompanied us for several years in the context of security and defence policy could go on forever: war of aggression, turning point, deterrence, annexation, drones over NATO territory, espionage, airspace violations, medium-range missiles, military provocation, large-scale manoeuvres in Eastern Europe. The consequences of the Russian war of aggression against Ukraine have also not

failed to leave their mark on Austria. On the contrary: central concepts of warfare from the Cold War era have come to the fore again. These include elements such as nuclear weapons, artillery, main battle tanks, air defence, long-range weapons and mobilisation. These concepts are supplemented and reinforced by new developments such as the proliferation of cheap, unmanned systems with lethal effects, precise situational awareness that makes the battlefield even more transparent through the use of open sources and artificial intelligence and quantum technology.

## Focus on national defence

With its Armed Forces Profile “Unser Heer”, the Austrian Armed Forces (AAF) had already placed the medium and long-term focus on the national defence in 2021, one year before the Russian invasion of Ukraine. This also involves a shift away from the primary focus of the AAF on international stabilisation operations and domestic assistance operations. The Defence Staff implemented the guidelines laid down in the Armed Forces Profile with the “AAF Development Plan 2032+”. However, this cannot be reduced to hardware alone, such as new weapon systems or infrastructure. It is more a question of realigning the military thinking and actions of the entire organisation towards military national defence and combat in Austria against a possible external aggressor.

The speed with which political intentions can change and existing potential can be utilized to achieve political goals was unequivocally demonstrated in 2022. It was also evident that there is usually little time for preparation. If you do not prepare to defend your own country, failure is inevitable should a defence situation arise. The AAF must therefore be able to react quickly to the threats which can be expected in the future. Even though Austria is currently in a relatively safe position, there are several things to consider regarding the future.

- A future military confrontation on the fringes of Europe will not be without its military implications for Austria.
- There is no certainty that Austria’s currently comfortable geostrategic position will continue to offer protection in 10- or 15-years’ time.
- All potential developments in Europe and its environs must be taken into account in the long-term orientation of the AAF. This inev-

itably includes defence against a conventional attack on Austrian territory.

This means that the scope of medium to long-term threats ranges from hybrid threats of various kinds to various forms of sub-conventional military actions and attacks with conventional means.

## **Requirements for a credible national defence**

A credible national defence requires, first and foremost, high-quality forces and resources that possess high combat capability and can effectively counter these comprehensive threats. However, they also need to be sufficient in number, because mass again plays an important role. In order to meet the military challenges of the future, the size of the armed forces has to be increased in the medium term. The AAF must again be enabled to work together in their entirety as armed forces and to be effective in combat involving all branches in all domains. This means strengthening combat power, readiness and responsiveness, information and decision superiority and sustainability and protection.

This entails expanding existing capabilities and, at the same time, bringing new ones into the AAF. In addition to the need of credible air defence and cyberspace warfare capabilities, the ability to deliver long-range firepower is required. It must be possible to hit an enemy where it hurts most. This needs to be supported by comprehensive reconnaissance and command capabilities, but also by excellent logistics. Catching up on shortcomings in this area will take time: at least a decade must be estimated for the first essential steps of re-equipping and equipping the AAF with resources adequate to the threat.

The AAF is a ready reserve army; the ready reserve should therefore be given a new status. The ability to mobilise quickly is one of the essential prerequisites for a successful operation. Mobilised forces must be able to deploy as quickly as possible, as the time available in the event of a conflict is extremely limited. Mastery of military skills is therefore indispensable for both stand-by forces and forces to be mobilised. High-quality national service of sufficient duration, supplemented by regular recalls to maintain qualification levels, is indispensable. The

preparation time currently still available must also be used intensively for training and exercises.

National defence is not just the responsibility of the armed forces; it is a whole-of-nation task, with political leaders, the population and the economy all playing key roles. This requires coordinated, whole-of-nation cooperation. The capacity to act in a crisis or conflict situation requires a strengthening of the will to defend the country; a precondition for this is the revitalisation and modernisation of comprehensive national defence, as enshrined in the constitution. A potential aggressor must be made aware that there will be no surrender without a fight. On the contrary, we are willing and able to resist aggression and to fight back. That is the core of deterrence, which in turn must be based on credible military capabilities.

## **Framework conditions**

The importance of military national defence has not changed in essence. Neither has an “end of history” come about, nor have wars between states disappeared. Clausewitz’s assertion that war is an act of violence in which one opponent seeks to impose their own political will on another by rendering them defenceless through physical force has also not changed. Accordingly, it is imperative to create the necessary legal and budgetary framework conditions to ensure the necessary security of action for the future.

One of the essential conditions for ensuring military national defence is to stick to the two per cent target until 2032 – in other words, to increase the budget for military national defence to two per cent of GDP. Likewise, adaptations to the legal framework must be made in good time in order to be able to effectively counter threats in areas such as the information environment, cyberspace or from unmanned systems.

The AAF Development Plan 2032+ has the clear objective of restoring Austria’s comprehensive military defence capability. However, shifting the focus to national defence does not mean abandoning the ability to cooperate with other armed forces. On the contrary: interoperability is essential for survival, both in international cooperation and in the event of war. In order to achieve these objectives, the first step is to “repair”

the existing AAF, i.e., to quickly eliminate existing shortcomings. At the same time, capabilities must be consolidated and expanded from the end of the 2020s onwards.

### **Key messages**

- The Russian war of aggression against Ukraine has demonstrated that conventional warfare is once again of central importance – flanked by new technologies such as drones and artificial intelligence.
- With its Development Plan 2032+, the AAF are refocusing on military national defence rather than international operations and assistance operations.
- Effective national defence calls for high-quality forces in sufficient numbers, including modern air defence, cyber defence and long-range firepower.
- National defence is not just a matter for the AAF; it is a whole-of-nation task. It requires a willingness to defend the country, political leadership and credible deterrence. Strengthening the ready reserve in order to be able to deploy forces quickly is crucial.
- Increasing the defence budget to two per cent of GDP by 2032 and making legal adaptations are essential to ensure the military capacity to act.



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# Austria's Neutrality and the risks of avoiding the debate

Martin Senn

After joining the European Union in 1995, Austria adapted the legal framework of its neutrality, thereby laying the groundwork for solidarity within the Common Foreign and Security Policy. However, the tension between neutrality and solidarity was never discussed publicly. As a result, the population is not sufficiently prepared for the demands of Austria's military defence or for a potential obligation to assist another EU member state.

Even nearly four years after the start of Russia's full-scale invasion of Ukraine, the debate about the nature and value of Austrian neutrality has barely begun. In light of the profound changes in the European and global security order, however, there is an urgent need to engage both the public and the policymakers in the debate about neutrality. This concerns both its relationship to European solidarity in the area of the

Common Foreign and Security Policy (CFSP) and the Common Security and Defence Policy (CSDP), as well as its armed dimension.

It would be misguided, however, to limit the discussion purely to neutrality – no matter how relevant this may be. What is needed is a comprehensive and ongoing debate about Austria's foreign, security and defence policy in the 21<sup>st</sup> century.

## **Differential neutrality**

The end of the East-West conflict marked a turning point in the history of Austrian neutrality. During this phase, a gradual shift towards differential neutrality, i.e. neutrality with limited validity, was introduced. In view of the end of the deadlock in the UN Security Council and the annexation of Kuwait by Iraq in 1990, Austria turned to a reinterpretation of its neutrality obligations and its obligations arising out of UN membership. Obligations under the United Nations collective security system were henceforth to take precedence. In this context, Austria also participated in enforcement measures against Iraq and subsequently against other states.

The second, even more far-reaching step was Austria's accession to the European Union in 1995. In order to provide a legal basis for participation in the CFSP and thus the CSDP, the National Council adopted Article 23f (later Article 23j) of the Federal Constitutional Act (B-VG). This not only enables participation in missions and operations within the framework of the "Petersberg tasks", but also, according to prevailing legal opinion, participation in common defence on the basis of Article 42(7) of the Treaty on European Union (TEU). Article 23j B-VG thus "overrides" the Neutrality Act of 1955 and allows Austria to suspend its neutrality for measures within the framework of the CFSP/CSDP. However, Article 42(7), with the "Irish clause" offers neutral EU states the option of refraining from measures that they consider incompatible with their neutrality.

## Solidarity and armed neutrality

How Austria would act after a trigger event within this legal framework is ultimately a political question. The Austrian population, however, is not prepared for this question. There has been neither public debate nor a discussion with the public, about what solidarity means in EU foreign, security and defence policy, nor about how Austria could use the room for manoeuvre created by its differential neutrality. The absence of a public debate on these issues increases the risk that, in the event of a mutual assistance case, the government would come under considerable pressure between the domestic public resistance and the expectations of solidarity from the EU member states.

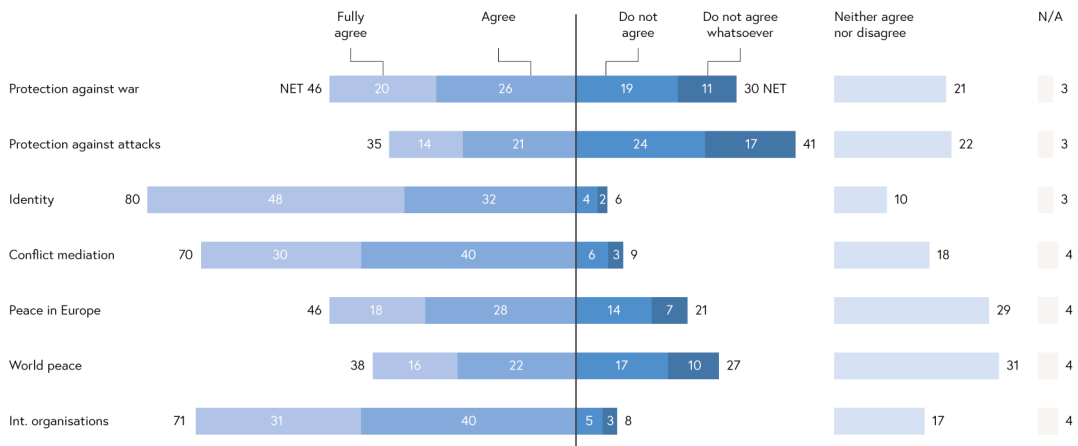


Illustration 2: Functions of Austria's neutrality. Austrian Foreign Policy Panel Project (<https://afp3.at/>, 3<sup>rd</sup> wave 2025, n = 3,000). Question: With which statement regarding neutrality would you agree?

