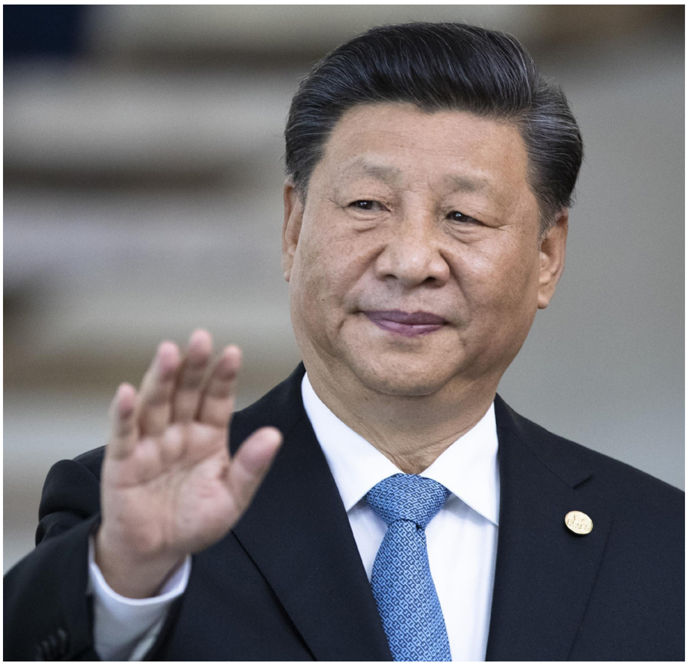
# STRATEGIC ESTIMATE 2026

theGeopolity

# Features



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As we pass the quarter point of the century the world looks very different to the way it looked at the turn of the century. America's unipolar moment is over and a competitor has emerged that keeps US policy makers awake at night. It seems everything the US touches blows up from the Middle East, Europe and the Far East.

Just three decades since the 'end of history' the US has slaughtered its sacred cows and seems to have placed ideology promotion into the dustbin of history. Freedom of speech, freedom of protest and Free Trade are now routinely abandoned and everything the west long stood for is seen as an obstacle rather than values that should be adhered to.

In *Strategic Estimate 2026* we assess the US position in the world and how it's trying to adapt and maintain its superpower status. We look at how China and Russia are trying to navigate the global landscape and weather Europe's century of humiliation has begun.

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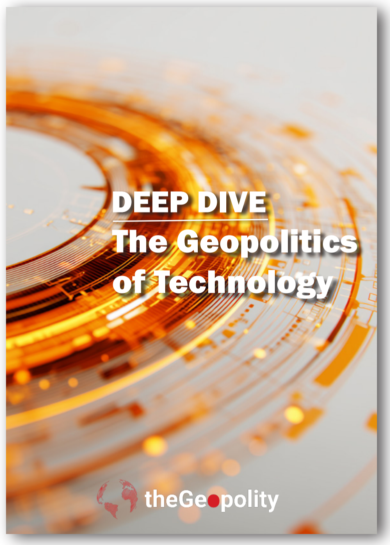
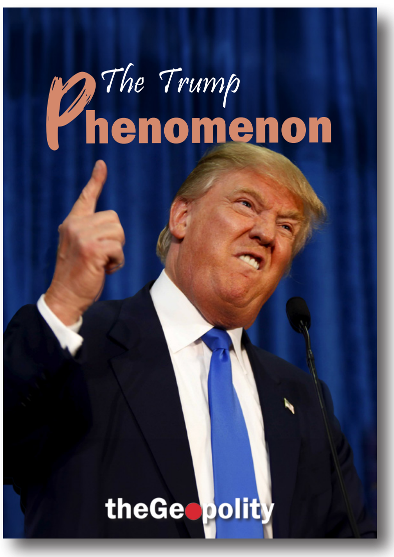
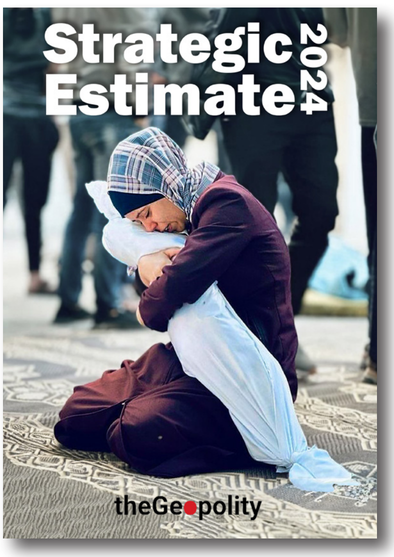
Making Sense of the World






# Contents

# Introduction

The central theme of this year's Strategic Estimate 2026 report is the systematic slaughtering of the West's sacred cows—the long-held assumptions, norms, and institutional taboos that once underpinned Western power and legitimacy. Ideas that were treated as untouchable for decades—free trade as an unquestioned good, independent institutions as neutral arbiters, permanent US alliance leadership, moral authority in foreign policy, and the inevitability of liberal democratic expansion—are now being openly challenged, abandoned, or weaponised. In 2026, these pillars are not collapsing due to external enemies alone, but are being dismantled from within by Western leaders responding to domestic pressure, geopolitical competition, and strategic fatigue.

The year 2026 marks a decisive inflection point in global politics. The assumptions that underpinned the post–Cold War order—American primacy, liberal multilateralism, institutional restraint, and predictable great-power behaviour—are no longer eroding at the margins; they are being actively dismantled. Strategic Estimate 2026 assesses a world that is no longer in transition, but one that has already crossed into a new and far more volatile geopolitical era.

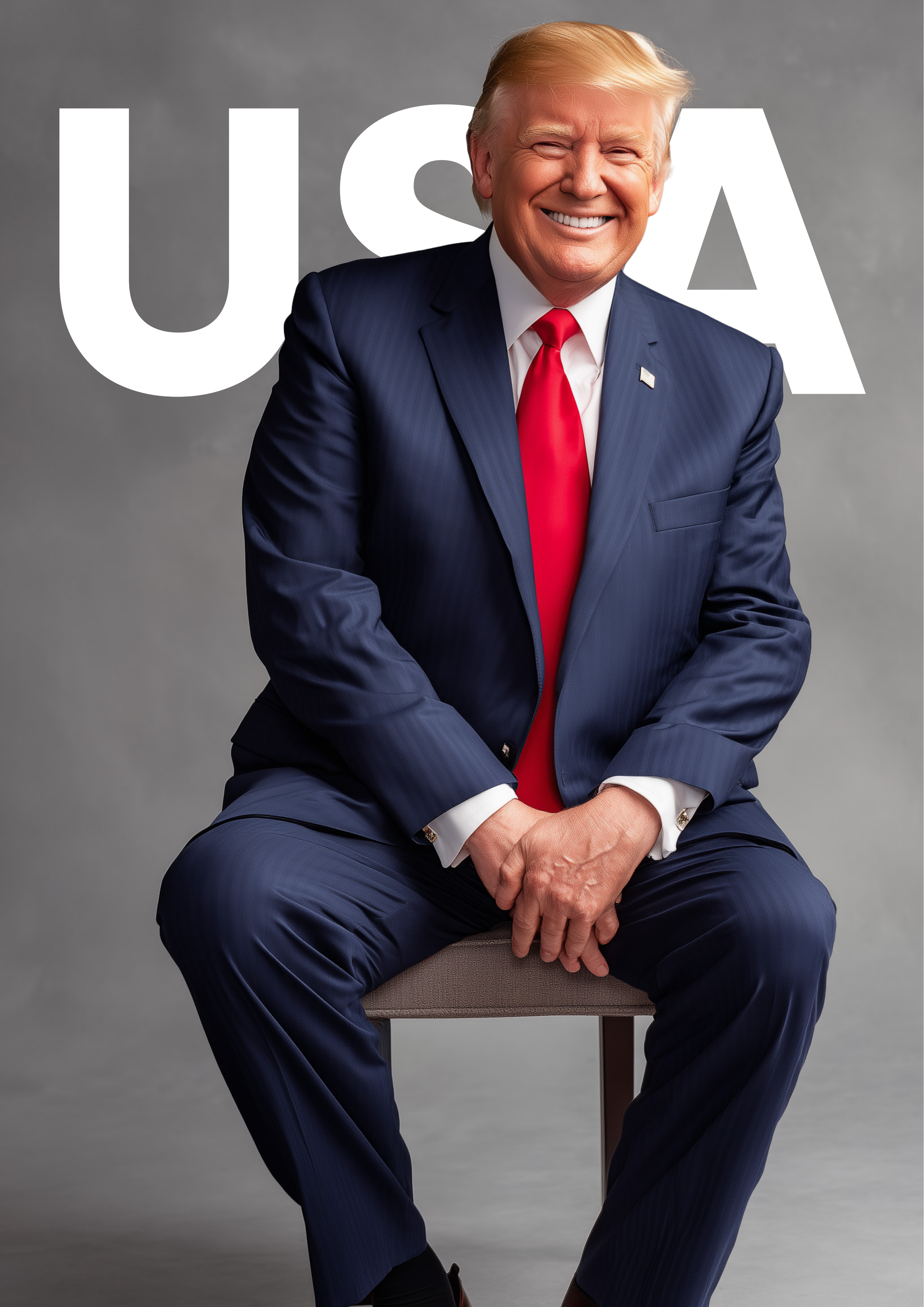
At the centre of this shift stands the United States. Donald J. Trump's return to the White House in January 2025 did not represent a restoration of his first presidency, but its radicalisation. The second Trump administration has accelerated trends that were once debated as hypothetical: the concentration of executive power, the hollowing-out of institutions, the abandonment of multilateral frameworks, and the replacement of rules-based order with transactional, personality-driven statecraft. American power remains vast, but it is increasingly unilateral, coercive, and unpredictable. Allies are reassessing their dependence on Washington, adversaries are probing for advantage, and neutral states are hedging rather than aligning.

This report examines how Trump's governing style—part strongman, part transactional deal-maker, part disruptor—has reshaped US domestic governance and foreign policy alike. It interrogates the claim that Trump has "ended seven wars," assesses whether the MAGA movement can survive the contradictions of power, and evaluates whether America's global posture is stabilising conflict or merely freezing it in unstable forms. In doing so, it treats rhetoric and outcomes as separate analytical categories—measuring not what is claimed, but what has materially changed.

Beyond the United States, the international system is increasingly defined by great-power competition without guardrails. Russia, four years into the Ukraine war by 2026, is no longer fighting for survival but for leverage—militarily, economically, and diplomatically—while recalibrating its position between China and a hostile West. China, for its part, has demonstrated resilience under tariff pressure, weaponised supply-chain dominance, and emerged as a decisive actor across Asia, Africa, and the technological domain. The contest between Washington and Beijing is no longer simply about trade or influence; it is about control over the future architecture of power—AI, rare earths, semiconductors, and standards-setting.

Europe enters this period strategically exposed. Internally divided, politically fragmented, and economically constrained, the continent faces uncomfortable questions about its relevance, autonomy, and long-term alignment. Simultaneously, regions once treated as peripheral—the Arctic, Africa, the Red Sea, and parts of Latin America—are becoming central theatres in global competition, not because of ideology, but because of resources, geography, and chokepoints.

The global system is moving away from stability through institutions toward order enforced by leverage. In this environment, the central question is no longer whether the old rules can be saved, but who will benefit most from their collapse.


USA

# The Trump Revolution Begins

Donald J Trump was inaugurated as the 47th President of the US on 20 January 2025. In the end he won a landslide victory and cleaned the floor with last minute democratic replacement, Kamala Harris, who failed to win any of the swing states.

Trump's campaign picked up where it ended in 2020: a tightly focused populist-nationalist message organised around the now-iconic slogans *"Make America Great Again"* and *"America First."* The underlying narrative was consistent and direct: the United States had been weakened, betrayed, and humiliated by globalist elites, corrupt Washington insiders, and a liberal bureaucracy—and only Trump possessed the will to restore American power, pride, and prosperity.

Trump's core themes remained unchanged:

- Economic nationalism and protectionism
- Cultural conservatism
- Anti-globalist rhetoric
- A personalised, strongman style of leadership

The MAGA movement promised sweeping action on every major front. Trump delivered volume, if not coherence. In his first year as the 47th President, Trump signed over 200 executive orders, many of which have been or are being challenged in court. His attempts to expand presidential power and conflict with the courts has been the defining characteristic of his second presidency. The Trump administration has taken action against law firms for challenging Trump's policies. On immigration, Trump signed the Laken Riley Act into law, issued orders blocking non-citizens from entering the US, reinstated the national emergency at the Mexico–US border and designated drug cartels as terrorist organisations, amongst many other policies.

## Trumponomics: Economic Nationalism 2.0

Trump's worldview on trade has always been anchored in the belief that the global economic system is structurally "rigged" against the United States. His return to power gave him the opportunity to attempt a full reset—not just of America's trade posture, but of the global economic order itself.

On 2nd April 2025 the world was introduced to liberation day, this was the day Trump signed Executive Order 14257, 'Regulating Imports With a Reciprocal Tariff to Rectify Trade Practices That Contribute to Large and Persistent Annual United States Goods Trade Deficits.' This order declared a national emergency over the US' trade deficit and invoked the International Emergency Economic

Powers Act (IEEPA) to authorize sweeping tariffs on foreign imports. The order imposed a 10% baseline tariff on imports from nearly all countries, alongside country-specific tariff rates scheduled to begin a few days later.

The reciprocal tariffs sent shockwaves around the world. The move was designed to deliberately disrupt the global economy, with a view to changing how the international trading system functioned.

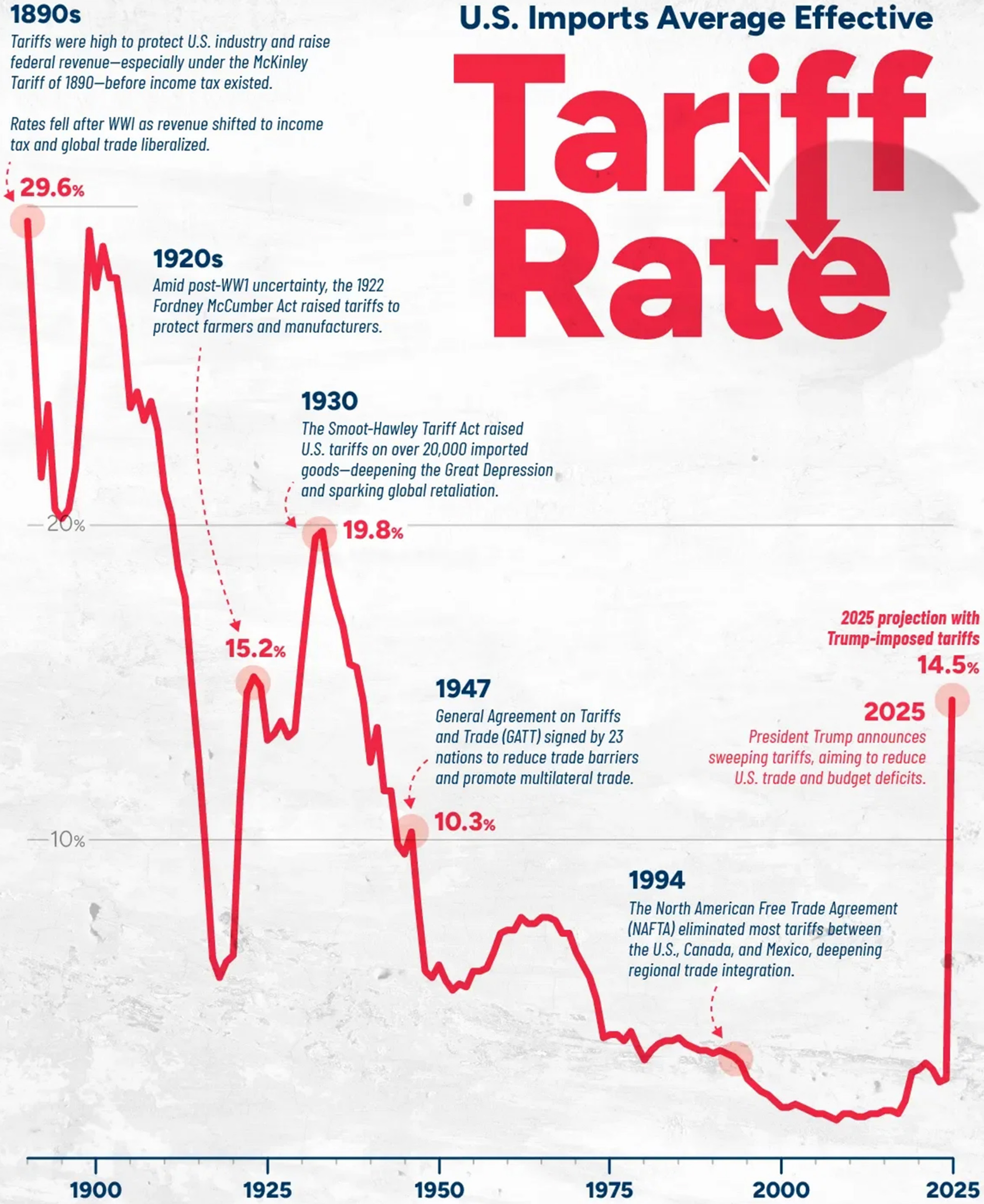
But Trump then began his first of many U-turns. The 'Liberation Day' tariffs led to a global market crash. In response, the White House suspended the April tariff increases to allow time for negotiation. By July 31st, Trump had announced deals with just 8 trading partners. He also ordered country-specific 'reciprocal' tariffs to resume on August 7th, 2025. Trump announced he would do 90 trade deals in 90 days."

The US Court of International Trade ruled in a lawsuit that Trump had overstepped his authority in imposing tariffs under the IEEPA and ordered that the 'Liberation Day' tariffs be vacated. On August 29th 2025, the Federal Circuit Court of Appeals ruled that Trump had exceeded his authority under the IEEPA, but stayed its decision to give the administration time to appeal to the US Supreme Court.

Trump's liberation day tariffs, at the end of 2025, have not gotten remotely close to the objectives they were meant to achieve. The US has only completed trade deals with a handful of nations. In the case of China, a framework has been in place for months, but a final trade deal hasn't been signed or agreed. A tentative truce technically now exists with China. However, Trump remains far from securing agreements with key trading partners, notably with Mexico, while Canada remains on hold.

When it came to the economy, Trump's policy was anchored on aggressive tariffs, intended to reset international trade flows. This is not even close to being achieved. On the broader economy, Trump promised to revive manufacturing, protect American jobs and stop outsourcing to China.

Behind the theatrics, the economic results are mixed. Manufacturing jobs have grown in certain sectors (autos, chips, strategic materials), but not at the scale Trump promised. The costs—higher consumer prices, supply disruptions, and retaliatory tariffs—remain significant.


U.S. Imports Average Effective
Tariff Rate
1890s
Tariffs were high to protect U.S. industry and raise federal revenue—especially under the McKinley Tariff of 1890—before income tax existed.
Rates fell after WWI as revenue shifted to income tax and global trade liberalized.
29.6%
1920s
Amid post-WW1 uncertainty, the 1922 Fordney McCumber Act raised tariffs to protect farmers and manufacturers.
15.2%
1930
The Smoot-Hawley Tariff Act raised U.S. tariffs on over 20,000 imported goods—deepening the Great Depression and sparking global retaliation.
19.8%
20%
1947
General Agreement on Tariffs and Trade (GATT) signed by 23 nations to reduce trade barriers and promote multilateral trade.
10.3%
10%
1994
The North American Free Trade Agreement (NAFTA) eliminated most tariffs between the U.S., Canada, and Mexico, deepening regional trade integration.
2025 projection with Trump-imposed tariffs
14.5%
2025
President Trump announces sweeping tariffs, aiming to reduce U.S. trade and budget deficits.
1900
1925
1950
1975
2000
2025

## Abandoning the Global Order

On the global front Trump broke with the post-1945 rules-based liberal international order and abandoned multilateralism. Trump dismantled or withdrew support from domestic and international organisations dedicated to promoting American soft power, such as USAID, UNESCO, National Endowment for Democracy (NED) and the Bureau of Democracy.

Trump emphasised an "America First" foreign policy, advocating for reduced US involvement in international organisations and a re-evaluation of global commitments. Trump broke with US strategy since WW2 by repeatedly expressing his desire to annex Canada, Greenland, and the Panama Canal. The effect of this has been US allies reconsidering their alliances with the US and re-evaluating if the US is a reliable partner and someone that could be relied upon in their time of need.

## China: Trump's Hardest Battlefield

The area Trump ran into major hurdles has been with regards to China. Trump imposed a 10% tariff on China immediately when he took office, which was increased during liberation day. But China responded with its own tariffs. This forced Trump to delay the implementation of some tariffs for 90 days, which led to talks between both countries. Whilst Trump managed to achieve some tactical gains, many of the more difficult, longer-term goals such as rebalancing supply chains away from China, creating more resilience, stopping unfair practices completely, ensuring China fully adhere to agreements, remain in flux. US exporters have been forced to bear losses, and US consumers now face higher prices. Whilst one year of a strategy is a very short period to assess a policy, it remains to be seen whether Trump's policies result in lasting structural change with China or just episodic agreements and resets.

## Middle East

During Trump's 2024 campaign, he made a number of statements and proposals about the Middle East. Trump argued that prior US policy had over-relied on expensive interventions, regime change, and foreign entanglements that cost lives and money without enough payoff. He emphasised that US foreign involvement should be more transactional. Trump proposed to continue supporting Israel's security, and that peace in the region, especially in Gaza was a priority. He promised to keep up pressure on Iran through sanctions, countering its influence via militias and proxies in the region. Trump called for normalisation and alliances with Arab States expanding normalisation through building on the Abraham Accords.

Despite imposing a ceasefire during his inauguration over Gaza, since then Trump gave Israel a free hand in its genocidal war. Whilst Trump proposed his riviera plan for Gaza where the US would manage Gaza, what ensued was significant uncertainty as many proposals were conditional. Trump's Gaza strategy caused further displacement, which made life even worse for the people of Gaza; forced takeover, aggressive deadlines, threats etc. These will likely lead to further instability or backlash.

