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Sovereignty Under Pressure: Energy, Sanctions, Defence and the Hidden Costs of Conflict



INTERVIEW WITH FRANÇOIS ARBAULT

Defense Readiness Doesn't Come with an Asterisk

Why are there no Nuclear Power Plants in Poland?

Poland operates the largest electricity system in the European Union that has never produced a single kilowatt-hour from a domestic nuclear reactor, although building one has been declared government policy for more than four decades.

The Invisible Battlefield

Military conflicts are traditionally judged by battlefield outcomes, territorial change and the achievement of strategic objectives. This essay argues that these measures, while important, no longer provide a complete understanding of modern warfare.

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Sovereignty Under Pressure: Energy, Sanctions, Defence and the Hidden Costs of Conflict

Sovereignty is often spoken of as something a state either has or lacks. The contributions in this issue suggest otherwise: sovereignty is built, financed, enforced and defended – and it can be lost through delay, dependence or neglect as easily as through defeat. This eleventh issue of the EPIS Magazine brings together articles, an interview and a guest contribution that examine how Europe and its neighbours are trying to regain room for manoeuvre in a more fragmented world.

Cyprian Krystek and Michal Lobocki open the issue by asking why Poland, the most coal-dependent electricity system in the Union, has never produced a single kilowatt-hour from a domestic nuclear reactor despite four decades of official commitment. They argue that the programme has been held back less by technology or public opinion than by political and institutional instability, and that its completion now depends on a financing model and legal framework able to survive a change of government. Laura Stengl turns to the enforcement of EU sanctions against Russia and examines the first activation of the Union's anti-circumvention instrument. She shows that Article 12f does not amount to US-style secondary sanctions, but marks a new form of conditionality in which access to European goods becomes leverage against circumvention through third countries.

Barry Campfield's essay on the U.S.–Iran conflict looks beyond battlefield outcomes to the "invisible battlefield" of energy prices, political institutions and the psychological lives of ordinary people in Iran, the United States and far beyond – reminding us that those least responsible for a conflict may be among those least able to afford its consequences. Valentina Wielewicki Bandeira then examines political polarisation and political violence in Latin America, arguing through the cases of Brazil, Mexico and Colombia that affective polarisation is closely associated with the occurrence of political violence, while organised crime complicates the picture across much of the region.

In our interview, Ferdinand Wegener speaks with François Arbault, Director at the European Commission's Directorate-General for Defence Industry and Space, about why Europe's defence readiness now depends on industrial scale and cooperation. The conversation covers EU instruments such as SAFE and EDIP, the failure of major cooperative programmes, the lessons drawn from Ukraine and the role of space in defence – and why, in Arbault's words, defence readiness does not come with an asterisk.

Gianni Pittella, member of the EPIS Board of Advisors, closes the issue with a guest contribution on the new defence agreement between Türkiye, Saudi Arabia and Pakistan. He reads the pact not as the birth of an "Islamic NATO", but as a sign of strategic diversification in a multipolar world – and asks why Europe still hesitates to build a stronger European pillar within the Atlantic Alliance.

Taken together, these contributions share a simple insistence: autonomy is not a slogan but a set of concrete decisions – about power plants and financing models, export controls and enforcement, defence budgets and industrial cooperation – that must be taken before a crisis rather than during it. We would like to thank all authors, our interview partner and the editorial team for making this issue possible.

Yours Sincerely,

Carolina Aronica & Carl Johan Steninge-Otto
The Editors of EPIS Magazine



About the Article

Poland operates the largest electricity system in the European Union that has never produced a single kilowatt-hour from a domestic nuclear reactor, although building one has been declared government policy for more than four decades. Coal still supplied 56.2% of the country's electricity in 2024, a record low that nonetheless leaves Poland the most coal-dependent electricity system in the Union (Forum Energii, 2025).

About the Authors

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Introduction

Poland operates the largest electricity system in the European Union that has never produced a single kilowatt-hour from a domestic nuclear reactor, although building one has been declared government policy for more than four decades. Coal still supplied 56.2% of the country's electricity in 2024, a record low that nonetheless leaves Poland the most coal-dependent electricity system in the Union (Forum Energii, 2025). Successive governments, regardless of political colour, have named nuclear energy as the technology meant to reconcile decarbonisation with energy security. Between a construction site abandoned in 1990 and a construction start now scheduled for 2028, the programme has survived one change of political and economic system, several changes of governing coalition, and at least two formal restarts.

The occasion for revisiting this record is immediate. In December 2025, the European Commission approved the state aid scheme financing the first Polish nuclear power station, clearing the principal legal obstacle to public co-financing of the Lubiatowo-Kopalino project (European Commission, 2025), and Polskie Elektrownie Jądrowe (PEJ) is now negotiating the engineering, procurement and construction contract with Westinghouse and Bechtel that must be concluded before construction can begin (PAP, 2026b; Rzeczpospolita, 2024). At the same time, Poland's only operating reactor, the small Maria research unit, was shut down for several months in 2025 after its licence lapsed because the National Centre for Nuclear Research had not filed the required regulatory documents in time (Wiech, 2025; Świat OZE, 2025). One development signals progress, the other institutional fragility, and together they make the present a natural point to ask why the programme has taken so long.

This article asks why Poland has not built a nuclear power plant despite four decades of official commitment to the technology, and what conditions would need to be met for the current programme to reach completion. The analysis covers the political economy of the programme: government decisions since the collapse of central planning, the coalitions of interest that have supported and opposed construction, the institutional barriers documented by regulators, and the balance of costs and benefits of nuclear generation relative to coal and wind. It does not extend to the engineering merits of the AP1000 reactor design or to an independent safety assessment, questions that belong to the licensing process conducted by the National Atomic Energy Agency (PAA) rather than to a policy analysis of this kind.

The article's central claim can be stated directly: Poland's nuclear programme has been delayed principally by political and institutional instability rather than by an absence of technical feasibility or public support, and its completion now depends less on further site studies or a change of technology than on a financing model and legal framework able to survive a change of government. The article traces the programme through four political periods, examines the coalitions of interest and institutional barriers that recur across them, sets out the alternatives on the table today, and turns to the economic evidence before closing with recommendations addressed to the actors named above.

Historic Background

The fall of communism in Poland

Poland's first attempt to build a nuclear power station was a product of the same centrally planned system that shaped the rest of its energy sector, and its cancellation reflected the collapse of that system rather than a judgement against nuclear technology as such. Central planning in communist Poland allocated large, capital-intensive energy investments from the top down, matching a single state-owned generator to a single state-owned fuel source rather than testing the pairing against a market price. The Bełchatów complex illustrates the model: a lignite-fired power station commissioned in 1982 beside a purpose-built strip mine, planned and built as one integrated unit under state ownership, and still, decades later, the largest lignite plant in Europe by installed capacity. Coal mining in Silesia followed the same logic on a larger scale, with investment and infrastructure planned centrally around the coal seam rather than around demand, tying Poland's electricity system, and its politics, to domestic coal for the rest of the century.

The levelised cost of electricity (LCOE) expresses the minimum price per unit of electricity needed to recover all construction, financing, fuel and decommissioning costs over the plant's lifetime.

Nuclear power was planned on identical lines. Construction of four Soviet-designed VVER-440 reactors began at Żarnowiec, on the Baltic coast west of Gdańsk, in the early 1980s, with a combined planned capacity of 1,600 megawatts (World Nuclear Association, 2026), proceeding under the same top-down financing arrangements that built Bełchatów and insulated it from any market test of its cost.

Two developments dissolved that insulation before the plant could be completed. The Chernobyl accident of 1986 changed the political calculus of nuclear power across Europe well beyond the Soviet bloc: the Netherlands suspended plans for two additional reactors, West Germany created a federal ministry for environmental and reactor safety, and public opposition to nuclear power rose by between 30 and 60 percentage points in Finland, Yugoslavia and Greece within the following years (Onero Institute, 2024). The second development was domestic: the negotiated end of communist rule in 1989 removed the political and financial guarantees that had kept an increasingly costly project alive. The incoming government suspended work at Żarnowiec in December 1989 and formally cancelled it in September 1990, by which point

roughly 40% of the first reactor unit had been built and a substantial share of the planned budget already spent (Gierszewski et al., 2021; World Nuclear Association, 2026). Central planning had made the investment possible in the first place, and its disappearance, more than any technical judgement about the reactors themselves, is what made completion impossible.

Early 2000s

The revival of Poland's nuclear ambitions responded to the same structural weakness that had undone the communist-era programme, dependence on a single domestic fuel source, but this time the government pursued it through market institutions rather than central allocation. In early 2005, the cabinet concluded that nuclear power was needed for energy diversification and for reducing carbon dioxide and sulphur emissions, and resolved to introduce it without further delay (World Nuclear Association, 2026). PGE followed in January 2009 with plans for two stations of 3,000 megawatts each, and in January 2010 established PGE EJ1, a dedicated subsidiary responsible for site selection, licensing and construction oversight.

The 2009 programme set out a five-stage timetable: a regulatory framework legislated in 2010 and passed in May 2011 as the amended Atomic Law; investor, site and technology decisions in 2011 to 2013; technical planning and site works in 2014 and 2015; and construction of the first unit between 2016 and 2020, with commercial operation implied for the early 2020s (World Nuclear Association, 2026). A 2009 shortlist identified Żarnowiec, Kopań and Lubiatowo-Klempicz as the most likely sites. Site preparation advanced furthest in January 2013, when PGE EJ1 awarded an 81.5 million dollar contract to WorleyParsons for site characterisation and permitting work at the shortlisted locations.

The programme did not survive its own timetable. PGE EJ1 terminated the WorleyParsons contract in December 2014, citing slow progress, and by mid-2015 the target for the first unit had already slipped from 2020 to 2024. The decisive blow came in June 2016, when the incoming government rejected the contracts-for-difference financing model PGE had proposed as too costly and stated a preference for continued reliance on coal (World Nuclear Association, 2026). Unlike the Żarnowiec cancellation, this stalling brought no formal decision to abandon the programme: no site was released, and no legislation was repealed, yet the practical effect was the same, since site works stopped and the target, once fixed for the early 2020s, was left without a credible successor for several years.

The Law and Justice government

In the period between 2015 and 2023, the nuclear energy programme in Poland achieved considerable success under the Law and Justice (PiS) government. Nuclear energy became an integral part of Poland's energy transition and energy security policies. This approach was codified by the adoption of the Energy Policy of Poland until 2040 (PEP2040) in 2021, which recognised nuclear energy as a stable and low-emission energy resource that facilitates the replacement of coal-fired power stations (Betkowski, 2022; Gierszewski et al., 2021).

An important step in this period was the selection of the optimal location for Poland's first

nuclear power station. The new version of the Polish Nuclear Power Programme evaluated 27 sites for the construction of such plants, and two sites (Lubiatowo–Kopalino and Żarnowiec) were recognised as the most appropriate (Gierszewski et al., 2021). Site selection involved the assessment of several environmental and technical factors, such as geology, cooling water availability, environmental protection measures, existing infrastructure, and public opinion.

Following such an evaluation, Lubiatowo–Kopalino was found to be the best choice due to the advantageous position near the coast and other factors. Meanwhile, PEP2040 has been developing plans for building six nuclear power units with a total capacity of 6–9 GW, with the first of them being operational in 2033. The plan was meant to provide support in decarbonisation and ensure the stable provision of electricity in Poland (Betkowski, 2022; Gierszewski et al., 2021).

After the PiS defeat in 2023

The newly elected government conducted a review of Poland's nuclear energy program launched by the previous Law and Justice Party (PiS) government after parliamentary elections held in October 2023. Despite the fact that the coalition government restated its commitment to continue prioritising nuclear power for the country's energy transition program, it ordered a review of the program with regard to its progress and funding (Reuters, 2024).

Importantly, the new government preserved the site of the first nuclear power plant, which remained in Lubiatowo-Kopalino, located near the Baltic Sea. Nonetheless, there was an agreement that the delays, inherited from the previous government, made the initial deadline of commissioning the reactor in 2033 unfeasible. Thus, the updated Polish Nuclear Power Programme pushed the deadline to 2036, with the start of construction planned for 2028 (NucNet, 2024).

The new Polish Nuclear Power Programme kept the long-term goal of building 6-9 GW of nuclear power capacity at two different sites and announced that the site of the second nuclear power plant would be determined through a competitive process in 2025. Besides, the Polish government concentrated its efforts on devising a sustainable funding scheme and initiating negotiations on state aid approval with the European Commission (NucNet, 2024).

Current policy status and timeline

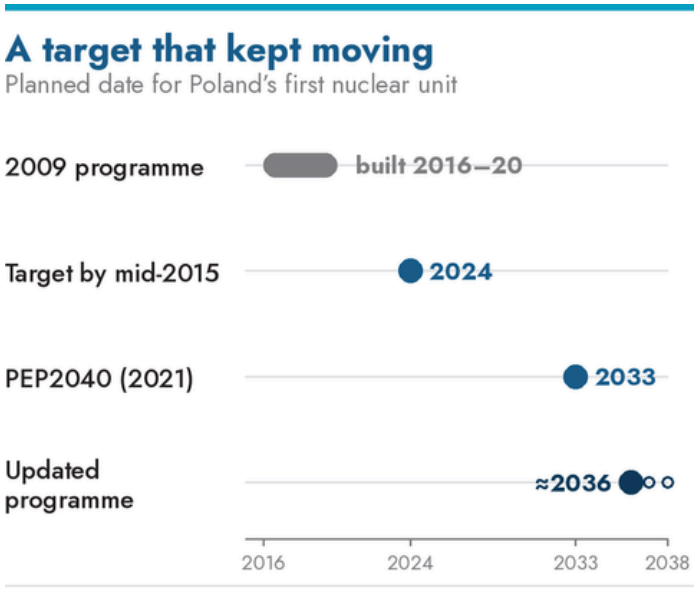
From 2024 to 2026, there was a period of realisation of Poland's nuclear power programme, the construction of the first nuclear power plant in Poland, and some organisational and administrative problems emerged. The government supports the application of nuclear energy, but it has adjusted the schedule of realisation received from the previous government. As a result, the first AP1000 unit at Lubiatowo-Kopalino is expected to be commissioned in about 2036 (not in 2033 as it was planned before), and subsequent units in 2037 and 2038 (Polskie Elektrownie Jądrowe, 2025; PAP, 2026a).

Now, the key factor that affects the development of the project is the conclusion of the EPC agreement and the procurement of long lead components, which are considered necessary for the adjustment of the schedule (PAP, 2026b).

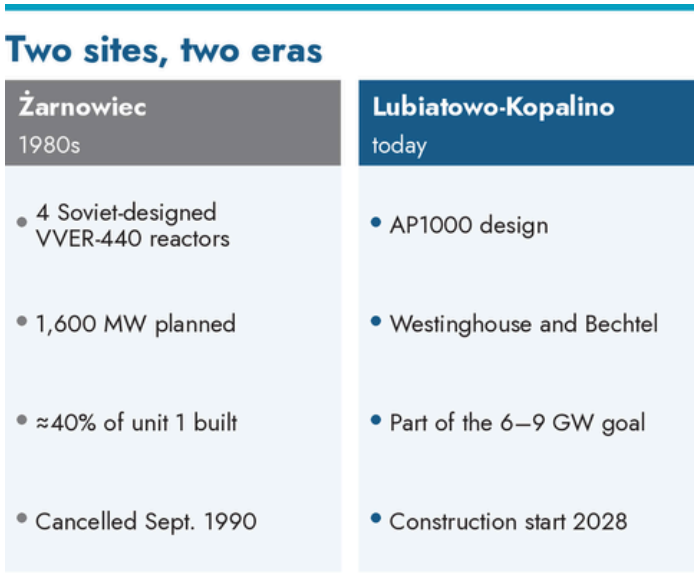
The current policy is related to the discussion of the balance between large nuclear reactors and Small Modular Reactors (SMRs). Even though SMRs continue to be a component of Poland's nuclear programme, large reactors continue to form the main route through which the country seeks to achieve decarbonisation and energy security (Ministry of Industry, 2025).

The situation in Poland's nuclear industry is exemplified by the Maria research reactor, which is currently the sole nuclear reactor in operation in Poland. In 2025, the reactor ceased operations temporarily because of the expiry of its licence as a result of failure on the part of the National Centre for Nuclear Research to provide adequate regulatory documents. Despite renewal of the licence, the case brought out problems in the regulatory framework that could affect the country's nuclear programme (Wiech, 2025; Świat OZE, 2025).

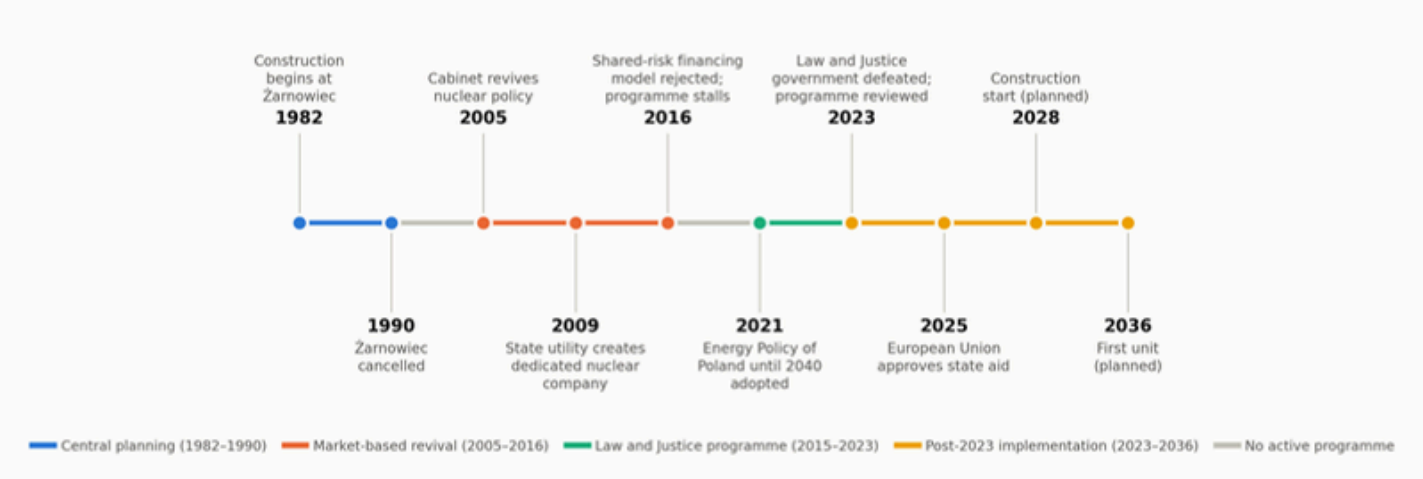
The four periods traced above share a pattern that is easier to see than to read from prose alone: an active phase of construction or policy commitment, a stall in which the programme falls dormant, and a restart under different political and financing terms.