The neglect of the armed nature of neutrality also poses a significant risk. In the course of its political interpretation, Austria has consistently emphasised the non-military dimension of its neutrality, i.e. international engagement and good offices. However, military national defence has been neglected as a result. The fact that so little attention was paid to the defence of neutrality was due to the role of the US as Europe's security guarantor after 1945.

Although the US is increasingly withdrawing from this role and taking an increasingly antagonistic stance towards Europe, this “protected phase” of neutrality still seems to be resonating. Surveys conducted by the Austrian Foreign Policy Panel Project (AFP3) show that protection against attacks is the least popular of all functions of neutrality, although it is still supported by 35% of all respondents. At the same time, only 14% of all respondents (22% of male respondents) would be willing to defend the country with arms. This puts Austria among the lowest-ranked countries in Europe.

This lingering influence of a non-military interpretation of neutrality makes it difficult for Austria to adapt to the changed requirements of the EU security and defence policy.

#### **Key messages**

- Art. 23j Federal Constitutional Act “overrides” the Neutrality Act and offers Austria far-reaching opportunities to participate in the EU’s Common Foreign and Security Policy and Common Security and Defence Policy.
- The relationship between Austria’s neutrality on the one hand and European solidarity on the other has not been sufficiently discussed in and with the public.
- Due to the lack of public discussion, the Austrian population is inadequately prepared for a call for mutual assistance from another EU member state.
- The lingering influence of a predominantly non-military interpretation of neutrality makes it difficult for Austria to adapt to the changed requirements of the EU security and defence policy.

# A comprehensive strategy for an era of epochal change

Markus Kornprobst

In recent years, Austria has introduced a number of strategic documents, including the Foreign Economic Strategy and the Security Strategy. As a result, there are numerous strategy papers tailored to specific policy areas, but no overarching strategy that transcends the individual policy fields and their respective strategies.

## The transitional period of epochal change

Three aspects of the environment of Austrian foreign policy are currently undergoing fundamental change. Materially, the Fourth Industrial Revolution is reshuffling the deck. The beneficiaries of technological progress include not only states, particularly in Asia and the Americas, but also non-state actors such as major technology corporations. In-

stitutionally, the pillars of the liberal, rules-based world order, which until recently appeared solid, have begun to wobble. The World Trade Organization, established to promote global free trade, finds itself marginalized, while U.S. President Donald Trump repeatedly threatened new tariffs and, in many cases, implemented them. The United Nations, founded to maintain international peace and security, is all too often merely a spectator in the armed conflicts of the world, even when these conflicts flagrantly violate its charter and principles.

Much has also changed epistemically. At the end of the Cold War, human security, in the form of the responsibility to protect, still brushed against the sacrosanct principle of sovereignty. Today, it is no longer considered one of the influential perspectives on international politics. Instead, an increasing number of decision-makers view world affairs through the lens of geopolitics. At the same time, a cognitive deglobalisation is underway. While a high degree of material globalisation persists, a romanticised nationalism claims that nation-state solutions can adequately address globalisation dynamics.

## **Austrian identity in international politics**

Neutrality is a cornerstone of the legal foundations of Austrian foreign policy and, beyond that, a key element of national identity. Public support for neutrality remains high. However, it is the responsibility of policymakers to shape it and adapt it to the changing times. Just as a reinterpretation of neutrality once enabled Austria's accession to the United Nations, today neutrality must be adjusted to reflect the sovereignty pooled within the EU and the security threats facing Europe.

Austria's foreign policy is closely intertwined with the foreign policies of the EU and other EU member states. The same applies, even more strongly, to economic policy, and increasingly to security and defence policy. It is not only sovereign states that must be defended, but also the sovereignty pooled within the EU. Violations of the territorial integrity of Poland or Estonia by Russian drones, for example, target not only those specific EU member states but the EU as a whole. The same is true for nuclear threats as well as for hybrid warfare.

Another relevant aspect of Austria's identity is cosmopolitan in nature. Austria has repeatedly distinguished itself as a peacemaker, mediator, and facilitator, whether through peacekeeping missions under the UN or through advancing international rule of law. Time and again, Austria has successfully contributed to shaping the international order.

## **International Order in the national interest**

Austria's foreign and security policy serves its national interests, from economic interests to the defence of territorial integrity. The latter is not only a matter of state *raison d'être* but also a legal obligation under international law. Neutral states must be able to defend their territory independently. In this sense, the goal of Austrian foreign policy is *raison d'état*. Richelieu, however, also pointed to *raison de système*. It is therefore not only in Austria's interest to pursue the country's short-term, utilitarian welfare. Rather, Austria seeks to promote an international order in which the rule of law prevails over the use of military force.

The international rule of law is of critical importance, particularly for states like Austria. Only with it is there a chance that great powers can be restrained in their (military) exercise of power. Accordingly, multilateralism is almost embedded in the DNA of Austrian foreign policy. At present, however, it is undoubtedly in a veritable crisis, yet this does not change Austria's interest in upholding multilateralism during this period of upheaval.

## **Issue of capabilities**

Austria must, together with the EU and its member states, develop further capabilities in at least five areas in order to safeguard its foreign policy interests. First, military national defence must be able to protect Austria's territorial integrity. This requires adequate military equipment, including new digital technologies, as well as societal support for the Austrian Armed Forces. Second, Austria needs civil-military capacities to protect its critical infrastructure and counter hybrid attacks aimed at polarising society and driving a wedge between Austria

and the EU. Here too, it is essential that the population supports the measures being implemented.

Third, from an economic perspective, Austria and Europe must unleash innovative potential to avoid falling further behind internationally. Advances in areas such as quantum computing, artificial general intelligence, or even artificial superintelligence could fundamentally transform people's lives. Understanding and anticipating how innovations can be applied for political and military purposes must therefore be sharpened. Fourth, the regulation of new technologies has diplomatic relevance. This requires specialists in emerging fields, such as tech diplomacy, to be trained or further educated. Finally, fifth, expertise in scientific and technical fields is essential. Universities, think tanks, and research institutes thus form a critical part of the infrastructure for effective foreign and security policy in the age of innovation.

## **In lieu of a summary: a question of consensus**

Strategy papers risk languishing in drawers if they are not backed by the broadest possible consensus. Such a broad consensus can ensure that a country stays on course even when the waves of world politics crash harshly against its ship. In particular, an overarching strategy that goes beyond sector-specific policy strategies requires such a broad consensus. Its outlines should be clearly identifiable, providing a foundation on which a public debate can be built.

### **Key messages**

- Austria operates in an environment of profound change, shaped by technological upheavals, a weakened global order, and a resurgence of geopolitical thinking.
- Neutrality remains a core part of Austria's identity but must be interpreted in a modern context, considering EU-level sovereignty and emerging threats.
- International rule of law and multilateralism form the heart of Austria's interests and are essential for the security of small states.
- To act effectively, Austria requires greater military, civilian, technological, and diplomatic capabilities, supported by broad political consensus.



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# Between War and Peace

## Russia's hybrid warfare in Europe

Elisabeth Hoffberger-Pippan

The invasion of Polish airspace by at least 19 Russian drones on the night of 9 to 10 September 2025 can undoubtedly be described as a decisive security event for Europe. The intrusion into NATO airspace is one in a series of hybrid operations undertaken by Russia to restore its geopolitical supremacy and implement its imperialist plans. The debate on hybrid warfare also has a gender dimension, as misogynistic sentiments are deliberately stirred up to support pro-Russia voters in Western democracies.

There is still no universally accepted definition of the term “hybrid warfare”, even though it has been in common use since the 1990s. It was not until James N. Mattis and Frank Hoffman published an article in 2005 that the term hybrid warfare was used for the first time in the same way in which it is understood today. Mattis and Hoffman assumed that in the future, i.e. today, hostile states would use a combi-

nation of various techniques and tactics in the grey zone between war and peace. These would extend to various domains, including civil and social, but also military.

Russia itself does not use the term “hybrid warfare”. However, an article published in 2016 by the Chief of the General Staff of the Russian Armed Forces, General Valery Gerasimov, is considered the main source for understanding Russian hybrid warfare, even though the terms “hybrid warfare” and “hybrid operation” do not appear once in the text.

## Hybrid warfare

In order to understand the challenges facing Austria in particular, it is worth taking a look at the Austrian Security Strategy. It then becomes clear that Austria must prepare itself above all for the increased risk of a direct military confrontation between Russia and a NATO member state. The exact legal and political classification of such a confrontation could prove difficult, as demonstrated by the intrusion of Russian drones into Polish airspace.

Shortly after this incident, NATO Secretary General Mark Rutte and Supreme Allied Commander Europe (SACEUR) Alexis G. Grynkewich launched Operation Eastern Sentry, clearly condemning Russia as the perpetrator of the attack. However, during a visit by Polish President Karol Nawrocki to the USA, US President Donald Trump expressed doubts that Russia had committed this incursion intentionally. US Secretary of State Marco Rubio also expressed similar doubts. This is because Russian Defence Minister Andrey Belousov claimed that Russia was not responsible for this attack.