*"Despite imposing a ceasefire during his inauguration over Gaza, since then Trump gave Israel a free hand in its genocidal war."*

## Ukraine: The War That Would End "in 24 Hours"

Donald Trump's only policy position that was clear, loud and measurable was his promise to end the Ukraine war in 24 hours. During the 2024 campaign, Trump made several bold claims, most notably that if elected he would end the war in Ukraine *"within 24 hours."* He also made it clear he was open to Ukraine ceding territory as part of a peace deal.

The world witnessed the new Trump administration in full action on 28th February 2025 in what were extraordinary scenes. Ukrainian President Volodymir Zelensky was cornered by Donald Trump and other senior members of Trump's team who proceeded to grill and humiliate him and question his lack of respect for the US presidency. What was made clear was the unlimited support by the Biden administration had now come to an end.

Despite this, Trump pushed ahead with the Ukraine–United States Minerals Agreement. Under its terms, Ukraine agreed to contribute a share of proceeds from some state-resource outputs to a joint investment fund. This was after Ukraine's leadership initially rejected the idea that any selling-off of state assets or resources would not happen.

***"Trump has done a complete U-turn on Ukraine..... By the end of 2025, Trump was forcing Ukraine to accept the loss of territory and began advocating Russia's position on the war."***

Trump proceeded to pause foreign assistance programs and suspended military aid to Ukraine and placed under review intelligence and weapons exports. In May 2025 Trump conditioned continued support in Ukraine engaging in peace talks and negotiations and showing confidence-building measures.

Trump then had the Alaska summit in August 2025 directly with Russian premier Vladimir Putin and all the signs were that the US and Russia were on the same page and that Ukraine needed to get in line. But Russia continued to expand its attacks across Ukraine and Putin's promises to speak directly with Ukraine never materialised.

By September 2025, Trump had done another U-turn: he publicly stated that he believed Ukraine can win back all territory lost to Russia and therefore restore its borders, particularly with support from the EU and NATO.

When an Austrian journalist asked Trump: *"You once said that you would end the Ukraine war in 24 hours. You later said you said that sarcastically."* Trump replied: *"Of course I said that sarcastically,"* When prompted, *"you've been in office for five months and five days, why have you not been able to end the Ukraine war?"* Trump said that ending geopolitical conflicts between rival countries is *"more difficult than people would have any idea. Vladimir Putin has been more difficult. Frankly, I had some problems with Zelensky, you may have read about them. And it's been more difficult than other wars."*[1]

Trump has done a complete U-turn on Ukraine. Originally, he argued against Biden's position, saying it had caused and then worsened the war, which was of no apparent strategic interest to the US. He made promises to his base that he would force a quick diplomatic solution. By the end of 2025, Trump was forcing Ukraine to accept the loss of territory and began advocating Russia's position on the war.

As Trump approaches his one-year anniversary, his list of accomplishments is looking rather bare. Everything Trump touched, has stalemated. No solutions. No breakthroughs. No real progress. The list continues to grow. Trump and his MAGA movement promised its supporters swift, decisive victories across all major fronts and a bold new path for the future and after the first year the 'revolution' has hit reality.


On 9th October 2025, President Donald Trump convened his cabinet one day after announcing that the "first phase" of the Gaza ceasefire would soon begin. During the meeting, he made a dramatic claim: *"We settled seven wars… and this is number eight."* Earlier , addressing the UN General Assembly on 23rd September 2025, he outlined his narrative: *"In just seven months, I have ended seven unendable wars… some lasting 31 or 36 years."*

Trump implied that he had achieved what previous administrations could not. Trump all but nominated himself for the Nobel Peace Prize, which he did not win in the end. So, has Trump really ended 7 wars?

**Egypt-Ethiopia –** Both African nations are not formally at war, but tensions have been simmering. Ever since Ethiopia built the Grand Ethiopian Renaissance Dam (GERD) on the Blue Nile, near its border with Sudan. Relations with Egypt have been simmering as the Nile is the lifeline for Egypt — it supplies about 97% of Egypt's freshwater, the new dam will reduce water flow downstream, threatening agriculture and livelihoods for over 100 million Egyptians. Ethiopia insists the dam is crucial for its economic development and electricity generation and it believes it has a sovereign right to use its water resources.

There have been no military clashes, but the rhetoric has been hostile. Egypt has repeatedly said that "all options are on the table" to protect its water security. Ethiopia has accused Egypt of "neocolonial attitudes" based on outdated treaties from the colonial era that favoured Cairo. No direct military conflict has occurred. There have been no airstrikes, troop movements, or declared hostilities between the two. Instead, the dispute has played out in diplomatic, legal, and propaganda arenas, with mediation efforts by the African Union (AU), the US and the Arab League and other African neighbours.

In July 2025, both countries resumed African Union–led talks, and some progress toward a framework on dam operation and drought management was agreed. However, no comprehensive agreement has yet been finalised. Egypt remains wary, calling for legally binding guarantees on how Ethiopia will release water in dry years.

Trump claims to have played a role in easing tensions, facilitating agreements and talks. But no war has taken place, therefore there was no war to end and tensions still remain, therefore Trump's claim of ending this war is false.

**Armenia-Azerbaijan –** The Caucasian nations have been at war effectively since the collapse of the Soviet Union in 1991 over the Nagorno-Karabakh enclave. This Armenian-populated region ended up inside Azerbaijan and over decades a number of wars has seen Azerbaijan acquire more territory. As this has taken place the ethnic Armenian population was displaced and the borders remained.

On 8th August 2025, the Armenian PM Nikol Pashinyan and Azerbaijani President Ilham Aliyev signed a peace agreement at the White House. Trump took credit for the agreement that established peace and this included the opening of transit and trade corridors, border normalisation and mutual recognition. The Zangezur corridor was officially called the Trump Route for International Peace and Prosperity.

Whilst Trump can be credited with ending this war, it should be kept in mind there are broader aims in the Caucuses by the US. The war was used by the US to achieve its main goal, of diluting Russian influence in the region. This is why, still today the deal has not been fully implemented. Some preconditions remain controversial, such as constitutional changes in Armenia, border delimitation and the rights of displaced persons. There has been opposition and protest within Armenia over what the peace deal might give up. So, the peace treaty exists in principle, but many details are still to be resolved. So, this is really a half-baked resolution for Trump, not a peace deal that has ended war.

**Pakistan-India –** In May 2025, both South Asia's nuclear powers went to war that lasted 3 days. The war's trigger was the Pahalgam attack in Indian held Kashmir, which India blamed on Pakistan based militants. This was the fifth major war between both nations since they gained independence in 1947, amongst many other skirmishes and attacks.

Both nations agreed a ceasefire after 3 days after Pakistan successfully downed a number of Indian jets and was on the offensive over Indian held Kashmir. The US intervention came when Pakistan could have dealt India a major blow but agreed to de-escalate from a position of strength.

Trump has claimed US mediation helped bring about de-escalation between both nations and some of this is true. But what the US did was impose a halt to military action in this particular war, the underlying issue of Kashmir remains and this has not even been part of any post-war action. Therefore, to say Trump resolved this war is a major stretch of the term.

**Serbia-Kosovo –** Kosovo was a US creation during the Balkan wars of the 1990s. The US did this to weaken Russian influence in the Balkans and ever since Serbia – who was expanding during the Balkan


wars has disputed Kosovo's status as an independent nation.

Trump claims that diplomacy under his administration has helped reduce tensions between Serbia and Kosovo and he claims he's ended the war. But whilst there have been talks between Kosovo and Serbia the underlying issues all remain unresolved. Kosovo is independent (recognised by many countries, but not by Serbia) but Serbia continues to dispute its border and minority rights. There is no fully resolved permanent peace deal in place.

Therefore, Trump has not ended or resolved anything in this conflict, despite his claims.

**Thailand-Cambodia –** The Asian nations have for long had border disputes that have led to regular low-level tensions. In May 2025 a skirmish at Chang Bok on the border between both nations led to the death of a Cambodian soldier. This heightened matters and set off a chain of retaliations and border tightening. Both countries began taking non-military measures: border crossings closed, trade and supply disruptions, restrictions on goods, etc. These economic and logistical measures escalated the stakes. Then in July 2025, heavy fighting broke out near the Ta Muen Thom temple (on the border between Surin Province in Thailand and Oddar Meanchey Province in Cambodia). This was one of the worst escalations in over a decade. Cross-border shelling took place as well as civilian casualties and displacement. Thailand declared martial law in several border districts.

The conflict drew immediate international concern. ASEAN (with Malaysia as chair), the US, China among others got involved as external actors and pushed for peace efforts. But there is no peace agreement. The conflict was more a border dispute than a war. De-escalation definitely occurred, but to argue, as Trump has, that he's ended a war is contentious.

**Congo-Rwanda –** Since 2022 the Democratic Republic of the Congo (DRC) has seen escalating conflict in its eastern provinces, notably with the M23 rebel group, which is widely reported to be backed by Rwanda. The rebels captured major cities in 2025, displacing millions that caused a serious humanitarian crisis.

In June 2025, the DRC and Rwanda signed a peace agreement in Washington, mediated by the US and Qatar. But the peace deal was rather limited. The peace deal did not include the M23 rebels as parties to the agreement. This is a major gap, since M23 is a central actor in the fighting. Rwandan troops have still not fully withdrawn. The withdrawal deadlines are missed or delayed constantly. Fighting, clashes and instability continue in many zones. As far as the locals are concerned the war is far from over

Trump's claim that he has ended the Congo-Rwanda war is overstated.

**Israel-Iran –** At the Sharm al-Sheikh conference in Early October standing in front of the region's leaders Trump boasted he had brought to an end the conflict that had been raging for 3,000 years. Trump had gathered the region's leaders to get their buy-in for a peace deal over Gaza that had been raging for two years.

Trump took credit for brokering the ceasefire between Israel and Hamas, for helping end the Israel-Iran confrontations and ending the regional conflict. Israel has however, not abided by the ceasefire agreements; it consistently violated its terms by continuing with killings. It became clear very quickly that most of the peace deal lacked sufficient detail. Whilst this round of fighting stopped, the conflict is not fully resolved, many open issues such as governance, reconstruction and security still remain outstanding. With Iran, many tensions remain from its proxies in Syria and Lebanon and its nuclear programme. While there may be reduced hostilities or pauses, it is not a definitive end as there is no comprehensive settlement in place.

All of the conflicts Trump has proclaimed to have ended are half baked and not definitive in their ending. Trump continues to exaggerate and mislead them. Whilst there have been some diplomatic achievements such as ceasefires, all the conflicts Trump is taking credit for ending are still ongoing. Trump's role in them was also extremely small and in many cases even disputed. In fact in most of the conflicts Trump is taking credit for there is no evidence of any real resolution.

Across all seven cases, the pattern is consistent:

- Some conflicts saw partial de-escalation
- None reached a permanent political settlement
- Trump's involvement was often minor, symbolic, or exaggerated
- In several cases there was never a war to begin with

Trump's narrative of "ending seven unendable wars" does not withstand scrutiny. At best, he brokered short-term agreements; at worst, he claimed credit for events he neither initiated nor completed. The geopolitical reality is clear: none of these conflicts are truly resolved, and several continue to deteriorate.

# Emperor Trump

In his first term Donald Trump was a polarising figure who regularly practiced partisan politics and brought to a halt a number of important pieces of legislation. Trump constantly provoked questions of character, ethics and temperament. Before his second stint at the presidency, Trump was found guilty of 4 felony counts of falsifying business records in the first degree, including 'hush' payments to a porn star. Trump remains subject to multiple other indictments and investigations over documents and fraud.

Trump has continued from his first term where his government is a vortex of chaos with a record turnover of staff. He surrounded himself with ageing white men and members of his own family, inviting accusations of corruption. Trump has continued to attack the media as 'the enemy of the people' while chalking up thousands of false statements.

Trump is no ideologue. He is neither a globalist nor a nationalist. He is in reality a narcissist and a crowd pleaser. Everything he does is for his own self-gratification, he cares little for ideological agendas and constantly chops and changes his views to get higher media ratings. He was never a team player and always worked on playing the crowd. At the same time, he hates any criticism.

Whilst the first year of Trump's second term as the president has seen some changes. Many of the characteristics of Trump's first term have carried over. Trump's way of working is causing chaos across the US and much of the world and can be seen from the characteristics that he uses to rule over the US.

**The Strongman -** Trump's ruling style is that of a populist strongman where he prioritises personal over institutional, performative over procedural, and nationalist over globalist. He uses charisma, confrontation, and a sense of perpetual crisis to maintain control, reshaping US governance around his personality rather than policy continuity or institutional legitimacy. This was clearly seen with his cabinet picks. Trump chose 'Yes' men and women and most of them lacked any experience or background in the departments they were picked to lead.

Trump ensured he had unconventional people around him and they were 'Yes' men and women, who only praise him and do not challenge him on any policy. This consolidation of loyalists, combined with the conspicuous absence of Trump's family (who declined formal roles this time), has created a decision-making environment defined by personal approval rather than expertise. Trump has effectively reshaped the executive branch into a court, not a cabinet. Linda McMahon (Education): background in entertainment wrestling, no grounding in education policy.

## Linda McMahon

Education Secretary

Linda McMahon is from WWF entertainment wrestling, with no grounding in education policy. She has been a long-time Trump ally, McMahon led the Small Business Administration during Trump's first presidency and donated millions of dollars to his presidential campaign. Trump has one sole job for her, shut down the education department.

## Pete Hegseth

Defence Secretary

Pete Hegseth is a National Guard veteran with no command, strategic, or Pentagon experience. Hegseth has been a  Fox News host with no prior political experience and was confirmed as defence secretary less than a week after Trump's inauguration.

## Robert F Kennedy Jr

Health and human services Secretary

RFK Jr, as he is known, is an environmental lawyer, conspiracy-aligned anti-vaccine activist lacking any formal public health credentials. He is nephew of former President John F Kennedy. Despite having no medical qualifications, Kennedy, 70, now has broad remit over US federal health agencies - including those that oversee approval of vaccines and pharmaceuticals.

## Pam Bondi

Attorney General

Pam Bondi was selected for unwavering loyalty, not legal independence. She defended Trump in his legal battles and supported Trump in his election fraud claims.

## Tulsi Gabbard

Director of National Intelligence

Tulsi Gabbard (Director of National Intelligence): Appointed the Director of National Intelligence, even though she has never done any intelligence work. She is well known for supporting the al-Assads in Syria as well as Russia. She is considered by many to be a Russian asset.[2]

**The Authoritarian –** Authoritarian leaders make themselves the centre of their regime. Their rule is about themselves and not about institutions. Anyone that gets in the way or makes the authoritarian look bad, their days in government are usually cut short. Trump has continued with undermining checks and balances, he questions judicial independence and politicises law enforcement. Trump has also pursued numerous purges.

This was on full display in August 2025 when Trump fired Erika McEntarfer, commissioner of the Bureau of Labor Statistics (BLS), one of America's most important economic institutions. This was just hours after weaker-than-expected jobs data stoked alarm about Trump's tariff policy. Trump accused her of having 'RIGGED' jobs figures *"...to make the Republicans, and me, look bad."*

This episode was emblematic: Trump routinely questions judicial rulings, attacks civil servants, and uses government authority to punish perceived enemies. Checks and balances, in his worldview, are obstacles to be overcome—not constitutional safeguards.

**The Monarch –** In a monarchy the monarch is above all officials, laws and institutions. For Donald Trump, institutions are not just secondary, but they should be subordinate to him. Trump for long has been speaking about lazy bureaucrats and the need to cut the government down to size.

As a result, when Trump took office in January 2025, he pursued a deliberate political strategy of structural disruption and loyalty tests leading a wave of mass firings of federal staff, combined with the dismissal of Inspectors Generals. Today many government departments remain understaffed and cannot fulfil their departmental work due to this deliberate policy.

Trump targeted career Civil Servants by revving plans to 'Schedule F,' a reclassification that would turn tens of thousands of career civil servants into at-will employees, meaning they can be fired and replaced easily. This saw thousands of staff dismissed or resigning pre-emptively when this system was revived. Agencies like the EPA, the State Department and Justice Department have seen major attrition because staff fear political purges and loyalty screening.

All decisions now go through the White House, rather than cabinet departments, this has meant policy is now directed by a small inner-circle of advisors rather than departmental experts.

As the Federal government, Congress department and US trade representative department are hollowed out the Treasury Secretary has been negotiating trade deals with the world over tariff negotiations. There is no team that can negotiate with over 100 countries in the world. In Trump's view, an understaffed government is not a weakness; it's proof the "deep state" is being drained. But this is less about efficiency and more about control.

**War on America's Bankers –** President Trump has reserved particular spite for the Federal Reserve and its chairman Jerome Powell. Trump has repeatedly demanded that the Fed slash rates, sometimes by as much as 3 percentage points. The Fed has been more cautious: inflation is still elevated, and the Fed must balance between promoting growth and avoiding runaway prices. Trump publicly criticised Jerome Powell's reluctance to move more aggressively. Trump has attacked the Fed's internal spending, especially the renovations of Fed buildings, as wasteful and excessive. He uses rhetoric about mismanagement and inefficiency to frame the Fed as not being held accountable.

> ***"Trump routinely questions judicial rulings, attacks civil servants, and uses government authority to punish perceived enemies."***

Trump then turned directly on the Fed's personnel. Trump threatened to remove Lisa Cook, the Fed's Governor, over alleged misconduct, asserting he has "sufficient cause" to fire her. Cook responded by suing to block her removal, leading to court battles over whether Trump has the authority to fire her without strong cause. Trump continues to argue the possibility of firing Jerome Powell, though doing so would be unprecedented and face legal constraints.

The Federal Reserve has been an independent central Bank for over a century and like Trump's other characterises he wants to bring it into line with his direction on the US economy.

**The Populist Purger –** Trump has systematically gutted US institutions, and in his second term he has been more aggressive. Trump has targeted their independence, expertise, and morale through firings, politicisation, disempowerment, and legal restructuring. All of this has been under the guise of cleaning the swamp and dealing with the 'deep state.'

At the justice department Trump has been openly antagonistic. Trump appointed as Attorney General, Pam Bondi, who is his long-time political ally who publicly defended him during his impeachments. Internal oversight offices have been stripped of authority. This has led to the longstanding norms of separating the White House from DOJ decision-making, to effectively collapse. This is why legal scholars are calling the US a partisan justice system — one that enforces loyalty rather than law.

*"Trump and his MAGA base constantly accused the Democrats of being communist and if they were in power they would make the country a communist nightmare. But like Trump's Ukraine policy, he's doing exactly what he accused Joe Biden of."*

Trump has politicised the intelligence community more than any president since Nixon. By appointing Tulsi Gabbard as his Director of National Intelligence, she has removed officers who contradicted the White House line on Russia, China and Iran. The National Security Council has been slimmed down and folded closer to Trump's personal advisors rather than career professionals. Trump also reduced or censored key briefings to Congress, citing "executive privilege."

The State Department is one of the most visibly hollowed-out institutions. Career diplomats have left in record numbers, demoralised by purges and political interference. Many ambassadorships remain vacant or are filled by donors and loyalists. Traditional diplomacy has been replaced by leader-to-leader transactional deals, often announced by Trump personally via social media or press events. US soft power — cultural and diplomatic influence — has sharply declined as traditional partnerships fray.

**The Socialist –** Trump has long argued for US nationalism over globalism and his America first mantra refers to placing US interests before all else. But what Trump has shown, despite all his anti-communist mantra, like the USSR, the Trump regime has been buying stakes in US companies, which are effectively nationalisations.

In August 2025, the US government became Intel Corporation's, America's premier semiconductor company, largest shareholder, buying a $9 billion stake. This effectively nationalised the chip manufacturer. Ostensibly this was to help the ailing company that was considering exiting the US manufacturing sector. The US government also has a "Golden share" in US Steel giving the US government veto powers over key decisions. Similarly, the US government effectively nationalised Lithium Americas and Trilogy Metals by taking stakes in the private corporations.

Trump and his MAGA base constantly accused the Democrats of being communist and if they were in power they would make the country a communist nightmare. But like Trump's Ukraine policy, he's doing exactly what he accused Joe Biden of.

**The Unilateralist –** Trump has for long been calling for the US to disengage from global issues, not get involved in foreign conflicts and focus on America's domestic issues. But rather than the US reducing its global role, under Trump it's just become more unilateralist, sidelining allies and excluding them from its political solutions.

Once Trump entered the White House again in January 2025, Trump officially cancelled the role of the Quartet Committee in Sudan, which included Britain and Norway, even though Trump engaged it in his first term. Trump also abandoned the Minsk Group, which had been responsible for resolving issues between Armenia and Azerbaijan, for more than five years, and included Russia and France. Instead, what Trump did and what has become a characteristic of his second term is he pursued peace talks between the two countries alone, sidelining the Minsk groups members.

When it came to Ukraine, Trump completely ignored international partners. Trump met with Putin in Alaska in August 2025, without even consulting the Europeans.

**The Transactionalist –** Trump has always viewed politics as a series of deals rather than moral or ideological commitments. Trump judges his allies and rivals on what they offer the US and even him personally and not shared values or historical partnerships. In his second term Trump has not disappointed.

Trump has pursued a foreign policy that sees him gain material benefits, through extortion and outright pressure, in exchange for managing their conflicts. In managing the conflict between Rwanda and Congo, American companies gained access to rare earth resources in eastern Congo, which is essential for the manufacture of microelectronics.

When it came to managing the conflict between India and Pakistan, Trump got Pakistan to agree to a deal where American companies will develop and extract Pakistan's huge oil reserves.

Similarly, when it came to the Thailand–Cambodia conflict, whose agreement was signed in Malaysia with Malaysian mediation, Trump declared that he had stopped the war between the two countries. In return, major trade agreements were announced that benefited US companies in both countries, while Cambodia announced its nomination of Trump for the Nobel Peace Prize.