Source: Cyprian Krystek and Michał Lobocki, based on the article text (WNA, 2026; NucNet, 2024)



Source: Cyprian Krystek and Michał Lobocki, based on the article text (WNA, 2026; NucNet, 2024)



Source: own work based on World Nuclear Association (2026), Betkowski (2022), Gierszewski et al. (2021), NucNet (2024) and European Commission (2025).

Interest Groups and Politics

The development of nuclear energy in Poland requires parties with varying degrees of power and conflicting interests. From the perspective of stakeholder theory, the most important actors will be those that combine a high degree of power and a strong personal interest in the success of the venture (Bryson, 2004; Reed et al., 2009).

In Poland, the government, with the backing of the Ministry of Industry, the Ministry of Climate and Environment, and Polskie Elektrownie Jądrowe (PEJ), is spearheading the nuclear project, with the regulation and safety of the program being taken care of by the National Atomic Energy Agency (PAA). There are state-owned companies like PGE, ORLEN, Orlen Synthos Green Energy, and ZE PAK that are taking part in future nuclear and SMR projects, while Westinghouse and Bechtel offer technology and construction knowledge.

The most significant opposition stakeholder is the coal sector, consisting of coal mining firms, labour unions, and politicians representing coal-dependent areas. Because of coal's economic and political significance, consecutive governments have had to reconcile their support for nuclear energy with the safeguarding of the interests of the coal sector. This dynamic is well-known as one of the major barriers to the energy transition in Poland (Świątkowski & Domagała, 2020).

Another conflict of interest occurs between large nuclear reactor advocates and SMR developers. Similarly, there is also a conflict between the objectives of decarbonisation and regional job creation. Despite growing public support for nuclear energy in recent times, the turnover of governments keeps on generating political instability through the modification of priorities, funding, and timelines (World Nuclear Association, 2025).

Key Political and Institutional Barriers

> **"The economic and political barriers are therefore not two separate obstacles to be solved in sequence, but a single constraint that must be resolved jointly if construction is to proceed."**

The nuclear program of Poland still faces many political and institutional barriers even though there is much political support. The first barrier is linked to political and electoral considerations, which impacted the process of implementation many times. Changes of government led to changes in terms of the financing model, planning and institutions, which caused delays in the program (International Atomic Energy Agency [IAEA], 2024; Ministry of Industry, 2020).

The second barrier consists of regulatory requirements that include compliance with the Polish Atomic Law, environmental impact assessment, licensing by the National Atomic Energy Agency (PAA) and state aid approval in accordance with EU legislation. The processes mentioned are necessary to ensure nuclear safety and significantly prolong the project preparation and implementation process

(European Commission, 2024; IAEA, 2024).

Public acceptance and risk communication are also important aspects. Even though the support of nuclear energy grows, the negative experience from cancellation of Zarnowiec nuclear power plant and consequences of Chernobyl catastrophe affects the attitude of the society towards it. Thus, communication with stakeholders at all stages of project development is crucial (World Nuclear Association, 2025).

Thirdly, there are shortages of well-trained staff and domestic suppliers in Poland. In the absence of a nuclear industry for decades, well-trained human resources and the capacity to regulate, as well as integration of Polish companies into global nuclear supply chains, are critical preconditions for programme implementation (IAEA, 2024).

Analysis of political options

In the case of Poland, its energy transition will be influenced by a number of opposing political-technological approaches. The key approach is associated with the construction of the so-called nuclear power plant generation III+, which is regarded as one of the most important components of energy security and decarbonization policy. The project includes the commissioning of the first reactor around 2030, in partnership with companies like Westinghouse and Bechtel (World Nuclear Association, 2026).

Another approach implies the use of Small Modular Reactors, advocated by industry as a more flexible and decentralised technology. Nevertheless, in the case of Poland, the use of such reactors is currently at the stage of planning and development, and there is uncertainty in terms of the commercial viability of such projects (World Nuclear Association, 2026).

Pathway three includes rapid development of renewable energy generation, such as offshore wind, solar PV, and storage. The Polish electricity generation portfolio already undergoes a process of diversification with growth in the generation of wind and solar energy, while maintaining coal-based electricity generation as dominant (World Nuclear Association, 2026). Even though renewable energy is critical to decarbonization, it is inherently intermittent and thus needs flexibility and backup for its reliable performance.

Finally, there are emerging forms of governance that can be represented by energy clusters and decentralised energy systems. Such systems include generation from wind, solar, and biogas in order to achieve regional balance between energy production and consumption.

Analysis from an Economic Perspective

Four recurring economic factors explain why investment in nuclear energy has repeatedly failed to reach completion in Poland. The first is a lack of funds: nuclear projects require capital far beyond what a single state utility can raise from its own balance sheet, and every Polish attempt so far has stalled where private or market-based financing was expected to take over from state guarantees. The second is insufficient economic viability under the financing terms on offer, illustrated by the 2016 government's rejection of the contracts-for-difference model PGE had proposed as too costly to the public purse

(World Nuclear Association, 2026). The third is a lack of proven domestic technology and supply chain, forcing Poland to depend entirely on foreign vendors, first Areva and now Westinghouse and Bechtel, for reactor design and a substantial share of construction. The fourth is the set of conflicts of interest examined in section 3, particularly the coal sector's capacity to make continued reliance on coal a lower-risk political choice than a multi-decade nuclear commitment (Brauers & Oei, 2020).

These four factors interact rather than operate independently. A government facing a powerful coal lobby has less incentive to accept the financing risk private capital demands for a first-of-a-kind reactor. The problem is also that reliance on state guarantees limits how much capital the programme can raise without breaching European Union state aid rules, precisely the constraint behind the Commission investigation opened in December 2024 (European Commission, 2024). The economic and political barriers are therefore not two separate obstacles to be solved in sequence, but a single constraint that must be resolved jointly if construction is to proceed.

Analysis of economic benefits

Assessing whether a nuclear power station is a sound use of public and private capital requires standard investment-appraisal tools used in the energy sector. The levelised cost of electricity (LCOE) expresses the minimum price per unit of electricity needed to recover all construction, financing, fuel and decommissioning costs over the plant's lifetime, and is the figure most often used to compare generation technologies.

The Polish case illustrates the scale of capital this method must be applied to. PGE's own 2012 estimate put the levelised cost of the planned station at €6.5 cents to 6.8 cents per kWh, and its capital cost estimate rose from roughly €2,500 to 3,000 per kilowatt of capacity in 2012 to about €4,660 per kilowatt by 2018 (World Nuclear Association, 2026), a trajectory consistent with the cost escalation that first-of-a-kind reactors have experienced elsewhere. The current Lubiatowo-Kopalino project is estimated to cost approximately 192 billion złoty, of which around 60 billion złoty is expected to come from direct public subsidy, with the remainder financed through loans and bonds (Drosińska-Komor et al., 2026). No Polish study has yet published a comparative LCOE figure setting the first nuclear plant in Poland project directly against domestic coal or offshore wind, which is an evidentiary gap rather than a settled comparison. The available evidence instead indicates that the plant's fuel cost is markedly less volatile than that of coal or gas, an advantage that standard LCOE calculations tend to understate because they typically use a single fuel-price assumption rather than modelling price risk (Drosińska-Komor et al., 2026).

The economic loss from thirty-five years without a domestic reactor is harder to quantify than the cost of building one, since no published Polish study offers a full counterfactual estimate of the price, emissions and import effects an operating plant would have produced since 1990. What is documented is the cost of the path taken instead: the abandonment of Żarnowiec destroyed an estimated 500 million US dollars of invested capital, of which only about six million was recovered through equipment sales (World Nuclear Association, 2026). Moreover, continued reliance on coal now carries a recurring cost through the EU Emissions

Trading System, which accounted for an estimated 15 to 16% of a typical Polish household's electricity bill in 2024 and 2025 (Notes from Poland, 2026). Against coal, nuclear's case rests on predictable fuel costs and low lifetime emissions, which the ageing Polish coal fleet lacks. Against offshore wind, it rests on firm output, though wind proceeds on a shorter timeline and at lower capital cost per megawatt, a trade-off Polish policy has resolved by pursuing both technologies at once (Drosińska-Komor et al., 2026; World Nuclear Association, 2026).

Benefits of building a nuclear power plant for the Polish economy

The clearest economic benefit of a domestic nuclear plant is a reduction in Poland's exposure to imported fuel. Overall energy import dependency rose from 29% to 45% over the decade to 2024, even as the country eliminated its imports of Russian gas and coal, and it spent 112 billion złoty on fossil fuel imports in 2024 alone, with crude oil import dependency at about 97% and natural gas dependency at about 82% (Forum Energii, 2025). A nuclear station runs on fuel that is imported in small, easily stockpiled quantities and traded on a diversified global market, which insulates the generation source.

Lower and more predictable electricity prices matter beyond household bills, because industry accounts for roughly one-fifth of national output and includes energy-intensive sectors such as chemicals, metals and mining, for which electricity is a principal determinant of production cost and competitiveness (gmk. centre, 2025). Nuclear generation has the potential to ease a cost pressure that is unusually large in Poland, though this remains an argument for the technology's contribution to growth rather than a demonstrated effect, since no published study yet quantifies the gross domestic product impact of the planned station directly. Construction and operation of Lubiatowo-Kopalino are nonetheless expected to create between 8,000 and 10,000 jobs during the building phase and around 1,000 permanent positions once operational, together with indirect employment that a competitive procurement process could allow Polish firms to capture in part (Drosińska-Komor et al., 2026).

Finally, nuclear power carries a social mandate that follows from the government's own commitments to coal communities. Poland's 2022 social contract with the mining trade unions provides for coal extraction to continue, with government subsidy, until 2049, alongside guaranteed relocation or early retirement at 80% of salary for miners affected by closures (International Energy Agency, 2023). That agreement makes an abrupt coal phase-out politically and financially costly, yet it does not remove the pressure to build low-emission capacity to meet Poland's climate obligations in the meantime.

Political and Economic Recommendations

Four recommendations follow directly from the barriers identified above, each addressed to a specific actor named earlier in the article. The first is stabilisation of the legal and financing framework, so that it no longer resets with every change of government. Poland's Atomic Law and the state aid architecture approved by the European Commission in December 2025

already provide a starting point (European Commission, 2025). What is missing is a durable, cross-party commitment, of the kind that has kept the coal sector's subsidy regime intact through several changes of government, extended to the nuclear programme on comparable terms.

The second is selection of a financing model that shares risk between the state and private capital rather than resting entirely on public subsidy or on a market structure investors have already rejected once. The rejection of the contracts-for-difference proposal in 2016 shows that the choice of model matters as much as its existence, since a technically sound instrument can still fail if the government that must approve it judges it too costly (World Nuclear Association, 2026).

The third is a sustained capacity-building programme addressing the shortage of trained personnel, licensing capacity within the National Atomic Energy Agency, and domestic suppliers able to meet international nuclear quality standards, since the International Atomic Energy Agency identifies this shortage as a precondition for delivery rather than a secondary concern (IAEA, 2024). The supplier symposia already held with Westinghouse and Bechtel are a reasonable start, but need to be matched by domestic training on a timescale that keeps pace with construction rather than following it.

The fourth is sustained, differentiated public communication. Aggregate support for nuclear power in Poland is high, but unevenly distributed across the political spectrum and appears to rest more on ideological alignment than on an assessment of risk and benefit, so a single national campaign is unlikely to be as effective as messaging tailored to distinct audiences: energy independence for those sceptical of the technology's safety, and environmental benefit for those already convinced of its safety but unconvinced of its necessity (Smolinski et al., 2024).

Summary

Poland has not built a nuclear power plant to date because every serious attempt has depended on a combination of financing, legal continuity and coalition support that has not survived a change of government, not because the technology has been judged unsafe, uneconomic in principle, or unwanted by the public. The Żarnowiec project fell with the central-planning system that had made it possible; the 2009 to 2016 revival fell when a new government judged its financing model too costly; and the current attempt, further along than either predecessor, still depends on concluding an EPC contract and holding a schedule that has already slipped once, from 2033 to 2036.

What would have to change for the outcome to differ this time follows from that diagnosis. The legal and financing framework needs to survive the next change of coalition, the financing model needs to distribute risk in a way that both government and private capital accept rather than one later governments can disown as too costly, the domestic workforce and supply chain need to be built on a timetable that matches construction rather than trailing it, and public communication needs to address the specific, politically differentiated sources of scepticism that current research identifies rather than assuming aggregate support translates automatically into durable backing. None of these conditions requires a change of reactor technology or a further site study; all are

institutional and political, consistent with the finding that political and institutional instability, not technical or economic infeasibility, has been the binding constraint on Poland's nuclear programme since 1990.

From barriers to recommendations

What has held the programme back – and what the authors recommend

BARRIER		RECOMMENDATION
Changes of government led to changes in the financing model, planning and institutions	1	Stabilise the legal and financing framework so it no longer resets with every change of government
Lack of funds; the 2016 government rejected the contracts-for-difference model as too costly	2	Choose a financing model that shares risk between the state and private capital
Shortages of well-trained staff and domestic suppliers	3	Sustained capacity-building: trained personnel, PAA licensing capacity, domestic suppliers
Public attitudes still shaped by the cancellation of Żarnowiec and by Chernobyl	4	Sustained, differentiated public communication tailored to distinct audiences

> "None of these conditions requires a change of reactor technology or a further site study.

Source: Cyprian Krystek and Michał Łobocki, based on the article text

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Energy and nuclear economics in numbers

Poland, as documented in the article

56.2%
of Poland's electricity came from coal in 2024

29% → 45%
overall energy import dependency, decade to 2024

112 bn zł
spent on fossil fuel imports in 2024

15–16%
of a typical household electricity bill went to the EU ETS (2024, 2025)

≈192 bn zł
estimated cost of Lubiatowo-Kopalino; ≈60 bn zł from direct public subsidy

€2,500–3,000 → €4,660
capital cost per kW: 2012 estimate, then 2018

8,000–10,000
jobs during construction; ≈1,000 permanent positions

$500 m
invested capital destroyed at Żarnowiec; only ≈$6 m recovered

Source: Cyprian Krystek and Michał Lobocki, based on the article text (Forum Energii, 2025; WNA, 2026; Drosińska-Komor et al., 2026; Notes from Poland, 2026)



About the Article

Since Russia launched its full-scale invasion of Ukraine in February 2022, the European Union has progressively expanded the scope and intensity of its restrictive measures against Russia. Successive sanctions packages have targeted financial flows, energy revenues, trade, advanced technologies, transport networks, and the Russian military-industrial complex (Immenkamp, 2024).

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Since Russia launched its full-scale invasion of Ukraine in February 2022, the European Union has progressively expanded the scope and intensity of its restrictive measures against Russia. Successive sanctions packages have targeted financial flows, energy revenues, trade, advanced technologies, transport networks, and the Russian military-industrial complex (Immenkamp, 2024). As these restrictions became more comprehensive, however, their effectiveness increasingly depended on the EU's ability to prevent circumvention through third countries, intermediaries, and alternative trade and transport networks. Consequently, sanctions enforcement became an increasingly important dimension of European sanctions policy.

Anti-circumvention instrument: an EU mechanism allowing country-specific export restrictions where persistent diversion through a third country undermines sanctions.

The EU initially responded to this challenge primarily through targeted measures against individual companies, financial institutions, vessels, and other actors involved in facilitating circumvention. Over time, these measures expanded beyond individual transactions and increasingly addressed the wider networks through which Russia obtained restricted goods and services. Measures targeting Russia's shadow fleet, third-country intermediaries, and contractual re-export arrangements illustrate this gradual externalisation of sanctions enforcement. A potentially significant further step occurred with the twentieth EU sanctions package adopted on 23 April 2026. For the first time since its introduction in 2023, the EU has activated the anti-circumvention instrument under Article 12f of Regulation (EU) No 833/2014. Following prior diplomatic engagement and an assessment of persistent diversion risks, the Council prohibited the export of selected machining centres and telecommunications equipment to Kyrgyzstan (Council Decision (CFSP) 2026/508; Council Regulation (EU) 2026/506). Unlike conventional individual listings, the restriction is not limited to specifically designated Kyrgyz companies. For the products in question, the destination country itself becomes relevant to the measure's application.

This development raises a broader question about the evolution of EU sanctions policy. The Union has traditionally distinguished its own restrictive measures from US secondary sanctions and has emphasised the importance of maintaining a recognised jurisdictional connection between EU law and the regulated conduct (Council of the European Union, 2024a). At the same time, effective sanctions enforcement increasingly requires the EU to address economic activity and circumvention networks located beyond its borders. Against this background, this article asks: Does the first activation of the EU anti-circumvention instrument against Kyrgyzstan mark the emergence of a distinct European model of selective extraterritorial sanctions enforcement?