Although both the NATO Secretary General and the SACEUR were quick to condemn Russia’s actions, statements by both the US President and the Secretary of State reveal the potential of hybrid warfare. Hybrid actions which always occur in a politically and often legally grey area can lead to differences in foreign policy perspectives and even to incoherence in foreign policy. Ultimately, they could undermine NATO’s credibility and deterrence potential.

Following another incursion by Russia on 22 September 2025, this time into Estonian airspace, Estonia convened an emergency meeting of the UN Security Council. During this meeting, however, the US Ambassador to the UN, Mike Waltz, emphasised that the US would defend every inch of NATO territory. Whether this will really be the case cannot be answered conclusively, particularly in view of current domestic political developments in the US. It will therefore be all the more important for European states to demonstrate greater unity in the future, thereby increasing their military independence from the US. In light of these developments, Austria should also actively work to strengthen the European strategic autonomy within the framework of its constitutional possibilities. This would help prepare Europe for a potential withdrawal of US support while simultaneously strengthening efforts to counter Russian hybrid warfare.

## **Austria's response to hybrid warfare**

The incursion of Russian drones into NATO airspace clearly shows that adequate, comprehensive and cost-effective air defence is essential. Austria therefore intends to continue participating in the European Sky Shield Initiative (ESSI). While there has been much discussion about the procurement of the air defence systems "IRIS-T SLM" and, at least in Germany, of the "Arrow 3", the need for cost-efficient counter-drone systems is now likely to become more prominent among political decision makers.

Another issue in the context of hybrid warfare is the dependence on fossil fuels. Although Austria stopped importing gas directly from Russia via the Transgas pipeline in 2025, gas deliveries from Slovakia are still possible, some of which are in turn sourced from Russia. The European Commission has already announced its intention to achieve full independence from Russian gas by 2028. However, crude oil supplies also pose a challenge; although Austria does not purchase crude oil directly from Russia, its current source of supply, Kazakhstan, delivers it via pipelines that run largely through Russian territory. Here, too, there is a risk that Russia could profit financially from oil deliveries to Europe and retain a political power lever that it might exploit as a part of its hybrid warfare if necessary.

## The gender dimension of hybrid warfare

During the 2016 US election campaign between Donald Trump and his opponent Hillary Clinton, in particular, it was possible to observe how misogynistic narratives were fuelled on social networks by Russian and to some extent Chinese bots in order to undermine the competence and credibility of the female candidate. Russia pursues an anti-feminist foreign policy with which it also aims to mobilise pro-Russian segments of the population of Western countries. This not only leads to further polarisation within democratic societies, but also dilutes awareness of the current threat landscape.

It is therefore all the more important to take action against the denigration and discrimination of women within European society as a whole, especially in the context of election campaigns. Furthermore, social media platforms should also be obliged to take much stronger action against disinformation and misogynistic comments. This could help to prevent President Putin from gaining additional voter support in Europe.

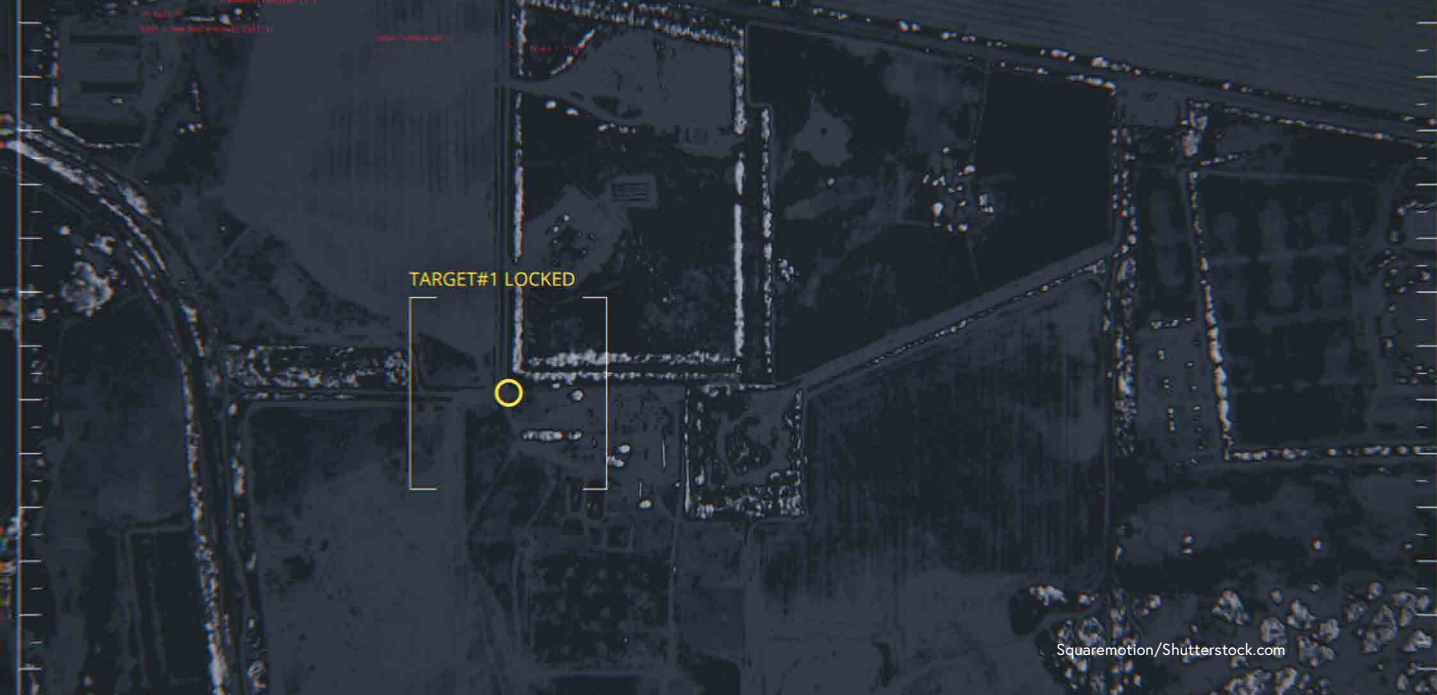
## Outlook

Although the concept of hybrid warfare is difficult to grasp, the term helps decision-makers to better understand the complexity and intricacy of politically relevant actions in the grey zone between the civil and the military component. The promotion of European strategic autonomy, participation in ESSI, and the procurement and development of high-tech drone defence systems appear to be important steps in this regard. Austria has already reduced its dependence on Russian gas, although the supply of oil from Kazakhstan is problematic due to the pipeline running largely through Russian territory.

Austria should therefore continue to seek to source crude oil from alternative sources and also import gas primarily from countries that are not dependent on Russian gas imports. The fact that hybrid warfare raises not only military or economic issues, but above all democratic and gender-specific issues, is demonstrated not least by Russia's influence on the 2016 US election campaign. In the fight against hybrid warfare, it is therefore urgently necessary to pay sufficient attention to the gender dimension, which is known to manifest itself in a wide variety of areas of life.

### **Key messages**

- Russia is deliberately using hybrid warfare to restore its geopolitical dominance and to destabilise Western democracies.
- The incursion of Russian drones into Polish and Estonian airspace demonstrates the difficulty of legal and political responses to actions in the grey zone between war and peace.
- Hybrid warfare aims to promote discord within NATO and to weaken its deterrence potential.
- Austria should deepen its participation in the European Sky Shield Initiative and advance with the development of cost-effective drone defence systems.
- Energy dependencies – particularly on oil and gas – remain a security risk that Russia can use as an instrument of power.
- The gender dimension of hybrid warfare, for example through anti-feminist narratives in election campaigns, calls for social and regulatory countermeasures in Europe.



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# Foreign Military Intelligence Services in focus

Reinhard Ruckenstein

The unstable security situation in the European neighbourhood requires both NATO and the EU to pay closer attention to military defence. The armament and defence efforts of Austria and its neighbouring countries thus represent particularly attractive targets for foreign military intelligence services. To this end, civilians are increasingly being recruited for individual intelligence-gathering activities via digital channels, often without receiving any formal training. The capabilities of Austrian counter-intelligence must therefore be fully aligned with the challenges posed by this new era of intelligence services.

## **The Austrian Armed Forces as a target for foreign intelligence services**

The erosion of the rules-based international order, coupled with interest-driven politics, is increasingly leading to an era of systemic competition. Against this backdrop, military intelligence services are becoming increasingly important as instruments for asserting interests. A key factor in the competition for supremacy is intelligence gathering, which ultimately always serves the purpose of enabling actions to an adversary's disadvantage. These actions can be both non-kinetic (e.g. espionage or disinformation campaigns) and kinetic in nature (acts of sabotage or targeted killings).

Especially in times of conflict or war, military intelligence services focus increasingly on information tactical and operational value. This means that military technologies and their application, research and development, procedures, but also certain functionalities are subject to increased reconnaissance interest. Austria and the Austrian Armed Forces (AAF) are also subject to this change. With its Development Plan 2032+, the AAF have entered a phase of rearmament and upgrading, which will see the arrival of a large number of modern armaments technologies and goods, many of which are also used by NATO countries, in the coming years.

## **Human sources are *en vogue***

Just like the armed forces, intelligence services also strive for constant modernisation. Modern technologies open up new and better opportunities for information gathering. Although technical methods of information gathering are an integral part of foreign military intelligence, gathering information from human sources remains as important as ever, as information is always context-dependent and therefore requires interpretation.