In the conflict between Armenia and Azerbaijan, the peace agreement signed between the two presidents was accompanied by the announcement that the Zangezur Corridor would be renamed the *"Trump Corridor."*

In the Russia-Ukraine war, the US already secured Ukraine's agreement to grant American companies half the profits from the extraction of rare minerals across all Ukrainian territories.

**The Tariff Man –** Trump's sole strategy to solve America's economic problems and fix the US is by imposing tariffs on the world. Whilst Trump has imposed tariffs this is being challenged by numerous court cases.

According to the US constitution, Congress has the authority to set tariffs, and Congress has over several decades given small pieces of that power to the president, but never to the extent that Donald Trump is now asserting. This now means Trump will have to go to the Supreme Court, throwing everything about the Trump tariff policy in doubt.

The tariffs are the core of Trump's economic and foreign policy, there is nothing beyond the tariff strategy, which is now in doubt.

**The Zionist –** Like all US presidents, Donald Trump, despite his claims of putting America first, has given Israel everything it wants. Trump has continued arms exports to Israel as it continues its genocide and even provide it cover.

Trump's MAGA support base includes pro-Israelis and one of his largest donors is Miriam Adelson who contributed over $100 million to Trump's election campaign. She openly advocates for the West Bank to be annexed by Israel.

The dependency has proven problematic for Trump as Netanyahu has wanted to expand the Gaza war to a regional war and called for the US to support Israel's war with Iran. US involvement led to discontent within Trump's MAGA base.

Despite this, Trump has provided support and cover to Israel, despite its atrocities and despite Israel becoming a global pariah.

**The Pacifier –** Trump has deployed the National Guard into several US cities, drawing a round of legal challenges by state and local officials. Trump has argued the use of federal troops is necessary to quell violence, crack down on crime and support his deportation initiatives: which all seem to be in Democratic-controlled cities.

In June 2025, Trump took control of the California National Guard to respond to protests against immigration raids in Los Angeles, even though California Governor Gavin Newsom objected. California filed two lawsuits against the Trump administration. In the summer, hundreds of National Guard troops arrived in Washington, DC because of what Trump called a "...situation of complete and total lawlessness." Trump cited homelessness and crime rates as justification.

Trump is using the national guard to circumvent governors who are placing obstacles to Trump's deportation endeavours. Trump's deployments of the military to urban areas mark a shift towards a domestic security presidency — using federal forces to manage internal dissent, immigration, and urban disorder. These are tactics used by Egypt, North Korea and most dictators.

**The Retributionist –** Trump's personality driven leadership means when you fall out with him he will never forget and it's likely he will use whatever laws or powers he has to come for you. Trump has been using the justice department to target his enemies for revenge.

John Bolton was the national security adviser during the first Trump administration. But after seeing how incompetent Trump was, he left the administration and became a critic of Trump and everything he does. In August 2025, the FBI was ordered to raid his business and personal residence. Bolton was accused of improperly handling classified materials. This is coming from a president whose officials regularly leak classified information and are caught discussing such matters on social media apps.

Donald Trump's targeting of James Comey, the former FBI Director, has been one of the most consistent and personal crusades of his political career. Comey led the FBI's investigation into Russian interference in the 2016 election and potential ties to Trump's campaign. Trump fired Comey in May 2017. Ever since, Trump has accused Comey of being a symbol of the deep state conspiracy against him.

Trump targeting James Comey is because he represents the origin of the investigations that nearly ended Trump's presidency. In Trump's worldview, punishing Comey is both personal revenge and political necessity — a way to rewrite history, delegitimize oversight, and consolidate control over the justice system. Using the FBI as a hit squad for political opponents is something the United States has never done. This is something China or Russia do. But now the US has joined the list.

Trump's second term is not ideological. It is not nationalist, populist, or conservative in any consistent sense. It is a presidency defined by one central organising principle: Donald Trump is the institution. All else is subordinate—law, bureaucracy, diplomacy, allies, even the constitution. The first year of his second administration shows a system moving toward personalist rule, where governance is driven less by policy and more by loyalty, vendetta, and the centrality of a single individual.


# Will MAGA Implode?

Donald Trump entered politics with no political experience. As a result, he needed to build a base of support as the Republican party didn't take him seriously. From the start, he relied on white, working-class voters who felt the US system no longer worked for them. Trump presented himself as outside the traditional political spectrum, utilising the racism card as such people for long harboured prejudices against people of colour. Trump presented himself as a political wrecking ball who defends "real Americans" from coastal elites, the media, and global institutions. Trump succeeded in creating a strong base called "MAGA," an acronym for "Make America Great Again."

When Trump launched strikes on Iran in June 2025 the lack of cohesion in Trump's base became clear as many questioned why the US was fighting Israel's war, 'America first' meant 'America first,' even before Israel. Whilst others in the MAGA base supported the president's actions as it aided Israel. What this episode revealed was that the MAGA base is more an emotional coalition built around grievance-based identity politics, distrust of institutions, and who believe in the personal authority of Trump himself.

Trump's MAGA base constitutes a number of segments who all support him for different reasons and their expectations of him wildly differ. The question emerging in 2026 is no longer whether MAGA dominates the Republican Party—but whether MAGA can hold itself together under the weight of its contradictions.

Unlike traditional political movements, MAGA was born without a coherent ideological foundation. Instead, it grew out of five core sentiments:

1. Economic despair among working-class whites
2. Cultural anxiety and demographic fear
3. Distrust of institutions and expertise
4. Resentment toward globalisation and foreign entanglements
5. A longing for a strongman who "fights for us"

These emotions created a durable political identity. Trump did not need policy consistency—he offered validation. In doing so, he built a movement unified not by principles, but by perceived betrayal and collective resentment.

MAGA became an identity, not a platform. And this is precisely why it is fracturing—because identity-based movements fracture when the central figure begins making contradictory decisions.

**Evangelical Christians –** The evangelical Christian community constitutes about a third of the American population. They are among the staunchest supporters of Israel, due to theological reasons and are among America's most powerful lobbyists and donors. They believe that the existence of Israel hastens the return of their messiah. Evangelicals were impressed by Trump's decisions during his first term, such as moving the US embassy to Jerusalem, recognising the annexation of the Golan Heights and his efforts in the Abraham Accords. Nearly 80% of them voted for Trump in the 2024 elections. Trump's position on Israel is what makes them a major part of the MAGA base.

**Traditional Conservatives –** The traditional conservatives have historically been Republican supporters. Traditional conservatives, especially amongst the elderly switched to Trump and believe America first means tariffs, reshoring, scepticism of free trade, hostility to China, and the protection of US manufacturing. Key figures include Peter Navarro, Steve Bannon, JD Vance, and some segments of the Rust Belt electorate. They all believe in the strategic alliance between America and Israel, and they see the relationship as being in America's interest.

**America First (Isolationists) –** This segment constitutes those who were won over by Trump's America first narrative and had lost confidence in the direction of the US. They demanded non-interference in foreign conflicts, refraining from providing aid to other countries, and requiring the president to focus on America's domestic issues, such as infrastructure and student loans. This younger, more online demographic aligned with Tucker Carlson, Marjorie Taylor Greene, Megyn Kelly and libertarian influencers, and new-right personalities. This is the group that is now criticising Donald Trump.

**The Alt-Right –** This segment is a broad spectrum of people and groups from racist right-wingers, such as the Ku Klux Klan (KKK), neo-Nazis and QAnon. It also includes disaffected right-wing libertarians, anti-vaxxers, "deep state" sceptics, conspiracists and online influencers.

What unites the alt-right is the deep distrust of government, intelligence agencies, media, and corporate elites. Trump's anti-establishment narrative and support for conspiracies is why they all joined the MAGA base. This segment is smaller than the others, and some of them are anti-Semitic, hate Jews, and demand an end to Jewish influence in American politics.

> ***"for the first time since its creation, MAGA is no longer a single organism. It is becoming a battlefield of competing visions for America's political future."***

As Trump's second term got into full swing his MAGA base appears to be getting further and further away from each other. Trump's MAGA base is now in the midst of a civil war that has spilled out in the open. There are three issues that are causing the split.

**Immigration –** The MAGA constituents have always been divided over immigration. There are two main camps, those that are hardliners who want zero immigration along with lots of deportations. Then there is the second camp who want less immigration and especially an end to illegal immigration, but still believe some legal immigration is necessary for both economic reasons and to protect America's status as the world's hegemon.

In the first camp, there are people like Tucker Carlson, who has called for Trump to *"shut down all immigration until unity is restored,"* as well as the late Charlie Kirk, who was originally in favor of legal immigration, but changed his mind. In the second camp, there are the tech billionaires like Elon Musk and Mark Andre who believe legal immigration is a good way of bringing talent into the US and a key advantage in America's geopolitical battle against China.

The flash point for this divide has long been the H-1B visa for high-skilled workers, which became a particularly hot topic in December 2024 when Elon

Musk came out in favor of it, triggering a furious backlash on Twitter. But Trump reopened the debate again in his interview with Laura Ingram on 12th November 2025. When Trump defended the visa on the grounds that you've got to have talent, in an astonishing exchange, Ingram replied by saying that we've got plenty of talent in America, to which Trump replied, "No, you don't."[3] The US president called his own people talentless and this went down especially badly with MAGA, who generally think that immigration is at best an unsustainable stop gap to America's economic and demographic shortcomings.

**Jeffery Epstein –** The Epstein saga has created a huge cleavage in Trump's MAGA base. Jeffrey Epstein was an American financier and convicted sex offender with connections to the elites in the US. He was arrested on federal charges of sex trafficking minors in July 2019, but died in his cell a month later. His death was officially ruled a suicide, but the circumstances were suspicious as the cameras around Epstein's cell apparently malfunctioned. The two guards who were supposed to be on suicide watch failed to check his cell and falsified records to imply otherwise, and his lawyer and brother claimed that there was no indication that Epstein was suicidal. This led to widespread suspicion of a cover up.

During the campaign, Trump promised to release the Epstein files. However, despite Trump's attorney general, Pam Bondi suggesting that Epstein's client list was on her desk, Trump has instead spent months telling MAGA to look the other way and trying to reframe the story as a Democrat hoax. This didn't really work, and ever since then, the story has trickled along.

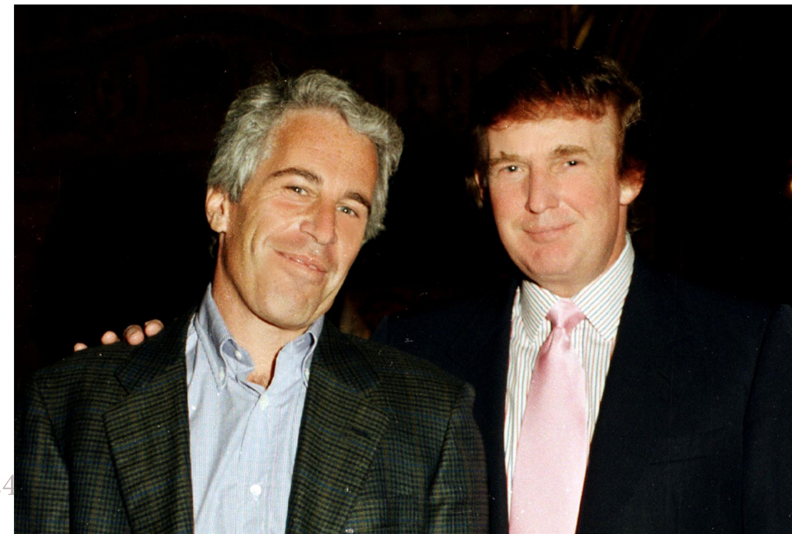
Democrats on the House Oversight Committee forced House Republicans to release tens of thousands of new emails from Epstein, obtained by the committee after it subpoenaed Epstein's estate in November 2025. In these new emails, Epstein is quoted as saying, *"Of course Trump knew about the girls…"* and describes Trump as both dangerous and the worst person he knew. Unsurprisingly, this didn't go down well with MAGA, who hoped Trump would be the one who would bring down the corrupt establishment rather than be part of it. Nor does this story look likely to go away anytime soon.

**Foreign policy and Israel -** The MAGA base is predicated on the US ending its forever wars and focusing on US domestic issues. But since Trump came to the White House in January 2025, all MAGA has seen is Trump's adventurous foreign policy. The biggest issue is Israel. Most of MAGA resent Trump's enthusiastic support for Israel and see the Israel lobby as a core part of the much-hated establishment. This has split the MAGA and has been further aggravated by Trump's continued focus on Venezuela. The interview between Tucker Carlson and Nick Fuentes, a self-described white nationalist who spends a lot of time railing against organised Jewry shows that MAGA has moved against Israel. The fact that Carlson was willing to sit down with Fuentes and not push back against him shows how far apart MAGA is from Trump.

With the genocide in Gaza going into its third year in October 2025 there has been a shift in Trump's MAGA base towards support for Israel. According to the Washington Post the percentage of Republicans under the age of 50 who view Israel favourably was 63% in 2022, and now stands at 48% and 52% unfavourable.[4] Many polls throughout 2025 showed declining support for US policy on Israel.

A split has emerged amongst Trump's supporters regarding his policy towards Israel, particularly his unconditional support for the massacres and starvation taking place in Gaza, which has shocked many. Some, such as Tucker Carlson, raise topics on his platform about the Gaza war and the starvation of people, that many media outlets in the US would never have done in the past.

Trump has anti-Israel supporters as part of his base and with the anti-Israel opinion growing and spreading throughout the US, this will force the hand of Trump. With Trump constantly changing his positions, lying and undertaking contradictory policies, for the first time since its creation, MAGA is no longer a single organism. It is becoming a battlefield of competing visions for America's political future.




# Somalia: America's Forever War

On 8th December 2025 the US bombed the African nation of Somalia for the 111th time in 2025. For a President who promised to reduce US global military action and America's forever wars this has clearly not been the case. For many, the image of US choppers in mangled metal in Mogadishu brought 'black hawk down' into global political jargon. America's disastrous intervention in the 1990s is a distant memory today.

The US has been involved for over three decades in Somalia, from backing a dictator to 'humanitarian' intervention and failed state-building to the current "war on terror" campaign. It's the war many have not heard about as it gets little global media attention. It is just one of the many forever wars the US remains involved in, despite President Trump's promise to end such wars.

## The Gateway to Africa

Somalia, much like the rest of Africa was carved up by the Europeans in the 1884 Berlin conference. Britain would come to control the north of Somalia, as she wanted access to the Red Sea and Italy came to control South Somalia. In 1960 both North and South Somalia gained independence as much of the continent was going through decolonisation. The unification of both the North and South of Somalia became the Somali Republic on 1st July 1960.

Somalia has always been strategically placed due to its location on the coastlines of the Red sea and the Gulf of Aden, Bab el-Mandeb and the Arabian sea. This makes Somalia the gateway to Southern Africa and the Arabian Peninsula. Somalia in time would also come to possess significant resources from Uranium, oil and gas.

In 1969, the sitting president Abdirashid Ali Shermarke was shot dead by one of his own bodyguards. His assassination was quickly followed by a military coup by Major General Mohamed Siad Barre who established the Somali Democratic Republic. He established his party as the sole political party, abolished the assembly and constitution and centralised the state. He ruled with an iron fist and was eventually backed by the US.

Washington provided hundreds of millions of dollars in military aid and economic assistance throughout the 1980s. As a result, the US gained access to Somali ports and airfields for Cold War logistics and surveillance. Barre's regime became a key anti-Soviet bulwark in East Africa — despite growing human rights abuses.

As the 1980's proceeded Somalia was rotting from within. Barre relied on his own Marehan clan and allied groups for power. This alienated rival clans, especially the Isaaq in the north and the Hawiye in the central-south regions. His regime became brutally repressive to maintain rule, mass arrests, torture, and killing of dissidents became widespread. In the north, the Somali National Movement (SNM) led an uprising, which Barre crushed with extreme force

— bombing Hargeisa and Burao in 1988. Thousands were killed; Amnesty International called it one of the worst atrocities in Africa that decade.

Alongside political problems the economic situation worsened with corruption and mismanagement destroying the economy. State socialism collapsed after Soviet withdrawal and despite US aid propping up the regime, none of this could fix the structural decay. Severe droughts and famine (1980–81, 1984–85) deepened resentment. By the late 1980s, inflation, unemployment, and unpaid soldiers turned the army against Barre.

With the Cold War nearing its end by the late 1980s, Somalia's strategic importance for the US plummeted. The US cut aid and with no Soviet or American patron, Barre lost the external funding and weapons that had sustained his regime.

By the 1990s multiple rebellions were in full swing in the form of clan-based insurgent movements. These groups coordinated offensives on the capital Mogadishu. There were even mutinies within the army. Barre's forces bombed Mogadishu indiscriminately, killing thousands and the US and international community evacuated their embassies. In January 1991, rebels entered Mogadishu and Barre fled the capital. The central government disintegrated, and Somalia descended into civil war and warlordism.

The subsequent loss of the centralised government led many to call Somalia a failed state, or even a collapsed one. However, the collapse of the Somali state was a blessing for its citizens, resulting in improved welfare indicators compared to life under Barre's rule.

## Black Hawk Down

In 1992 the US intervened under the umbrella of the UN, calling its intervention a humanitarian one. President George H.W. Bush sent in 25,000 US troops to protect humanitarian operations. At first, it worked. By early 1993, famine deaths dropped sharply and aid reached millions. Then, Washington changed the mission to the infamous nation building.

After Bush left office, Bill Clinton inherited the mission. He expanded the mission mandate from humanitarian to nation building. Which meant disarming the militias, rebuilding the Somali state, and enforcing peace among warlords. This turned a humanitarian operation into a military-political

President Mohamed Siad Barre, 1990

occupation — in a country that had no government, no army, and no unified identity. The US went from relief provider to combatant in Somalia's clan war. The US forces tried to disarm factions by force, and this only made the US the enemy of the clans and by extension, a target.

In the battle for Mogadishu in 1993 the US launched a mission to capture the top lieutenants of the Habr Gedir clan using elite Rangers and Delta Force. The mission went catastrophically wrong when two Black Hawk helicopters were shot down and 18 American soldiers were killed, and dozens wounded. Hundreds of Somalis — fighters and civilians — also died. Graphic footage of dead US soldiers dragged through Mogadishu's streets was broadcast worldwide. This single battle destroyed US public and political support for the mission. The US failed to bring any stability and withdrew humiliated in 1995.

## Decade of Collapse – 1995-2005

After the US withdrawal in 1995 until the emergence of the Islamic Courts Union (ICU) in 2006, Somalia went through anarchy, warlord rule, failed peace efforts, and fragmented attempts at state reconstruction.

There was no central government after the US left humiliated. Somalia broke into fiefdoms run by clan warlords, each controlling territory, ports, and checkpoints for revenue. The capital Mogadishu was divided between rival factions of the Hawiye clan

— particularly Ali Mahdi Mohamed (recognized by the UN) and General Mohamed Farah Aideed. Both claimed to be president; neither controlled more than a few streets. For most Somalis, they suffered from famine, banditry, and lawlessness.

From 1997 a string of failed peace initiatives, led mostly by neighbouring states and the UN took place. By early 2000, Somalia existed only as a name. There was no functioning central state, no national army, and no rule of law. In late 2000 the Transitional National Government (TNG) emerged as a new reconciliation effort took place in Arta, Djibouti. It was headed by Abdiqasim Salad Hassan, a former Barre official and included civil society, Islamic groups and clan leaders. The international community recognised it as Somalia's government. But it failed quickly as it only controlled parts of Mogadishu — the rest was still in the hands of warlords, who saw it as an attempt by old regime cronies to regain power. Somalia came to have two competing governments — one internationally recognised but with little control and the other being the warlords with their clans who were militarily powerful but fragmented.

After the TNG collapsed, another peace conference in Kenya produced the Transitional Federal Government (TFG) in 2004. The TFG was backed by Ethiopia but distrusted by many in Somalia. It was based in Kenya, later moving to the Somali town of Baidoa, since Mogadishu was too dangerous.

## The Islamic Courts Union (ICU)

By 2005 Somalia had suffered from a decade of crisis due to foreign interference and failed warlord wars and rule. This led to the emergence of a grassroots alternative to warlord rule. As the warlords' control disintegrated, local communities turned to Islamic shari'ah courts to provide basic order, justice, and security. These courts were clan-based religious institutions that focused on stability and crime control. They banned looting, reopened markets, and offered dispute resolution where warlords offered only chaos.

These local courts began uniting under a common umbrella — the Islamic Courts Union (ICU), led by Sheikh Sharif Sheikh Ahmed and Sheikh Hassan Dahir Aweys. By mid-2006, the ICU had defeated US-backed warlords and captured Mogadishu. For the first time since 1991, the capital experienced relative peace — checkpoints removed, trade resumed, and aid returned. Many Somalis welcomed the ICU as a law-and-order alternative to 15 years of chaos. The ICU brought some degree of law and order by implementing some parts of the Shari'ah.

## The US Intervenes Again

As the ICU was not western, UN or US backed, this became a problem for the US. The US began to build the narrative after 9/11 that Somalia was part of its war on terror. The US accused the ICU of providing sanctuary to al-Qaeda.

The US proceeded to pressure Ethiopia to invade Somalia and overthrow the ICU government. The US provided logistical, and intelligence support to the 50,000 Ethiopian invasion force. Ethiopia officially intervened to back the Transitional Federal Government (TFG). They drove the ICU out of Mogadishu and re-installed the TFG with US military backing. Ethiopia left after three years of occupation. Whilst the ICU was gone, Ethiopia originally believed their invasion would be an easy victory. Its forces got bogged down in an insurgency and saw their departure as a withdrawal rather than a victory.