The article argues that the activation of Article 12f does not amount to the adoption of US-style

secondary sanctions. It nevertheless represents a significant development in the external reach of EU sanctions enforcement. By moving from predominantly actor-specific restrictions to a mechanism that allows access to selected European goods to be restricted at the level of a third-country destination, Article 12f introduces a new form of conditionality into the EU sanctions regime. The Kyrgyz case should therefore be understood as an early indication of a more externalised European enforcement approach rather than evidence of a fully developed extraterritorial sanctions doctrine.

The article first establishes the jurisdictional foundations of EU sanctions and their traditional distinction from US secondary sanctions. It then traces the gradual shift from direct restrictions on Russia towards increasingly network-oriented anti-circumvention measures, culminating in the first activation of Article 12f. Finally, it assesses the extent to which this development constitutes an emerging European approach to external sanctions enforcement and where important differences from the US model remain.

The Jurisdictional Foundations of EU Sanctions and the Secondary-Sanctions Benchmark

For the purposes of this article, sanctions are understood as restrictive measures adopted to pursue foreign-policy objectives by influencing or constraining the behaviour of a target (Lohmann, 2016, p. 933; Marinov, 2005, p. 566; Morgan et al., 2009, p. 94; Weber & Schneider, 2020). The relevant distinction for the present analysis is not primarily between unilateral and multilateral sanctions (Tsouloufas & Rochat, 2023), but between measures that remain tied to the sender's jurisdiction and measures designed to influence economic activity beyond it. This distinction is particularly important when comparing the European Union's traditional approach with US secondary sanctions.

EU sanctions are adopted through a two-stage legal process. The Council first adopts a decision under Article 29 of the Treaty on European Union within the framework of the Common Foreign and Security Policy (Immenkamp, 2024; Weber & Schneider, 2020). Where the measures interrupt or restrict economic and financial relations, they are subsequently implemented through a Council regulation pursuant to Article 215 of the Treaty on the Functioning of the European Union. Such regulations are binding in their entirety, directly applicable throughout the Union, and subject to judicial review by the EU courts. Their practical enforcement, including the investigation and penalisation of infringements, remains primarily the responsibility of the Member States (Immenkamp, 2024). The jurisdictional reach of the EU's Russia sanctions is codified in Article 13 of Regulation (EU) No 833/2014. The Regulation applies within the territory of the Union, on board aircraft and vessels under the jurisdiction of a Member State, to nationals of Member States wherever they are located, to companies and other legal entities incorporated under the law of a Member State, including when they operate outside the Union, and to any legal person, entity, or body in respect of business conducted wholly or partly within the Union. EU sanctions, therefore, extend beyond territorial jurisdiction in the narrow sense. An EU national or EU-incorporated company may remain subject to the Regulation while operating abroad, while a non-EU company may fall within its scope where the relevant business is conducted, at least partly, within the Union.

Despite this comparatively broad reach, EU restrictive measures have traditionally remained anchored in a legally recognised connection with the Union. The Council's Sanctions Guidelines explicitly state that restrictive measures should apply only where such links with the EU exist, including territory, nationality, incorporation under Member State law, or business conducted wholly or partly within the Union (Council of the European Union, 2024a). The same Guidelines state that the EU will refrain from adopting legislative instruments with extraterritorial application where this would breach international law (Council of the European Union, 2024a).

This approach has historically distinguished EU sanctions from US secondary sanctions. Secondary sanctions seek to influence third-country actors by attaching consequences to their dealings with sanctioned states, entities, or individuals, even when the underlying transaction occurs outside conventional US jurisdiction (Beaucillon, 2024). Their effectiveness is closely linked to access to the US market and financial system. The traditional EU approach, by contrast, has not generally sought to prohibit a company established exclusively in a third country from engaging in an otherwise external transaction solely because that transaction conflicts with an EU foreign-policy objective (de Galbert, 2016). The EU's longstanding scepticism towards broad claims of extraterritorial jurisdiction is also reflected in its Blocking Statute, Council Regulation (EC) No 2271/96. The instrument was introduced to protect EU operators against the effects of specified third-country legislation applied extraterritorially and, subject to certain exceptions, restricts compliance with such measures. Its existence illustrates the political and legal sensitivity surrounding attempts by one jurisdiction to regulate economic conduct taking place under another (Council Regulation (EC) No 2271/96). At the same time, the EU's jurisdictional approach does not permit EU operators to use controlled companies abroad as instruments of circumvention; the Council Guidelines make clear that an EU-incorporated entity may not use a company it controls to evade prohibitions binding upon it (Council of the European Union, 2024a).

This distinction between jurisdiction and effects is essential for assessing the subsequent evolution of EU anti-circumvention policy. Even conventionally territorial sanctions inevitably produce economic consequences abroad. Foreign companies may lose European customers, access to EU-origin goods, or the ability to use European financial and logistical services. Such external effects do not in themselves amount to extraterritorial legal application. The more difficult question is whether newer measures merely intensify those effects or alter the underlying jurisdictional logic by making access to the European market conditional upon conduct undertaken in third countries. To assess the implications of the anti-circumvention instrument, Article 12f, it is not necessary to determine whether it affects actors outside the Union; EU sanctions have always done so, but the question is whether it represents a shift from regulating EU-connected persons and transactions towards using that jurisdictional authority to impose more systematic behavioural conditions on third-country jurisdictions. The distinction provides the conceptual basis for determining whether the EU is retaining its established territorial and personal connecting factors, or developing a selective form of

sanctions enforcement that increasingly resembles the functional logic of secondary sanctions.

From Restriction to Enforcement: The Externalisation of EU Sanctions and Article 12f

The evolution of EU sanctions against Russia since February 2022 reflects a gradual shift in both the scope and logic of restrictive measures. The initial sanctions packages focused predominantly on imposing direct economic costs on Russia and constraining its ability to finance and sustain the war. Financial restrictions were rapidly complemented by extensive export controls on dual-use goods and advanced technologies, limitations on transport and services, and increasingly far-reaching measures targeting Russia's energy revenues and military-industrial complex (Stengl, 2025). By the end of 2022, the EU sanctions regime had developed into a broad architecture covering finance, trade, technology, transport, and energy. The introduction of the oil price cap further linked access to European maritime, insurance, and financial services to compliance with sanctions restrictions (Stengl, 2025). As these direct restrictions became more comprehensive, however, circumvention increasingly emerged as a central challenge (Council Regulation (EU) 2023/1214). Russia sought to replace restricted European suppliers and services through third-country intermediaries, alternative transport routes, and re-export networks. The focus of EU policy, therefore, gradually shifted from adopting additional prohibitions on direct EU–Russia transactions to enforcing existing restrictions beyond the immediate bilateral relationship.

The eleventh sanctions package of June 2023 marked an important institutional step in this transformation. Alongside additional restrictions on third-country entities supplying Russia's military-industrial complex, the EU established a dedicated anti-circumvention mechanism that was subsequently incorporated into Article 12f of Regulation (EU) No 833/2014 (Council of the European Union, 2023a; Council Regulation (EU) 2023/1214). The instrument was deliberately conceived as a measure of last resort. The EU would first pursue diplomatic engagement and technical cooperation with the third country concerned and, where appropriate, impose targeted restrictions on individual operators facilitating circumvention (Hilgenstock, 2025). Only where individual measures and further engagement proved insufficient, and the volume, type or systemic nature of circumvention demonstrated a continuing and particularly high risk, could the EU resort to country-specific restrictions (Council of the European Union, 2023a).

This created a legal possibility that went beyond conventional individual listings. Nevertheless, Article 12f remained unused for almost three years. Instead, subsequent packages progressively strengthened less far-reaching forms of external enforcement. The twelfth sanctions package, for instance, introduced the so-called "No-Russia Clause", requiring EU exporters of certain sensitive goods to contractually prohibit their re-export to Russia. It also strengthened enforcement of the oil price cap and introduced notification requirements for the sale of tankers to third countries (Council of the European Union, 2023b). These measures extended the practical reach of EU sanctions into commercial relationships beyond the Union

without directly regulating third-country actors as such.

The gradual shift towards network-oriented enforcement became particularly visible in measures against Russia's shadow fleet. From the fourteenth sanctions package onwards, the EU increasingly targeted not only Russian transactions but also the vessels and services enabling them. Subsequent packages expanded restrictions to shipowners, operators, insurers, traders, and other actors, facilitating circumvention (Stengl, 2025). By the seventeenth package, the Council explicitly referred to the targeting of the broader "shadow fleet ecosystem", including companies established in third countries (Council of the European Union, 2024b, 2025). The relevant object of sanctions policy was therefore no longer confined to the Russian state or direct EU–Russia transactions; it increasingly encompassed the transnational infrastructure through which Russia adapted to sanctions.

Yet these measures remained predominantly actor- or infrastructure-specific. Particular vessels, companies, banks, or service providers were targeted because of their identifiable role in sanctions circumvention. The first activation of Article 12f in the twentieth sanctions package of 23 April 2026, therefore, represents a qualitatively different step.

For the first time, the Council added both a third-country jurisdiction, the Kyrgyz Republic, and specific product categories to Annex XXXIII of Regulation No 833/2014. Council Regulation (EU) 2026/506 prohibits the sale, supply, transfer, or export to Kyrgyzstan of selected machining centres and telecommunications equipment. Crucially, the restriction is not limited to previously designated Kyrgyz companies. For the goods concerned, the destination itself becomes the relevant regulatory criterion (Council Regulation (EU) 2026/506; Council Decision (EU) 2026/508). The Council justified the measure by pointing to substantial changes in trade flows. According to Regulation 2026/506, Kyrgyz imports of EU-origin Common High-Priority items during the first ten months of 2025 were almost 800 percent higher than before Russia's full-scale invasion, while Kyrgyz exports of such goods to Russia had increased by approximately 1,200 percent. The selected machining centres can be used to manufacture high-precision components relevant to military production, while the telecommunications equipment concerned may serve military

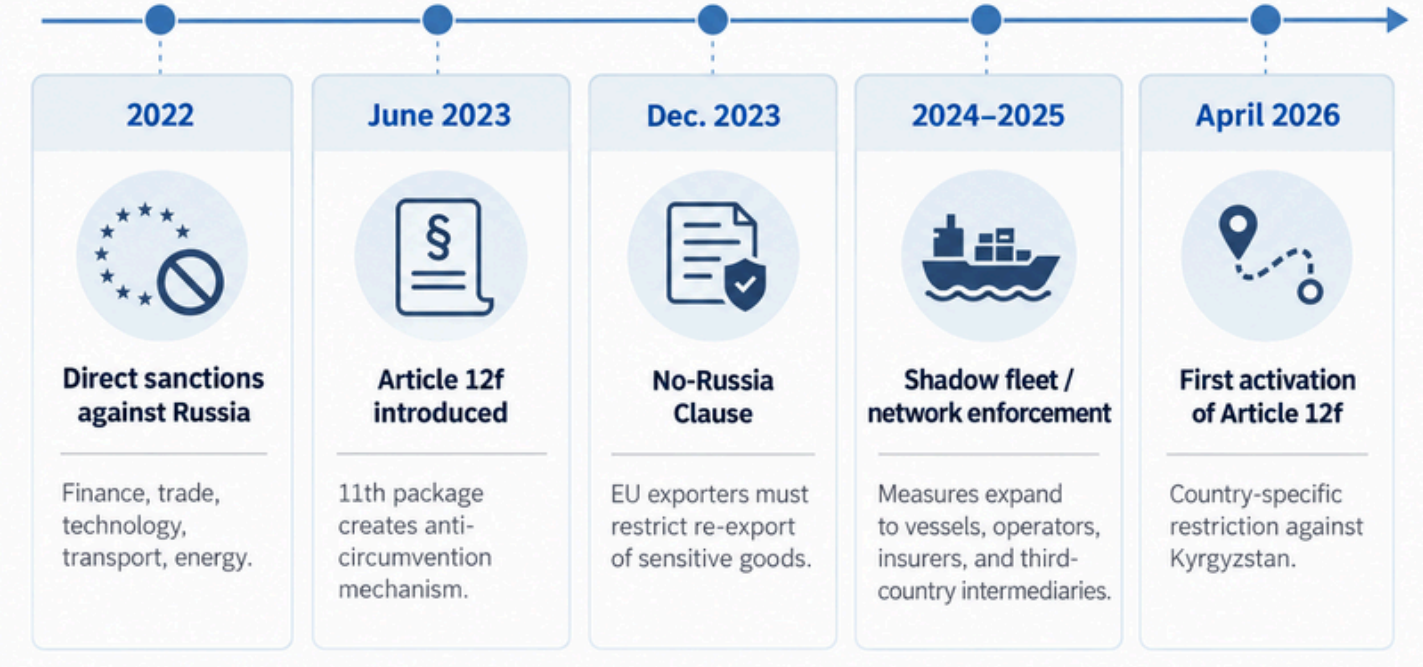
> **"Article 12f allows the EU to respond where circumvention is no longer treated primarily as the conduct of individual intermediaries but as a broader problem associated with a particular destination."**

communications and drone-related applications (Council Regulation (EU) 2026/506). Importantly, activation was not based solely on trade diversion. The Regulation records prior diplomatic engagement, including discussions with the EU International Special Envoy for the Implementation of EU Sanctions and repeated efforts to secure stronger Kyrgyz controls on re-exports. The Council ultimately concluded that the measures adopted by Kyrgyzstan had been insufficient to prevent systematic diversion of sensitive EU-origin goods to Russia (Council Regulation (EU) 2026/506). The first application thus followed the escalation logic envisaged when Article 12f was created. Diplomatic engagement and targeted measures precede a country-specific restriction.

Assessment: An Emerging European Model of External Sanctions Enforcement?

The first activation of Article 12f represents a significant development in EU sanctions enforcement, but it should not be equated with the adoption of US-style secondary sanctions. Its significance lies instead in the way the EU increasingly uses access to European goods as leverage against sanctions circumvention occurring through third countries. The measure, therefore, points towards a more externalised form of enforcement while remaining narrower in scope and design than the US model.

Figure 1. The gradual externalization of EU sanctions enforcement, 2022–2026



Source: Author's compilation based on Council of the European Union (2023a, 2023b, 2024, 2025) and Council Regulation (EU) 2026/506.

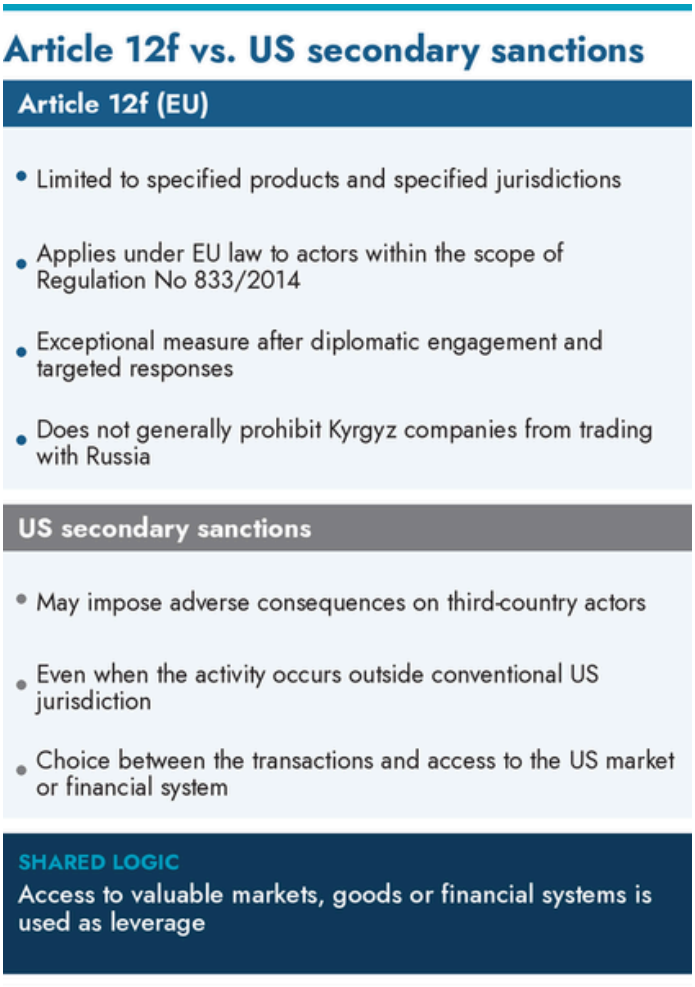
The principal innovation concerns the level at which circumvention is addressed. Earlier measures predominantly targeted identifiable actors or infrastructures involved in sanctions evasion, such as companies, banks, vessels, or service providers. Article 12f allows the EU to respond where circumvention is no longer treated primarily as the conduct of individual intermediaries but as a broader problem associated with a particular destination. In the Kyrgyz case, access to selected EU-origin goods was restricted because the Council considered the existing measures insufficient to prevent their continued diversion to Russia (Council Regulation (EU) 2026/506). The importance of the instrument, therefore, lies not primarily in the economic weight of the products concerned, but in the fact that the destination country itself becomes relevant to the enforcement decision. This does not mean that the EU has abandoned its traditional jurisdictional approach. The prohibition continues to apply under EU law and covers the sale, supply, transfer, or export of specified goods by actors within the scope of Regulation No 833/2014. Article 12f does not generally prohibit Kyrgyz companies from trading with Russia, nor does it automatically impose EU sanctions obligations on third-country firms because of their independent commercial activities. This remains an important distinction from US secondary sanctions, which may impose adverse consequences on third-country actors for transactions with sanctioned entities, even when the underlying activity occurs outside conventional US jurisdiction (Beaucillon, 2024). Nevertheless, the functional logic of the two approaches has come closer together. Both respond to the same structural problem: sanctions lose effectiveness when third-country actors or jurisdictions provide alternative channels through which prohibited goods, services, or financial relationships can be maintained. Both, therefore, seek to influence behaviour outside the sender's immediate territory by using access to economically valuable markets, goods, or financial systems as leverage. In this sense, Article 12f introduces an element of conditionality into EU sanctions enforcement. Continued access to selected European goods becomes dependent, at least indirectly, on whether the destination country takes sufficient measures to prevent their diversion to Russia.