Foreign military intelligence services will therefore continue to disguise their personnel as researchers, journalists, etc., or deploy them as so-called “illegals” in the target country, completely concealing their true identity and origin. In Austria, they are predominantly deployed under diplomatic cover. In the case of this type of cover, they particularly

benefit from the strong presence of international organisations and the respective national missions in Austria.

## **Non-professionalisation as a trend?**

In Europe, Russian intelligence services are increasingly relying on civilians recruited digitally to carry out their missions. Unlike agents, however, these individuals receive no training. Their missions range from simple tasks such as carrying out socially polarising actions to spying on military support for Ukraine to specific acts of sabotage. Due to the resulting difficulty in attribution and credible deniability, together with the large number of Russian intelligence officers expelled from Europe in recent years, this trend towards non-professionalisation of intelligence service activities will continue in 2026.

Given the success of this method, it can be expected to be imitated by other intelligence services. It is therefore clear that foreign intelligence services are using all available means and methods and are sometimes very creative in developing new ones. This presents Austrian intelligence services with challenges that will have to be met with equally adapted methods backed by an appropriate legal basis.

## **A turning point in intelligence affairs?**

Europe has embarked on a sustained path toward rearmament, armament and strengthened defence capabilities. At the same time, the security situation in the EU's neighbourhood remains tense and military intelligence activities will remain at a high level – even if the war in Ukraine comes to an end. As a result, the intelligence service threat to Austria will remain unchanged in 2026, but may intensify if Austria increases its military engagement for Ukraine or NATO.

The high rate of innovation in intelligence and military threats will remain, and this must be taken into account legislatively, methodologically and technically. At the same time, the penalties for foreign intelligence operations in Austria lag behind those in other European countries, thereby limiting their deterrent effect. Austria will therefore remain an important hub and safe haven for foreign intelligence services.

### **Key messages**

- The Austrian Armed Forces are becoming the focus of foreign intelligence services, right down to the tactical level.
- The use of human sources remains highly important.
- The trend towards the non-professionalisation of intelligence service activities will continue.
- The speed of innovation in intelligence threats must be comprehensively addressed.



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# Economic National Defence

Thomas Feßl and Sonja Linskeseder

Economic National Defence has been part of Comprehensive National Defence and thus part of the security provision in Austria for over 50 years. It focuses on maintaining economic performance and preventing disruptions to the economy, and consequently on ensuring supply security for the population. Numerous crises since 2020 have highlighted the vulnerability of supply systems. Since then, several initiatives have been launched in Europe to increase the resilience of the economy. In Austria, too, greater attention is once again being paid to Economic National Defence.

In 1975, Comprehensive National Defence (CND) was enshrined in Article 9a of the Austrian Federal Constitutional Act. CND is divided into four areas: Military, Intellectual, Economic and Civil National Defence. Economic National Defence (END) aims to prevent economic disruptions through precautionary measures and to ensure the supply security and performance of the Austrian economy in times of crisis. According to the Federal Ministries Act, the Federal Ministry for Economic Affairs, Energy and Tourism is responsible for coordinating END.

## Objectives of Economic National Defence

One objective of Economic National Defence in its modern interpretation is to minimise extra-European dependencies, to strengthen the security and diversity of supply chains, and to increase national economic and technological resilience. The scope of END is therefore very broad and basically includes any situation in which goods or services become scarce. This includes ensuring the supply of essential goods to the population, guaranteeing currency stability and providing the material resources necessary for defence. In addition, there are measures to secure jobs and stabilise the labour market, as well as to maintain social peace and cohesion.

The specific tasks of Economic National Defence include maintaining international trade, ensuring the supply of raw materials and basic commodities, and securing the supply of cash. This also includes a reliable supply of energy and fuel, the organisation of waste and sewage disposal, and the timely procurement and secure provision of goods and data – including those necessary for defence. An essential legal basis for Economic National Defence is ensured by the economic control legislation, which is intended to secure supplies for the population in the event of foreseeable market disruptions. These include the Supply Security Act and the Energy Control Act, both of which fall within the remit of the Federal Ministry for Economic Affairs, Energy and Tourism. In addition, the Food Management Act falls within the remit of the Federal Ministry of Agriculture and Forestry, Climate and Environmental Protection, Regions and Water Management (BMLUK).

## National and international initiatives

The experience gained from the crises in recent years highlights both the importance of resilience and the vulnerability of supply systems: examples include the COVID-19 pandemic, impending energy shortages and supply chain disruptions. For example, the export ban on medical protective equipment from Germany led to shortages in the medical sector in Austria. This clearly demonstrated the dependence on international supply chains and the need for national production capacities. In response to the developments since 2020, several initiatives have

been launched at both national and European level to revitalise strategic resilience and CND.

At the European level, measures are being developed and implemented to ensure a self-sufficient supply for at least 72 hours and the resilience of critical facilities. These include strategy papers such as the Preparedness Union Strategy and the EU Stockpiling Strategy, as well as the EU Directive on the Resilience of Critical Entities (RCE). The Austrian Federal Crisis Security Act (B-KSG), which has been in force since 2024, provides for the creation of a continuous, strategic overall situation assessment. This goes hand in hand with the need to record the situation reports relevant to CND.

## **Inter-ministerial cooperation**

In addition to the Federal Crisis Security Act, the Austrian Programme for Critical Infrastructure Protection (APCIP) also aims to increase Austria's resilience. This programme involves companies in the protection of critical infrastructures on a voluntary basis, thereby contributing to a higher national supply security. The Federal Act on Ensuring a High Level of Resilience of Critical Entities (RKEG) also implemented the requirements of the European RCE Directive and, for the first time, standardised legal requirements for increasing resilience and protecting critical facilities in Austria.

Both the Austrian Programme for Critical Infrastructure Protection and the Federal Act on Ensuring a High Level of Resilience of Critical Entities thus contribute to achieving END objectives. However, both fall within the remit of the Federal Ministry of the Interior (BMI), therefore requiring inter-ministerial cooperation between the Federal Ministry of the Interior, the Federal Ministry for Economic Affairs, Energy and Tourism and the Federal Ministry of Agriculture and Forestry, Climate and Environmental Protection, Regions and Water Management. Also of particular note is the physical protection of selected critical infrastructures that is ensured by the police and, if assistance is required, also by the Austrian Armed Forces.

## Challenges for companies

It is also in the interest of companies themselves, however, to remain resilient and capable of acting in times of crisis and to be able to react flexibly to disruptions. This necessitates crisis and emergency plans, a flexible organisational structure and secure IT systems. Wherever possible, attention should also be paid to maintaining stable supply chains and alongside proactive financial planning. This is not only economically significant for business, but also serves as a crucial element of economic national defence. In order to further implement national and international requirements, it will be essential that companies do not suffer any disadvantages as a result of clear and practical regulatory framework and that their contribution to Economic National Defence does not distort competition.

### Key messages

- Economic National Defence as part of Comprehensive National Defence of the country has been established in Austria for over 50 years.
- The goal of Economic National Defence in its modern interpretation is to reduce extra-European dependencies, to strengthen the security of supply chains, and to increase resilience in Austria.
- Initiatives to strengthen resilience have been launched across Europe regarding the response to crises since 2020.
- The protection of critical facilities supports Economic National Defence and necessitates inter-ministerial cooperation.
- Measures to strengthen resilience in companies should be implemented, while ensuring they do not create competitive distortions.



# Civil National Defence

## Caught between yesterday and today

Josef Farda

Civil National Defence was established in the 1960s to protect the population and ensure the state's capacity to act. Over the past forty years, security-policy and societal developments have fundamentally changed the environment. Given the increasingly dynamic and hybrid threat landscape, the role of Civil National Defence needs to be reconsidered and oriented more towards the future.

In 1961, a decision by the Council of Ministers set the first points of reference for Comprehensive National Defence (CND). This comprises military, economic, intellectual and civil components. This concept was further developed in the following years, enshrined in the Federal Constitution in 1975 and finally culminated in the National Defence Plan of 1985. A large number of tasks for Civil National Defence were summarised there in four chapters:

- protection of the population (civil defence),
- ensuring the functioning of state organs and other important institutions,
- protection of cultural assets, and
- ensuring the personnel requirements for Civil National Defence.

These definitions are still formally valid today. In summary, Civil National Defence pursues the protection of the population and the functioning of state organs and other important institutions that would probably be referred to today as the critical infrastructure. Furthermore, from a public perspective, civil defence is understood to mean preparation for operations, the warning and alarm system, the construction of public shelters and other measures, such as human or veterinary medical care or radiation protection measures. For private individuals, the implementation of self-protection measures and the construction of private shelters are important.

The distinction made by the author between public and private measures highlights one peculiarity of Civil National Defence: in contrast to other spheres of Comprehensive National Defence, the population plays an active role in Civil National Defence, as every individual is responsible for taking preventive and protective measures. This involvement goes beyond receiving information or participating in an organisation.

## **Undefined competences**

Responsibility for Civil National Defence has not been clearly defined until today. Responsibility for disaster management lies with the federal states. As early as 1985, however, the federal states pointed out that the nine disaster management acts were not applicable in the cases covered by Comprehensive National Defence (crisis, neutrality and defence). At the same time, the fire brigades and rescue organisations organised at provincial level were recognised as suitable instruments for Civil National Defence. The 15a Agreement recommended in the National Defence Plan on the deployment of these forces by the federal government was never concluded.

Independently of Comprehensive National Defence, a state crisis management system was developed, which was reorganised in 2004 as the

State Crisis and Disaster Management System (SKKM). Within this framework, Austria-wide standards were established, *inter alia*, for disaster management and cooperation between authorities and emergency services. Operational responsibilities remain clearly with the federal states.