The overthrow of the ICU in 2006 led to the organisation splitting apart. The ICU splintered into several different factions. Some of the more radical elements, including Al-Shabaab, regrouped to continue their insurgency against the TFG and oppose the Ethiopian military's presence in Somalia. The leader of the ICU - Sheikh Sharif Ahmed went into exile, where he began negotiations with the TFG and signed a pact in 2008. He went on to become the Somali president from 2009-2012. Al-Shabaab continued with their attacks and launched a full-scale insurgency.


Sheikh Sharif Ahmed

To counter al-Shabaab, the African Union deployed the African Union Mission in Somalia (AMISOM). The TFG, followed by a number of western supported transitional governments, attempted elections, international recognition efforts and the rebuilding of institutions. Despite this, governance in many areas remained weak; al-Shabaab retained control over large rural territories and continued its attacks and bombings.

## A History of Failure

For the US, Somalia is a strategic territory that must firmly remain within America's sphere of control. Due to this the US has implemented a decades long disastrous strategy of supporting clans to power, despite them having little popular support. The US intervened in 1992 only to face defeat by the clans who defended their country against foreign interference. The US then resorted to finance and aid to maintain its position, but the country descended into chaos.

The US then watched in horror when the Islamic Courts Union, an indigenous movement successfully ruled over most of the country and was seen as the solution to the country's ills. The US then pushed Ethiopia to invade the country, who only made things worse when they overthrew the ICU, but themselves got embroiled in an insurgency.

Ever since, the US has continued to support corrupt tribes into transitional and temporary government in Mogadishu, despite them controlling little territory. As a result, the US has had to rely on regional nations to do the heavy lifting whilst the US provides aid and intelligence. Turkey has come to play a central role in this, it maintains Mogadishu's government acting as the most important security and diplomatic partner. Turkey has its biggest embassy and military training centre, Camp TURKSOM, in Mogadishu.

For the US, its Somalia strategy rests on two directions. The first, a reduction of US Embassy staff in Mogadishu, letting the central government run the country on its own feet. The fear is that this would hasten its collapse. The second is staying the course and increasing military action such as drone strikes against al-Shabaab.

The US military strategy has been a complete failure for three decades. It's something President Trump wishes to continue. Somalia is now officially America's longest war, the war that's undeclared, and one most of the world doesn't even hear about.

Mogadishu

# Great Power Competition

Joe Biden and Donald Trump disagreed on many areas, but one area they both agreed and worked together on was China. America's unilateral moment ended with China's emergence, and this is very likely the reason the US elites supported Trump, someone with no political experience, into power in order to face-off against China. In his election campaign Trump made clear he wanted to bring manufacturing jobs back to the US that were lost to China. Trump also promised to crack down on Chinese espionage and theft of intellectual property.

As Trump took office sweeping tariffs became the main pillar used against China. Trump imposed sweeping, escalating tariffs on Chinese imports, at various rates, as retaliation for what he saw as unfair trade practices by China. In trade negotiations with the rest of the world countries such as Panama, Ireland and Indonesia were specifically told to decouple from China in order to get a trade deal. Panama capitulated immediately.

China responded with its own measures from retaliatory tariffs, export controls, raising fees, being more restrictive toward US goods and shipping. China imposed additional tariffs on US goods, including agricultural products, energy (coal, LNG), industrial goods and large vehicles. This caused supply chain disruption, inflation and backlash from American companies dependent on Chinese manufacturing.

On the technology front Trump has not just kept but expanded export control regimes restricting AI chips, semiconductor equipment and software to Chinese firms. Trump also forced NVIDIA and AMD to only sell certain chips to China under stricter licensing, with revenue-sharing obligations, where the US government gets 15% of revenues from AI accelerators and chip sales to China.

Trump's tech strategy has been firmly linked with national security concerns about adversarial technologies, ensuring that China does not get access to frontier AI or chip tech that could be used for military purposes.

China responded to Trump's escalation by unveiling sweeping export controls on rare earths and related technologies. These are strategic inputs used in the tech industry and defence. China's response provides Beijing with complete control over the entire advanced semiconductor supply chain. Even US AI chips made in a US fabs, sent to a US AI lab would need Beijing's permission as they all require rare earth elements. No chip company with business in China can risk non-compliance with China's new rules as it would then run the risk of being seized.

This is exactly what the Dutch did in October 2025 when the government took control of Nexperia, a Chinese-owned but Netherlands-based semiconductor maker. For the first time, the Hague used its

Goods Availability Act because of *"...a threat to the continuity and safeguarding on Dutch and European soil of crucial technological knowledge and capabilities."* Nexperia is one of the world's largest makers of simple computer chips such as diodes and transistors. A state-backed Chinese investment consortium acquired Nexperia for $2.75 billion in 2017 after it was carved out of NXP Semiconductors, a Dutch chip manufacturer. The following year, the consortium began selling its shares to Chinese technology group Wingtech, which became Nexperia's majority owner in 2019. Wingtech released a statement which said the move *"...gravely contravenes the European Union's long-standing advocacy for market-economy principles, fair competition, and international trade norms."* This act was hardcore economic warfare by the Dutch against the Chinese. Considering the close alignment between the Dutch and the US on for example ASML, it's likely they were aligned on this act.

In response, China moved on rare earth elements. US president Trump said his country would impose new tariffs of 100% on imports from China *"...over and above any tariff that they are currently paying,"* Trump also said that the US would also impose export controls on *"...any and all critical software."*

The Trump statements did not lead to panic in China. China's commerce ministry in a response accused the US of imposing new restrictions on China, including putting groups on a trade blacklist, since Chinese and US officials held talks in September as part of a truce in the trade war. China's position on the tariff wars has been consistent: *"...we do not want to fight, but we are not afraid to fight,"* the ministry said. The commerce ministry added that the US side had for a long time *"...abused export controls…"* and overstretched the concept of national security.

As Trump approaches a year since taking office his China strategy is facing many unintended consequences. American farmers have been among the hardest hit by Beijing's freeze on soybean purchases from the US. They forced the Trump administration to provide a  government bailout of up to $14 billion despite a bumper harvest. The "America first" agenda has turned into "America pays first". In a similar case, US efforts to ban Huawei from accessing technology from US suppliers, instead has led to the Chinese firm's revenue rising 22% since 2023, its fastest rate of growth since 2016. These antagonistic policies helped accelerate its growth and reduce its reliance on technology from other countries, all without bending to Trump's will.

# Can Trump Make Russia Kneel?

In December 2025 US president Donald Trump made public a new deal to end the Ukraine war. This deal came just a month after Trump announced he was considering offering long-range Tomahawk missiles that could be used by Kyiv against Russia. The sudden U-turn was even more dramatic as the new deal required Ukraine to give up territory Russia had seized, it was like the deal was written in Moscow. As Trump completes his first year in office his strategy and plan on dealing with Russia hasn't gone according to plan.

Trump repeated again and again in his election campaign that he wants to end the Ukraine war quickly, in 24 hours, by negotiating an end to the war with Russia. Trump also continued to repeat that the war *"would never have happened"* had he still been in office. Trump argued he knows Putin well and Zelenskyy and he would use his personal standing to negotiate an end. Trump criticized the amount of US military and financial assistance that was being given to Ukraine under the Biden administration and suggested that Ukraine should be more willing to negotiate with Russia. Trump on more than one occasion made statements that Zelenskyy should have done a deal with Putin. When it came to NATO Trump criticised US allies for what he called using US defence efforts without contributing enough. He argued he would re-evaluate obligations and burden sharing. Trump also made clear in his election campaign he considered some parts of Ukraine occupied by Russia could remain under Russian control in any negotiated peace, or that Ukraine might need to accept difficult compromises.

When Trump took office in January 2025, he extended sanctions against Russia that were imposed under past administrations through executive orders and presidential decrees. On 28th February 2025, he signed a decree to extend the national emergency sanctioning framework with respect to Russia. But Trump has not introduced any new sanctions directly targeting Russia or adding new designations tied to the war in Ukraine. US lawmakers expressed frustration that the sanctions regime was not being expanded in response to Russian aggression. What Trump did do with sanctions was threaten secondary sanctions and tariffs on third-party countries, who continued to buy Russian oil.

In this light Trump called for direct talks with Putin. In March 2025 direct talks took place in Jeddah between the US and Russia with Steve Witkoff and Marco Rubio representing the US and Sergey Lavrov representing

Russia. What came out of this was a 30-day ceasefire. This meeting also included discussion on energy development in Russia, Arctic investments and technology transfer from the US to Russia. These talks went well beyond Ukraine and indicated the US was prepared to discuss global strategic issues (beyond Ukraine) in order to get Russia on board on Ukraine and other strategic issues. The US was prepared to do this, if Russia and the US could align on strategic matters.

However, despite this, Russia continued to expand its war and dealt Ukraine a number of severe blows. Russia in fact began to make gains more quickly than at any point in the war since early 2022. The increasingly thinly stretched Ukrainian frontline becomes more porous and vulnerable with the danger of collapse looming. For the first time in years, the Russian armed forces broke through key defensive positions, and logistical hubs critical for the Ukrainian armed forces to supply their troops in the east.

By August 2025, for the first time Russia began producing more weapons than it needed to fight the war in Ukraine. It doubled its production of artillery, drones, armored vehicles and tanks. No longer producing just what it needs, Russia was looking at restarting arms exports in a meaningful way.

It was in this light that Trump called for direct talks with Putin and the Alaska summit took place in August 2025. The Europeans and Ukrainians were not invited. The summit ended without a formal agreement, though Trump later indicated he thought Ukraine might need to cede territory as part of a peace deal.

Trump repeatedly made public overtures to Russia aiming at ending the Ukraine war. He even demanded that Ukraine make concessions such as dropping aspirations to join NATO, and recognise some territorial changes to end the war. But Russia continued to say it takes Trump's proposals seriously but cannot accept them in their current form. Russia's Deputy Foreign Minister Ryabkov said Russian demands around addressing the root causes of the conflict are missing from the US proposals. Putin even made public statements rejecting concessions in future peace talks: saying Russia will not give up its illegally annexed territories, and that any deal must protect Russian interests.

As a result, from September 2025 Trump did a U-turn and changed track as his overtures had failed to win Putin to end the war. Despite the US offering a number of items on its shopping list to win Putin over, Russia continued to expand the war. On 23rd September 2025 President Trump posted on Truth Social that: "Ukraine is in a position to fight and WIN all of Ukraine back."

By October 2025, Trump made public he was considering offering long-range Tomahawk missiles to Ukraine, if Russian president Putin does not end the war in Ukraine. Tomahawk missiles have a range of 1,550 miles, long enough to strike deep inside Russia, including Moscow.

There has been a gradual escalation in western military support for Ukraine from the start of the war. What started with European helmets, moved on to ammunition, artillery, tanks, missile systems, and then F-16s. Every time the narrative was that the next escalation would surely change battlefield dynamics – but none of the escalatory moves ever did. Each time, the new "wunderwaffen" supplied to the Ukrainians inflicted short-term pain on the Russians, but eventually these were overcome and the gradual Russian grinding away at Ukrainian forces on the frontline returned and was continued.

> ***"Trump's election pledge of ending the war in 24 hours is looking really silly now. It's no wonder Trump threw in the white flag in early December 2025 with a new 28-point peace proposal, where Ukraine was being told to hand territory over to Russia, in order that Moscow will make peace."***

Trump has struggled to compete with China and with Russia, Trump's election pledge of ending the war in 24 hours is looking really silly now. It's no wonder Trump threw in the white flag in early December 2025 with a new 28-point peace proposal, where Ukraine was being told to hand territory over to Russia, in order that Moscow will make peace,

# Will Venezuela be Trump’s Iraq?


The drums of war are beating once again — but this time, not in the Middle East, but in the Caribbean. In October 2025, President Donald Trump deployed America’s largest aircraft carrier off the coast of Venezuela, under the guise of a drug interdiction operation. The alleged culprits are Venezuelan “narco-terrorists” led by President Nicolás Maduro. Yet, to many observers, it looks increasingly like Washington is preparing to overthrow the Venezuelan government. Trump may have campaigned on ending “endless wars,” but when it comes to Venezuela, his rhetoric has met its opposite. His policy has been all about war.

## From Sanctions to Gunboats

During his first term, Trump sought to push Maduro from power — accusing him of stealing elections, stripping the US’s recognition of his government, imposing sweeping sanctions, and rallying allies to isolate Caracas. When Maduro claimed victory in the 2024 national election with 51.2% of the vote, opposition candidate Edmundo González insisted he had actually won with 67%. The Carter Center declared the election failed to meet international standards and *“...cannot be considered democratic.”*

Soon after, González fled into exile in Spain in September 2024, hiding for thirty-two days inside the Dutch embassy before escaping on a Spanish military aircraft. Opposition leader María Corina Machado warned that González’s life was in danger from *“...growing threats, legal citations, arrest orders, and blackmail attempts.”*

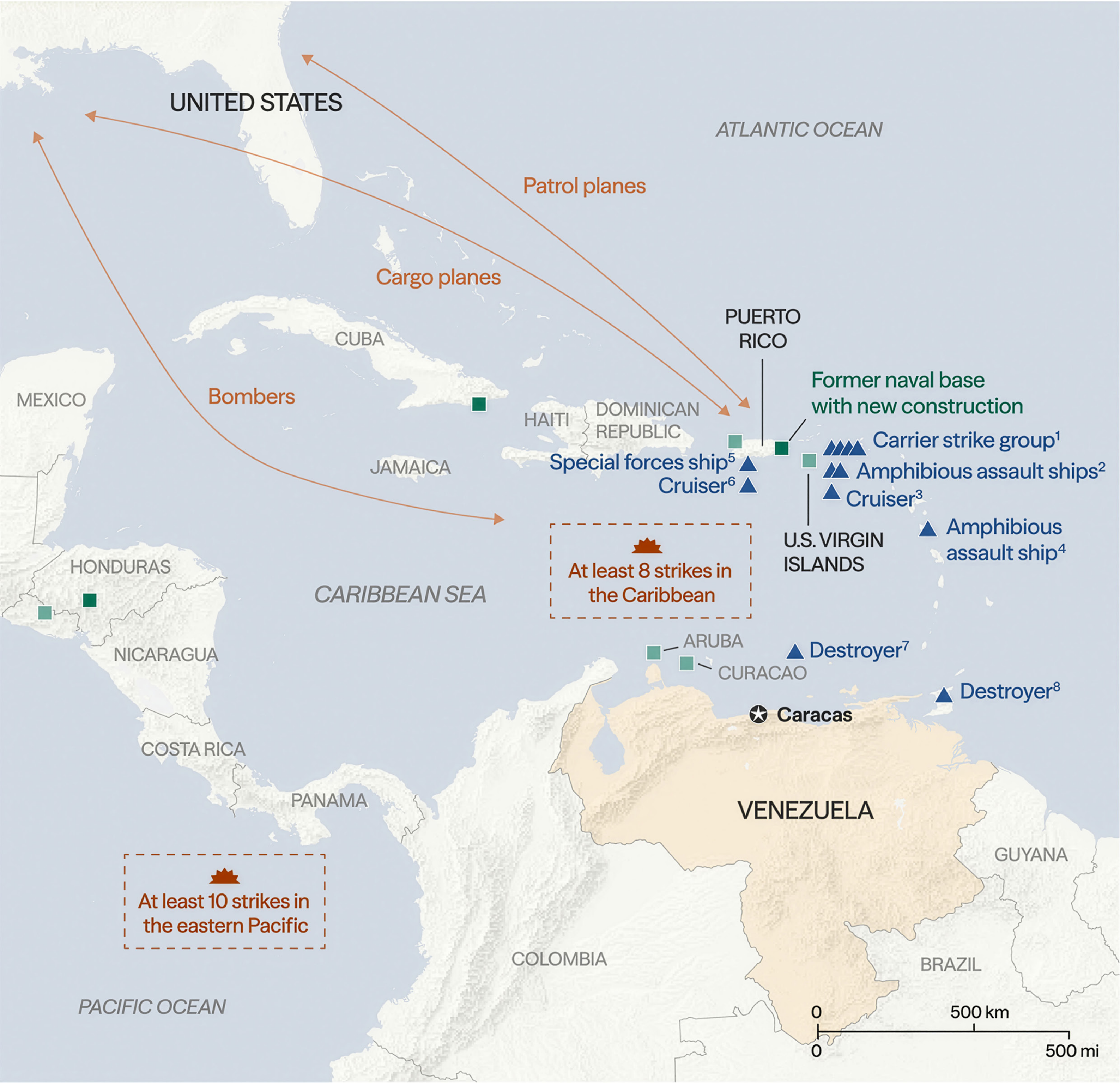
Since beginning his second term, Trump’s response has been unequivocally military. From September 2025, US forces have launched multiple deadly strikes against alleged drug vessels, killing over fifteen people. The administration has even sent Congress a confidential notice declaring that Venezuelan drug cartels are engaged in an “armed attack” against the United States — a sweeping legal claim asserting war powers without Congressional approval and redefining counternarcotics operations as armed conflict.

## History of Confrontation

This confrontation did not arise overnight. It is the culmination of nearly three decades of US intervention in Venezuela — a cycle of regime-change attempts that have consistently failed to achieve their stated goals.

The interest of the US in Venezuela dates back to the early 20th century, following the discovery of vast oil reserves. For decades, US energy companies controlled the oil industry, but the Venezuelan government nationalised it in 1976. Venezuela then suffered significant economic decline and political instability until Hugo Chávez came to power in 1998. The US breakdown with Venezuela then began with Hugo Chávez’s 1999 election. While relations be-

## US assets for war with Venezuela



tween Caracas and Washington had remained stable throughout the 1990s, Chávez's self-proclaimed "socialist" and "anti-imperialist" revolution marked a rupture. This coincided with the rise of American neoconservatism and its pursuit of full-spectrum dominance.

The first major crisis came in April 2002, when Venezuelan military officers briefly overthrew Chávez for forty-seven hours, installing business leader Pedro Carmona as interim president. Carmona immediately dissolved the National Assembly and Supreme Court. The George W. Bush administration's swift recognition of the coup regime devastated US credibility across Latin America, even after officials reversed course when the coup collapsed.

This episode established a pattern that would echo for decades: US-backed regime-change efforts, followed by failure and denial. The 2002–2003 oil strike — which paralyzed production for two months with tacit US backing — failed to unseat Chávez but crippled Venezuela's economy.

Relations deteriorated further through a cascade of diplomatic expulsions. Chávez expelled US Ambassador Patrick Duddy in 2008 after uncovering an alleged coup plot. Maduro followed suit, expelling three US diplomats in 2013, three more in 2014, and another wave in 2018. The final diplomatic rupture came in 2019 when Washington recognized opposition leader Juan Guaidó as interim president — prompting Venezuela to expel all remaining US personnel.

### The Sanctions War

Since 2005, Washington has imposed twelve distinct rounds of sanctions — one of the most comprehensive economic warfare campaigns in the Western Hemisphere.

Trump's "maximum pressure" strategy between 2017 and 2020 blocked Venezuela from US financial markets and targeted its state oil giant, PDVSA. Sanctions also hit the gold, mining, and banking sectors. Oil export revenues collapsed from $4.8 billion in 2018 to just $477 million by 2020.

Yet Maduro remains in power. The Biden administration briefly lifted some sanctions in October 2023 in exchange for electoral reforms, only to reimpose them in April 2024 when Caracas failed to comply. Trump's second administration has since gone further, implementing secondary sanctions — targeting any nation purchasing Venezuelan oil — and raising the bounty on Maduro's head to $50 million.

Today, Washington maintains 431 sanctions designations on Venezuelan individuals and entities, including 88 individuals and 46 companies. The humanitarian cost has been catastrophic, but regime change remains as elusive as ever.

> ***"This confrontation did not arise overnight. It is the culmination of nearly three decades of US intervention in Venezuela."***

### "Drug Lord" Diplomacy

In his second term, Trump has changed tactics. While still declaring Maduro illegitimate, he now frames Venezuela's leader less as a dictator and more as a criminal — a drug lord threatening American lives.

The new campaign has labelled several Venezuelan groups as terrorist organizations, carried out strikes against alleged drug boats, and further cut off diplomatic contact with Caracas.

Since 2002, the US has supported or been directly involved in at least five coup attempts or military operations. The most notable include Operation Freedom (April 2019), when Guaidó's attempted uprising collapsed within hours, and Operation Gideon (May 2020), when former US Green Beret Jordan Goudreau led a botched mercenary invasion with sixty Venezuelan dissidents and two American ex–Special Forces operators. Venezuelan forces swiftly crushed the assault — dubbed the "Bay of Piglets" — killing six and capturing the rest.

Now, in 2025, the Trump administration has gone further than ever before — deploying eight warships, over 4,000 personnel, and a nuclear submarine to the Caribbean, marking the largest American military buildup near Venezuela in decades.

Parallel to this, Washington continues to fund opposition movements through the National Endowment for Democracy (NED) and related organisations.

Legally, the administration justifies its escalating posture by classifying Venezuelan officials as "narco-terrorists." The 2020 US federal indictment of Maduro accused him of leading the "Cartel de los Soles" — allegedly using cocaine *"...as a weapon against America."*

### After Thirty Years of Failure

Three decades on, Maduro still rules Venezuela. The country's alliances with Russia, China, and Iran have deepened, while its economic collapse and humanitarian crisis have only worsened. Each US intervention, from coups to sanctions, has tightened Maduro's control rather than weakened it.

### The Dissent Within

Not everyone in Washington agrees with Trump's aggressive approach. Senior US officials have questioned both the scale of Venezuela's role in the global drug trade and the justification for military action. Many dissenting officials have resigned or been dismissed.

Trump insists that military force is essential to stopping "narco-terrorists" smuggling a "...deadly weapon poisoning Americans." He claims that "...every boat…" sunk off Venezuela's coast is "...stacked with bags of white powder — mostly fentanyl — that kills 25,000 on average."

But US intelligence and drug agencies dispute this narrative. Most of the vessels targeted operate between Venezuela and Trinidad and Tobago — a route used primarily for marijuana and cocaine shipments bound for West Africa and Europe, not the United States. According to the US Drug Enforcement Administration (DEA), 90% of cocaine entering the US comes through Mexico, and Venezuela is not a source of fentanyl.