The difference lies in the degree and design of this conditionality. US secondary sanctions may directly confront a third-country company with the choice between maintaining certain transactions with a sanctioned actor and preserving access to the US market or financial system. Article 12f is considerably narrower. It is limited to specified products and specified jurisdictions and was designed as an exceptional measure following diplomatic engagement and more targeted responses (Council Regulation (EU) 2026/506). The instrument, therefore, does not establish a general requirement that third countries align themselves with the EU sanctions policy. Rather, it creates a mechanism by which the EU can restrict access to particular goods when circumvention in a given jurisdiction is considered persistent and insufficiently addressed. This narrower design is politically significant. The EU has traditionally emphasised that its restrictive measures should be linked to the Union and has criticised certain forms of extraterritorial sanctions imposed by third countries (Council of the European Union, 2024a). Article 12f allows the Union to strengthen the external effectiveness of its sanctions without simply replicating the US model. The instrument can therefore be interpreted as an attempt to

reconcile two competing objectives: maintaining the effectiveness of sanctions in an increasingly interconnected trading environment while preserving a more limited and targeted approach to their external application.

At the same time, the Kyrgyz case reveals potential limitations. Country-specific restrictions may reduce circumvention through one jurisdiction while redirecting trade towards another. If alternative transit routes remain available, the effect may be displacement rather than prevention. The effectiveness of Article 12f will therefore depend not only on whether exports to the targeted jurisdiction decline, but also on whether the underlying flow of sensitive goods to Russia is actually reduced. A further challenge concerns proportionality. If the instrument were applied too broadly or too frequently, it could become increasingly difficult to distinguish targeted anti-circumvention measures from broader attempts to pressure third countries to align with EU foreign-policy preferences. For this reason, the first activation of Article 12f should be understood as the emergence of a possible European model rather than evidence of a fully developed doctrine. One case involving a limited number of product categories does not yet establish a systematic policy of extraterritorial sanctions enforcement. Its importance lies in the precedent it creates. The Council has demonstrated that, where individual listings, contractual safeguards, and diplomatic engagement are considered insufficient, it is prepared to move from actor-specific restrictions towards a country-specific limitation on access to selected EU goods.

The answer to the article's central question should therefore remain qualified. The activation of Article 12f does not make the EU a secondary-sanctions actor in the US sense. It does, however, indicate a broader transformation in how the Union seeks to protect the effectiveness of its sanctions. The EU is increasingly prepared to use its economic weight not only to regulate transactions connected to its own jurisdiction, but also to influence the conditions under which third countries facilitate access to sanctioned markets. Whether this develops into a distinct European model will depend on future practice: how often Article 12f is activated, how narrowly the affected goods and jurisdictions are defined, and whether the instrument remains a measure of last resort. For now, the Kyrgyz case is best understood as a carefully circumscribed extension of EU sanctions enforcement beyond the traditional bilateral relationship with the primary target.

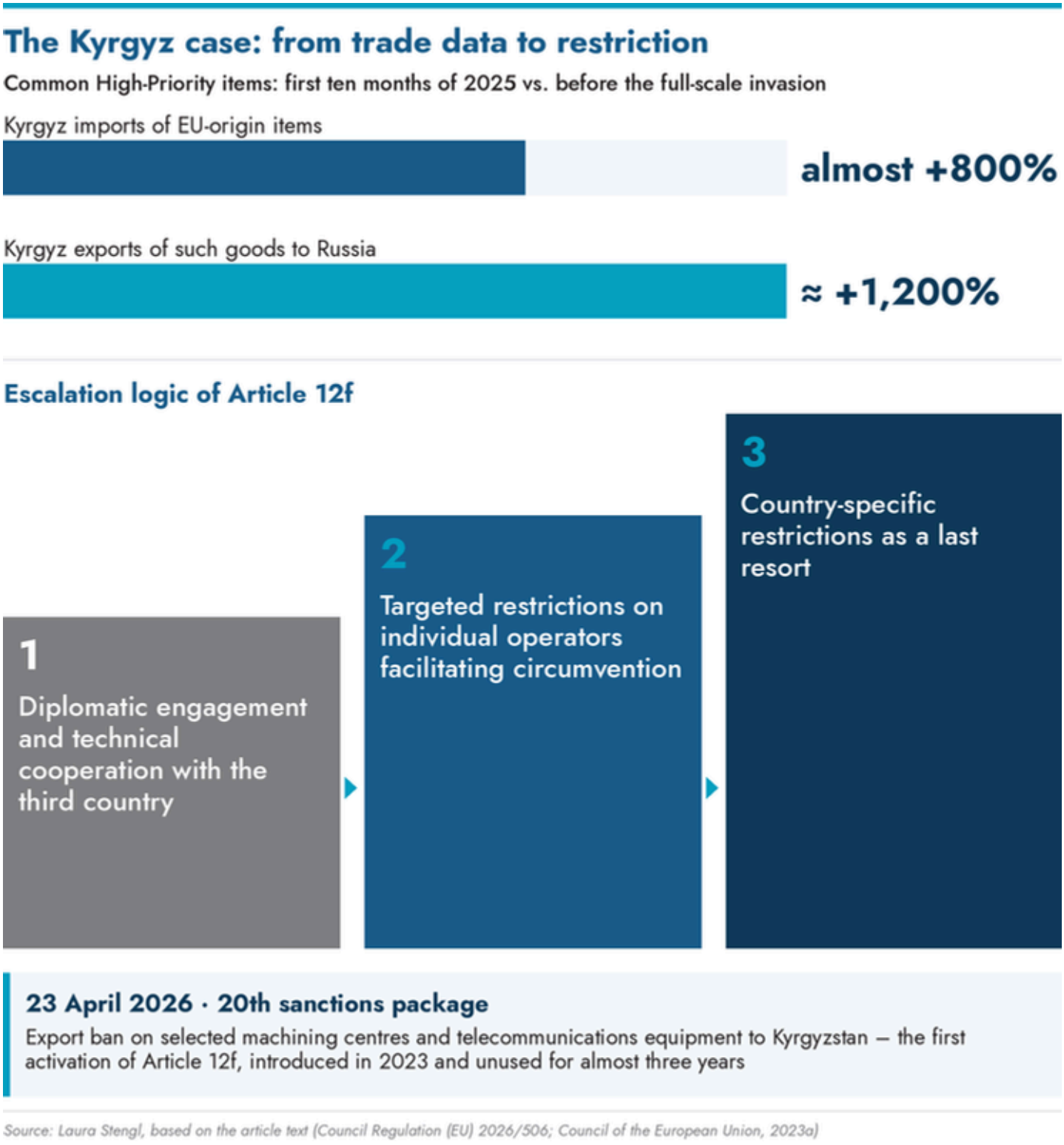


Source: Laura Stengl, based on the article text (Council Regulation (EU) 2026/506; Beaucillon, 2024)

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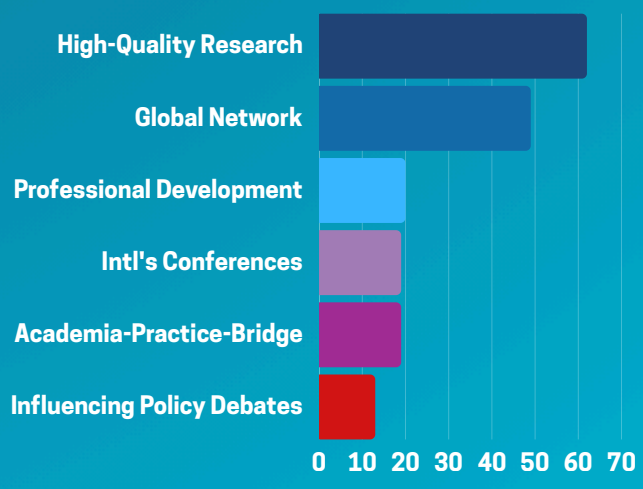


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Question of the Month

What should EPIS be known for in five years?





About the Article

Military conflicts are traditionally judged by battlefield outcomes, territorial change and the achievement of strategic objectives. This essay argues that these measures, while important, no longer provide a complete understanding of modern warfare. Using the U.S.–Iran conflict as a case study, it examines how contemporary war extends beyond the battlefield into economic systems, political institutions, and the psychological lives of ordinary people.

About the Author

Barry Campfield brings a multidisciplinary background spanning engineering, geopolitics, and emergency management, including training as a New York City Homeland Security First Responder. His research focuses on Middle Eastern security, cyber warfare, and the economic and strategic developments shaping Asia. Following a 40-year career in management and operations, Barry is transitioning into research and analysis. He publishes commentary on contemporary international affairs and is seeking opportunities

Military conflicts are traditionally judged by battlefield outcomes, territorial change and the achievement of strategic objectives. This essay argues that these measures, while important, no longer provide a complete understanding of modern warfare. Using the U.S.–Iran conflict as a case study, it examines how contemporary war extends beyond the battlefield into economic systems, political institutions, and the psychological lives of ordinary people. Its central argument is that modern conflict increasingly tests the resilience of societies as well as the effectiveness of their armed forces.

The battlefield no longer ends where the fighting stops.

Invisible battlefield: the economic, political and psychological systems through which modern military confrontation travels, reshaping the lives of people far from the fighting.

Every war produces visible casualties. Soldiers are killed, civilians lose their lives, infrastructure is destroyed, and governments calculate the military cost of conflict. These losses rightly dominate headlines and military assessments because they are immediate, measurable, and deeply tragic. They become the statistics by which wars are remembered and, frequently, the measures by which victory or defeat is judged.

Yet modern warfare also produces consequences that are considerably harder to count.

They can be found in the Iranian graduate questioning whether a future still exists at home, the American family paying more for fuel and household necessities, the European manufacturer confronting unpredictable energy costs, and the farmer in a developing economy facing higher fertiliser and food prices. None belongs in the same category as those killed, injured or displaced by war. Yet all may experience consequences created by political and military decisions made thousands of miles away.

The United Nations Development Programme's Human Development Report 1994 challenged the traditional state-centred understanding of security by arguing that security should concern people as well as territory. Its concept of human security broadened the discussion beyond national borders and military capability to include the economic and social conditions that allow individuals to live with dignity and reasonable confidence in their future (United Nations Development Programme [UNDP], 1994).

Three decades later, the U.S.–Iran conflict demonstrates the continuing relevance of that idea. Economic and technological interdependence has reduced the protection once provided by geography. Military confrontation in one region can rapidly affect energy markets, international shipping, investment, inflation, and household finances elsewhere.

This essay therefore asks a question conventional military analysis can overlook:

When governments wage war, who ultimately pays the price?

The New Battlefield

Not all battlefields are marked on military maps.

Clausewitz (1976) understood war as an instrument of politics. Military force was not an end in itself but a means through which political objectives could be pursued. That insight remains fundamental. What has changed is the international environment through which military action now produces consequences.

Globalisation has created societies dependent upon international energy markets, financial networks, digital infrastructure and complex supply chains. Keohane and Nye (2012) describe the interdependence created by such relationships: states remain politically sovereign while becoming increasingly exposed to economic developments occurring beyond their borders. Military conflict can therefore travel through these systems even when armies do not.

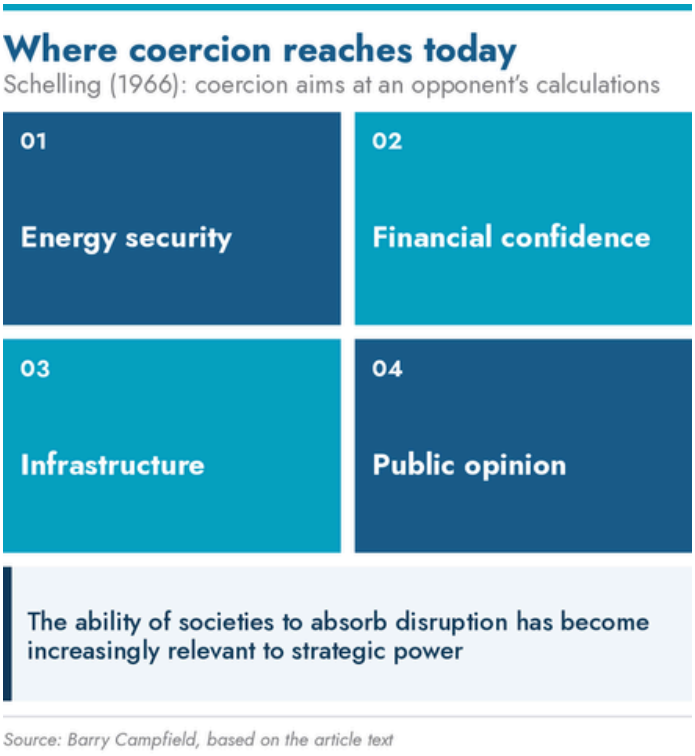
The Strait of Hormuz provides perhaps the clearest contemporary example. What appears on a map as a narrow maritime passage connects Gulf energy producers with consumers throughout the world. Disruption therefore creates consequences extending far beyond the immediate military theatre. The World Bank (2026) estimates that the Middle East conflict has contributed to higher energy prices, greater inflationary pressure and weaker economic growth, forecasting global growth of 2.5 per cent in 2026. It also warns that higher fertiliser prices could feed through into food costs, creating particular difficulties for developing economies (World Bank, 2026).

Energy markets have become strategic terrain

The consequences do not stop with oil. Energy is embedded within transportation, agriculture, manufacturing, and household consumption. When energy prices rise, transporting food becomes more expensive, manufacturing costs increase, and businesses reconsider investment. The OECD (2026) identifies the Middle East conflict as the dominant force shaping the present global economic outlook, with the energy shock pushing inflation higher and weakening growth.

This does not mean that every increase in the price of groceries or gasoline should be described as an act of war. Such language would exaggerate the argument. Rather, it demonstrates how the indirect consequences of military confrontation can be transmitted through systems upon which modern societies depend.

Schelling (1966) argued that coercion concerns influencing an opponent's calculations rather



than merely destroying its military capabilities. Today those calculations extend into energy security, financial confidence, infrastructure and public opinion. The ability of societies to absorb disruption has therefore become increasingly relevant to strategic power.

The battlefield now includes the institutions that allow societies to function.

The Iranian Citizen: Patriotism, Uncertainty and the Hope for Change

Nowhere is the distinction between military security and human security more important than inside Iran.

It is tempting for outside observers to interpret Iranian society through a simple political division: those supporting the Islamic Republic and those seeking its replacement. Such a distinction fails to capture the complexity of public opinion. Citizens can criticise their government while defending national sovereignty, desire political reform while fearing instability, or resent economic hardship while opposing foreign military intervention.

Research conducted after the June 2025 Twelve-Day War demonstrates this complexity. Gallagher, Ramsay and Mohseni (2025) found notable evidence of a rally-round-the-flag effect among Iranian respondents, including positive assessments of aspects of the government's and military's wartime performance. Yet the same research found continuing political and economic discontent, with six in ten respondents identifying the economy or aspects of it as Iran's greatest challenge.

That distinction matters.

Mueller's (1970) classic work on the rally effect helps explain why external military threats can strengthen national solidarity without necessarily resolving underlying political grievances. An Iranian citizen may therefore support the defence of the country without supporting every aspect of the political system governing it.

Equally, dissatisfaction with that system should not automatically be interpreted as support for foreign intervention.

War introduces another emotion into this already complicated relationship: uncertainty. Kahneman and Tversky's (1979) Prospect Theory demonstrates the importance of potential losses in decision-making under uncertainty. Its central insight is that people tend to weigh losses more heavily than equivalent gains, so the prospect of losing what they already have can outweigh the promise of something better. Applied cautiously to wartime society, this framework offers a useful way of considering why individuals confronting an unpredictable future may become increasingly reluctant to take risks. When the range of possible outcomes includes severe and sudden loss, caution often appears more rational than ambition. The effects are visible in everyday choices. Families postpone major purchases. Entrepreneurs delay investment. Graduates reconsider whether to build careers at home. Parents question whether their children will inherit greater opportunity or prolonged insecurity. Each decision, taken alone, seems prudent, yet together they can slow the wider economic and social recovery that the population ultimately depends upon.

These decisions will never appear in military casualty figures. Yet collectively they can reshape a country.

The economic background makes these decisions still more difficult. The International Monetary Fund currently projects that Iran's economy will contract by 5.4 per cent in 2026, while consumer-price inflation reaches 68.9 per cent (International Monetary Fund [IMF], 2026a). Such figures are macroeconomic measurements, yet for ordinary citizens they translate into tangible pressures. A shrinking economy and rising prices mean that the same income buys less, eroding purchasing power in everyday life. Likewise, fast-rising prices reduce the value of savings, creating uncertainty over how households can protect what they have. Together, these conditions force families into increasingly difficult decisions about the future.

This is where the psychology of the conflict becomes particularly difficult to interpret. War may strengthen attachment to the nation while simultaneously increasing frustration with the circumstances in which people live. These two responses do not necessarily cancel each other out. A person may feel a deep loyalty to their country and, at the same time, resent the economic hardship, insecurity or political failures that the war has exposed or deepened. Each feeling can coexist with the other, and neither is easily reduced to the other. The same ambiguity appears in how people look ahead. War may generate hope among some that political change will follow, since the upheaval itself can seem to open a path towards reform. Others, however, fear that change imposed through war will produce greater instability rather than improvement. Such concerns are not confined to separate groups of people. Both emotions may exist within the same individual, pulling in opposite directions as they weigh the costs and possibilities of the conflict. This internal tension is what makes the psychological dimension of the conflict so difficult to read from the outside.

We should therefore resist claiming to know what "the Iranian people" want.

There is no single Iranian response.