## **Inclusive civil protection**

Crisis situations pose particular challenges for people with disabilities (PwD). For example, many communication channels and messages are not freely accessible, and not every communicated measure can be implemented equally by everyone. This affects both individuals and entire institutions, such as care facilities. The National Action Plan on Disability 2022–2030 therefore provides for concrete measures for the inclusion of PwD.

Since the 2024 floods in particular, the authorities have been working intensively on implementing inclusive disaster control. In 2025, for example, the Ministry of Social Affairs held various workshops on this topic together with the Austrian Disability Council, the Ministry of the Interior and other stakeholders. Since 2025, the Austrian Civil Protection Association has also been directly involving the Austrian Disability Council in the development of individual preparedness and conduct guidelines. These processes allow conclusions to be drawn for Civil National Defence.

## **Hybrid threats**

Resilient communication by the organisations responsible for disaster management is essential – both in preparing for and coping with disasters or military conflicts. Hybrid threats therefore pose a significant potential danger also to Civil National Defence. Disruption of communications (whether hardware or software) restricts the ability to assess the situation and potentially reduces the range of command.

Just like the communication between public authorities, communication between authorities and the population can also be the target of hybrid attacks. Whether it be deliberate disruption of supply chains, infrastructure failures or armed conflicts, it can be assumed that the

information environment will continue to gain importance as a sphere of conflict in the future and that attacks will particularly target the civilian population. Even today, false alarms pose a problem for emergency services, authorities and the civilian population when dealing with emergency situations. In some countries, specialised teams have already been established to monitor and analyse information circulating on the internet during an incident. This allows disinformation to be countered quickly. In Austria, personnel are already being deployed for this purpose and a nationwide coordination is being considered.

## Conclusion

The terminology and content of Civil National Defence have not been updated since 1985. While its institutions (committees and working groups) no longer exist today, disaster management in Austria has become more professional and created its own formats for cooperation. It is up to the decision-makers to now redefine the significance and objectives of Civil National Defence in the light of the challenges that have changed since the end of the Cold War, and to derive procedures and responsibilities from this.

### Key messages

- Civil National Defence aims to protect the population and ensure the functioning of state institutions.
- Since the floods in 2024 in particular, the authorities have been working intensively on implementing inclusive civil protection.
- Resilient communication between the organisations responsible for disaster management is essential.
- Just like the communication between public authorities, communication between authorities and the population can also be the target of hybrid attacks.



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# Intellectual National Defence

**Democracy education as an opportunity for greater social cohesion**

Anna Katharina Obenhuber and Jan Sisko

Schools play an essential role in strengthening democracy and securing peace. Both the democratisation of the school as an institution and the examination of democratic processes in school and extracurricular education make self-efficacy tangible and contribute to the communication of democratic values and thus to social cohesion. This is an essential foundation for Intellectual National Defence.

## **Strengthening democratic skills and attitudes**

Alongside Military, Civil and Economic National Defence, Intellectual National Defence (IND) is part of Comprehensive National Defence (Article 9a of the Federal Constitutional Act). It is a task for society as a whole, in which the interaction of a wide range of actors is essential. However, schools as “socialisation spaces” play a fundamental role in strengthening democratic skills and attitudes in society and in safeguarding peace. In the classroom, IND is inextricably linked to political education, as was already reflected in the first Policy Decree on Political Education and is also evident in the references in the curricula. In addition, other actors such as the Federal Ministry of Defence, the Federal Chancellery and other institutions play an important role.

Democratic structures and opportunities for participation at national and European levels cannot be taken for granted and are under pressure – as clearly demonstrated by current political events, geopolitical threats and studies on the increasing alienation *vis-à-vis* democratically legitimised institutions and constitutionally protected fundamental rights and freedoms. The latest National Education Report also highlights this clearly in its discussion of the development area of “democracy education”.

Under these conditions, IND in the school context aims in particular to engage with security policy issues and Austria’s role in a European and global context, thereby raising awareness of the need to defend democratic values and principles.

## **Democracy education promotes social cohesion**

After all, democracy and democratic participation mean much more than just voting in elections. Both the democratisation of the school as an institution and the examination of democratic processes in school and extracurricular education should enable children and young people to experience democratic participation and self-efficacy. This should also create a sense of belonging, which is a valuable resource in terms of security policy. The measures in the current government programme aim to firmly establish “democracy education” in the school system. This involves the planned introduction of a separate subject in lower

secondary education as well as further measures to establish a democratic school culture. School partnership networks and programmes that enable real encounters with democratic participation and social engagement also play an important role here.

Through joint projects, pupils experience the importance of solidarity and responsibility. They develop empathy, encounter people from different backgrounds and dismantle prejudices. This creates a stronger sense of togetherness. Respectful discussion of different opinions and approaches is also an essential foundation of a liberal and pluralistic democracy. In a current research project of the Austrian Security Research Programme (KIRAS), in which the Federal Ministry of Education and the Federal Ministry of Defence participate as project partners, approaches to and challenges and perceptions of IND in the educational context are being researched and future needs identified. The findings from the “SEEDS – Security Education by Empowering Democratic Strength” project will also form the basis for measures to strengthen education in democracy.

## **Digital political education in the age of hybrid threats**

Changes in the availability and consumption of information are creating broader opportunities for stakeholders of all kinds to influence public opinion, particularly among, younger people. Social media and artificial intelligence follow a different logic than traditional media. This often makes it difficult for the state to control and restrict content in terms of its educational suitability for certain age groups.

This highlights the need to raise awareness among pupils about disinformation campaigns and other digital threats to the constitutional order and democratic system. The many challenges associated with this are already being addressed at various levels of political education. The Council of Europe, in particular, recently launched several initiatives to put digital political education and measures against online hate on the agenda in its member states. 2025 was declared the Year of Digital Political Education, and the “Zentrum polis”, the contact point for political education in schools commissioned by the Ministry of Education, regularly implements programmes for schools.

In addition, the school subject “digital literacy” and the associated media education aim to enable children and young people to use digital media responsibly. The links between political education and the use of media will also play an important role in the new school subject “democracy education”.

#### **Key messages**

- Political education and democracy education contribute significantly to Intellectual National Defence.
- Curricula offer numerous points of reference for Intellectual National Defence.
- Democratic skills and attitudes must be made tangible and strengthened in schools.
- Democracy education in schools promotes social cohesion in society.
- Digital political education is of central importance in the face of hybrid threats.



BMLV/Daniel Trippolt

# The “Preparedness Union Strategy” and Comprehensive National Defence

## European preparation for crises – but how?

Matthias Resch

Over the past 15 years, Europe has been consistently shaped by conflicts from a security policy standpoint. These conflicts have emerged in various forms and types with unpredictable timelines. In response, the EU is attempting to address these issues jointly and proactively for the future.

## Security and socio-political responsibility

After the newly formed EU Commission took office in 2024, Finnish Special Adviser Sauli Niinistö published the “Niinistö Report” in the autumn of the same year. Its aim was to prepare the EU for the security policy challenges ahead. The goal was to develop comprehensive and active crisis prevention measures coordinated by the EU, covering both civil and military aspects of comprehensive prevention.

Based on this report, the European Commission drew up the EU Preparedness Union Strategy in March 2025. The strategy defines disasters, hybrid threats posed by various actors and geopolitical crises (including attacks on EU member states) as threats. The strategy is to be implemented through a whole-of-society and whole-of-government approach. Its seven areas are:

- strengthening anticipatory capabilities through comprehensive risk and threat analysis at EU level,
- Protection of critical infrastructures such as hospitals, schools, transport and telecommunications, as well as stockpiling,
- self-sufficiency,
- public-private preparedness measures,
- enhanced civil-military cooperation,
- improved crisis response, also at EU level, and
- resilience through partnerships, e.g. with NATO.

For Austria, this means that existing national measures in these areas have been given additional conceptual support. It should be noted, however, that concepts presented by the European Commission have no legal character and are therefore not binding.

## European alignment of national concepts

The EU is working intensively to prepare the member states for crises of all kinds. To this end, extensive cooperation is already taking place in numerous areas. While the EU has no primary legal competence in the field of defence, the division of responsibilities and tasks between the EU and the member states has also been settled in secondary legislation, particularly in the area of internal security. Conceptually, the term

“resilience” mainly refers to threats and dangers that do not concern defence. So what does this mean for the realisation of the “Preparedness Union”?

The Comprehensive National Defence (CND) of the Republic of Austria is enshrined in the Federal Constitution. Article 9a defines its purpose as follows: “[..] to safeguard Austria’s independence from external influence and to preserve the inviolability and unity of its federal territory [..] to safeguard and defend it against violent attacks from outside.” It further stipulates that CND encompasses Military, Intellectual, Civil and Economic National Defence. The purpose of CND itself is therefore the military defence of the country, which is achieved at the national level through the instrument of these four sub-areas.

Since the establishment of the Federal Crisis Security Act (FCSA), the relevant committees have also been enshrined in law. With the tasks it contains (Section 5) “for the overall strategic advising of the federal government on issues of crisis prevention, crisis management, Comprehensive National Defence, national security and state resilience”, the FCSA forms the national link to the “Preparedness Union”.

The proposals put forward by the EU will mainly be implemented in those areas of CND that are not directly related to Military National Defence. Nevertheless, due to the “hybridity” of modern warfare, there is an overlap with core military issues, and separating threats according to the pillar-like structure of CND is illusory. Building resilience against crisis-related threats affects all areas of society and the state: it encompasses a broad spectrum of measures, ranging from raising awareness among the population (Intellectual National Defence) through individual and organised crisis preparedness within the framework of civil protection (Civil National Defence) and the stockpiling of goods (Economic National Defence).