The 2025 UNODC World Drug Report confirms that Venezuela "...has consolidated its status as a territory free from the cultivation of coca leaves, cannabis, and similar crops," with only 5% of Colombian drugs transiting through its borders.

Moreover, a classified memorandum from the Office of the Director of National Intelligence (ODNI), dated April 7th, 2025, contradicts the administration's narrative. Summarizing assessments from all 18 US intelligence agencies, it concludes that "the Maduro regime probably does not have a policy of cooperating with the TDA (Tren de Aragua) cartel and is not directing its movements."

In short, US intelligence itself disputes Trump's claim that Maduro leads the Cartel de los Soles or directs narcotics operations against the US — making the administration's case for military escalation even weaker.

### A War Waiting to Happen

Trump may continue to present himself as an anti-war president, but his actions tell another story. His Venezuela policy blurs the line between counter-drug operations, coercive diplomacy, and outright war.

With aircraft carriers stationed off the Venezuelan coast, sanctions tightening, and domestic dissent within his own government mounting, Trump now faces a pivotal choice: to pull back from another quagmire or repeat the cycle that once turned Iraq into America's longest mistake. If history is any guide, Washington's road to war often begins with just such denials.

# Conclusions

As the US celebrates its 250 year anniversary its empire, place in the world and credibility are all in flux. Whilst the US remains globally dominant, it is erratic, transactional and not viewed as a reliable ally. This all takes place with China's credibility rising around the world, especially outside the western world. Trump's personalised style of ruling is widening domestic tensions, rather than solving them and this will likely take up considerable time of the government as its challenges globally increase.

## 2026

**MAGA rupture -** Trump's support base is fracturing over Israel, war, immigration and Jeffery Epstein. This base has been a reliable electorate for Trump on two occasions, but just one a year into his second term the fractures are only getting larger. Trumps challenge is he has opposing supporters in his camp, from pro-Israel to anti-Israel supporters. In 2026 Trump will face the prospect of having to deliver for his donors verses fulfilling the wishes of his supporter base who want to see the opposite of what he's doing.

**Making Russia Kneel -** Trump made major promises of ending the Ukraine war in 24 hours, but a year on this has been a major failure. He failed as Russia refuses to play ball as it has the upper hand in Ukraine and sees Ukraine as an existential issue. Trump's problem is he's revealed his hand, he is prepared to force Ukraine to give up land and cut arms transfers to please Russia and get it on side. But Russia has still not come to any agreement. In 2026 Trump has his work cut out to use Ukraine to get Putin on side.

**US soft power -** The US spent decades building its soft power. The American dream , Hollywood, free trade, freedom of expression were all values many in the world wanted and looked up to the US for having. But Trump has slaughtered these sacred cows and embraced transactionalism, nationalism and short-termism. The US is now down to its hard power, its soft power has been buried. In 2026 the US only has its hard power to bend others.

# Russia

# Ukraine: 4 years in 2026

On 24th February 2026, the war in Ukraine will reach its fourth anniversary. Russia's disastrous start to the war back in 2022 and Ukraine's surprise at halting Russia's war machine is now a distant memory. Even before Trump's second presidency in January 2025, America's contribution and interest was declining, Trump's White House bullying of Zelensky on his visit in February 2025 was just the culmination of this trend. Russia has been on top in the war from 2023 and whilst the end to the war still remains a distant prospect, Russia is in pole position to resource and finance the war effort.

## The Economics of War

Stalin famously said wars are not won on the battlefield, but in the factories. The Kremlin has now reoriented its economy to ensure it can support the war effort for the long term.

The Kremlin massively increased the defence budget by redirecting a large portion of its federal budget to defence, security and military-industrial production. The war-related budget and quasi-budget injections from 2022–24 exceeded 10% of GDP. Russia has directed civilian enterprises into war-related production, with factories running round-the-clock, state enterprises given priority, and a "two-speed economy" emerging, one speed for military-defence, another for civilian.

Russia has continued to rely heavily on oil and gas exports to generate the foreign exchange and revenue necessary to fund the war economy. Russia has for long got around western sanctions by replacing exports to Europe with India, Turkey and China.

Russia has been forced to accept trade-offs with this approach. The civilian economy has not grown, labour shortages are increasing and the Kremlin has increased social controls to ensure the population doesn't take to the streets.

Russia is facing economic challenges, but Ukraine is facing much bigger issues. The IMF revealed that the situation is far worse than projected. Ukraine has received $145 billion in international aid since the war began, and they have a massive budget deficit they cannot repay. The Ukrainian economy is completely dependent on foreign assistance.

Russia's economy, despite sanctions, hasn't collapsed, as western officials keep arguing.

## Manpower

In conventional wars the manpower to fight the war is critical for eventual victory. In the war with Ukraine, despite Russia's higher rate of personnel losses, its large population means it will remain in this high intensity war, despite Ukraine's best efforts. Russia has managed to recruit over half a million troops into the army, something Ukraine will struggle to ever achieve.[5] The Russian military continues to recruit significant numbers of new personnel: nearly 40,000 during the second quarter of 2025.

Despite Russia's bad start to the war and Ukraine's offensives and operations to capture Russian and recapture Ukrainian territory, success is now a distant memory. In the famous Kursk offensive where Ukraine captured some Russian territory, when this was finally recaptured by Russian forces, Ukraine lost many men and much equipment in an offensive operation that ultimately gained it little or nothing other than fleeting Western headlines.

Whilst there are no official numbers for war losses from Russia, Ukraine faces a much bigger problem when it comes to manpower. Ukraine is running out of soldiers to fight the war. Millions have left the country, hundreds of thousands have avoided the draft, and, worst of all, hundreds of thousands have been killed or seriously injured. Back in 2023, a close aid to Zelensky had complained that, even if Ukraine had all the weapons they needed, they *"...don't have the men to use them."*[6] Two years later, the situation is far worse

## Weapons of War

Whilst we keep hearing in the Western press that the West can make up for Ukrainian weaknesses in terms of manpower with more weapons, Russia is now producing more weapons than it needs to fight the war effort. It has doubled its production of artillery, drones, armored vehicles and tanks. No longer producing just what it needs, Russia is poised to restart arms exports in a meaningful way, with there being reports that Algeria may become the first foreign operator of the SU-57 aircraft by 2026, receiving 14 such aircraft during 2026-7.

Russia is not just producing more weapons, it is producing improved weapons. Russia is passing Ukraine in the race for more sophisticated drones and more sophisticated ways of defending against drones. It is also using them in increasingly sophisticated ways that better co-ordinate with other arms. It has also upgraded its ballistic missiles to evade the best air defences Ukraine has, including American made Patriot systems. Russian ballistic missiles now seem capable of performing last minute changes of course and dives that confuse Patriot interceptors. A report produced by the U.S. Defense Intelligence Agency concludes that the Ukrainian armed forces are now "*...struggle[ing] to consistently use Patriot air defence systems to protect against Moscow's ballistic missiles because of recent Russian tactical improvements.*"[7]

With Ukraine cut off from the flow of American weapons, Ukraine is dependent on what it can produce for itself and what an economically troubled Europe can provide. That has left it depleted of weapons to prosecute the war and even more depleted of air defences to defend it. This is why Zelensky asked Trump for Tomahawk missiles.

## Territory

Russian forces have not made decisive advances on the battlefield in 2025 but they have been making gains more quickly than at any point in the war since early 2022. The increasingly thinly stretched Ukrainian frontline is becoming more porous and vulnerable with the danger of collapse still looming in the background. For the first time in years, the Russian armed forces broke through, in 2025 key defensive positions, and logistical hubs critical for the Ukrainian armed forces to supply their troops in the East and have been partially infiltrated and all but surrounded, challenging the Ukrainian armed forces's ability to supply their troops.

## The Future

The possibility of a Ukrainian victory is as dim as ever as we approach the 4-year anniversary of the war. Russia has adapted, reorientated, resourced and planned for the long haul. As Russia has its own economy, defence industry and resources it's in a position to determine how it will fight the war. Ukraine on the other hand depends on western handouts to stay in the war. President Trump from his election campaign wanted to get out of the war and began direct talks with Russia to achieve this.

In his meeting with Zelensky on 19th October 2025 Trump told Zelensky the best way to end the war in Ukraine would be to *"...cut up..."* the country's Donbas region in a way that would leave most of it under Russian control, *"Let it be cut the way it is,"* Trump told reporters aboard Air Force One. *"It's cut up right now..."* that you can "*...leave it the way it is right now. They can negotiate something later on down the line. But for now, both sides of the conflict should stop at the battle line – go home, stop fighting, stop killing people.*"[8] Such comments are music to the ears of the Russians.

**Territorial Control of Ukraine, Dec 2025**

# Can Russia Keep a Foothold in Syria?

In October 2025, Syria's leader, Ahmad al-Sharaa, visited Russian President Vladimir Putin in Moscow, in his first state visit to Russia since taking control of Syria in December 2024, following the ouster of Russia's ally, former leader Bashar al Assad. After a decade of support and spending significant treasure, Russia was left reeling and could do little when the regime it was maintaining collapsed. This now presents significant challenges to Moscow as Syria played a key role in the supply line that goes from Russia all the way to Africa.

Moscow developed relations with Syria during the Cold War when the Soviet Union engaged in a confrontation with the US in the Middle East. Moscow supported Communist movements in the Middle East and carried an anti-Israeli policy to align with nationalist, Middle Eastern regimes. Moscow attempted to provide military equipment and arms along with aid in exchange for influence, Egypt and Syria became the mainstay for this policy.

The Soviet Union equipped and trained the Syrian military and in subsequent years the Soviets provided military platforms and arms. Under Hafez al-Assad, a naval base in Tartus was opened and this was considered the height of Soviet influence in the Middle East. But despite deep military relations, Syria was never a Soviet proxy. Under Hafiz al-Assad Moscow and Damascus did not have the same views on many issues. He was difficult to control and managed to get more from the Kremlin than the other way around.

After the collapse of the Soviet Union in 1991 the US worked with Syria, who played a key role for US interests in the region. Syria was the only non-monarchical state in the region to dispatch troops in the 1991 invasion of Iraq. In the 2003 invasion, Syria used its intelligence of the militant groups leading the insurgency in Iraq and passed this onto the US.

Following the end of the Cold War and the collapse of the Soviet Union, the Russian Navy suffered a steep decline in readiness and expeditionary capability. As a result, the Russian base at Tartus fell into a state of disrepair.

### Russia to the Rescue

The uprising in Syria began soon after other regional nations experienced uprisings from 2011. Very quickly the al-Assad regime doubled down, carrying out massacres. This only emboldened the people who had had enough of decades of oppression. As the uprising spread the army began to fracture with many officers joining the people. The al-Assad regime quickly found itself on the brink of collapse.

Russia intervened in Syria in September 2015, after the US and Russia put aside their long-standing differences. The US did this because in July 2015 Bashar al-Assad admitted in a televised speech before local dignitaries in Damascus, that the Syrian army had given up some areas of Syria, in order to fight elsewhere. *"It was necessary to specify critical areas* *for our armed forces to hang on to. Concern for our soldiers forces us to let go of some areas. Every inch of Syria is precious. There is a lack of human resources… Everything is available [for the army], but there is a shortfall in human capacity,"* Assad said.[9] This meant al-Assad's forces had been crippled to the point they had to give up some areas in order to defend others.

Russia's intervention in Syria proved to be pivotal in saving the al-Assad regime from collapse. Russian forces stabilised and strengthened President Bashar al-Assad's government by providing airpower and conducting airstrikes against rebel groups. Russia expanded and beefed up its air base in Khmeiem which also acted as a supply base for weapons, missiles and ordinance to be used to defend the al-Assad regime.

Russia's entry into Syria drove many of the rebel groups into the arms of regional powers and the US. But when Russia invaded Ukraine in 2022 and the difficulties it initially faced, its attention turned to its war in Europe and its position in Syria became secondary and fell in terms of priority. Russia's presence was never large in Syria, at its peak there were 5,000 security and military personnel in Syria, this was a small to medium operation for Russia.

***"when Russia invaded Ukraine in 2022 and the difficulties it initially faced, its attention turned to its war in Europe and its position in Syria became secondary and fell in terms of priority."***

From 2020 the regional Arab nations all began normalising relations with the al-Assad regime. For Russia, it had succeeded in defending and propping up the al-Assad regime and with the uprising all but over and with the regional nations welcoming al-Assad back into regional organisations, this allowed Russia to focus on its war in Europe whilst maintaining a small presence in Syria.

## From Moscow to Africa

Syria came to play a key role in Russia's presence in Africa. Tartus and the Khmeimim bases gave Russia a permanent Mediterranean military presence,


allowing Moscow to provide supply lines into Libya, the Sahel, and West Africa without needing Atlantic basing rights. Most Wagner deployments to Africa flowed via Latakia–Benghazi–Bangui–Bamako. Russia was able to rapidly move men, weapons and electronic warfare systems via Syria without relying on any African state for transit.

Without Syria, Russia's reach into Africa would have been much slower, riskier, and more reliant on African governments granting access. Syria gave Russia sovereign, permanent territory from which it could stage power southward. It was not just useful — it was foundational. If Syria was ever lost, then Russia's entire African expansion after 2017 would likely not have happened.

## Revolution

After the events of October 7th 2023, Israel began restructuring the region's security landscape and whilst it crippled Hizballah in Lebanon, it wanted to cut its supply line that ran from Iran, Iraq, through Syria into Lebanon and it had its sights on Syria to cut this supply line. Israel was able to convince the US of this strategy and what unfolded after 13 years of war in Syria was the crumbling of the al-Assad regime.

The US with Turkey organised the rebel groups in Syria to topple the al-Assad regime. The US organised the groups in the south of Syria by using the Revolutionary Commando Army (RCA), a group US Special Forces established to dismantle the so-called ISIS caliphate. The US continued to pay their salaries after ISIS had been ejected.


In the North of Syria, it was Türkiye that organised the rebel groups in partnership with the US. Türkiye had long maintained the military capabilities of the groups, including HTS. When the rebel groups stormed Aleppo on the 30th of November 2024 and eventually captured it they were organised into the Al-Fath Al-Mubin Operations Room, which was led by HTS under Turkish tutelage. When these Turkish backed factions moved onto Hama, they faced no opposition from regime forces, who were in disarray. Russia was forced to carry out airstrikes and Iran after more than a decade of war and reeling from its losses in Lebanon, Palestine and now direct war with Israel, was forced to call upon pro-Iranian groups in Iraq to intervene.

## Catch-22 for Russia

Russia provided air-support to Syrian forces to defend Aleppo and Hama, but these fell extremely quickly to rebel forces. After a decade of supporting the al-Assad regime, Russia was now heavily committed to the ongoing war in Ukraine, limiting its ability to send additional reinforcements to Syria. Ukraine was always more important to Moscow than Syria was ever going to be. Even with Russian air support, the Syrian army was unable to mount an effective counteroffensive. Despite Russian airpower, regime forces on the ground were capitulating en masse. Moscow had concluded, even before the fall of Damascus, that preserving its military assets was more important now than a prolonged battle with advancing rebels. Russia relocated its forces to Libya. After more than a decade of defending the al-Assad regime, Russia determined preserving and protecting its military assets was more important than defending the al-Assad regime.

On the 10th December 2024 Russia provided Bashar al-Assad and his family asylum in Russia. Al-Assad was flown out from the Khmeimim air base, bringing to an end the decades long, bloody and brutal regime of the house of al-Assad.

## Post al-Assad

Given the importance of Russia's Syria presence, for its aims in Africa, losing the al-Assad regime placed under threat Russia's presence in the country. But as the rebel forces took over Damascus and Israel carried out a wave of strikes that decimated the military and weapons systems of Syria, this weakened the new revolutionary government. It also meant they had little military capability to force Russia from its bases.

Russia continued to deliver oil and wheat to Syria after the fall of the al-Assad government in an attempt to maintain its military bases at Tartus and Khmeimim in Latakia. Russia eventually resumed printing Syrian currency banknotes when its currency collapsed.[10] Russia reduced its troop presence and equipment, including advanced S-400 air defence systems and today just maintains a skeleton crew and a few fixed-wing aircraft at both bases. This contrasts with Iran — al Assad's other key ally — who evacuated its troops from Syria in December 2024 as the regime crumbled. Iran now has no remaining bases in the country, despite over a decade of investments in building up military infrastructure there.

Syria's armed forces were decimated after 13 years of civil war and the intense Israeli air campaign that destroyed much of its remaining heavy weaponry shortly after al Assad's fall crippled the forces. In addition, deep internal divisions between ethnic groups like the Kurds, Druze and Alawites posed serious security risks to the provisional government, which was largely Sunni-dominated and led by former jihadi rebels. There have been numerous outbreaks of violence, with a high risk of further clashes as different ethnic groups seek to preserve their autonomy and defend against potential threats from al-Sharaa's government.

Damascus is thus poorly positioned to engage in a confrontational foreign policy with any military power, including Russia. Syria prioritised pragmatic ties with Russia, which has included leaving Assad-era diplomatic pacts intact, particularly regarding Russia's military bases in Syria. Damascus has also worked to improve personal relations with Russia's government to secure vital energy and food trade, crucial for the war-torn country still in dire need of reconstruction and awaiting full relief from US sanctions.

Ahmed al-Sharaa's visit to Moscow in October 2025 followed one in September 2025 by a high-ranking Russian delegation, led by Deputy Prime Minister Alexander Novak. What's become clear is Syria looks to Russia as another security counterweight against Israeli aggression. In this way, despite the fall of the al-Assad regime and despite the threat to Russia's Africa supply lines, the new regime wants to maintain Russian ties, relations and Russia's military presence in the country. So, Moscow has managed to adapt and now has friendly ties with the new regime in Damascus and in this way it will maintain its foothold in Syria.

Despite being on opposite sides in the brutal civil war that lasted well over a decade, now Russia and the former Jihadi regime are on the same side.


# Is Russia Losing the Caucuses

In August 2025 US President Donald Trump hosted Armenian Prime Minister Nikol Pashinyan and Azerbaijani President Ilham Aliyev at the White House, where the three leaders issued a joint declaration. The declaration was a draft peace agreement by Armenia and Azerbaijan, aimed at ending decades of conflict between the two countries. The OSCE Minsk Group and its associated mechanisms were also terminated and all three nations agreed to develop a 27-mile transit corridor across southern Armenia to connect mainland Azerbaijan with its Nakhchivan exclave. This route, locally known as the Zangezur Corridor, was rebranded as the Trump Route for International Peace and Prosperity (TRIPP). According to media reports, the United States was granted 99-year exclusive development rights over the route. The sides also affirmed mutual recognition of sovereignty, renounced future territorial claims and explicitly rejected *"...any attempt [at] revenge."*

Whilst the agreement is notable, what was also notable was the absence of Russia who has tried, unsuccessfully, to also end the conflict. Armenia and Azerbaijan sit along the Caucuses which has always been a key border for Russia and with the US brokering the peace deal, this is a major victory for the US.

## Geopolitics

The Caucuses is a critical piece of real estate that has historically drawn in major powers. The mountainous territory is the southern route to the core of Russia which has the Black sea on one side and the Caspian to the other side. The Caspian was where oil in commercial value was first produced and what turned Russia into an energy power.

The Caucuses is the only land bridge between Russia, the Middle East, and the Black Sea. Whoever controls the Caucasus can project power southward towards Iran, Turkey, Syria and westward into the Black Sea and Europe. It is literally the gateway through which Russia can reach warm water and influence major continental trade routes. The Caucasus is often described as Russia's underbelly, as the South Caucasus separates Russia from Turkey and Iran. Even when relations between them and Moscow are good, the three powers regularly compete to dominate the region and shape it into a buffer zone

The region carried geopolitical importance for three major Eastern powers: The Persian Empire, the Ottoman Empire and the Russian Empire. In the early 1800s, the region acted as a buffer zone between Orthodox Christianity and the Muslims of the Middle East. Russia's expansion into the Caucasus in the sixteenth century additionally carried economic considerations, evident in projects like the Trans-Caspian railway, which facilitated access to Central Asia and control over Caspian oil supplies. Next to its

geographical advantages, the Central Caucasus was a boon for natural resources. Besides petroleum, the region was rich in copper ore. The minerals also attracted foreign investors and as of 1870, Rothschild and Shell were extracting oil, while Siemens mined copper.

In time the Caucuses became an energy chokepoint. Oil and gas pipelines from the Caspian Sea to Europe run through the South Caucasus, especially Azerbaijan → Georgia → Turkey. These today bypass Russia.

After World War II, the Caucuses were behind the iron curtain, and both the US and USSR became preoccupied with their rivalry. The Soviet Union established its rule over Caucasian nations, the region once again became extraneous to the interests of international observers and witnessed its geopolitical role as a bridge for regional and international trade routes reduced to serving the southeastern border of Europe with Communist Russia and the Middle East.

### Independence

When the Soviet Union disintegrated in 1991 a number of new nations emerged in the former space of the USSR. As the 1990s turned into the 2000s some nations remained Russian allies, others formed new ties, more often than not with the West. In the Caucuses, when Moscow went to war with Chechnya, it tried to break away from Moscow and become an independent nation. Russia refused to let Chechnya become independent and what ensued was a decades long insurgency.

Russia established a number of institutions to succeed the Soviet Union. The first of these was the Commonwealth of Independent States (CIS). It comprised all of the former Soviet republics with the exception of the Baltic states, which sought out partnerships with the European Union and NATO after gaining independence. Though the CIS was meant to replace the political, economic and security cooperation that existed before the Soviet Union fell, the group became largely symbolic, and its members developed domestic and foreign policies on their own.