What the available evidence allows us to say is more restrained, and perhaps more important. External threat can strengthen national solidarity, but it does not necessarily extinguish aspirations for economic, political or social change. In other words, a shared sense of danger may bind a population together without silencing the demands its members already hold. Solidarity and reform can therefore coexist, and analysts should avoid assuming that one must displace the other.

Perhaps one of the least visible costs is, therefore, expectation itself. Roads and buildings can eventually be reconstructed once the

Iran: pressure on households

–5.4% projected contraction of Iran's economy in 2026

68.9% projected consumer-price inflation in 2026

6 in 10 respondents name the economy as Iran's greatest challenge

Source: Barry Campfield, based on the article text (IMF, 2026a; Gallagher, Ramsay and Mohseni, 2025)

resources and political will are in place. Restoring confidence is a far more demanding task. People must come to believe again that education will produce opportunity, that savings will retain their value, and that tomorrow will be more secure than today. Each of these beliefs rests on years of stable institutions and predictable conditions, and once they are shaken, rebuilding them may take considerably longer than repairing physical damage.

The American Citizen: A Distant War Comes Home

The experience of Americans is fundamentally different.

Most Americans do not confront bombardment, displacement or the destruction of their communities. Equating their experience with that of civilians living inside the conflict would diminish the severity of what those populations endure.

> **Those least responsible for a conflict may sometimes be among those least able to afford its consequences.**

But distance does not mean immunity.

For Americans, the conflict arrives primarily through economic, political, and personal channels. Energy prices provide the most obvious example. When disruption in the Gulf reduces global supply or raises fears about future availability, the consequences can reach American consumers through fuel and transportation costs before spreading more widely through the economy.

The IMF's July 2026 outlook found that the global disinflation process had stalled, with global headline inflation revised upward to 4.7 per cent for 2026 (IMF, 2026b). Importantly, however, the IMF also concluded that the international economy had weathered the war-related shock better than initially feared, helped by inventories, expanded production outside the Gulf, renewable energy and declining energy intensity.

That qualification matters.

A serious assessment of war should not select only the evidence that supports a predetermined argument. Consider the international economy. The conflict has clearly disrupted it, with supply chains interrupted and prices pushed upwards. Yet the same system has also demonstrated an ability to adapt, as trade routes were redirected and producers found alternative markets.

This pattern matters for the wider debate. Resilience is therefore not merely something war threatens, to be counted only as a loss. It is one of the mechanisms through which societies limit the consequences of war. Recognising this does not deny the damage done. It simply places that damage within a fuller account of how economies and communities absorb shocks.

At household level, however, inflation and uncertainty alter behaviour in ways that ripple outward. Families begin to reconsider discretionary expenditure, postponing or cancelling purchases that they would otherwise

have made without hesitation. Prospective homebuyers confront uncertainty over affordability and interest rates, which makes it harder to judge whether a mortgage commitment will remain manageable over time. Retirees, who depend on the steady value of their savings and investments, become more cautious about how they hold them. Businesses, in turn, reconsider expansion when future costs become more difficult to predict, since investment decisions rely on reasonable expectations of what production and borrowing will cost.

Again, none of these experiences is comparable to physical injury, bereavement, or displacement. Their significance lies elsewhere. They demonstrate something different: the ability of geographically distant conflict to penetrate civilian life through economic systems. Ordinary households feel the effects not through the battlefield itself but through the prices, supply chains and markets that connect them to it.

There is also a human burden much closer to the traditional experience of war. Behind every military deployment stand families who live with the possibility of injury, escalation or loss. Their anxiety rarely appears in strategic assessments, which tend to measure objectives, capabilities and risks in terms of forces and territory rather than the daily lives of those at home. That omission matters. This anxiety is one of the most direct ways a distant war enters American homes, shaping how the public understands a conflict long before it reaches headlines or policy debates.

The political consequences are becoming visible as well. A Reuters/Ipsos poll conducted five months into the war found only 35 per cent of Americans supporting it, while half expected the conflict to leave the Middle East more chaotic rather than more stable (Reuters/Ipsos, 2026). These figures matter because democratic governments depend on sustained public backing to pursue long campaigns, and falling support narrows the room for manoeuvre available to policymakers. Public confidence in the purpose and outcome of military action is therefore no longer a background consideration. It is itself becoming part of the strategic environment, shaping what governments can credibly promise, how long they can sustain operations, and how adversaries and allies judge their resolve.

The American experience reinforces rather than contradicts the essay's central argument. Modern conflict affects different populations with radically different levels of severity. Its consequences, however, are no longer confined to those geographically closest to the fighting. Distant societies can feel its effects through trade disruption, migration flows and shifts in public opinion. This means that the reach of a conflict is determined less by distance than by the connections that link one society to another. Read in this light, the American case illustrates the essay's point rather than complicating it.

When the World Pays

The argument becomes more striking when the people bearing the consequences belong to neither belligerent.

The World Bank's June 2026 assessment describes the Middle East conflict as a major shock to the international economy. Higher energy prices, greater inflation and borrowing costs are expected to weaken global growth, while developing economies face particularly difficult conditions. Growth in developing

economies is projected to fall to 3.6 per cent in 2026, compared with 4.4 per cent in 2025 (World Bank, 2026).

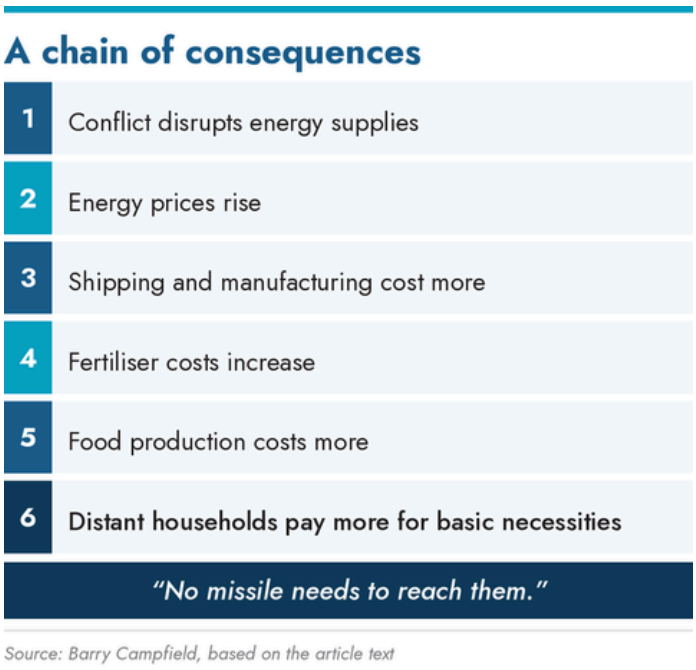
Consider the chain of consequences.

Conflict disrupts energy supplies. Energy prices rise. Shipping and manufacturing become more expensive. Fertiliser costs increase. Food production becomes more expensive. Households thousands of miles from the battlefield pay more for basic necessities.

No missile needs to reach them.

This is where economic interdependence becomes both a strength and a vulnerability. The same systems that allow goods, capital and energy to move efficiently during periods of peace also transmit disruption during periods of conflict.

The consequences are not distributed equally. Advanced economies generally possess greater financial capacity to diversify energy supplies, support industries, or cushion vulnerable households. Developing economies frequently possess fewer options. The OECD (2026) warns that prolonged disruption would impose particularly severe economic and social costs on countries most exposed to energy and food-price shocks.



Source: Barry Campfield, based on the article text

A farmer facing higher fertiliser prices, a manufacturer confronting rising energy costs and a family spending a greater proportion of its income on food are not casualties in the conventional meaning of the word. But they are bearing part of the cost.

That distinction is essential. The idea of the invisible battlefield should broaden our understanding of war, not trivialise its physical horrors.

Rethinking Victory

This brings us to the central policy question.

How should victory be measured?

Traditional strategic analysis asks whether military objectives were achieved, whether an adversary's capabilities were degraded and whether deterrence was restored. Governments and armed forces must continue asking these questions.

But they should also ask others.

Did society withstand the economic shock? Did political institutions retain legitimacy? Did critical infrastructure continue functioning? Did citizens retain confidence in the future?

Buzan, Wæver and de Wilde (1998) argue that security extends across military, political,

economic and societal sectors. The U.S.–Iran conflict demonstrates the usefulness of that broader framework. A country may possess formidable armed forces while remaining vulnerable through energy dependence, economic instability, damaged infrastructure or political fragmentation.

This does not replace Clausewitz. It extends the question he posed about the relationship between military force and political purpose.

If military action exists to produce greater political security, then the condition of society after military action matters. Tactical success that produces lasting economic weakness, political instability or diminished national confidence cannot automatically be regarded as complete strategic victory.

National resilience therefore deserves a more prominent place within strategic analysis.

Resilience is not passive endurance. It is the capacity of a society to absorb disruption without losing the institutions, economic functions and public confidence upon which national power ultimately depends.

This has practical implications. Energy diversification becomes part of security policy. Protecting digital and physical infrastructure becomes security policy. Maintaining trusted institutions becomes security policy. Preserving supply chains and emergency reserves becomes security policy.

Military power remains indispensable.

But the society it exists to protect is itself part of national power.

Modern strategic planning must therefore evolve to account for this multidimensional reality. If security is no longer confined to physical borders or active combat zones, national defense must encompass the stabilization of domestic and global systems. A state that can neutralize enemy firepower but succumbs to domestic inflation, fragmented supply networks, or systemic public distrust has achieved only a hollow victory. Preparing for conflict in the twenty-first century requires bridging the traditional divide between civilian governance and strategic defense, treating economic health, civil cohesion, and infrastructural integrity not as secondary concerns, but as primary pillars of national security.

Ultimately, recognizing the existence of invisible battlefields requires a fundamental shift in how leaders evaluate both the decision to enter conflict and the criteria for ending it. War can no longer be viewed as a localized contest of force, isolated from the delicate networks that sustain everyday life. Every strategic decision ripples through global markets, national institutions, and individual households, leaving marks that linger

How should victory be measured?

Traditional	Also ask
Military objectives achieved?	Did society withstand the economic shock?
Adversary's capabilities degraded?	Did institutions retain legitimacy?
Deterrence restored?	Did critical infrastructure keep functioning?
	Did citizens retain confidence in the future?

Source: Barry Campfield, based on the article text

long after active hostilities cease. True strategic wisdom lies in understanding that winning a war involves more than defeating an opponent on the battlefield; it requires safeguarding the complex, fragile ecosystems of modern human society so that peace, when it returns, leaves a world still capable of thriving.

Conclusion

The U.S.–Iran conflict will eventually be assessed through familiar measures. Analysts will count casualties, calculate expenditure, examine weapons performance and determine which strategic objectives were achieved.

Those assessments will be necessary.

They will not be sufficient.

The Iranian graduate reconsidering a future at home, the American household absorbing higher costs, the European manufacturer postponing investment and the farmer confronting higher agricultural inputs occupy profoundly different circumstances. Their experiences should never be treated as equivalent.

What connects them is something else.

Their lives have been altered by political and military decisions over which they exercise almost no control.

That is the invisible battlefield.

It does not replace the physical battlefield. Nor does it turn every economic inconvenience into a casualty of war. Rather, it reveals an additional dimension of contemporary conflict: military confrontation now travels rapidly through the economic, political and psychological systems upon which ordinary life depends.

The policy implication is straightforward. Governments preparing for future conflicts must think beyond military resilience. Energy security, economic adaptability, infrastructure, institutional trust and social cohesion increasingly form part of strategic power.

Perhaps this is how the U.S.–Iran conflict should ultimately be remembered—not only for what happened on the battlefield, but for what it revealed about warfare beyond it.

History will ask who won.

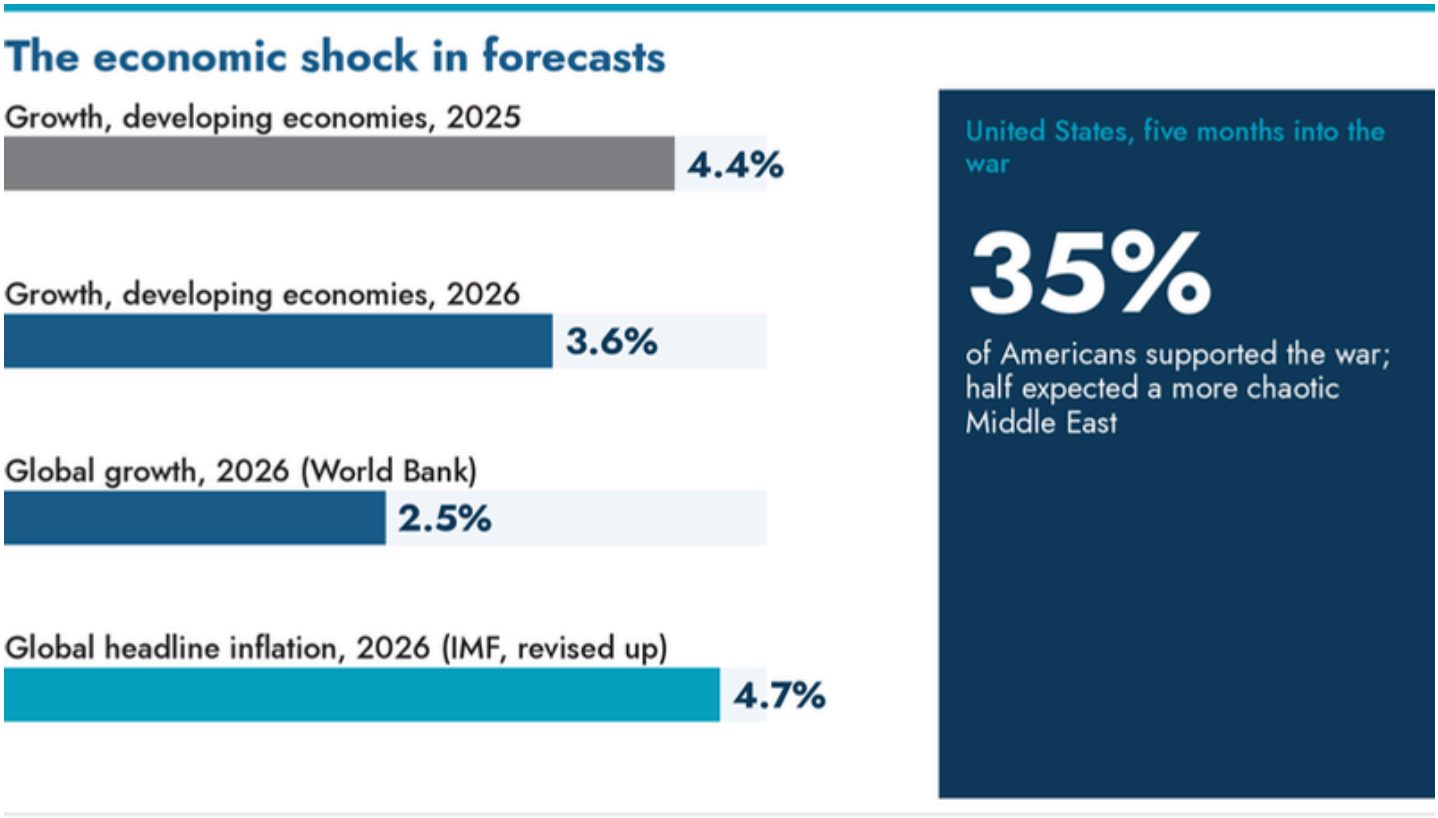
We should also ask who paid the price.



Source: Barry Campfield, based on the article text

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Source: Barry Campfield, based on the article text (World Bank, 2026; IMF, 2026b; Reuters/Ipsos, 2026)

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About the Article

Over the past two decades, levels of political polarisation have shown an upward trend in almost every region of the world. Particularly in Western democracies, there is growing concern across various sectors of society regarding the consequences of this phenomenon. In this essay, I argue that political polarisation is positively associated with the occurrence of political violence.

About the Author

Valentina Wielewicki is in the final year of her bachelor's degree in International Relations at Fundação Getulio Vargas, São Paulo. She has a deep academic interest in International Security and Political Economy, and her research focus is China and the Indo-Pacific. Over the course of the past few years, she has worked as a researcher and analyst of international trade and political risk, and as a volunteer at SEWING, helping empower women in Ghana through education and economic development.

Over the past two decades, levels of political polarisation have shown an upward trend in almost every region of the world. Particularly in Western democracies, there is growing concern across various sectors of society regarding the consequences of this phenomenon. In this essay, I argue that political polarisation is positively associated with the occurrence of political violence. In societies with higher levels of polarisation, and where significant signs of affective polarisation are evident, there is a greater tendency for political violence to occur. To illustrate my argument, I will conduct an analysis focused on Latin America, through case studies on Brazil, Mexico, and Colombia. For these case studies, I will use indices of democracy and political polarisation, as well as official data on political violence (subject to availability in each country), and I will estimate affective polarisation based on public opinion surveys.

Affective polarisation is the tendency not only to support one group but also to openly display aversion towards another, often dehumanising opponents.

Literature Review

The concept of affective polarisation was first introduced in the 2012 article Affect, Not Ideology: A Social Identity Perspective on Polarization (Iyengar, Sood, and Lelkes), as the tendency not only to support one group but also to openly display aversion towards another. According to the authors, this represents the most accurate way to assess mass polarisation within a society, as opposed to traditional measurement methods such as divergent stances on public policy, ideological distance from opponents, and opinion polls. In the article, the authors argue that affective polarisation is a more diagnostic indicator of mass polarisation in a society, to the extent that "partisan identification represents a meaningful group affiliation", based on the assumption that social identification requires a positive view of one's own group and a negative perspective of the opposing groups. Since partisan preferences relate inconsistently to public policy preferences, a more representative measure of mass polarisation would be the dislike partisans have to individuals belonging to the out-group. They propose that identification with a political party is sufficient to generate rejection of and aversion to the opposing party,

Following this study, other authors began exploring the causes, consequences, and various manifestations of affective polarisation across different regions and contexts. In a 2023 study, Berntzen, Kelsall, and Harteveld examined the consequences of affective polarisation in the United Kingdom and Norway, seeking evidence of correlations with intolerance, social withdrawal, and support for violence within these societies. There is a persistent concern in the literature that political polarisation can lead to the erosion of social norms and democracy, political gridlock, and ultimately political violence; however, much of the research in this field still focuses on the United States. Berntzen, Kelsall, and Harteveld extend the scope of research on affective polarisation to another region and find little

evidence that mere dislike of an opposing political group is sufficient to generate intolerance and social withdrawal, and completely rule out political violence. The authors suggest that other elements must be considered when weighing the likelihood of more severe consequences of polarisation within a society. Like other studies, they highlight, in particular, an extreme dualism (a Manichean mindset); the perception of societal injustice, specifically, belonging to a group perceived as being disadvantaged by another; and individual personality traits that may lead to more violent stances.