The question of the connectivity of national measures with EU concepts therefore focuses on two key points: Firstly, it should be noted that there cannot be standardised and harmonised processes for resilience across the EU and its member states, since competences lie at national level and the design of crisis management mechanisms is regulated differently in each state. Secondly, the respective national security policy characteristics of each state must be taken into account,

such as membership in alliances, which, like the EU, may also provide thematic guidelines on resilience. The question of connectivity is therefore not solely related to the EU.

Consequently, this means that Austria should take into account the guidelines of the EU's "Readiness Union" within the framework of its national crisis response mechanism. The better any cooperation – or at least the exchange of information with other states – is implemented, the better the response to crises will be. However, the starting point for actual cooperation is that the crisis at hand is of such a nature that there is an advantage in dealing with it jointly. In other words: cooperation must not be an end in itself.

## **Conclusions**

The holistic Austrian approach of CND already encompasses the whole-of-society and whole-of-government concepts proposed by the EU. The FCSA provides the procedural framework for comprehensive crisis prevention. It is therefore important to ensure that existing national processes, from state crisis and disaster management (SCDM) to civil protection and military national defence, are compatible with the EU's new conceptual ideas.

Specific existing national measures, such as the newly implemented national situation assessment within the framework of the FCSA, fit seamlessly into the above-mentioned "comprehensive risk and threat analyses at EU level". Existing national cooperation at bilateral, multilateral and international level can also be contextualised within the EU's "resilience through partnerships" area.

### **Key messages**

- The “EU Strategy for a Preparedness Union” developed by the European Commission in 2025, aims to prepare member states for future threats by means of whole-of-society and whole-of-government.
- The strategy covers seven specific areas, ranging from crisis anticipation to coordinated crisis response, involving various levels of administration, armed forces and security forces, as well as civil society.
- In Austria, a corresponding structure already exists in the form of Comprehensive National Defence with its four sub-areas, which is enshrined in the Federal Constitution. The FCSA provides the procedural framework for comprehensive crisis prevention.
- The aim is to make the existing mechanisms of Comprehensive National Defence compatible with the EU concepts.



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# 6G without Space?

## Austria's orbital dependence

Robert Toni Pfaffenbauer

Space has become an indispensable foundation for modern societies and security systems. Space services enable global connectivity, support critical infrastructures and create redundancies for communication, navigation and terrestrial observation. With the transition to 6G and highly networked applications, dependence on satellite-based services and thus vulnerability are also growing. Geopolitical rivalries are increasingly being played out in space, which has become an arena for security policy conflicts. States are therefore faced with the task of ensuring resilience, capacity to act and technological sovereignty in their use of space-based services in order to guarantee stability and crisis resistance.

In the digitally connected world of the 21<sup>st</sup> century, space has become an essential infrastructure for modern states. The transition to sixth-generation mobile communications (6G) will enable far-reaching

connectivity of previously separate systems in real time. Applications such as the Internet of Things, autonomous mobility, AI-based logistics and virtual reality environments require global network connections with minimum latency, high data rates and maximum reliability. These requirements can no longer be met without satellite-based components. They complement terrestrial networks, ensure connectivity in remote regions and enable flexible response capability.

Space is therefore already a key pillar of the digital infrastructure. Its benefits become particularly evident in security-related situations. In the event of disasters, terrestrial observation, independent communication and precise navigation are indispensable. Satellite services are also central to military operations, for example for situation awareness, secure communication, navigation and time services. Against the backdrop of increasing geopolitical rivalries, which can also manifest themselves in the form of sabotage of fibre optic cable connections, space infrastructure can provide valuable redundancy. Since a large part of transcontinental data traffic runs via submarine cables, which are susceptible to damage from anchors or sabotage, entire regions could be cut off from global communications. Such damage can take weeks to repair. In such cases, satellite communications provide important redundancy that can quickly take over critical functions in a crisis.

## **National vulnerabilities**

However, the heavy reliance on space services for these capabilities creates new vulnerabilities. Satellite-based infrastructures are increasingly becoming attractive targets for hybrid warfare. Many global navigation satellite systems are particularly vulnerable, as they are largely outdated and particularly easy to disrupt or manipulate. Such attacks can have a massive impact on military capabilities, but also on the daily lives of the population. This is exemplified by the Russian war of aggression against Ukraine, in the course of which targeted attacks on the energy infrastructure are putting the resilience of the civilian population to the test.

Similar effects can be achieved by disrupting space services, which would not necessarily require cruise missiles, ballistic missiles or drones. Cyber operations would often suffice. Disruptions to basic social services could conceivably increase domestic political pressure on

governments to end military confrontations as quickly as possible or to prevent them altogether. Attacks on space infrastructure thus become an instrument of strategic influence that is used below the threshold of conventional force but can nevertheless have a significant socio-political impact.

## **Growing challenges**

In addition, there are new opportunities for covert influence, such as those known from cyberspace. Reversible effects, such as the temporary blinding of optical sensors by lasers or the disruption of communication links with directed microwaves, can be technically detected in some cases, but are nevertheless difficult to attribute unequivocally to a specific actor. As a result, space is increasingly becoming a theatre for hybrid conflicts. In addition to physical interference, this spectrum also includes the use of satellite-based services for disinformation, reconnaissance, surveillance and cyber operations against space infrastructure.

The growing dependence on commercial capacities poses a particular challenge. States that do not have their own space programmes must rely on the systems and services of private providers or allied states in an emergency. Decisions on access, bandwidth prioritisation or control of such systems are then not necessarily made in accordance with national security interests, but are based on commercial or geopolitical considerations.

At the same time, there is a lack of clear international traffic management in orbit. The competition between major space powers and between state and private actors is leading to increasingly dense occupation of strategically important positions in near-Earth space. International agreements are often insufficient. The increasing geopolitical competition also makes binding cooperation more difficult. This not only increases the risk of collisions in orbit, but also the potential for escalation if, for example, approaches are perceived as a threat.

## Implications

These developments undermine political, economic and technological sovereignty. States that cannot develop access to space themselves remain dependent in key areas. This affects security preparedness as well as economic and technological competitiveness and the ability to manage crises independently. This is not about an abstract vision of complete self-sufficiency, but about strategically maximising and safeguarding the capacity to act. Societies and institutions must recognise that space-based services are neither a given nor are they invulnerable. Their failure, disruption or withdrawal must be considered as part of Comprehensive National Defence and security preparedness at the technical, organisational and cognitive levels.

Innovative concepts and new technologies are becoming increasingly important in security policy in order to overcome these challenges. “Responsive Space”, for example, aims to quickly provide additional satellite capacity in the event of failures or threats. Satellite-based quantum communication will also play a central role in the future thanks to secure encryption. Space is therefore not merely a transmission medium, but an integral part of national resilience. An active role as a space actor is a prerequisite for sovereign crisis management and the preservation of political influence.

### Key messages

- Satellite-based systems are indispensable for global connectivity, communication, navigation and terrestrial observation – and thus for the resilience of modern societies.
- 6G, AI, autonomous systems and global data streams are increasing the dependence on space-based services, which in turn increases vulnerability.
- Attacks on satellites and infrastructure can target military as well as civilian areas, thus having a major political and social impact.
- Increasing competition between states and private actors in space, space debris and the lack of international rules exacerbate escalation and security risks.
- In the European context, states must develop redundancies, protective measures and sovereign capabilities to ensure their capacity to act and to maintain stability in crises.



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## Division as a Strategy

### Polarisation and radicalisation as a security-policy challenge

Roman Schuh

Social polarisation and radicalisation are key risk factors in Europe's security policy environment, and increasingly so for smaller EU member states such as Austria. These developments are closely linked to geopolitical, social and technological dynamics that will continue to intensify in the coming years. Particular attention should be paid to targeted influence of external actors, the fragmentation of public opinion through social media, and the increasing instrumentalisation of gender and sexuality in extremist narratives.

Polarisation is not merely a symptom of social change, it is a tool used strategically by, for example, foreign disinformation campaigns or domestic extremist movements that deliberately sow mistrust. Issues such as migration, gender equality, sexual identity, and climate and en-

ergy policy are particularly polarising. These lines of conflict cut across population groups and make Europe vulnerable to political instability.

## **New actors, new frameworks, new narratives**

In 2026, radicalisation is expected to become further digitised and individualised. The classic milieus of right-wing extremist or Islamist radicalisation will remain, but new hybrid forms will emerge: for example, conspiracy-ideological groups with religious or identity-political overtones. Women and girls are increasingly becoming active participants in these processes. In the right-wing extremist milieu, they are not only active as passive supporters, but also as multipliers on social media, as ideological bearers of a “traditional image of women” and as key figures in women-centred influencer circles that deliberately combine emotionality and lifestyle with radical content. Islamist extremism is also seeing growing involvement of women – whether as ideological missionaries on the internet, as marriage prospects for jihadists or, in rarer cases, as active perpetrators.

## **Sexualised violence as a means of propaganda and power**

Terrorist groups use sexualised and gender-based violence strategically: as a demonstration of power, for recruitment (e.g. by promising sexual availability) or to dehumanise opponents. In propaganda materials, violence is often explicitly sexualised in order to present dominance and strengthen loyalty within the group.

This instrumentalisation often targets particularly vulnerable groups. These include women in precarious social situations, LGBTQIA+ persons and young people with little attachment to social structures. In Europe, and especially in smaller countries such as Austria, this poses a particular challenge for the justice system, integration policy, schools and social institutions.

While men are attracted in many cases by images of authoritarian masculinity, women are often influenced by other narratives. Right-wing extremist groups increasingly mobilise women through issues such as

child protection, gender criticism, family values or the claimed “over-sexualisation” of society. Islamist groups, on the other hand, promise purity, affiliation and a clear role assignment, which is particularly effective in phases of personal or social disorientation.