Though the CIS sank into irrelevancy, two of its subgroups emerged as Russia's premier integration blocs in Eurasia. One was the Collective Security Treaty Organization (CSTO), established in 2002 to focus on security and military matters. It consisted of Russia, Belarus, Armenia, Kazakhstan, Kyrgyzstan and Tajikistan. The other is the Eurasian Economic Union, which debuted in 2015 as the natural progression of the 2010 Customs Union formed between Russia, Belarus and Kazakhstan.

In the Caucuses, Azerbaijan and Georgia both looked towards the West for their future. Azerbaijan became the location for a number of new pipelines that would take Capsian energy to Europe that would circumvent Russia. Georgia also aligned with the West when Mikheil Saakashvili became Prime Minister in 2004. But Russia's invasion of the country in 2008 ensured it did not completely leave Russia's orbit.

### The Nagorno-Karabakh Stand-off

Following the breakup of the Soviet Union, the enclave of Nagorno-Karabakh became a battleground for the newly independent states of Azerbaijan and Armenia. Armenia declared Nagorno-Karabakh, which had a majority ethnic Armenian population, part of its territory, while Azerbaijan claimed it as its own. But Armenia never had the capability to support the ethnic Armenians there. As Russia began

to secure its former republics when Vladimir Putin emerged as leader in 1999 Russia supplied the Armenians with diplomatic, economic and military help in order to safeguard Russian interests. For Russia this area became even more important as Azerbaijan received recognition and support from the West who were also looking to gain influence within the former Soviet territory.

In 2020 Armenia and Azerbaijan went to war for six weeks and on this occasion, Azerbaijan achieved a resounding victory. Azerbaijan had been to war with Armenia twice previously and lost. But on this occasion the Azeris prevailed with Turkish military help and guidance utilising conventional tactics and assembling a small coalition of ground forces to neutralise Armenian positions.

Despite Russia's support, Armenia was forced to cede territory to Azerbaijan. Russia notably failed to come to Armenia's aid when Azerbaijan attacked it over the enclave. To the shock of Armenia, they watched in horror as Russia began a rapprochement with Azerbaijan in 2023. This even included the construction of a north-south trade route, which bypasses traditional European routes that were closed to Moscow. The decision to withdraw Russian peacekeepers from Nagorno-Karabakh ahead of schedule, further proved to Armenia that Russia was now an unreliable ally.

This all culminated in the August 2025 meeting at the White House where President Donald Trump hosted both nations' leaders, with the notable absence of Russia. Armenia and Azerbaijan's decision to accept US mediation was due to Russia's diminished presence and attention. For Armenia, the erosion of Russian security guarantees, combined with long-standing economic isolation amid its closed borders with Turkey and Azerbaijan, has driven it into the arms of the US.

This has, in turn, tilted the balance in favour of frameworks that involve US stewardship, which the Trump administration has capitalised on to gain a foothold on the Caspian-Turkey corridor, reorient Azerbaijan and Armenia toward Western markets, and further curb Russian influence. With Russia's eyes and attention on Ukraine it's been blindsided by the US in its own periphery. Russia can exploit Armenia's energy dependence and its membership in the Eurasian Economic Union to regulate, delay or disrupt the deal, but its relations with Armenia have taken a major hit.

# Russia: Between China and the US

As 2026 begins, Russia sits uneasily between the world's two dominant powers. Its war in Ukraine has entrenched long-term hostility with the US and Europe, while simultaneously deepening its strategic dependence on China. Yet Moscow is neither a passive junior partner nor a fully aligned ally. Instead, Russia is pursuing a balancing strategy: leveraging China to withstand Western pressure while quietly seeking selective engagement with the US to avoid becoming irrevocably subordinated to Beijing.

US strategic thinkers have for long called for a Reverse Nixon, where the US wins Moscow and dilutes the Sino-Russian relationship, similar to how the US succeeded in the Sino-Soviet split in the past. This triangular dynamic is one of the defining geopolitical realities of the global situation.

## Why Russia Needs China

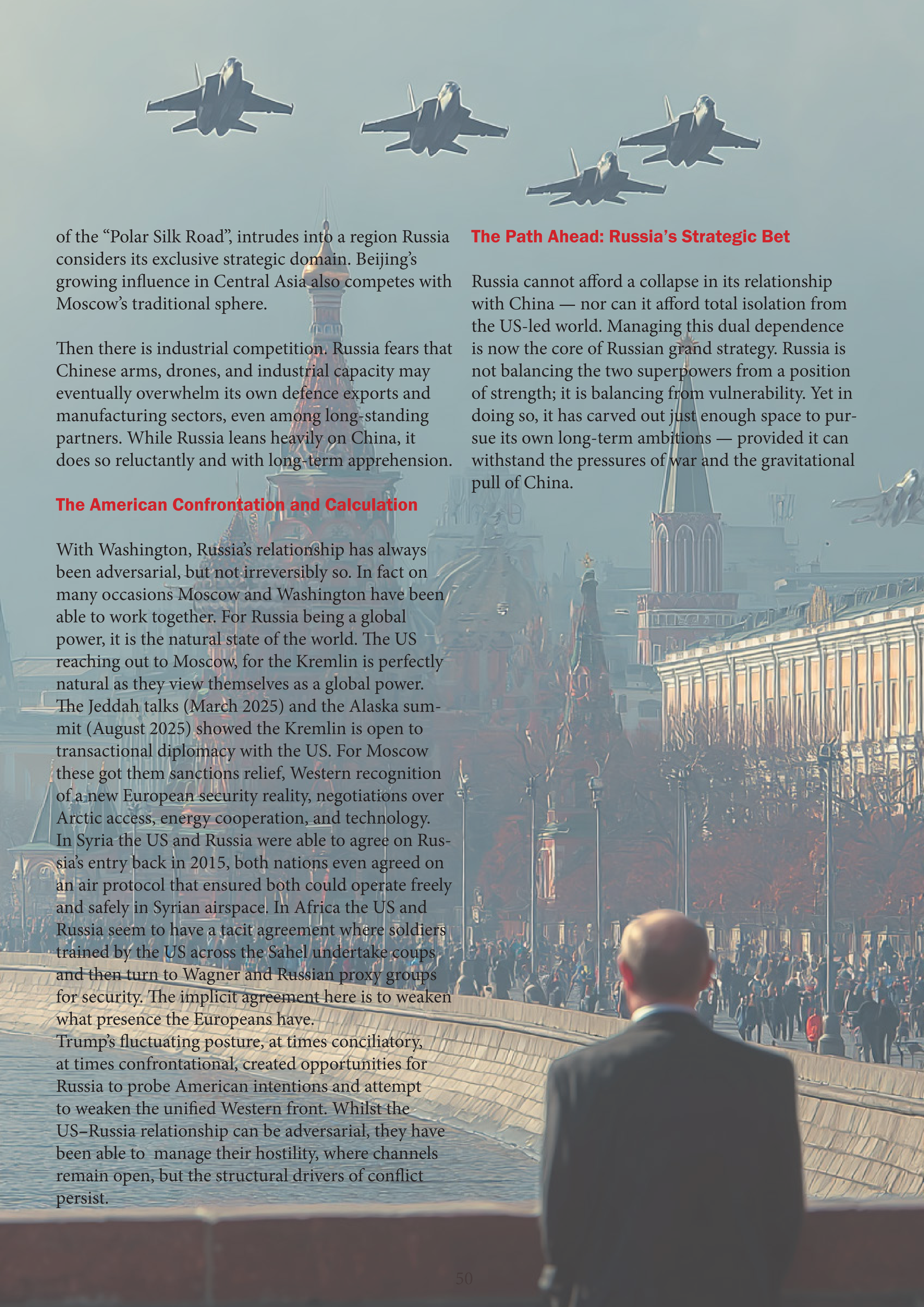
The Western sanctions regime has pushed Russia into China's economic orbit far more rapidly than the Kremlin ever intended. Moscow's survival during the war has hinged on Beijing's willingness to provide:

- **Lifeline trade:** China is now Russia's largest trading partner by a large margin, absorbing discounted oil, gas and commodities.
- **Technology access:** Chinese dual-use goods — microelectronics, manufacturing equipment, industrial components — now underpin Russia's wartime production.
- **Financial resilience:** Yuan-denominated trade, alternative payments networks, and Chinese banks have softened the blow of Russia's exclusion from SWIFT.
- **Diplomatic cover:** China's refusal to condemn the invasion has prevented Russia's international isolation from becoming total.

The relationship is fundamentally asymmetric. China gains cheap energy, strategic leverage, and a dependent northern partner; Russia gains the means to wage a long war. In this context Beijing holds far more cards.

Despite its reliance, Moscow is increasingly wary of becoming China's geopolitical appendage. There is the real possibility Russia comes to overdepend on China. A Russia isolated from the West risks becoming a resource exporter tied entirely to Chinese demand. The Kremlin understands the danger of replacing one dependency (Europe) with another (China), especially a partner with vastly greater economic power.

There is also unease over the Arctic and Far East. China's expansion into the Arctic, under the banner



of the “Polar Silk Road”, intrudes into a region Russia considers its exclusive strategic domain. Beijing’s growing influence in Central Asia also competes with Moscow’s traditional sphere.

Then there is industrial competition. Russia fears that Chinese arms, drones, and industrial capacity may eventually overwhelm its own defence exports and manufacturing sectors, even among long-standing partners. While Russia leans heavily on China, it does so reluctantly and with long-term apprehension.

## The American Confrontation and Calculation

With Washington, Russia’s relationship has always been adversarial, but not irreversibly so. In fact on many occasions Moscow and Washington have been able to work together. For Russia being a global power, it is the natural state of the world. The US reaching out to Moscow, for the Kremlin is perfectly natural as they view themselves as a global power. The Jeddah talks (March 2025) and the Alaska summit (August 2025) showed the Kremlin is open to transactional diplomacy with the US. For Moscow these got them sanctions relief, Western recognition of a new European security reality, negotiations over Arctic access, energy cooperation, and technology. In Syria the US and Russia were able to agree on Russia’s entry back in 2015, both nations even agreed on an air protocol that ensured both could operate freely and safely in Syrian airspace. In Africa the US and Russia seem to have a tacit agreement where soldiers trained by the US across the Sahel undertake coups and then turn to Wagner and Russian proxy groups for security. The implicit agreement here is to weaken what presence the Europeans have.

Trump’s fluctuating posture, at times conciliatory, at times confrontational, created opportunities for Russia to probe American intentions and attempt to weaken the unified Western front. Whilst the US–Russia relationship can be adversarial, they have been able to manage their hostility, where channels remain open, but the structural drivers of conflict persist.

## The Path Ahead: Russia’s Strategic Bet

Russia cannot afford a collapse in its relationship with China — nor can it afford total isolation from the US-led world. Managing this dual dependence is now the core of Russian grand strategy. Russia is not balancing the two superpowers from a position of strength; it is balancing from vulnerability. Yet in doing so, it has carved out just enough space to pursue its own long-term ambitions — provided it can withstand the pressures of war and the gravitational pull of China.

## Conclusions

As the Ukraine war edges closer to its 4-year anniversary, Russia has adapted and managed to turn the tide in the Ukraine war. It has managed to replace the European energy export market with China and reconstructed its economy into a war economy. But as Russia has achieved this, its dependency has increased and this does not bode well for its future. Russia considered itself a global power who can go toe-to-toe with the West. As the war in Ukraine rages on these issues will only get deeper and broader for Russia, which will force it to possibly abandon issues further from Russia's border.

## 2026

**Between the periphery and beyond -** With the war in Ukraine close to its 4-year anniversary, it's taking up significant resources and the longer the war goes on Russia will be forced to determine which issues to prioritise. Unless Russia can quickly achieve a suitable outcome in Ukraine, the longer the war goes on the more acute the resources needed will drain the war effort impacting Russia's global position.

**Where's the Eastern bloc -** For nearly two decades Russia along with China have been promoting an alternative bloc to the world's established, western dominated blocs. But in 2026 a lot of this remains aspirational and real tangible outcomes that impact the world remain to be seen. Unless this changes in 2026, Russia will be forced, like China, to rely upon its own power rather than utilise the advantage of an alliance structure.

**How does the Ukraine war end? -** What is Russia's ideal outcome in Ukraine that is both achievable and allows Russia to secure its strategic interests. Russia claims it occupies 20% of Ukraine, from the Donbas down to Khersan in the South. Russia does not fully control these areas, but it controls most of the territory. Russia has controlled most of this 20% for over 2 years and has not been able to expand or acquire more territory. In 2026 it remains to be seen if this is the best Russia can achieve and if this gives it the buffer it so desperately needs.


Chi

# China Stands up to Tariff War

When Donald Trump took office in January 2025, he proceeded to immediately target China, something he long argued for. The trade war began under Donald Trump's first term and Joe Biden expanded it to include technology and imposed further restrictions. China's response has been to engage in talks to de-escalate tension with the US. But now the gloves are off and a full-blown trade war is now in full swing and China has played its cards wisely.

One of the first things China has done is to not capitulate to US demands. China has in fact learned to escalate and retaliate as effectively as America. Trump opened his second term with aggressive tariffs, imposing a 10% duty on all Chinese imports in February 2025, citing trade deficits and fentanyl concerns. By April, he escalated further, announcing sweeping reciprocal tariffs that sent rates on Chinese goods soaring to 145%, effectively an embargo. Beijing countered with 125% tariffs on US exports, targeting agricultural machinery, coal, and liquefied natural gas, while also launching an antitrust probe into Google, signalling its readiness to use regulatory power as a weapon. This plunged global markets as recession fears grew and supply chains faltered. By May 2025 both sides met in Geneva, Switzerland and the US agreed to a 90-day truce. The White House announced tariffs would be cut by 115%, leaving a 105% baseline. The effective US tariff on Chinese goods fell from 145% to 30%, while China's rate on US goods dropped from 125% to 10%. China succeeded in forcing the US to the table.

Similarly, after President Trump imposed a levy on Chinese container ships arriving at American ports, China responded with its own port charges. China threatened antitrust investigations to put pressure on American firms such as DuPont, Google, Nvidia and Qualcomm. Its refusal to buy American soyabeans—a $12 billion market for midwestern farmers led to talks of a bailout for the industry.

China's response has also included shifting its export markets. For long the US was China's largest export market, China has shifted the geography of its trade. In the year to September 2025, China's goods exports grew by over 8%, even as those to America fell by 27%.

> ***"One of the first things China has done is to not capitulate to US demands. China has in fact learned to escalate and retaliate as effectively as America."***

China's threats to limit rare-earth exports has caused fear as it dominates the market and could cripple Western manufacturing supply chains. But this was also remarkable because they show China trying to impose a system of global licensing. Now anyone who has over 1% of rare earth elements processing in China needs to get a licence. This is the same playbook America has used to control the semiconductor industry.

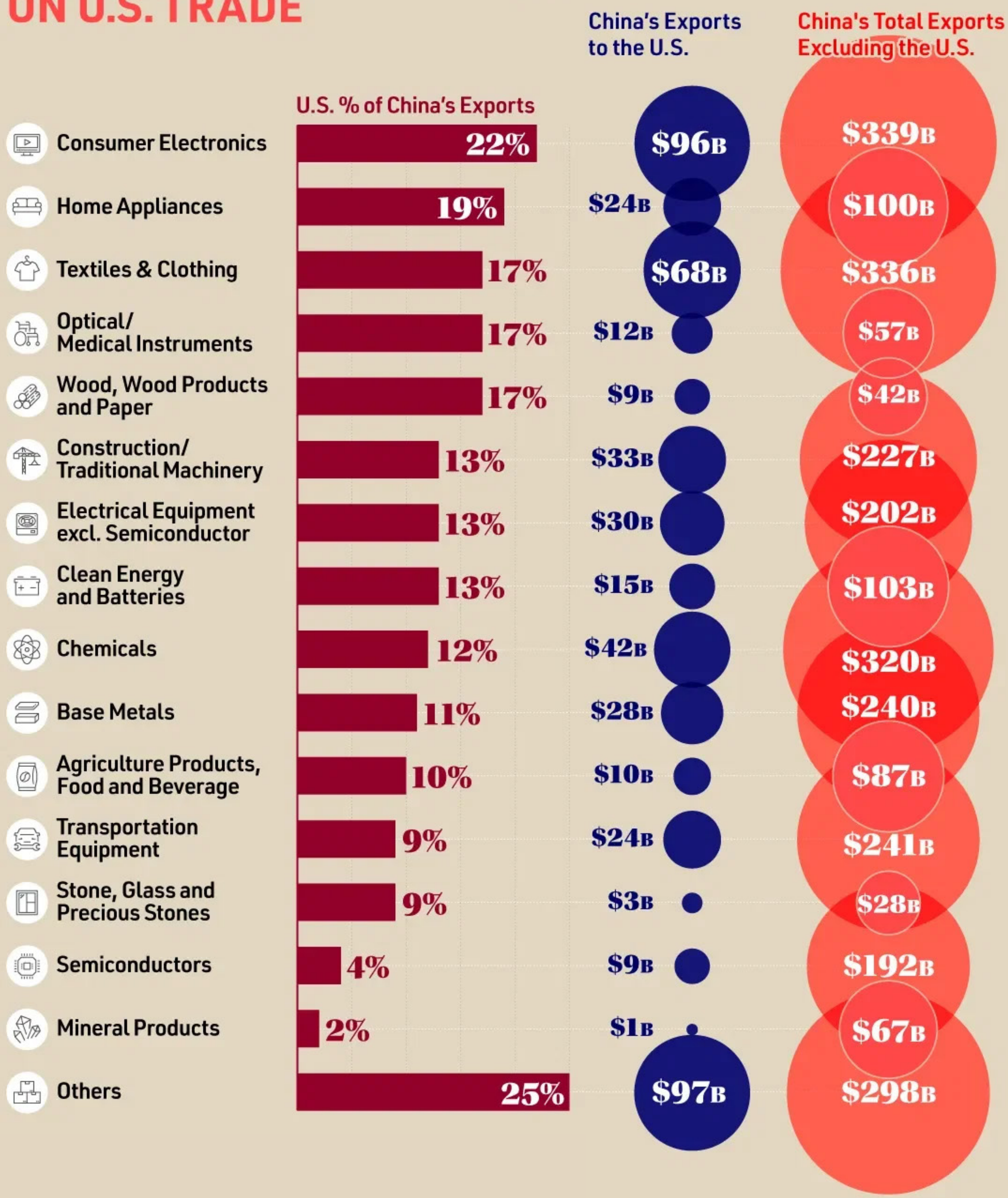
China has also responded in kind to export restrictions and the blacklisting of thousands of Chinese companies. Beijing retaliated by accusing Nvidia of antitrust violations and then announcing sweeping export controls on rare earth elements. The measures expanded licensing for 12 of the 17 rare earth metals and restricted the export of refining equipment and related technologies. Foreign companies would be required to obtain licenses for any product containing more than 0.1% Chinese rare earth content, with all military-related exports outright banned.

> **“As far as China is concerned, they do not want to fight, but will do so if they are pushed.”**

By October 2025, when Trump and Xi met at the APEC summit, Trump began to strike a conciliatory tone on Truth Social: *“Don’t worry about China, it will all be fine! Highly respected President Xi just had a bad moment … The U.S.A. wants to help China, not hurt it!!!”*

China has not backed down but responded in kind to each US provocation. What has become clear is many of Trump’s policies had not been fully thought through and their implications considered. This is why Trump has done a number of U-turns and truces and earned the title TACO – Trump Always Cops Out. What the Trump administration is finding out is that China has numerous tools at its disposal to hit back at the US. As far as China is concerned, they do not want to fight, but will do so if they are pushed.

# China's Dependence
## ON U.S. TRADE



# Was China the winner in the India-Pakistan War?

In May 2025 India and Pakistan engaged in their latest war that lasted four days after the US and the international community forced a ceasefire. The most notable part of the war was Pakistan's ability to dominate the airspace of Kashmir and the fact it downed a number of Indian jets. India has for long been buying up western technology whilst Pakistan has had a long relationship with China that included regular supplies of Chinese military equipment. The war is the first test case between high-end Chinese and Western military hardware, which reveals many insights of China's military ascent.

Pakistan had for long relied upon US supplies of military hardware, something that goes back to its Cold War role in the region. But with the US imposing a number of restrictions over the decades, Pakistan turned to China to fill the gaps. This began after Pakistan's 1965 war with India, where the US placed sanctions on Pakistan for using US supplied military equipment against India, something the US expressly prohibited. China quickly became a supplier of cheap and high quantities of fighter jets, tanks and missiles for Pakistan. As China's military rapidly modernised Pakistan has received and partnered with China in developing new platforms, with the JF-17 being a result of this alliance.

India on the other hand had long been supplied by the Soviet Union and then Russia. But after the collapse of the Soviet Union in 1991 and India's opening during the era of globalisation it also turned to western suppliers to modernise its armed forces. India turned to France and the US to replace its aging military platforms. Whilst India maintained its relations with Russia, the country continued to be a large supplier to India's military industry the trend was moving towards India being kitted out by the west.

### Cheap supplier

China received significant help from the Soviet Union in developing its military after WW2. China was able to develop a nuclear programme and missile systems with Soviet technical help. But after the Sino-Soviet split Moscow withdrew such support and ever since China developed new versions of Soviet tanks, jets, missiles and other equipment. The Chinese military doctrine for long rested on a huge ground force with cheap and not very sophisticated military systems, the Chinese believed they would always have more troops than its enemy would have bullets. After the collapse of the Soviet Union and the Revolution in Military Affairs (RMA) throughout the 1990s it became clear to the Chinese that its military was completely out of date with the modern era of threats. The Chinese military, which was a huge ground force with an outdated air force and navy that would stand little chance as was seen when the Iraqi army's defeat in the first Gulf War in 1991, who, was also based on a similar doctrine like the Chinese. Iraq was crippled with the latest tech and precision guided missiles (PGM).

### Modernisation

China began modernising its forces in the 1990s and the success of this has been seen with the development of modern fighter jets, sea vessels and a complete overhaul of its command, control, intelligence and reconnaissance (C4ISR) systems. This ascent has for long received significant western attention and the 4-day war between Pakistan and India became the first real world test case study of this.