For this essay, I adopt a perspective aligned with political psychology studies addressing hostility between societal groups. In-group and out-group dynamics have been central to many debates in political science and international relations for decades, explaining a range of political behaviours, from policy alignment to ethnic conflicts and civil wars. Political polarisation, as described by Iyengar, Sood, and Lelkes, is fundamentally rooted in in-group and out-group dynamics, that is, the perception of belonging to one group in opposition to another. In the 2003 article Prejudice and Intergroup Hostility, John Duckitt describes how prejudice and intergroup hostility arise and manifest in society. Although he does not directly address issues of political polarisation, focusing instead on dynamics that are primarily ethnic, racial, and social in nature, Duckitt explains how intergroup threat, or the perception of a threat, helps determine the levels of hostility between groups. This threat can manifest in various ways, but the article highlights, in particular, realistic threats to a group's power, well-being, and resources; symbolic threats related to values and beliefs; and threats to a group's identity. In a political context, this perception of the opposition as a threat is further exacerbated in scenarios of polarisation, which could explain a level of intergroup hostility that goes beyond mere political disagreement, a phenomenon described by the concept of affective polarisation.

The relationship between political violence and polarisation, specifically affective polarisation, has been increasingly explored by academia in recent years, yet most studies are limited to the United States, and the overall body of research remains quite restricted. In a 2023 article, J. Piazza focuses on the relationship between Democrats and Republicans in the United States but extends his research to Brazil, Turkey, and Bangladesh. Drawing on both qualitative and quantitative approaches, the author argues that one of the ways political polarisation can lead to instances of political violence is through the dehumanisation and demonisation of opponents. When a group comes to view its adversary as both inferior and a threat, violence directed at that adversary becomes more socially acceptable. The study finds sufficient empirical evidence to support the thesis that the likelihood of political violence is higher in polarised democracies, yet it does not establish a causal

Key studies at a glance

Iyengar, Sood & Lelkes (2012)
Affective polarisation: support for one group, aversion towards another

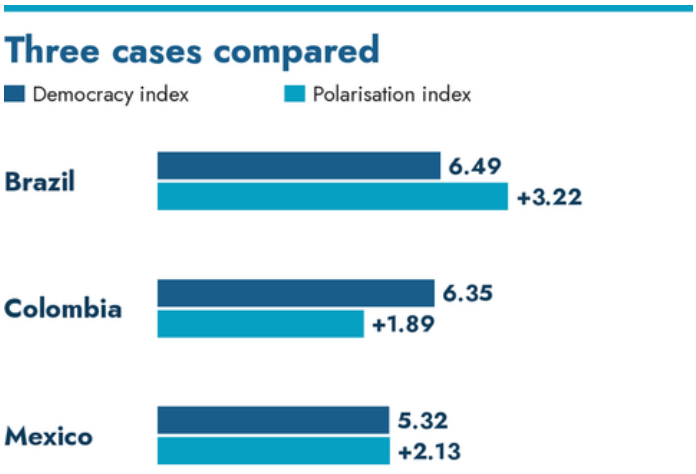
Berntzen, Kelsall & Harteveld (2023)
UK and Norway: dislike alone not sufficient for intolerance; violence ruled out

Piazza (2023)
US, Brazil, Turkey, Bangladesh: violence likelier in polarised democracies, no causal link

Source: Valentina Wielewicki Bandeira, based on the article text

relationship between polarisation and political violence.

The literature on this topic presents certain limitations, primarily because it focuses largely on the American political landscape. The United States possesses a very particular political model and society, which can make it difficult to extend these studies to other regions. Therefore, drawing on existing literature regarding affective polarisation and political psychology, I aim to expand research on the relationship between polarisation and political violence to Latin America. In line with the articles mentioned here and others used throughout my research, I will limit my scope to democracies, albeit ones presenting diverse political and socioeconomic contexts. My objective is to analyse whether the relationship observed between these two political phenomena in Latin America corresponds to that observed in the United States by Piazza, or in Norway and the United Kingdom by Berntzen, Kelsall, and Harteveld, for example. I will adopt the definition of affective polarisation proposed by Iyengar, Sood, and Lelkes, that "the mere act of identifying with a political party is sufficient to trigger negative evaluations of the opposition", and I will describe



Source: Valentina Wielewicki Bandeira, based on the article text (EIU, 2025; V-Dem, 2025)

in more detail how I intend to measure this phenomenon in the case studies in the next section.

Research Design

To illustrate my argument, I will develop three case studies focusing on Latin American countries. The rationale for this choice lies in the high levels of political polarisation in South and North America, the highest in the world, respectively, and the variation in the quality of their democracies. The preliminary selection of cases within Latin America was based on data regarding the incidence of political violence, the quality of democracy, and polarisation, as well as public opinion surveys, where available, that I will use as a proxy for affective polarisation. My intention was to select countries where it would be possible to conduct a deep and extensive analysis of the political and social landscapes relevant to my research question, after considering data availability and prior research in the field.

The first case selected is Brazil, with a democracy index of 6.49 and a polarisation index of +3.22. The significant polarisation in the country, which intensified between 2013 and 2022, combined with the fact that Brazil is one of Latin America's most consolidated democracies, makes it an interesting case for this study, particularly for analysing the potential democratic consequences of affective polarisation. The Bolsonaro administration represents a pivotal moment in this regard, given that the former president himself was a target of political violence during his 2018 campaign and was recently convicted in an attempted coup d'état and plots to assassinate political rivals. Although Brazil has always experienced a

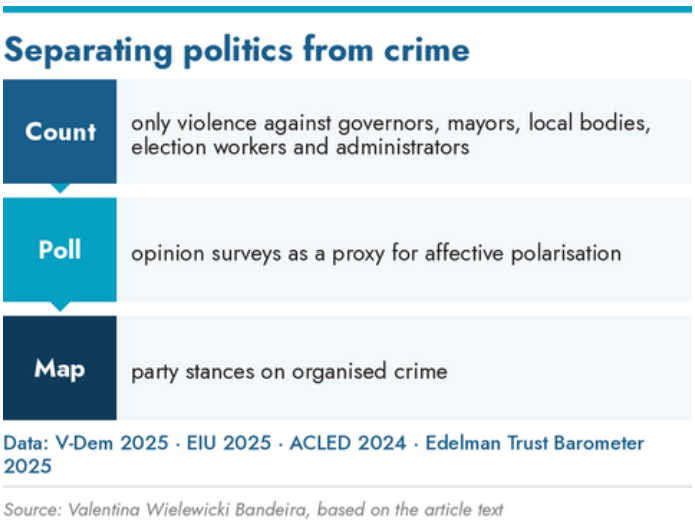
certain degree of political polarisation, the emergence of the far right led by Bolsonaro caused affective polarisation to become much more pronounced in society; therefore, I will focus primarily on this period for the case study.

The second case focuses on Mexico, which has a democracy index of 5.32 and a polarisation index of +2.13. Although Mexico has historically exhibited high levels of violence, largely attributed to the presence of criminal organisations and cartels, there is significant evidence of political violence driven by competition between opposing political groups. The high levels of violence during the 2024 elections, reported by various international organisations, offer an excellent opportunity to understand the country's complex internal dynamics.

The third case is Colombia, which has a democracy index of 6.35 and a polarisation score of +1.89. Political violence has been a problem in Colombia for a few years now; however, in 2024 and 2025, the country experienced a sharp rise in polarisation, and incidents of politically motivated attacks or attacks against candidates increased significantly. The 2025 assassination of presidential pre-candidate Miguel Uribe during a rally stands out as the most prominent example of this escalating political violence. Given the recent surge in polarisation and political violence, Colombia offers an interesting case for analysing the potential triggers behind this escalation.

As mentioned above, the issue of organised crime is highly prominent throughout Latin America, and the countries selected for the case studies are significantly affected. A potential limitation of my analysis is accurately distinguishing whether cases of violence reported as political are, in fact, acts of political violence rather than the result of organised crime in these regions or the country's overall level of violence. I attempt to minimise this ambiguity by selecting data solely on violence directed at governors, mayors, village chiefs, local councils, local government bodies, election workers, and other administrators. Another strategy adopted to address this issue is the use of opinion polls capable of indicating levels of affective polarisation and signalling social dynamics that are difficult to identify through data alone.

However, to incorporate the significant element of organised crime into my analysis, I intend, where applicable, to identify the stances adopted by different parties on this issue. In Colombia, for instance, the agenda of combating organised crime was highly prominent in recent elections, whereas in Brazil, it is generally a key issue for the right and the far-right. The positions political actors or parties take regarding organised crime can potentially exacerbate political polarisation or even serve as a driver for acts of violence against political actors. Although this is not the study's primary focus, I consider it an important factor that could



Source: Valentina Wielewicki Bandeira, based on the article text

significantly influence my analysis and conclusions.

The data presented above were collected from the 2025 V-Dem dataset on political polarisation, the 2025 Economist Intelligence Unit dataset on democracy, and reports from ACLED (2024) on violence and the Edelman Trust Barometer (2025). For the case studies, in addition to these datasets, I will use reports from international organisations, news regarding recent events, opinion polls, and, where applicable, statements and pronouncements by political actors.

Case Studies and Results

Brasil

Brazil is one of Latin America's largest and most consolidated democracies, having enjoyed a long period of relative stability since the country's return to democracy in 1985. In 2013, however, the Dilma administration faced a turbulent period of public dissatisfaction and protests that spread across the country. Although re-elected in 2014, the President was impeached in 2016. Following more than a decade of Workers' Party (PT) rule, and in response to the turmoil that marked the Dilma administration, the political right gained significant ground, featuring new actors and a new platform. Jair Bolsonaro, then a congressman, emerged as the symbol of the right-wing and the country's rising far-right, announcing his candidacy for the 2018 presidential election. Domestic tensions escalated sharply, driven by a right-wing movement of unprecedented strength in recent years, while the leftist leader and former President Lula remained imprisoned and ineligible to run due to his involvement in one of the biggest corruption scandals in Brazilian history.

> **"In societies with higher levels of polarisation, and where significant signs of affective polarisation are evident, there is a greater tendency for political violence to occur."**

About a month before the 2018 elections, then-presidential candidate Jair Bolsonaro was attacked during a rally. Shortly thereafter, the perpetrator was arrested and charged with a "personal attack motivated by political dissent." For years, Bolsonaro's supporters questioned whether the attack was an isolated incident or part of a larger conspiracy against the candidate, but the Federal Police concluded that it was, in fact, an isolated act. Bolsonaro was elected President of the Republic in that year's election.

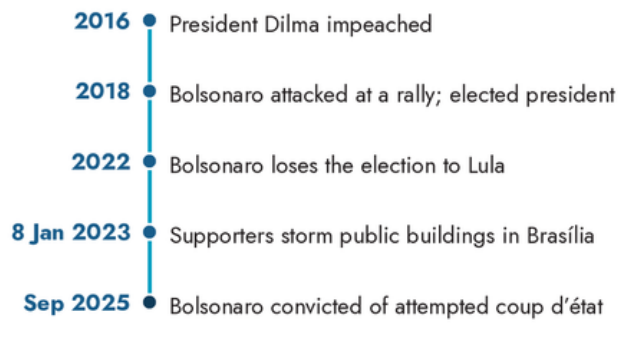
The Bolsonaro administration involved several controversies, instability, and internal political disputes. During his term, former President Lula was released from prison, and the case in which he had been convicted was annulled, restoring his eligibility to run for office. In 2022, Bolsonaro lost the presidential election to Lula. The 2022 election and transition period were marked by significant tension and mistrust across the country, with Bolsonaro and his supporters constantly questioning the legitimacy of the election and protests gaining momentum. Many of his supporters called for a military intervention, and encampments outside army installations spread across the country. On January 8, 2023, Bolsonaro supporters stormed

and vandalised public buildings in the capital, Brasília, with many being arrested. Despite the popular unrest, there was no military intervention, and Lula took office.

It was revealed over the following three years that high-ranking officials of the Bolsonaro administration had indeed contemplated a coup d'état following the election defeat, in addition to plotting the assassination of Lula, his vice-president Geraldo Alckmin, and other figures deemed political enemies. In September 2025, Bolsonaro, members of his administration, and involved allies were convicted by the Supreme Federal Court of attempted coup d'état and attempted violent abolition of the democratic rule of law, among other crimes.

After these events, the country is deeply divided between a far-right faction that still supports former President Bolsonaro and an established left-wing bloc supporting President Lula and the PT. In 2025, 17% of the Brazilian population approved of threats and acts of violence as a means to bring about political change. Other opinion polls from 2024 and 2025 also indicate a significant rise in the perception of incivility among people holding opposing ideologies, pointing to growing affective polarisation in the country. These data indicate that, although the country is no longer at the peak of polarisation seen in 2022, a strong social division persists, causing people to even alter the way they relate to one another. In 2024, there were 102 acts of violence recorded as political violence; however, as noted in the previous section, this figure cannot be considered absolute. When analysed alongside previous data, it is possible to infer that some of these acts are indeed politically motivated, driven by the country's overall political situation, yet there is a risk of contamination by other phenomena.

Brazil: escalation in five steps



Source: Valentina Wielewicki Bandeira, based on the article text

Regarding the issue of organised crime, which is highly salient in certain regions of Brazil, the public security agenda is largely dominated by the country's right and far-right. Bolsonaro was a staunch advocate of gun ownership for the general population, and most governors, deputies, and senators elected through his party or among his close allies place the fight against organised crime at the core of their mandates. Because the discussion is heavily concentrated on the Brazilian right, it has become a key point of debate, particularly given the left's lack of a clear stance on the issue. As organised crime-related violence has escalated in some regions, support for the Lula administration has declined, while approval ratings for right-wing governors have risen.

Mexico

Political violence in Mexico has been significant for years, with election periods proving extremely violent and attacks against political opponents occurring frequently. In 2018, the country recorded 145 murders of individuals directly linked to the electoral process, and 88 during the 2021 elections. In 2024, there were 342 acts of violence against governors, mayors,

village leaders, local council members, local government officials, election workers, and other administrators, according to ACLED data. Within this figure, ACLED reports 102 political assassinations, kidnappings, enforced disappearances, assassination attempts, and other attacks targeting family members, staff, and others.

In the case of Mexico, however, the issue of organised crime is so deeply rooted in all levels of society that it becomes virtually impossible to distinguish between acts of political violence driven by polarisation and those driven by criminality. This is particularly true given the extensive direct involvement of organised crime in Mexican politics; consequently, violence perpetrated by organised crime often effectively becomes political violence. Political and criminal groups are simultaneously associated with and competing against each other, not merely for political office, but for control over entire regions. The interests of cartels and criminal organisations come to dictate the direction of politics and society, especially in areas where public offices are held by members or allies of these groups.

Due to all these factors, the case of Mexico is extremely difficult to analyse within the scope of this essay. The country experiences high levels of political polarisation and extremely high rates of political violence; however, the involvement of organised crime in politics makes it exceedingly complex to disentangle the country's political and social dynamics. In many instances, political polarisation stems from conflicts between rival criminal groups, and the same applies to political violence. Disputes between cartels and criminal organisations blur with and overlap the conflicts between political parties, candidates, and ideologies.

However, despite the case's inherent obstacles, it was still possible to identify interesting points regarding Mexico relating more directly to this essay. According to 2025 Edelman Trust Barometer research, 20% of the population approves of threats and acts of violence as a means to bring about political change. A significant segment of the population is dissatisfied with the political and social situation in Mexico, particularly regarding the feeling of insecurity caused by cartels. Protests against the government and calls for change are frequent, yet this dissatisfaction appears to be directed more at the state of the country as a whole than at the rivalry between political groups, as is the case in Brazil.

Colombia

The case study for Colombia proved very similar to that of Mexico, with a high level of involvement of organised crime and cartels in the country's politics, making it extremely complex to distinguish the dynamics at play. In 2024, there were 74 acts of violence classified as political, and the 2025 assassination of presidential pre-candidate Miguel Uribe during a



Source: Valentina Wielewicki Bandeira, based on the article text (ACLED, 2024; Edelman Trust Barometer, 2025)

rally demonstrates how violence in the country has escalated significantly in recent years. Uribe was an opposition pre-candidate, part of the Democratic Centre party, and a fierce critic of former left-wing President Gustavo Petro.

However, the primary source of polarisation in the country remains the issue of public security and the fight against organised crime, particularly due to persistent allegations of cartel involvement in national politics. Yet, much like in Mexico, public dissatisfaction appears directed at the state of the country as a whole, and only recently has the situation begun to resemble the political polarisation seen in Brazil. In the past few months, the matter of organised crime in the country gained once again more relevance in the face of the threat of American intervention to fight drug cartels.

Conclusion

Based on existing literature on the subject and the case studies presented here, it is possible to observe the dynamics of the relationship between political polarisation and political violence, particularly when affective polarisation is present within society. This relationship is especially evident in the case of Brazil, given the pronounced nature of political polarisation and the fact that recent events concretely demonstrate how it can escalate into political violence. The emergence and growth of affective polarisation within society are also observable, particularly in the country's opinion polls and in the nature of its political division.