## **Resilience through inclusion and education**

The most effective counter-strategy against radicalisation lies not only in restrictive security policy measures, but also in promoting social resilience, especially among marginalised groups who feel disconnected from politics and institutions. Target group-oriented political education, empowerment initiatives for disadvantaged young people, digital media literacy programmes and psychosocial support services are central pillars of sustainable prevention.

A more intersectional approach is particularly recommended for smaller states such as Austria: prevention measures must be socio-spatial, gender-sensitive and oriented towards everyday life, with a focus on early intervention and outreach youth work. The EU can play a key role here as a multiplier and funding body.

The Austrian Armed Forces (AAF) can also contribute to national resilience. In addition to its central function of military national defence, it has particular potential to promote social cohesion by developing and maintaining a strong military culture. Military culture can convey values such as camaraderie, discipline, responsibility and democratic loyalty, thereby acting as an identity-forming counterweight to fragmenting extremist narratives. By making these values visible to the outside world, the AAF help to anchor resilience not only within the armed forces, but also throughout society as a whole. Suitable instruments for developing an inclusive military culture would be education in state and defence policy, the integration of young people into the ready-reserve structure, international cooperation and the full integration of women into the AAF.

## Recognise polarisation, prevent radicalisation

Polarisation and radicalisation will remain key risks to social cohesion in Europe in 2026. Particularly threatening are the dynamics that are deliberately orchestrated around gender roles, sexual identity or cultural fears. In a time of growing global tensions and technological acceleration, the challenge for security policy lies not only in responding to violence, but also in recognising and interrupting radicalisation processes at an early stage in both the analogue and digital worlds. For countries such as Austria, it is crucial to have a clear strategy for promoting democracy, digital civil courage and target group-specific prevention work. This is the only way to ensure in the long term that polarisation does not become permanent division – and radicalisation does not become an open threat.

### Key messages

- Polarisation is deliberately used as a strategic tool, for example through disinformation or extremist movements, to sow mistrust and deepen social divisions.
- Radicalisation is becoming increasingly digitised and individualised, with new hybrid movements emerging that combine conspiracy ideologies, religion and identity politics.
- Women are playing a growing role in extremist circles, both as ideological multipliers on the internet and as actors who exploit gender and family narratives.
- Sexualised and gender-based violence serves as a propaganda and power tool in terrorist and extremist contexts to create dominance, loyalty and fear.
- Social resilience is created through inclusion, education and military culture, not solely through security policy measures – in particular through early, gender-sensitive prevention work and the promotion of democratic values, for example in the Austrian Armed Forces.



BMLV/Paul Kulec

# Marching in step with equality

## The Austrian Armed Forces in transition

Alexander Scheidl

A low proportion of women and slow progress in the area of equality pose potential risks to the performance, legitimacy and resilience of the armed forces. Since the Austrian Armed Forces (AAF) opened their doors to women in 1998, various measures have been taken to promote equality, including the Women's Promotion Plan and "voluntary national service" for women, which has been in place since 2023. In the long term, it is clear that genuine equal treatment and a gender-balanced personnel structure are not only socio-political goals, but also central prerequisites for Austria's security and future viability.

## Every beginning is difficult

Whether as professional soldiers, in the ready reserve or in the “voluntary national service”, women are now an integral part of the AAF in all areas. However, at around six per cent, their share remains low, showing that the military profession continues to be strongly dominated by men. This poses considerable challenges for the AAF in terms of equal treatment and real implementation of equal opportunities.

When the first women joined the AAF in 1998, this was controversial in many quarters – despite various efforts at the EU level and especially within the United Nations to consistently implement existing equal treatment and equality guidelines in the armed forces. Austria thus followed the Scandinavian example relatively quickly; Scandinavian countries had already opened up access to the military for women at the end of the 1980s.

Despite fundamental social and political support, there were numerous hurdles and challenges from the outset. On the one hand, the infrastructure had to be redesigned, which affected, for example, sanitary facilities and accommodation for both sexes, new clothing had to be procured, and changes had to be made to medical and sports standards. On the other hand, women had to contend with prejudice and discrimination both within the armed forces and at the ministerial level.

One means of combating unequal treatment is the Federal Equal Treatment Act (FETA), which was introduced in 1993. Its aim is to achieve a demographic composition of public service personnel that reflects the population as a whole – in particular, a 50 per cent share of women. This naturally also entails the need to adapt the structural and procedural framework conditions to such a heterogeneous workforce.

In order to achieve these goals in a sustainable manner, a working group on equal treatment issues was set up in the Federal Ministry of Defence in the mid-1990s. To promote the equal treatment of female soldiers in the long term, the introduction of the FETA also made it mandatory to draw up a comprehensive plan for the advancement of women (AW plan), which is revised regularly.

## **Lack of diversity as a security risk**

A lack of diversity and a lack of targeted promotion of women poses a long-term security policy risk. Armed forces that do not reflect the diversity of society run the risk of losing legitimacy, innovative strength and operational adaptability. International comparisons show that mixed teams are more effective and have better communication skills, especially in peacekeeping and crisis operations. Insufficient involvement of women therefore not only means the loss of valuable perspectives and skills, but also a weakening of institutional resilience. Furthermore, a lack of equality undermines the goal of a modern, democratically anchored security architecture. Diversity, on the other hand, strengthens the credibility, efficiency and future viability of the AAF, and thus ultimately also the security of Austria.

This idea underlies all measures to promote women and diversity in the AAF. Last but not least, this is also the reason for numerous personnel planning and management initiatives, such as the preferential admission, recruitment and admission to training courses for female employees with equal qualifications in the Federal Ministry of Defence and the AAF, as enshrined in the AW Plan. In addition to the promotion of women, the FETA also includes the requirement for equal treatment regardless of age, sexuality, origin and ideology – which is essential for anchoring the armed forces at the heart of society.

## **Women in the AAF as an opportunity**

Due to demographic developments and the associated challenges in the personnel situation of the AAF, the inclusion of women offers a potential opportunity to fill the resulting gaps in terms of both quality and quantity. Likewise, a higher proportion of women gives the AAF the opportunity to incorporate different approaches and perspectives into its decision-making. In this way, the inclusion of women contributes to the quality of decision-making.

The inclusion of women is therefore not only a necessity, but must also be seen as an opportunity to attract highly qualified personnel. In this respect, targeted recruitment measures for women are necessary. For example, the MoD is pursuing the goal of facilitating access to the AAF

for women, increasing the proportion of women and strengthening the integration of women in all military areas in the long term with the “voluntary national service” for women, which has been in place since April 2023. Initial experiences with this model are seen as thoroughly positive. Other examples of targeted measures aimed at women include the “Girls’ Day”, which aims to inform young women about careers in the AAF and thus spark their interest in becoming soldiers.

## **The Austrian Armed Forces of tomorrow**

The road to complete equality in the AAF is still long. However, numerous initiatives, reforms and structural adjustments show that the Federal Ministry of Defence is actively striving to create modern, equal opportunity and diverse armed forces. Measures such as the AW Plan, “voluntary national service” for women and targeted awareness programmes are initiating a cultural transition aimed at long-term change. The Austrian Armed Forces of tomorrow will increasingly have to be measured by how consistently they combine diversity, equality and professionalism. The sustainable integration of women is not only an expression of social justice, but also a decisive factor for the operational performance and democratic legitimacy of the armed forces. Only if the AAF reflect the diversity of society can they fully meet their security policy responsibilities in the 21<sup>st</sup> century.

### **Key messages**

- Measures to promote women, raise awareness and implement structural reforms are intended to create a modern, diverse and equal armed forces in the long term.
- Since the opening of the AAF for women in 1998 and the introduction of the “voluntary national service” for women in 2023, important steps have been taken towards integration, but the proportion of women still falls short of the expectations of the Federal Equal Treatment Act.
- A lack of infrastructure, prejudice and discrimination continue to hinder genuine equal opportunities. A lack of diversity in the AAF, however, poses a strategic risk.
- Numerous measures have already been taken to promote the inclusion of women in the AAF. However, the advancement of women remains a nationwide challenge for which numerous measures are also planned in the current government programme.



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# Securitisation of Climate Change

Eva Widhalm

Although climate change poses a global security threat, its consequences are increasingly being pushed into the background despite daily disaster reports. Political goals are being watered down, conspiracy theories are being spread in the media, and the security-political consequences are also being suppressed at the geopolitical level. However, armed forces are already integrating the consequences of climate change into their operational and capability planning. The Austrian Armed Forces (AAF) can credibly promote the development of whole-of-society resilience as a central necessity for securing Austria's future capacity to act and defend itself in public discourse.

The protection of the soil, water, ecosystems and biodiversity is the basis for a resilient population and thus a cornerstone of Comprehensive National Defence and the European Preparedness Union Strategy. The Austrian Security Strategy also recognises the protection of resources

as a cross-cutting issue and a security policy area, which represents a challenge for society as a whole due to its impact on all areas of life and politics. The measures provided for in the strategy serve primarily to ensure the security and stability of Austrian society.

According to the second Austrian Status Report on Climate Change, Austria is warming twice as fast as the global average. Without effective climate protection and adaptation measures, annual damage in Austria could rise to as much as EUR 10.8 billion by 2050. In addition to the security policy risks, such as for supply chains, critical infrastructure, water supply, health, agriculture and security of supply, climate change is a fundamental catalyst and threat multiplier that exacerbates and intensifies existing global instabilities, social tensions and political fragility.