### All Weather Allies

The war began with airstrikes from India, which India officials argued was a response to the attack at Pahalgam on 22nd April 2025, by what India says was by "terrorist infrastructure" inside Pakistan. India used its Rafale fighter jets, the Pakistan Air Force deployed its Chinese-supplied Chengdu J-10 Dragon jets, following their purchase in 2021, in the aftermath of the India-Pakistan skirmishes in 2019, when Pakistan shot down two Indian military aircraft. Pakistan shot down a number of Indian aircraft, including France's crown jewel military asset – the Rafale fighter jets. Whilst the numbers downed seem to be subject to speculation, this has now become the first combat loss of a Rafale jet anywhere in the world, a symbolic victory for China.

Pakistan was able to achieve this due to China's advanced PL-15 air-to-air missiles that played a central role in the conflict. Debris recovered on the Indian side of Punjab reportedly included identifiable remnants of the missile, including one largely intact PL-15, providing clear indications of its deployment. Pakistan's Air Force also released a video on social media confirming the integration of the Chinese advanced missiles as the 'potent punch' for the PAF. A report by RUSI compared the PL-15s to the US's AIM-120C/D (AMRAAM), claiming that the Pl-15 "outranged the latest AIM-120D model". The AMRAAM is one of the United States' flagship beyond-visual-range (BVR) air-to-air missiles, procured by over 40 countries and integrated into nearly all major Western and NATO aircrafts – from the F-15, F-16, F-22 and the F-35A, as well as the Eurofighter Typhoons.

The war showed Pakistan now relies on Chinese military hardware — a change from the past, when US equipment was often at the heart of Pakistan's arsenal. Pakistan is now able to integrate a range of Chinese platforms – from the J-10Cs and PL-15 missiles, to Chinese air-defense systems, drones, and radar networks. The conflict showcased for the first time the operation of so many Chinese military systems in a live and high-intensity environment.

India, in comparison, operated a patchwork of platforms: Russian air defence systems, French fighter jets, Israeli drones, and US artillery shells – each with different technologies and frameworks. This patchwork complicated technical integration, particularly as many systems are not built to operate seamlessly together or communicate effectively in a fast-moving situation. Operational coordination thus becomes more complex, particularly in situations where split-second decisions were dependent on interoperable equipment.

> ***"Whilst the numbers downed seem to be subject to speculation, this has now become the first combat loss of a Rafale jet anywhere in the world, a symbolic victory for China."***

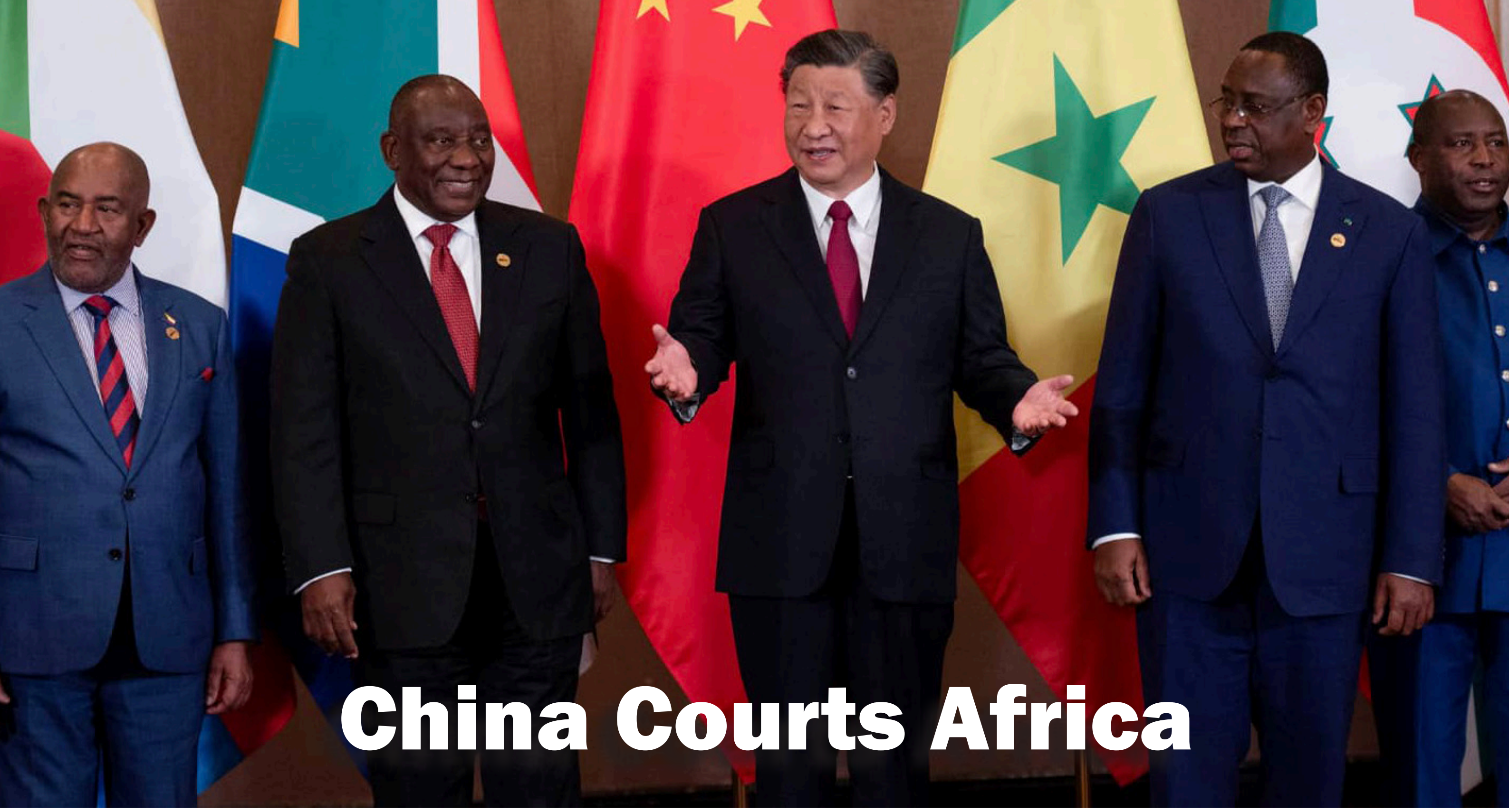
In the immediate aftermath of the conflict, shares of AVIC Chengdu Aircraft Co.—maker of the J-10C fighter jet— surged over 20%, while Dassault Aviation, the European manufacturer of the French Rafale, saw its stock tumble more than 6%.

What this war has done for China is it forced many to reassess China's military capacity and its potential to rise as an arms exporter. The war is being called China's 'DeepSeek Moment' – one that showcased China's defence capabilities on a global stage, just as DeepSeek did in generative artificial intelligence. Selling more warplanes and missiles in the Global South is not only a lucrative business, but also one that strengthens the Chinese footprint globally.

For China, this encounter reflected a rare glimpse on how their military systems, from fighter jets to missile platforms, might perform against Western designs, and in particular advanced Western military platforms – a scenario particularly relevant to potential flashpoints like the Taiwan Strait and the South China Sea.

The India-Pakistan May 2025 conflict revealed China can kit out foreign militaries who can then win wars against their adversaries, even if they are kitted up by western military platforms. This was not just a clash between the nuclear neighbours, but a preview of the central contest in modern geopolitics. For the West their technological and strategic superiority now has a competitor.


***"The conflict showcased for the first time the operation of so many Chinese military systems in a live and high-intensity environment. The war is being called China's 'DeepSeek Moment' – one that showcased China's defence capabilities on a global stage, just as DeepSeek did in generative artificial intelligence."***



# China Courts Africa

Africa is now a battle ground between global powers. The Europeans in the past used the continent for resource extraction and then during the Cold War both the US and the Soviet Union saw the continent for their respective ideologies and supported the wave of decolonisation. Russia has continued to maintain relations with the continent and now China is deepening relations as the continent has become a supplier of mineral and energy for the Chinese economy.

Africa is located beyond China's immediate neighbourhood. As a result African governments do not have any territorial disputes with China and largely welcome Chinese engagement. While China's relations with Africa were dominated by ideological imperatives in the early days, Beijing has focused on advancing its economic interests and winning political legitimacy in recent years. China has presented itself as a reliable and balanced partner for the Global South and Africa in particular which is challenging long held views on the continent that there is an alternative to the western world for economic and infrastructure development.

## Ideology

China's modern-day relations with Africa began in the middle of the 20th century. At the time, Chinese foreign policy was based on Mao Zedong's Three Worlds Theory, which sought to counter imperialism, promote national independence, and facilitate cooperation among countries in the Global South.

In addition, Beijing sought diplomatic recognition to minimise the effect of hostile policies from what it perceived as imperial Western and Soviet powers. Following the declaration of mainland China as the People's Republic of China (PRC) and the island of Taiwan as the Republic of China (ROC), the United States continued to recognise the government of the ROC. This drove the government of the PRC to seek diplomatic recognition from other states.

The first official exchange between Africa and the PRC was at the Bandung Conference in 1955. Leaders from Egypt, Ethiopia, Ghana, Liberia, Libya, and Sudan met with China's Premier Zhou Enlai. The aims of the Bandung Conference were aligned with China's foreign policy goals, and all countries represented at the conference adopted the Five Principles of Peaceful Coexistence.

The desire of African leaders at the time was to obtain political independence from the colonial powers. At the same time, the PRC aimed to achieve extensive diplomatic recognition to counter imperialist powers and gain recognition as the legitimate government of all of China. This paid off in 1971 when support from 26 African states helped ensure passage of UN General Assembly Resolution 2758, which expelled Taiwan from the organisation and declared that the People's Republic was the sole legitimate representative of China at the UN. In return, China actively supported liberation movements of several African countries and provided training and resources.

From the 1950s through the mid-1970s, China's relationship with Africa was motivated primarily by ideological and political objectives. China sought to lead countries in the Global South in a coalition balancing against the imperial powers, mainly the US and the Soviet Union. China provided economic and military aid to the continent, but this was limited due to the economic effects of the Great Leap Forward and the Cultural revolution. But due to China not interfering in local politics and providing aid and loans with little conditions, China was seen in a good light by African leaders.

In the late 1970s China came to prioritise its economic development. The Chinese economy underwent a reform and opening up that was designed to develop its economy, industry and infrastructure. China saw Africa as a huge market that she could export to and buy mineral resources. Chinese companies initially had trouble competing with more experienced Western firms, but—aided by Chinese subsidies, loans to African governments, and high-profile public works gifts that won local leaders' favour—they eventually made inroads in the resource and labour-intensive petroleum, mining, and construction sectors.

By the late twentieth century, China's economic and commercial activities came to be widely viewed as one-sided, neo-colonial, mercantilist ventures that exploited the region's resources while undermining local industries, burdening African governments with heavy debts and providing few long-term economic benefits for Africans. Beijing in 2000 created the Forum on China-Africa Cooperation (FOCAC) as a regional venue for coordinating and repositioning China's engagement with the region.

Bandung Conference, 1955

Since then, China has four overarching interests in Africa:

**1. Access to natural resources,** particularly oil and gas
**2. Export markets** for Chinese manufactured goods
**3. International political legitimacy** as a global power, including recognition of Beijing as the sole representative of China (the "One China" policy) and acknowledgement of the principle of non-interference in sovereign countries' internal affairs
**4. Sufficient political stability and security** for China to safeguard its citizens and pursue its economic and commercial interests.

China has increased political engagement with all African countries that recognise Beijing as the legitimate ruler over all of China. Its commitment to avoid interfering in or even passing judgment on sovereign nations' behaviour and policies allows it to pursue its political and economic interests across the continent with democrats and despots alike. Beijing's willingness to pursue political ties and economic opportunities with pariah governments, whether arms sales to Zimbabwe or oil exploration in Sudan, have, without question, provided some African regimes with the resources they need to perpetuate their often-abusive rule. Such engagement has proven at times to be a source of contention with the US and Europe.

> ***"In terms of individual countries, China's most significant relationships are with South Africa, its pivotal partner on the continent..."***

In terms of individual countries, China's most significant relationships are with South Africa, its pivotal partner on the continent, and Tanzania. South Africa is one of the five BRICS countries and is a cofounder of the New Development Bank. The country's attractiveness as a partner stem in part from its economy, the second largest in sub-Saharan Africa. Moreover, because of its strong financial sector, rule of law, and infrastructure, it is a destination of choice for Chinese businesses and serves as a gateway to the rest of the continent. Beyond economics, South Africa is a regional leader and active in a number of regional organisations, including the African Union and the Southern African Development Community, making it widely considered a continental leader. Tanzania, on the other hand, has become an increasingly important Chinese partner in military affairs. Other important relationships in the region include the major oil-producing states, Angola and Algeria.

## Economic Engagement

China's economic engagement has focused on gaining access to natural resources, creating markets for Chinese-manufactured goods, and developing manufacturing facilities that can take advantage of the continent's low labour costs. China's principal interest in Africa is to ensure access to the raw materials it needs to fuel its own economy— principally oil, gas, metals, and minerals. It has, thus, invested heavily in countries that are richly endowed with such resources, and its trade with the continent is overwhelmingly concentrated in raw materials. From 2003 to 2010, more than half of China's investment in Africa was concentrated in the oil sector, almost all of it coming from well resourced State Owned Enterprises SOEs. China's imports from Africa consist overwhelmingly of natural resources; today 40% of its imports from the continent consist of petroleum and 50% consist of iron and other metals.

China seeks natural resources in Africa, bypassing the pricing regime on international
markets. As a result, Chinese development assistance is largely designed to facilitate exports.
Infrastructure projects undertaken in Africa by China enhance its ability to efficiently extract and transport natural resources back to China.

### China Relations in Africa

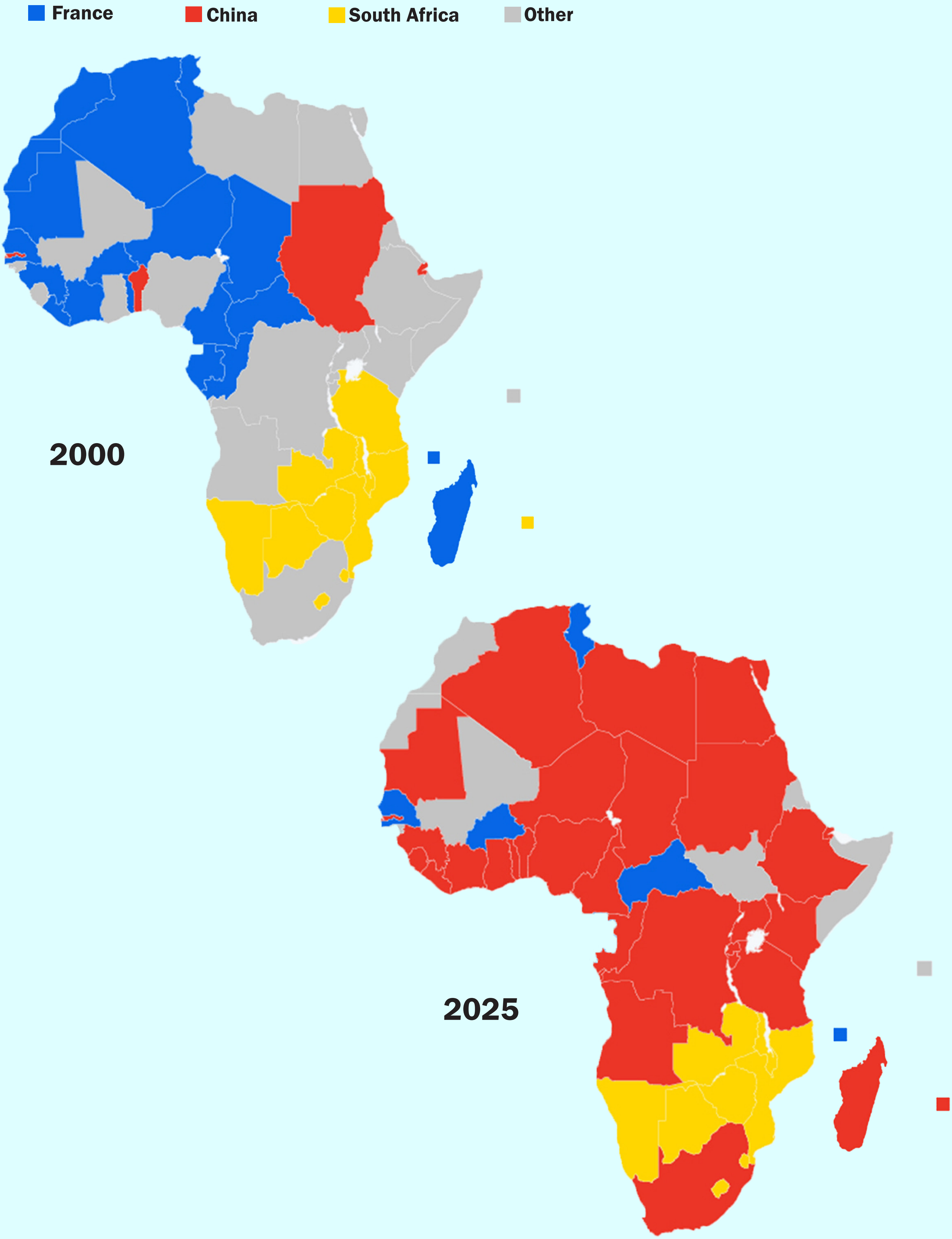

In 2000, China established the Forum of China-Africa Cooperation (FOCAC), at the time China-Africa trade was $10 billion, which grew to over $260 billion in 2023. China surpassed the US as Africa's biggest trading partner in 2009. One of the reasons that China-Africa trade grew significantly during this period is the credit facilities that China made available to African countries. In 2000, Chinese loans to Africa were $140 million, but, by 2010, this had grown to $6.8 billion. African countries continued to borrow from China because of the generous loan terms and because China implemented a debt relief program. In addition, contracting with Chinese firms also significantly increased. From an annual contracting revenue of $1.09 billion in 2000, Chinese firms increased their contracting revenue in Africa to $35 billion by 2010.

China has been increasing its military and security engagement with the region. In recent years, there have been more PRC arms sales to the region, more senior military leadership visits to the region, and more Naval visits. China also participated in three joint exercises with
African forces have engaged in significant peacekeeping operations as well as military operations other than war in the region. Most importantly, China has become more invested in helping provide regional security. While China had long maintained a hands-off approach to security matters in Africa, regional instability has threatened Chinese investments and citizens recently. Beijing has responded by building up host nation capacity, making greater use of private Chinese security firms, and even using government assets and resources to evacuate Chinese citizens from conflict zones. This has culminated in China's first overseas military base in Djibouti in 2017.

Africa provides China with a regular and reliable supply of energy and minerals. As China doesn't impose any values and doesn't get involved in the continent's politics it has come to be seen as an easier partner to work with compared to the West. This has seen significant Chinese money flow to the continent including infrastructure development which has helped the continent. China just doesn't have the colonial history or negative opinion many have about the West and this places China in a good position with the continent's growing population. Whilst western media focus on reporting the loans and debt China's created in Africa other parts if the world see things in a very different light, this all helps China engage the region

# China Takes Over African Trade

## Top Source for Imports



## Conclusions

It's been a good year for China. She has successfully pushed back against the US tariff agenda and stood up against US provocations. When Pakistan and India went to war China came out looking strong as it supplied Pakistan with military platforms that caused considerable damage to India. Across the world China's soft power is growing and perceptions of China as a reliable partner and as a nation that doesn't impose values upon others has placed it in a strong position.

But the US is in full swing in its great power battle with China and this poses the biggest challenge to China. With the US placing restrictions and targeting China's industries and technology, China needs to find solutions to these challenges sooner rather than later.

## 2026

**Can China win the Trade war? -** China's strategy against the US trade war has been reactionary and in small pieces based on the US attack. As China did not start the trade war China does not want to escalate the battle, but China needs to see this battle as part of the broader great war struggle taking place and this raises the question in 2026: how China can win the battle and does it have the tools to do so before the US expands and deepens the battle.

**Will China invade Taiwan 2026? -** It's extremely unlikely China will do so, but this places a major question mark over China's claim that it's the sole and legitimate ruler over all of China. Taiwan is now the Israel of the Far East and an outpost for the US. Until China does not put an end to this, its claims of being a globe power will continue.

**Can China take advantage of American transactionalism? -** As the US abandons all pretence of values and principles in its alliances, this gives China the opportunity to fill a void left by the global power. The US currently treats its allies worse than its enemies and this presents a unique opportunity to step in where the world power leaves a gap. The issue that remains is, is China a confident power that is prepared to go into regions of the where it has  usually limited itself to economic relations?

# Europe

# Has Europe's Century of Humiliation Begun?

Transatlantic relations have been a cornerstone of the global system that emerged after WW2. The US funded, armed, aided and helped Europe after the devastation of WW2. The threat of communism made the European continent the front line in the ideological battle between the two ideologies. Since the end of the USSR, Europe has continued to rely on the US for security; European nations reduced their defence budgets and military forces due to their relationship with the US. For the last decade successive US presidents have come to see Europe's role in NATO and Europe's dependency on the US as problematic. They accuse Europe of being freeloaders and now they have been put on notice to stand on their own feet, which presents a major strategic challenge for the continent.

Donald Trump from his first term as president took aim at Europe. He accused them of not pulling their weight in NATO, he accused the continent of taking advantage of the US and as far as Trump was concerned, enough was enough. Trump proceeded to bully German Chancellor Angela Merkel and threaten the French President. When Biden took over at the White House relations improved, only for Trump to return in 2025 and continue from where he left off.