In the case of Mexico, and to some extent Colombia, the issue of organised crime made analysis nearly impossible, not only because it coexists with political issues (as in Brazil) but because it is directly intertwined with politics in those countries. This was a challenge encountered during the research, one that proved greater than I had initially anticipated. I believe, however, that this phenomenon recurs across much of Latin America and that, in this regard, Brazil is the exception. The question of the quality of democracy becomes particularly relevant here, given that Brazil possesses a much more stable democracy, with far greater safeguards against external interference in its electoral processes, than other countries in the region. This factor may even help explain why Brazil does not exhibit the same dynamics regarding organised crime as Mexico, Colombia, and other Latin American nations. I believe this represents a limitation of my essay, as well as an opportunity for future research focused on the subject.

Finally, the case of Brazil, in particular, illustrates how high political polarisation can undermine the quality of democracies, as can more severe instances of political violence, such as those witnessed in Brazil and Colombia. Yet, once again, the initial quality of the democracy proves significant, given that Brazil managed to maintain considerable political and institutional stability despite the assaults on its democracy.

Brazil vs. Mexico and Colombia

Brazil	Mexico, Colombia
Organised crime coexists with political issues	Organised crime directly intertwined with politics
Division between rival political groups	Dissatisfaction with the state of the country as a whole
More stable democracy, greater safeguards	Polarisation and violence hard to disentangle

Source: Valentina Wielewicki Bandeira, based on the article text

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Our ILCJ Fellow Bruna De Carvalho Santos Pineschi is your Fellow of the Month in November! In October she published four insights - from France's digital sovereignty to foreign interference. Thank you for your sharp analysis, Bruna!

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Gianni Pittella is an Italian politician and former First Vice-President of the European Parliament. He led the S&D group and later sat in the Italian Senate. With EPIS, he discussed Europe's role in a stronger NATO.

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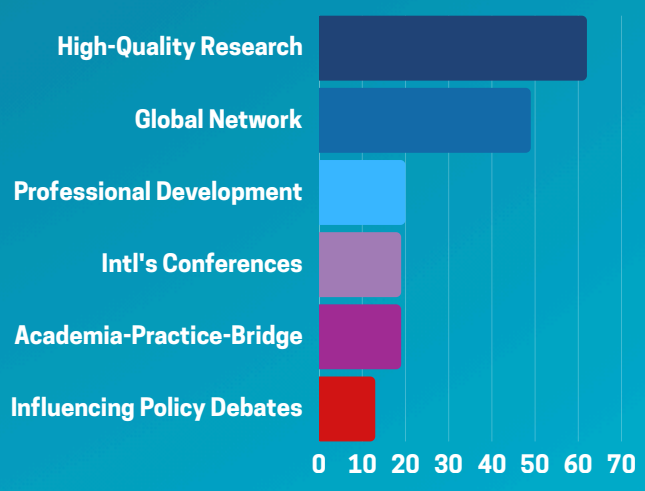
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About the Article

EU Commission Director François Arbault explains why Europe's defence readiness now depends on industrial scale and cooperation. The conversation covers EU instruments like SAFE and EDIP, the failure of major cooperative programmes, lessons drawn from Ukraine and the role of space in defence.

About the Interviewer



Ferdinand Wegener is Co-Founder of EPIS and Head of External Affairs. As former Head of Delegations, he represented EPIS at the Munich Security Conference, Warsaw Security Forum, Airbus Defense Summit and Black Sea Security Forum. His research covers security policy and defense technology, especially military aviation. He studied European and International Law at the University of Cologne and works as Consultant for Digital & Defense at Trilligent in Brussels.

About the Interviewee



François Arbault is Director for Defence Industrial Programmes at the European Commission's DG DEFIS, which he joined as Director for the Defence Industry on 1 January 2021. Previously, he coordinated policy on the European Green Deal in the Secretariat-General and negotiated the UK's Withdrawal Agreement in the Brexit Task Force. He also headed the Public Procurement Strategy and Industrial Property units and served in the cabinets of Commissioners Jacques Barrot and Michel Barnier (2008–2013).

Ferdinand Wegener:

Dear Mr. Arbault, you joined the European Commission in 2005. Setting your individual roles aside, what has changed most about the institution over those two decades? How have the goals evolved? Was defense even a topic on your radar back then?

François Arbault:

Actually, I joined the Commission even earlier. I was attached to the Court of Justice for a couple of years, but I joined in 1995, believe it or not, so I have been with the Commission for 30 years. That being said, I think what has changed is probably two main things, which are a bit intertwined. We have to face the reality that we are now living in a world of permacrisis. It is a very much used word, but indeed we see the climate crisis, of course, and we need to act on that. You mentioned 2005; in 2008 there was the financial crisis. We have had the COVID crisis, the energy crisis, the war in Ukraine, the war in the Gulf. Needless to say, we have to adapt to a situation of permanent crisis.

DG DEFIS: The Directorate-General for Defence Industry and Space is the European Commission department tasked with shaping EU policy to strengthen the competitiveness of Europe's defence industry.

Another element is the massive deterioration of Europe's security environment. It goes far beyond the defense aspect of our policies. We have to be able to stand up for ourselves much more than ever. We know that the multilateral, rules-based international order is shattered, and for that we need to regain our sovereignty. Even for our closest allies, we cannot be absolutely sure that we can always rely on them. To use a phrase that we very often use these days, defense readiness doesn't come with an asterisk, a footnote that says you are defense ready only if your partner acts like this or that. That's a major challenge. So again, what changed is: a world where power play has become the norm, plus, as a consequence, the succession of crises that this institution has to address.

Wegener:

You led the internal market and security policy units in the Brexit task force, and you worked on the European Green Deal in the Secretariat-General. What did those two roles teach you that you still draw on at DG DEFIS

[Directorate-General for Defence Industry and Space] now?

Arbault:

Again, maybe two main things. We could dwell a lot on those, but regarding the first, let me say that we need to cherish our internal market. I think Brexit revealed, partly for the UK, that you pay the consequences of exiting a market of more than 450 million customers. This is also valid for defense in an EU context. We have a market that is far, far too fragmented. The demand side is fragmented; the supply side is fragmented. That is plaguing the ability of the EU to have the properly dimensioned and highly competitive market that it deserves, and that will serve defense readiness. Our ability to defend ourselves essentially relies on our capabilities, and therefore on our defense industry; that's very clear. For that, we need a more integrated market. That was the lesson learned the tough way via the UK back then, and now we have to accept that this is the way forward for defense.

As for the Green Deal, one tends to see the Green Deal, or the ecological transition that it embodies, in opposition to defense. We should absolutely not see them as mutually exclusive. I have pleaded in the past years that defense readiness is just another form of resilience, and resilience is a form of sustainability. Maybe the first ever form of sustainability, which speaks very much to the Green Deal community. Now, of course, on the battlefield, you don't consider your ecological footprint; you have to be able to defend yourself. But we should consider that the ability to defend ourselves is the first form of resilience. If you are secure, then you get some brain time to also address daunting and equally important challenges that are more long-term, like climate change or climate adaptation. People should not oppose one or the other, but instead combine them. There are also things which are less intuitive. For instance, for a long time we considered that electric propulsion was not relevant for defense. The drone revolution has proved the contrary. Now we see that electric engines can propel not only drones but missiles, and that their thermal signature is quasi nil. It makes a lot of sense to invest in those clean technologies also for defense purposes. That was not as clear five years ago; now it's obvious.

> **On defense and sustainability**
>
> *"Defense readiness is just another form of resilience, and resilience is a form of sustainability. Maybe the first ever form of sustainability."*

Wegener:

The UK is a trusted ally and a European defense powerhouse. Even though Brexit took them out of the EU, wouldn't it have made sense to include them in EU defense programs like SAFE [Security Action for Europe; a financing instrument for common procurement], given the boost they could offer to defense capabilities?

Arbault:

Brexit has consequences, and, at the same time, the UK is a trusted ally. Now, when it comes to participation in EU programs where the EU budget is mobilized, you cannot have the UK on the same standing as a Member State without all the jurisdictional integration that comes with membership. That's impossible. There are, of course, ways to bring the UK or Canada closer to us, and this is exactly what we've done in SAFE. Subject to

several conditions being negotiated, their products can be eligible for procurement by the Member States on the same terms as those of the Member States. The negotiations with Canada were successful in that respect. They failed when it came to the UK, because we asked in those negotiations for the basics provided by the regulation, notably a financial contribution to the SAFE budget. There might be ways to reopen that conversation. There was a possibility of having the UK in, but the negotiations were not successful.

Wegener:

You took over your role at DG DEFIS in January 2021, just over a year before Russia's full-scale invasion of Ukraine. What was DG DEFIS focusing on until the start of the Russian war of aggression, and where was the focus of your work?

Arbault:

During that one year before the aggression, and I'm speaking for my defense directorate at the time, we were focusing very much on the implementation of the brand-new EDF [European Defence Fund; supporting collaborative defense research & development], which came to life on 1 May 2021. We were all out on this. There was an element of premonition, because the EDF did not come out of thin air. The idea started in 2016. That was after the invasion of Crimea, in the context of Brexit and of the first Trump administration. It did not come out of nowhere; the geopolitical context was already integrated.

But of course, when the war broke out, it changed everything. Everything. We immediately scrambled to issue a Communication on the Defense Investment Gaps, as we called them, where we identified three main gaps: a financial gap, meaning massive underinvestment over the last 15 years, with the peace dividends being massively overspent; a capability gap; and the underlying industrial gap. That was a couple of months after the war broke out.

When it comes to support to Ukraine, you will know very well that in the days after the invasion we turned the European Peace Facility into also a military support facility and already gave 500 million Euros to Ukraine on 28 February 2022, and then this increased massively. We calculated the gap that we had to fill, and then we adopted emergency programs to fill that gap: one program, EDIRPA [European Defence Industry Reinforcement through Common Procurement Act], focusing on the joint procurement of equipment urgently needed by Member States to get to the proper level, and ASAP [Act in Support of Ammunition Production], as a way to support productive investment in the EU's production capacity for weapons and components. Then, as the war unfolded, we adopted SAFE and the Ukraine support loan instruments. We basically haven't stopped innovating since then.

Wegener:

How did you, personally and in your role, experience 24 February, the start of the Russian invasion? How did your work at DG DEFIS change on that day, and then gradually over the years after?

Arbault:

It was a dramatic event, and it had far-reaching consequences for us. But paradoxically enough, it was not a day when we were all rushed into a situation room. This is important

to explain: DG DEFIS is not the diplomatic or defense policy arm of the EU; that is more for the EEAS [European External Action Service]. We were more in the back office, basically providing the possibilities for Member States to get organized much more efficiently to fill the gap I mentioned before, the investment gap in defense capabilities. It's not that it required a complete revolution instantly, overnight, but it was a major wake-up call that we were under a threat that was much more acute than we had initially thought. Then we had to actually get defense ready, and for that we had to get organized at EU level, because no Member State on a standalone basis, however invested in defense it might be, like France, or however powerful financially, like Germany, can be defense ready by itself. We have to become cooperative to meet the challenge, and this was the lesson learned from Ukraine.

Wegener:

How much contact was there between DG DEFIS and Ukraine before the invasion? And was there immediate contact with Ukrainian officials via DG DEFIS after the invasion, after the first days?

Arbault:

When it comes to the EU institutions, there were of course immediate contacts with the EEAS. I would say, in sum, that the contacts we had with the Ukrainians intensified as the war unfolded. Why? Because we shifted from immediate military support via the European Peace Facility, in a rather intergovernmental set-up, towards the progressive integration of Ukraine into our industrial policy. That's why it was more a kind of second wave, in which the contacts intensified as we were twisting, tilting and mobilizing our budget to come up with programs which were, and still are, supporting the increased competitiveness of the defense community in the EU. By doing that, we are now also integrating the Ukrainians. We now have proper programs which are also designed to support the industrial power of Ukraine in terms of defense capabilities. For instance, we have the Ukraine Support Instrument, which is part of EDIP [European Defence Industry Programme]. We have BraveTech EU, which is a program to jointly invest in the innovation capacity of innovators both in Ukraine and in Europe. This came at a later stage, but contacts already existed on 24 February 2022.

Wegener:

Was this also because the survival of the Ukrainian state and of the Ukrainians in the first few days was a surprise? This industrial integration obviously necessitated that the Ukrainian army continued fighting and that the Ukrainian state survived, which it did, contrary to what a lot of defense officials believed at first when Russia attacked.

Arbault:

In the early days of the war, the full-scale invasion came as a total shock, and a lot of experts anticipated that Ukraine would be wiped out in a couple of days, or weeks, or at most months. Then it became a very positive surprise that Ukraine was able to stand the fight, also thanks to the massive international military aid it received. The forces re-established the balance somewhat, and we were faced with a more classical situation of high-intensity conventional warfare, more symmetric than in the first weeks. And it turns out that we're back to the eternal lesson that you win a war if you are the last one able to churn out weapons. In the end, it's all about

industrial policy and the capacity to produce weapons. In that context, of course, it makes what DG DEFIS does much more relevant to supporting Ukraine in its victory. So, to sum up, we shifted from snap military support in the early days via the EPF to more structured support to Ukraine's industrial apparatus, in a way that it can become more and more able on its own, but also, thanks to the ramp-up of EU industry, jointly withstand the brutal aggression.

> **On lessons from Ukraine**
>
> *"You win a war if you are the last one able to churn out weapons. In the end, it's all about industrial policy and the capacity to produce weapons."*

Wegener:

How do you ensure that SMEs [Small and medium-sized enterprises] are represented fairly, and not only formally included, when it comes to fostering defense innovation and building a broader sovereign EU defense industry ecosystem?

Arbault:

On the substantive question of SMEs, we have always been extremely attentive to make sure that SMEs are very much at the center of our attention and can participate easily in our defense programs. The programs normally work on the basis of international consortia, and we make sure that SMEs have access to those consortia. Even in the structuring capability programs, for instance, we give funding bonuses to projects which incorporate SMEs. We also have dedicated calls for proposals directed towards SMEs, where you have to be an SME to benefit from funding. We very recently adopted an interesting new program, AGILE [Programme for Agile and Rapid Defence Innovation], which is meant to fund very disruptive innovation with very short delivery times, and which is also directed at SMEs and even start-ups. It is very important to have them on board.

And I will finish with what is probably the most important point. What we are witnessing today is a complete revolution. These are lessons learned from the battlefield in Ukraine. That kind of "new defense", is essential to our capability to be defense ready. Therefore, it's not only that we have to integrate SMEs: they are part of our capability to withstand any threat tomorrow. It's even more urgent that we incorporate that kind of new defense approach into our policies.

Wegener:

On SMEs and industrial side of these programs: how do you manage to integrate the smaller member states into these programs as well, to make sure that small member states, and not only the large industrial players, are included in the defense picture for the EU?

Arbault:

That's an absolutely critical and relevant question, and it's quite a challenge. We have a huge asymmetry in the distribution of the defense industry in Europe. You basically have France, Germany, Italy, Spain, also to a lesser extent Sweden, Finland, Belgium, but many countries don't have a real defense industry of their own, even if, of course, the picture is more complex than that. So, if you are essentially funding the big primes that are located in, let's say, five or six countries at most, you end up in a situation where a majority of member states will say: "Okay, it's all very nice, but what's in it for me? I don't have industry that receives

funding from the EU budget." This matters because the great novelty of the EDF at the time was that, for the first time in history, we were mobilizing the EU budget in support of defense via the industrial policy lever. You might very much lose the political support of the constituency of Member States. It's super important, and this was really at the top of my priorities from the day I took up the job, to make sure that there is a real effect among all the Member States regarding the relevance of making a common, collective effort. For that, we must show that we are very inclusive, and that we are also funding SMEs, because SMEs can be located in any member state. You always have a gem in cyber or quantum or whatever in Ireland, in Cyprus, in Austria. It's very important indeed to keep the Member States together in support of the collective ambition of defense readiness.

Wegener:

EDIP, the European Defence Industry Programme, provides 1.5 billion for 2025 to 2027, a step change compared with 20 years ago, but most likely still modest against the volumes that high-intensity conventional conflict would demand. Is the Commission employing new approaches, like subscription-based defense spending to maintain reserve industrial capacity, to achieve its goals?

Arbault:

To be clear: we had the EDF, with close to 8 billion euros. Then the war broke out, as we discussed, and we had to test new intervention logics. We did that with EDIRPA and ASAP. Then EDIRPA and ASAP were integrated into a new program – the European Defence Industry Programme – which rolled out those new interventions: not R&D this time, but the downstream elements, meaning joint procurement and industrial reinforcement. It's a bridging program, a short-term program that makes the bridge with the new MFF [Multiannual Financial Framework; the EU's long term budget plan] starting in 2028. It's only 1.5 billion, but that's already quite a lot, and it will be massively scaled up as we perpetuate those new intervention logics in the defense window of the European Competitiveness Fund. Now, admittedly, in terms of budget it's quite low. We would need much more, but the current MFF is very constrained. That's why the Commission also mobilized the loan instruments, and this is extremely powerful. Look at the numbers: with SAFE, we have injected 130 billion euros into member states' procurement of defense products. And with the Ukraine support loan instrument, a loan instrument targeted at the EU supporting Ukraine, we have another 60 billion euros allocated to military support to Ukraine. This has not prevented us from going very big on the money dedicated to defense readiness.

Wegener:

What other approaches are the Commission and DG DEFIS employing in their programs to achieve an outsized effect? For example, providing subscription-based support, like funding factories to keep overcapacity, so that there is spare capacity for the production of military-grade technology in case of a full-scale war.