## **Strategic opportunity and multiple dilemmas**

Armed forces are already incorporating these developments into military capability and operational planning. The NATO basic assumption is the worst-case scenario, i.e. an increase in the global average temperature of at least 3°C by the end of the century. This would have serious consequences for the military infrastructure, equipment, logistics and, last but not least, the safety and health of soldiers at home and abroad. As a result, European armed forces are facing multiple dilemmas. Russia's aggressive policy requires rapid development of capabilities and an energy transformation to reduce dependencies. At the same time, it is necessary to build autonomy and resilience and adapt to the civilian energy transition. Similarly, the consequences of climate change require the adaptation of infrastructure, equipment and appliance while maintaining or even increasing operational readiness and endurance.

As connectivity and interdependence can lead to disruptions across all sectors, such disruptions threaten power grids, fuel and water pipelines, communication systems and transport routes, which are also used by the armed forces. Thus, the need of the AAF for new technologies, especially new energy and climate technologies, and for equipment adapted to climate change, taking into account the entire life cycle, is not only an ecological necessity but also an operational imperative. At

the same time, it offers a strategic opportunity to promote innovation in the field of military capabilities.

## **Competition of narratives and disinformation**

Environmental and climate protection measures are subject to various, sometimes conflicting narratives. While some narratives equate climate protection measures with an “economic slowdown” or a “surrender of prosperity” or insinuate that they are “ideologically driven measures”, arguments that it is all about a good life for all, clean air or less noise fall on deaf ears. One reason for this is that climate protection could be put on the back burner behind supposedly more urgent challenges – after all, it is about the climate, not us.

Environmental and climate protection measures are also often watered down or undermined by deliberate or unintentional false or misleading information in social media and political discussions in order to influence public debate and reduce the pressure to act. Examples of this include denying the man-made causes of climate change, downplaying the security policy consequences, or citing questionable studies and misinterpreting data or statistics. Hostile actors exploit the free media landscape to spread misinformation or conduct disinformation campaigns in connection with the energy transition in Europe. Their goal is to destabilise societies, maintain dependencies and prevent resilience.

However, scepticism towards science and politics fuelled by disinformation is making it dangerously difficult to take the necessary measures and implement them, and is preventing adaptation and the development of resilience in Austria. Furthermore, security-related aspects are not sufficiently addressed in the public discourse due to the climate protection debate having been initiated by civil society. Security-policy actors are also called upon to reflect these aspects in democratic discourse.

## **The role of security policy actors**

The tasks of security policy actors will include overcoming barriers, highlighting security-related issues and engaging in targeted, strate-

gic communication. Not least, this serves to promote measures across society in the interests of Intellectual National Defence. Because if Austria fails to adapt and drive forward transformation, the AAF will also find it increasingly difficult to fulfil its tasks. In the interests of Comprehensive National Defence, the goal must therefore be to invest equally in national and European defence capabilities, whole-of-society resilience and civil-military cooperation, as well as in adaptation measures and climate protection. Recognising climate change as a security risk could accelerate the necessary measures.

### **Key messages**

- Building whole-of-society resilience is crucial to securing Austria's future capability to act and defend itself. This requires a functioning democracy and a resilient, adaptable society capable of defence.
- The armed forces are directly affected by the consequences of climate change and take these into account in their military capability and operational planning.
- The need of the AAF for new climate and energy technologies and equipment adapted to climate change is both an ecological necessity and an operational imperative. At the same time, this offers strategic opportunities for self-sufficiency.
- Climate risks and climate resilience will become determining factors for the operational readiness and endurance of the AAF in the future.
- Combating disinformation campaigns through targeted, strategic communication within the framework of Intellectual National Defence is crucial. Security-political actors also have a role to play here. They can contribute to a securitisation of the discourse, which in turn could accelerate necessary measures.



BMLV/Paul Kulec

# On the Development of Modern Armed Forces

Martin Dorfer

The Austrian Armed Forces are undergoing a comprehensive transformation into modern, technologically connected armed forces. The focus is on modernising equipment and systems, specialising brigades, expanding the ready reserve and digitising command and control and the information environment. The Development Plan 2032+ combines investments in personnel, infrastructure and capabilities to ensure a flexible, responsive and socially anchored defence by 2032.

## Capability and technology

In 2026, the Austrian Armed Forces (AAF) will continue to face considerable challenges in view of the changed security environment. Conventional wars, global crises, hybrid threats and the increasing importance of new technologies require continuous adaptation of capa-

bilities and structures. While traditional tasks within the framework of military national defence remain central, aspects such as cyber defence, digitisation, international cooperation and ensuring modern mobility are becoming increasingly important.

The question of adequate personnel, infrastructure and material resources is also more pressing than ever in order to ensure constant operational readiness. The aim must be to align the AAF in such a way that it can effectively fulfil its constitutional tasks and at the same time respond flexibly to new security-political requirements as efficient and modern armed forces.

## **The road to modern armed forces**

The combat capability of the Austrian Armed Forces is at the heart of the transformation. It is strengthened by the continuous modernisation of weapon systems, the annual improvement of equipment and the targeted training of soldiers. Milestones in 2026 will include the introduction of combat drones, the continuing additions to the Pandur APC system family, and the start of the development of air defence for the four land brigades.

These measures, together with the increase in weapon effectiveness through the strengthening of rocket artillery and the development of new capabilities for electronic warfare and drone defence, will ensure that the armed forces are able to handle complex operations in the future. The will to fight and the readiness to act decisively in an emergency in accordance with the command principle of “mission command” are promoted through training, the teaching of values and active camaraderie.

The specialisation of the brigades is another important step in the concerted effort by the land forces to enable combined arms warfare. Each brigade will be given targeted specialisations tailored to its core tasks. This diversification, together with the special operations forces, will enable a clear assignment of tasks and a high level of performance in the respective specialisations. From 2026 onwards, the ready reserve will be reorganised and strengthened in close cooperation with the brigades. However, the military commands will also be strengthened in their command capabilities.

## Response capability

This will be complemented by integration into multinational exercises and cooperation, which strengthen interoperability and ensure international operational capability, particularly within the framework of the Common European Security and Defence Policy (CESDP). Furthermore, air defence is being systematically developed in order to reliably protect the federal territory, troop movements and critical infrastructure. A modern network of sensors and effectors ensures that threats are neutralised, while digital command and control systems enable a timely response. In this context, medium to long-range air defence systems in the context of the European Sky Shield Initiative should be mentioned as examples. The integration of systems in the area of close air support and operational and tactical air transport for the land forces and special operations forces will continue in 2026.

The response capability will be adapted to future operational challenges by increasing the mobility of land brigades and special operations forces. The operational capability of the armed forces will be enhanced by establishing a domestic stand-by force, including the further roll-out of the rapid reaction reserve, and by reorienting the stand-by forces to form an international stand-by force. Modern transport solutions, protected vehicles, improved infrastructure and digital communication systems will ensure that forces can be deployed quickly and can operate under all conditions.

## Information space

At the same time, the response capability of the armed forces in the information space is being continuously improved. Command superiority is vital for modern armed forces. The AAF must become a “joint force”. Consequently, the operative headquarters will become fully operational by 2029. The command capability of the armed forces will be enhanced by the digitisation process that has already begun, by command information systems such as the new cloud landscape (Mission Cloud) and the rollout of the “SITAWARE” battle management system.

This will enable precise situation assessment, rapid decision-making and efficient coordination of forces. The digitisation of all processes en-

sure that information is available in real time, significantly shortening decision-making processes, aided by the use of artificial intelligence. The focus remains on field command, with reconnaissance capabilities also being strengthened through the establishment of an operational reconnaissance battalion and the reinforcement of the brigade sensors.

## **Personnel development**

Sustainability is the foundation of continuing development, ensuring that the AAF remain operational even in protracted conflicts. The new defence model is designed to ensure sustainable personnel readiness and resilience. The main focus here is on harnessing social diversity and attracting more women of all ages and professions to serve in the armed forces. In all operations, female soldiers are an essential factor for successful and sustainable conduct of operations and an integral part of modern armed forces.

At the heart of the continuing development is a well-trained and regularly practising ready reserve. It anchors the armed forces in society, enables a broad personnel base and ensures that the Austrian Armed Forces remain responsive and sustainable when needed. Another essential operational basis is the expansion of military bases to enable longer deployments. In addition, work on strategic stockpiling and optimised supply chains will be continued so that operations can be continued over longer periods of time, even under difficult conditions.

## **First steps on a long road**

The Development Plan 2032+ sets out the main framework for action by the armed forces as they move into the future. It provides for comprehensive investment in personnel, equipment and infrastructure in order to gradually achieve the target for defence readiness by 2032. Initial measures, such as the modernisation of certain weapon systems, the expansion of logistic capabilities and initiatives to strengthen cyber defence, have already been implemented and mark the beginning of a structured transformation.

Nevertheless, the road ahead remains challenging: the plan requires, on the one hand, long-term planning, and on the other, continuous adaptation to an evolving threat landscape and consistent implementation in all areas. The main strength of the armed forces lies in the excellently trained and highly motivated personnel. The path we have chosen now also provides our soldiers with the equipment and infrastructure that this motivation deserves. The Austrian Armed Forces are on their most important but challenging path, with the goal of achieving a modern and comprehensive defence capability by 2032.

### **Key messages**

- The modernisation of the Austrian Armed Forces aims to create flexible, technologically advanced armed forces that can respond to new security policy challenges such as hybrid threats and cyber attacks.
- The focus is on strengthening combat capabilities through new systems (drones, rocket artillery, electronic warfare), specialising brigades and building a responsive ready reserve.
- Digitisation, command superiority and information environment will be significantly expanded with systems such as Mission Cloud, SITAWARE and a joint operational headquarters (by 2029).
- The Development Plan 2032+ provides for comprehensive investment in personnel, equipment and infrastructure to ensure a modern, sustainable and socially anchored armed force by 2032.

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