Arbault:

In EDIP, we have not only integrated the newly and successfully tested intervention logics, joint procurement and industrial reinforcement, but we have also very much opened up the types of intervention logic that can be funded. Typically,

we can, under EDIP, fund defense readiness pools or ever-warm capabilities. We know, for instance, that when it comes to drones, which are central in operations, it makes absolutely no sense to have a zillion drones in a hangar, because they will be obsolete in a couple of weeks. So, you have to be ready for surge production if one day this is of the essence. We are now indeed in need of testing new models, like keeping ever-warm facilities, so that they are warm enough to be massively upscaled quickly. I think we will increase our attention to more innovative approaches in terms of the ability to have a properly sized defense apparatus if one day we need it, but it's something that is still being tested.

Wegener:

On the topic of European cooperative programs: several flagship cooperative programs have failed even after the Russian invasion made the need for them evident. FCAS [Future Combat Air System; next generation fighter programme] collapsed in June 2026. MGCS [Main Ground Combat System; planned replacement to legacy main battle tanks] was narrowed in July 2026 to a platform-independent technology rather than a common vehicle. There is also a longer lineage of failed programs, like the Europanzer agreement of 1957, the MBT-70, and the Eurofighter, which did become a fully functional plane, but France left after considerable investment in the joint program. What can DG DEFIS realistically do to raise the success rate of cooperative development and procurement? Specifically, how do EDIP, the EDPCIs [European Defence Projects of Common Interest; large joint defence-industrial projects] and SAFE change incentives compared with purely intergovernmental cooperation?

> **'We know that the multilateral, rules-based international order is shattered, and for that we need to regain our sovereignty.'**

Arbault:

First, international cooperation has always existed in defense, and indeed you've mentioned a number of projects which have been more or less successful. But there are success stories. The Meteor programme [An air-to-air missile] is an example. We are really disappointed to see big projects like FCAS or MGCS being seriously challenged, if not abandoned. It's important to stress that these are not EU programs or EU-funded projects, although we have been indirectly, and very much, funding research and development which is directly relevant to those programs. In the EDF, for instance, we have very important projects on collaborative air combat, on an enhanced cockpit for the next-generation fighter jet, and on technological bricks for armored vehicles and the main battle tank. So, we are already supporting the advancement of technologies and capabilities in those domains.

Now, I think we need to produce proof that it makes a lot of sense to cooperate at EU level. We are funding this as an incentive to test cooperation, in the firm hope that there will be a realization that it is simply compelling. The massive investment that needs to be committed means that the investment has to be mutualized; there is absolutely no doubt about that. It is also a confrontation of cultures,

industrial cultures. That can be tricky, but it can also help you to be more innovative, because you can learn from partners of a different culture. We have no other choice if we want to stay on the radar. If we want to be able to defend ourselves, and to remain at the negotiating table worldwide, we have to be credible. For that, we cannot just be a juxtaposition of 27 mini defense markets; we must unlock the full potential of the internal market. It's about creating a culture of cooperation that becomes the norm, and about tapping the full potential of a much more integrated market, meaning a lot of circulation of components, technologies and IP across the EU.

Wegener:

Is this also a question of industrial scale and production capacity for you? We see that with at least 14 different types of main battle tank we have in Europe, compared with only a single type for the entire US, which leads to a much larger logistics train. After Ukraine, where, as you said, production scale proved to still be what wins a long conventional war of attrition, is this also the thinking there?

Arbault:

Absolutely. We have a market that remains too fragmented, and this is simply preventing us from tapping the massive economies of scale and scope that are within reach, and that we are preventing ourselves from benefiting from. This is not sustainable at all in the situation of acute threats that we're facing. As you said, if you take a more operational viewpoint, interoperability and interchangeability are absolutely critical to our ability to defend ourselves, if one day we must do it together. The definitive proof of that has been produced, tragically, in Ukraine. We have been supporting our Ukrainian friends very much, but we have supplied them with all sorts of different products, materials and platforms which were not talking to each other. And the Ukrainians, although extremely grateful for that effort, have also hinted that it was a logistical nightmare. We need to fix that, not only for the sake of Ukraine, but also for the sake of our own ability to come together to defend ourselves, if one day we had to.

Wegener:

Will the planned revision of the Defense and Sensitive Security Procurement Directive bring us closer to a genuine EU single market for defense? And is such a market even a realistic goal, given Member States' incentives to favor national industry for reasons of sovereignty and local employment?

Arbault:

Basically, as you mentioned yourself, there is a wariness among Member States vis-à-vis any notion of a really integrated market for defense. For historical reasons, the mindset in Member States is still very, very national. They have the responsibility of defending their country and their people, first and foremost. But nobody can believe for a second today that national defense can ignore European defense in its broadest sense. We have to rely on a market which is more efficient. I like to say in my public interventions that, although Member States don't like it, there is already a single market, because the single market has invited itself into the defense domain without asking permission. The wake-up call that Ukraine produced was that, as we needed to massively ramp up our production capacity, each Member State realized that it actually depended on another

Member State for powder, for explosives, for all sorts of components. The supply chains massively span across borders, but to date we have failed to give ourselves the governance at EU level to monitor that market, identify bottlenecks and act on the pain points. Member States are still extremely reserved on that, because they sometimes suspect that we are making a power grab, which is not the case. It's not about substituting for Member States. It's about having an informed conversation and a decision-making space at EU level, based on proper knowledge of the supply chains and the EDTIB [European Defence Technological and Industrial Base; the EU's collective defense industry]. There is a huge paradox today is that we are weak because of our interdependence, whilst we could be extremely strong thanks to our interdependence if we managed it properly. So, it's about governance of the single market.

> **On the single market for defense**
>
> *"We are weak because of our interdependence, whilst we could be extremely strong thanks to our interdependence if we managed it properly."*

Wegener:

DG DEFIS is the Directorate-General for Defence Industry and Space. As defense has moved to the center of the political agenda, how do you prevent space from becoming a subordinate objective within this defense agenda? And does the directorate essentially treat all space technology as dual-use, or is there still a meaningful category of space activity that sits outside the defense envelope?

Arbault:

There is an optical effect, because everybody has been discussing defense frantically over the past years. But we have never stopped investing in and paying a lot of attention to space, for many good reasons. Where would we be if Galileo [EU's own global navigation satellite system, alternative to GPS] were not operational today and tomorrow? IRIS² [Infrastructure for Resilience, Interconnectivity and Security by Satellite; providing secure satellite communications], for instance, is the latest-generation big EU project, and it is becoming obvious that it is also critical for us. We also see that space is central to anything that has to do with defense. Again, Ukraine has demonstrated that; just think of the dependency of Ukraine, and of certain Member States, on Starlink, for instance. It's clear that anything to do with defense will have a space-relevant component in the future. Collaborative combat, be it in the air, on the ground, at sea or undersea, is based on space capabilities. Communication, radio communication, the resilience of GOVSATCOM [Governmental Satellite Communications; pools and shares existing satellite capacity]: all of this is based on the ability to rely on space capabilities. So, we need to have the proper capabilities in space. We also need to be able to defend ourselves in space, because our space assets are also under threat. All this is just to say that it is central to everything we do that we reinforce the space dimension of defense; space for defense, as we call it. We have done that from the beginning, since 2021, already in the EDF, even before the war. Each year, we were already spending a significant chunk of the EDF money on space defense projects.

Wegener:

A short follow-up, as you mentioned Ukraine. In Ukraine, we saw a cyber-attack on Viasat that disabled a lot of satellite-dependent equipment

for a while. We also saw an attack in Israel where Hezbollah hit a ground station for satellite infrastructure. We're investing a lot on the space side in orbit, in the satellites themselves. But how much is the EU doing on the defense side to invest in resilient ground data infrastructure, meaning the ground stations that take the very valuable data created by IRIS² or other European satellites in orbit, bring it down, and get it processed and used? Without this downlink, they're just very expensive pieces of high technology orbiting us without a meaningful way to transmit.

Arbault:

Here again, there are probably two dimensions to the answer. First, we have always invested significantly in cyber defense, or cyber security applied to defense: the ability to prevent any cyber-attack on our platforms, our communication systems and our combat systems. This is ongoing and intensifying. We also invest a lot in quantum technologies, which are key to making sure that we are safe from the harm of cyber-attacks. There is also another subject, which is the ability to protect our critical infrastructure. That can be the infrastructure you mentioned, but also communication nodes, and all sorts of other critical infrastructure, such as energy infrastructure. You mentioned the EDPCIs, for instance. Through them, we offer member states an opportunity to discuss how we can get better organized, also in terms of governance, to equip Europe with a real air defense capability, some kind of European dome, which will protect us not only from ballistic missile attacks and hypersonic threats, but also protect our capacity to move troops. So critical infrastructure protection is also very important.

Wegener:

Amazing. This was fantastic, Mr. Arbault. Thank you so much for your time.

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About the Article

The defence agreement between Turkey, Saudi Arabia and Pakistan may prove to be one of the most significant geopolitical consequences of the war involving the United States, Israel and Iran. Its importance does not lie only in the commitments undertaken by the three countries.

About the Author

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The defence agreement between Turkey, Saudi Arabia and Pakistan may prove to be one of the most significant geopolitical consequences of the war involving the United States, Israel and Iran.

Its importance does not lie only in the commitments undertaken by the three countries. It lies above all in what the agreement tells us about the changing international order.

Three important regional powers — different in their political systems, strategic traditions and international alliances — have decided that closer cooperation in the field of security and defence is now in their common interest.

Turkey brings considerable military strength, a rapidly developing defence industry and its unique position as both a Middle Eastern power and a member of NATO. Pakistan brings a large military establishment and, crucially, nuclear deterrence. Saudi Arabia contributes enormous financial and energy resources together with its growing ambition to act as an autonomous geopolitical power.

Taken together, these capabilities create something potentially significant: a new centre of strategic gravity stretching from the Mediterranean and the Gulf to South Asia.

Does this amount to the beginning of an "Islamic NATO"?

Not yet. Perhaps not ever.

But the question itself tells us something important about how rapidly the geopolitical landscape is changing.

The erosion of American deterrence

For decades, the security architecture of the Middle East ultimately rested on American power.

The Gulf monarchies depended heavily on the American security umbrella. Turkey anchored its security within NATO. Pakistan, despite a complicated relationship with Washington, remained deeply connected to the Western strategic system for much of the Cold War and its aftermath.

That architecture is now becoming more fluid.

The war against Iran may have accelerated a trend that was already visible: regional powers no longer want their security to depend exclusively on decisions taken in Washington.

This does not mean that American military power has disappeared. The United States remains the dominant Western military power and an indispensable security actor.

But military superiority and political deterrence are not exactly the same thing.

Three partners, three capabilities

Turkey	Military strength, fast-developing defence industry, NATO member
Pakistan	Large military establishment and nuclear deterrence
Saudi Arabia	Financial and energy resources, ambition as autonomous power

Source: Gianni Pittella, based on the article text

Deterrence depends on credibility. Allies must be convinced not only that a great power can protect them, but that it will do so, at the necessary moment and under circumstances that may not perfectly coincide with its own immediate interests.

The emergence of an additional security arrangement among Saudi Arabia, Turkey and Pakistan therefore deserves to be interpreted as a form of strategic insurance.

These countries are not necessarily choosing between Washington and a new alliance. They are doing something more sophisticated: diversifying their security relationships.

They are hedging.

And that may be one of the most important characteristics of the emerging multipolar world.

The Turkish paradox

Turkey's participation makes the agreement particularly relevant for Europe.

Ankara is not simply a partner of NATO. It has been a member of the Atlantic Alliance since 1952 and possesses one of its largest and most important military forces.

Turkey therefore already belongs to the world's most powerful collective-defence alliance.

Why does it feel the need to participate in another security architecture?

There is no inevitable contradiction between the two. A country can belong to NATO while developing regional partnerships responding to specific geopolitical challenges. Indeed, stronger regional cooperation can sometimes reinforce rather than weaken the broader alliance.

But politically, the Turkish decision remains highly significant.

It demonstrates that NATO membership no longer prevents an important member state from developing parallel structures of security cooperation when it believes that its national and regional interests require them.

This does not automatically weaken NATO.

But it does reveal a transformation of NATO.

The Atlantic Alliance may increasingly become an umbrella under which different regional pillars, coalitions and strategic partnerships coexist.

The danger would arise if these different structures developed conflicting priorities or strategic objectives.

The opportunity, however, is equally important: a more balanced NATO in which responsibility for security is distributed more widely rather than concentrated overwhelmingly in Washington.

Not yet an "Islamic NATO"

The expression "Islamic NATO" is certainly attractive, but it should be used cautiously.

NATO is much more than a political declaration of mutual assistance. It is the product of more than seventy years of military integration, common planning, interoperability, command

structures, shared strategic doctrine and nuclear deterrence.

Nothing comparable yet exists among Turkey, Pakistan and Saudi Arabia.

The new arrangement should therefore be understood primarily as a political and strategic signal rather than as the birth of an organisation comparable to NATO.

But political signals matter.

Alliances rarely emerge fully formed. They begin when states conclude that their security interests increasingly coincide.

If cooperation among the three countries deepens over time — through military exercises, intelligence sharing, defence-industrial cooperation, technological integration and coordinated strategic planning — today's political agreement could eventually acquire a much more substantial military dimension.

The real question is therefore not what the pact is today.

It is what it could become tomorrow.

Where are Egypt, Qatar and the other Arab states?

The composition of the emerging framework is as interesting as the countries that are absent from it.

Egypt would be an obvious candidate for any broader regional security architecture. It is the most populous Arab country, possesses one of the region's largest armed forces and remains strategically indispensable to both the Mediterranean and the Middle East.

Its future relationship with the initiative will therefore be important to watch.

Qatar faces a different strategic calculation.

Its influence has traditionally depended on maintaining relations with actors that are frequently in conflict with one another. It combines close security relations with the United States with an ability to communicate with Iran and with political actors that other governments find difficult to reach.

A rigid collective-defence architecture could potentially limit precisely the diplomatic flexibility that has given Doha an outsized role in regional mediation.

The United Arab Emirates represents yet another model. Abu Dhabi has developed an increasingly autonomous foreign policy and a dense network of strategic, economic and technological partnerships extending well beyond traditional alliances.

NATO vs. the new pact

NATO	The new pact
More than seventy years of military integration	A political and strategic signal
Common planning, interoperability, command structures	Could deepen: exercises, intelligence sharing, industrial cooperation
Shared doctrine and nuclear deterrence	*"Not yet. Perhaps not ever."*

Source: Gianni Pittella, based on the article text

These differences suggest that the Middle East is unlikely to reproduce the relatively clear alliance structures that characterised Europe during the Cold War.

Something more complex is emerging.

Rather than two opposing blocs, we may see overlapping coalitions, flexible partnerships and countries simultaneously cooperating and competing with one another.

And what about Iran?

Iran remains the unavoidable question.

Even if the new arrangement is not formally conceived as an anti-Iranian alliance, it cannot be separated from the strategic transformation produced by the conflict with Tehran.

At the same time, Turkey and other regional actors have strong reasons to avoid a permanent confrontation with Iran.

Iran is too large, too important and too deeply embedded in the political geography of the Middle East to be simply isolated indefinitely.

This creates an interesting dual function for the new security architecture.

On the one hand, it strengthens deterrence and demonstrates that important regional powers are prepared to cooperate in protecting their security.

On the other hand, it signals something to Washington and Israel as well: Middle Eastern powers increasingly want a greater say over the strategic decisions that determine the future of their region.

In this sense, the pact should not be interpreted only through the Sunni-Shia divide or through the relationship with Iran.

Its deeper meaning may concern the gradual emancipation of regional powers from an international system in which their security depended overwhelmingly on decisions taken elsewhere.

Europe's uncomfortable question

For Europe, this development should be a wake-up call.

If Turkey can remain inside NATO while simultaneously strengthening a regional pillar of security and defence, why should Europeans continue to hesitate about constructing a much stronger European pillar inside the Atlantic Alliance?

For too long, the debate on European strategic autonomy has been framed around a false alternative: either Europe develops its own defence capacity, or it remains loyal to NATO.

The two objectives are not contradictory.

A stronger European defence capability could become the European pillar of a renewed Atlantic Alliance: capable of acting autonomously when necessary, while remaining firmly anchored in the transatlantic partnership.

Europe possesses the economic resources, technological expertise, industrial capacity and human capital required to achieve this.

What it still lacks is sufficient political integration.

Europe needs more common procurement, stronger and more integrated defence industries, interoperable armed forces, greater investment in strategic technologies, stronger command capabilities and, above all, the political willingness to assume responsibility for its own security.

This would not mean creating a European alternative to NATO.

It would mean creating a stronger Europe within NATO.

From dependence to strategic diversification

The broader lesson of the Mecca Pact goes far beyond the Middle East.

We are entering an international system in which states increasingly refuse to depend on a single security provider.

Saudi Arabia is diversifying.

Turkey is diversifying.

Pakistan is expanding its strategic role.

The Gulf countries are pursuing different combinations of relationships with the United States, China, Europe and regional powers.

India is doing something similar in Asia.

And many countries of the Global South increasingly prefer flexible partnerships to permanent geopolitical alignment.

This is what multipolarity looks like in practice.

Europe cannot be the only major geopolitical actor that refuses to adapt.

The paradox is striking: Turkey, one of NATO's most important military powers, is demonstrating that membership of the Atlantic Alliance and the pursuit of greater regional strategic autonomy can coexist.

Europe should draw the appropriate conclusion.

The future of NATO may depend less on preserving the distribution of responsibilities inherited from the twentieth century than on building stronger and more responsible regional pillars within the Alliance.

America will remain indispensable. But Europe must become capable of carrying a much greater share of the burden.

If the emerging world is becoming a world of strategic diversification, Europe must finally learn to diversify its power without abandoning its alliances.

And in the NATO of the future, the European pillar should be the strongest pillar after the United States.

Europe's uncomfortable question

> *This would not mean creating a European alternative to NATO. It would mean creating a stronger Europe within NATO.*

Source: Gianni Pittella, based on the article text


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