In March 2025 the world saw what the American leadership really feels about Europe, in spectacular fashion. A signal group that consisted of US national security leaders was leaked, that showed them conversing in a group chat about imminent military operations against the Houthis in Yemen. The group discussion included exchanges about European economic interests in Red Sea shipping lanes and the administration's policy regarding cost-sharing with allies, with the JD Vance-associated account stating *"I just hate bailing Europe out again."* while the Hegseth-associated account responded: *"VP: I fully share your loathing of European free-loading. It's PATHETIC. But Mike is correct, we are the only ones on the planet (on our side of the ledger) who can do this."*

## Ukraine

Trump made it clear to Ukrainians that the US would no longer fund or arm Ukraine in its war with Russia. If they wanted to continue then the Europeans would need to pick up the burden. For Europe any Russian expansion poses a major strategic challenge and as a result the Europeans were forced to take charge.

> ***"The challenge European leaders face is many still do not see the US as the problem, they do not see a Europe standing on its own without the US."***

The European Union deepened its macro-financial assistance by using Russian-assets to fund Ukraine. Furthermore, it considered transferring frozen Russian central-bank assets to Ukraine to fund its war effort. This would circumvent European nations having to directly fund Ukraine, from domestic budgets that are already stretched and something that would be unpopular with the masses.
The Ukraine war has forced Europe to develop a new independent military industrial plan. This led to the Defence Readiness Roadmap 2030 which aims to fill the EU's capability gaps in nine areas: air and missile defence, enablers, military mobility, artillery systems, AI and cyber, missile and ammunition, drones and anti-drones, ground combat and maritime.

The EU is pushing EU members to buy weapons together and wants at least 40% of defence procurement to be joint contracts by the end of 2027 — up from less than a fifth now. The roadmap also sets targets for at least 55% of arms purchases to come from EU and Ukrainian companies by 2028 and at least 60% by 2030. Europe will need to mobilise up to €800 billion for this, which will be extremely difficult to achieve.

### Defence

In all the wars since the end of the USSR, Europe has needed intelligence, logistics and weapons from the US. If Europe is to become independent and be able to stand on its own feet it will need to re-start its defence industry again, which has been shrinking for the past three decades.

> ***"Europe needs to make huge investments into defence and industry and this will require an increase in the EUs defence budget by local nations. This means cuts will have to be made elsewhere such as in healthcare and education, which will impact the electoral prospects of member nation governments."***

It was in this light the European Defence Industrial Strategy (EDIS) was launched in 2024. It aims to transform European industry by building resilience and sovereignty, while integrating Ukraine as a partner in that transformation. The plans identified Europe's capability-gaps such as long-range fires, heavy transport, missile/air defence and links them to the industrial base.

However, there are a number of challenges that will need to be overcome. In the EU, Defence remains largely a national undertaking. While the EU sets frameworks and incentives, each Member State retains control over procurement, budgets, export policy etc. If the aim is for Europe to become independent, then many European nations have major arms and industrial dependencies on the US.

Europe needs to make huge investments into defence and industry and this will require an increase in the EUs defence budget by local nations. This means cuts will have to be made elsewhere such as in healthcare and education, which will impact the electoral prospects of member nation governments.

### Europe Signs Up for Its Century of Humiliation

European Commission President Ursula von der Leyen agreed to a new trade deal with US president Donald Trump in July 2025. The US and EU trade deal was not positive for the EU. French Prime Minister François Bayrou slammed the deal as a 'dark day' and tantamount to 'submission,' as other politicians poured vitriol on the deal.

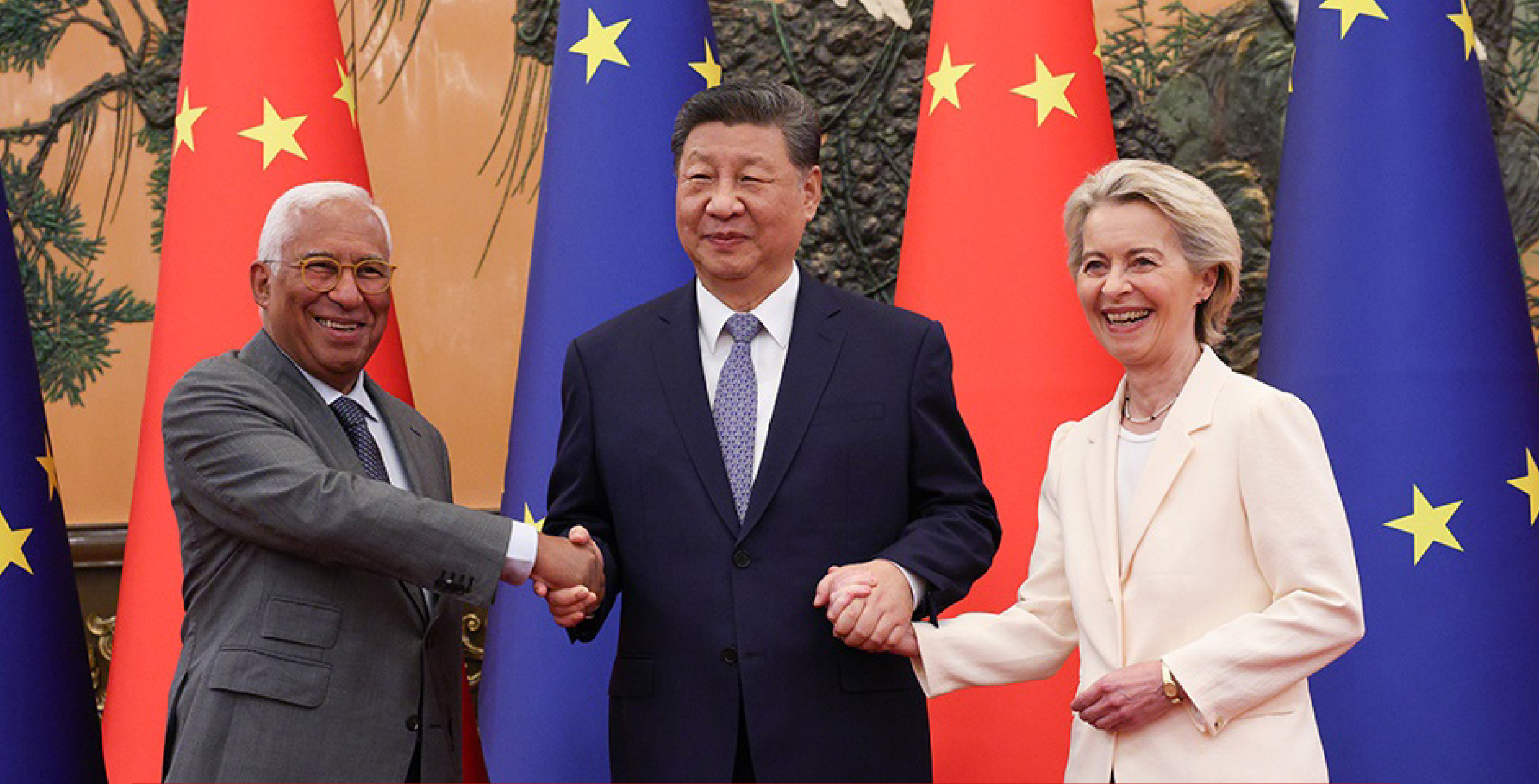
The EU placed itself in an unenviable negotiation position through its sanctions on Russian energy, as this effectively made it dependent on American energy; and its position in the Ukraine War, which, since it does not have the military power to back up its stated aim of defeating Russia on the battlefield, made it dependent on American weapons. The complete failure of the EU trade talks with China, the week before, represented the final nail in the coffin, as it left the EU with no trade alternatives besides the US.

The new deal with the US saw the EU being charged 15% tariffs on most imports, committing to purchasing $750 billion in US energy exports and investing $600 billion in the US economy, some of which will be military purchases. The consequences of the deal will likely worsen the EU's already really bad outlook. Economically, its heavy industry will continue to suffer as American energy is relatively expensive – much more so for Europe than for US industry.
In addition, the 50% tariff on steel and aluminium remains. The lack of a deal with China, and the EU's moralistic stance regarding China, threaten the EU's energy transition, as this requires Chinese technol-

ogy. And militarily, the EU has now committed to buying billions in US weaponry, which means it will not have the financial capability needed to build out the European defence industry.

## European Leaders in Denial

The challenge European leaders face is many still do not see the US as the problem, they do not see a Europe standing on its own without the US. The US has been very open about what it thinks of Europe and what it wants to see. With Europe, even when they agree to strategic autonomy, individual nations are still making deals with the US. Europe has not aligned with China, which would have been the way to decouple from the US. But for the moment Europe seems to still be running to Washington and hoping their transatlantic partner will always be by her side.



# Will Europe Embrace China?

European and Chinese officials have stepped up high-level diplomatic engagement in 2025 in response to the growing fallout from sweeping US tariff increases. For China, Europe has for long been a market for its exports, whilst for Europe, China provides a low-cost destination for European consumption. But with great power competition between the US and China getting deeper and broader, Europe is being forced to take sides. Which side Europe takes will not just impact global competition between the US and China, but it will also have a major effect on Europe's economic future.

When the Communists established the People's Republic of China in 1948, Europe viewed China through the lens of communism and the Cold War divide. This meant China was firmly in the Eastern bloc and became allies with the Soviet Union. After the Sino–Soviet split in the 1960s, some European powers began to see China as a potential counterbalance to Moscow. France under Charles de Gaulle became the first major Western state to recognise the communist party as the legitimate leaders over all of China; this paved the way for other European states to follow.

When China's open and reform era began in 1979, European firms like Siemens, Volkswagen, and Alstom entered China providing technology transfer and industrial cooperation. The European Economic Community (EEC) and China signed a Trade Agreement in 1985, that led to the first relations between the European bloc and China.

As the Cold War ended, for Europe, relations with China were not as important as its relations with the US, Japan and other Asian powers. However, interest in closer relations started to rise as economic contacts increased and interest in a multipolar system grew. Although initially imposing an arms embargo on China after the 1989 Tiananmen Square protests and massacre, European leaders eased off China's isolation. China's growing economy became the focus for many European visitors and in turn Chinese businessmen began to make frequent trips to Europe. Europe's interest in China led to the EU becoming active with China during the 1990s with high-level exchanges. EU-Chinese trade increased faster than the Chinese economy itself, tripling in ten years from \$14.3 billion in 1985 to \$45.6 billion in 1994. The EU came to see China as a strategic partner, no longer an adversary, whilst China became Europe's largest source of imports and a growing export market.

When China joined the World Trade Organization (WTO) in 2001 this accelerated integration with global and European markets. European industries benefited from low-cost manufacturing, while China benefited from European technology and investment. Europe was more than happy to import cheap Chinese goods, but the Chinese also had other ideas beyond trade.

## Self-Sufficiency

China didn't just see Europe as an export market; it also saw it as a market where it could make commercial relations to transfer technology to China and in time become self-sufficient. China allowed European companies access to its market only if they shared technology or localised production. What became clear over time was that China's Intellectual Property regime was minimal. European firms often found their tech copied or leaked but accepted it as a cost of market entry in China.

Chinese state firms and private investors bought European technology companies that were often in distress. Volvo in Sweden was acquired by Geely in 2010, the companies design and engineering was all transferred to China. KUKA Robotics in Germany was bought by Midea in 2016 and gave China access to advanced automation. Dozens of machine-tool, materials and sensor firms across Germany, the Netherlands, and the UK were quietly purchased.

> ***"Following over two decades of economic engagement since China's accession to the World Trade Organisation in 2001, the European Union adopted a more pragmatic, cautious framework in 2019 by simultaneously redefining China as a partner, an economic competitor and a systemic rival."***

China also established research centres in Europe; Huawei, ZTE, Haier, and CRRC established R&D centres in Munich, Paris, and London, giving China direct access to European engineers and patents. Huawei's European R&D alone employs 2,500+ researchers, integrating European innovations into its global ecosystem.

China also launched a major parallel covert programme. Chinese firms engaged in industrial espionage. European intelligence agencies have repeatedly documented Chinese cyber intrusions targeting Aerospace (Airbus, Rolls-Royce), Energy and materials science and Research universities and labs. Chinese state-linked hackers (APT10, APT31) stole designs, patents, and blueprints. China has used academic collaboration as cover. Thousands of research partnerships (especially under EU's Horizon 2020 program) were exploited to gain dual-use or sensitive tech. European universities later found that Chinese visiting scholars were linked to PLA-affiliated institutes. Beijing's Thousand Talents Plan recruited European scientists and engineers. Some were later charged with IP theft. Chinese students in aerospace, AI, quantum, and microelectronics programs often fed data into national projects.

## Systemic Rival

Following over two decades of economic engagement since China's accession to the World Trade Organisation in 2001, the European Union adopted a more pragmatic, cautious framework in 2019 by simultaneously redefining China as a partner, an economic competitor and a systemic rival. By 2019 Europe realised that China had moved up the tech ladder and was now competing with and undercutting European industry, especially in areas such as electric vehicles, wind turbines and robotics

Although China remains a key export and investment destination for several European industries, this relevance is waning on the back of its rapid industrial transformation. Once a major engine of EU export growth, China has become a source of strategic dependency, particularly in digital infrastructure and green technologies. This comes on top of long-standing concerns in Europe over unfair economic and trade practices, including China's use of coercive economic and trade policies to exert geopolitical influence on countries in Europe and elsewhere, its limited market openness to European companies, and its known practice of intellectual property theft and economic espionage.

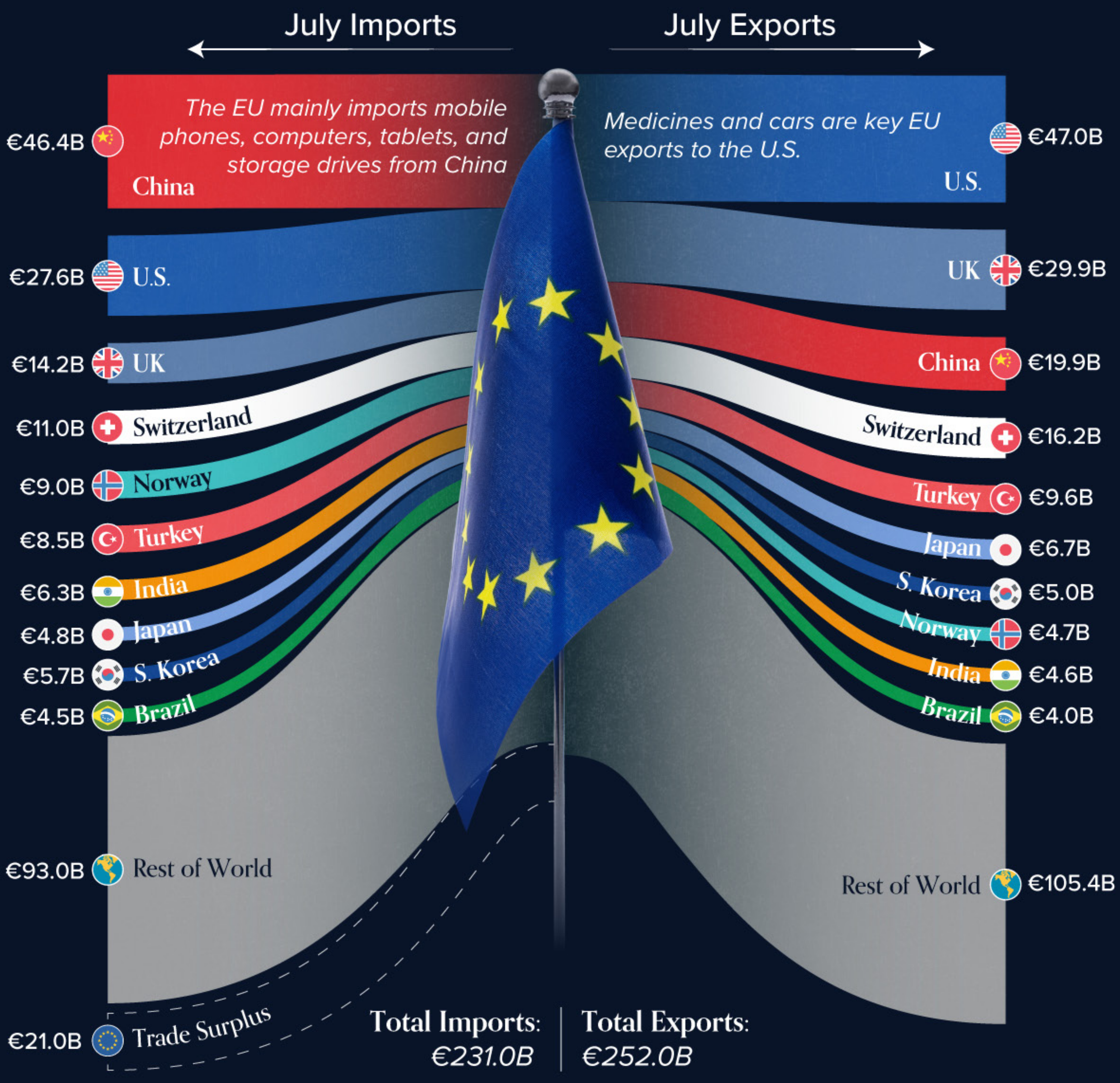
Against this backdrop, the European Union has adopted a strategy of de-risking in recent years aimed at reducing strategic dependencies while enhancing economic resilience and competitiveness, leading to the development of stronger trade-defence tools, tighter investment screening regulations, protectionist policies and diversification measures. This led to Brussels blocking Chinese takeovers of semiconductor and defence-adjacent firms, as well as export controls on lithography, chips, AI tools following the US lead.

China still remains an important economic partner for the European Union, which still depends heavily on Chinese supply chains and consumer markets, making full disengagement neither feasible nor desirable. Brussels' gradual de-risking approach instead aims to balance sustained economic ties with broader strategic priorities, in contrast with Washington's more aggressive decoupling strategy centred around actively containing China's economic and technological rise.

China's technological rise was not built in isolation; Europe served as the training ground, supplier, and laboratory for four decades. Only now has Europe realised the strategic cost: its own industrial crown jewels helped empower a geopolitical rival. Europe now needs to decide its future: The US wants Europe to restrict Chinese access to its markets and play this indirect role in the great power competition between the two. On the other hand, China would be a suitable and cheap supplier of the next generation of technology from electric vehicles to quantum computers. But this would be at the expense of its own industrial giants who just cannot compete with China.

Unlike the Cold war where the USSR had borders on the European continent with the European powers, in the battle between China and the US the border is not in Europe and therefore Europe needs to decide if it wants to be on the side of the US or should it be on the side of China. As relations fray with the US, Europe will have to make this strategic decision sooner rather than later.

# Who Does the EU Trade With?



# Au revoir to Africa

At the 30th annual Ambassadors' Conference in Paris, French President Emmanuel Macron said: *"I think someone forgot to say thank you."*[11] This was in the context of African countries being ungrateful over France's role in helping fight militant insurgencies. Macron said that Sahel states forgot to thank France for its role, amid the continuing withdrawal of French troops from West African countries. He said no Sahelian nation would be a sovereign nation without France's intervention that prevented them from falling under the control of militants. The French have never been able to reckon with their fall from grace after WW2, now French influence in Africa is inexorably on the decline.

The last few years have been difficult for France in its former African colonies. Many of them have cut defence ties which has forced France to remove its military assets from their territories. In a number of US backed coups, pro-French leaders have been overthrown one after the other. Others have turned to Russia for their security needs.

France maintained close ties to many of its former colonies, despite giving them independence. It did this through economic relations, privileged access to resources and monetary agreements. France signed secret national defence agreements with many of its African colonies. The agreements, which have never been made public, allow France to retain a physical presence in the countries in exchange for defending their national sovereignty. France further cemented its clout in its former colonies by maintaining critical economic infrastructure, disbursing development aid and building influential social networks and institutions.

France benefited greatly from the arrangement. There are many economic benefits to French companies, many of which are partially state-owned. It gave French products attractive export destinations that were secured by French troops, who were always on hand to protect the assets and interests of French companies. This only justified the large capital expenditure in costly deployments and establishing bases in Africa.

The French worked with the political elites across Africa, whilst the masses languished in poverty. With much of the public unhappy with the status quo the last decade has seen the French position unravel. The Central African Republic (CAR) was the first to turn to Russia in 2018. Since then, Mali, Burkina Faso and Niger formed the Alliance of the Sahel States. This was after military coups that resulted in the ousting of regimes friendly to Paris in favor of nominally more nationalist ones. They then proceeded to replace French military assets with Russian assets.

This has now opened Pandora's box with other countries now also interested in following suit. Chad has signed initial agreements with Russia, even as it removes French and US forces, while Senegal's president has spoken repeatedly of breaking neo-colonial ties and removing foreign militaries from its territory.

France is being muscled out of Africa by Russia, the US and China. All the military leaders who took power over the last decade in former French colonies, have seen French soldiers and bases replaced by Russian entities such as Wagner. China has also been moving into mining operations and increasing trade ties, muscling out the French.

The US has for long been looking to expand its military ties under the guise of dealing with terrorism. With a raft of insurgencies in the region the US has been training national armies and bringing to power soldiers that have been trained in the US.

France has been in slow decline since WW2 and its colonies in Africa were key to maintaining a semblance of global influence. But with African leaders and other powers muscling in, the sun is setting on France's global role.

# The Rise of the Right

The European Far Right in 2024 had one of their best electoral years since the Second World War. In elections in the EU, Austria, Germany, France and beyond, far or hard right parties all did exceedingly well. European far-right groups have long been on the rise and have been a permanent feature of European politics, despite being on fringes most of the time. Currently their popularity is due to the deep anxieties over wealth inequality, immigration and identity.

For much of post-war history in Europe mainstream political parties across Europe were able to keep the far-right on the fringes of public opinion as they coalesced around what was considered mainstream politics and economics. But in times of economic downturns, as mainstream and centralist parties struggled to solve such issues, this gave the right the chance to enter mainstream discourse. But this usually resulted in a few far-right politicians entering their respective parliaments or as minority partners in coalitions. As Europe opened its gates to immigration, a necessity due to declining workers after WW2, this led to the arrival of many from South Asia, Africa and the Caribbean to Europe.

The rise of Japan and China and other industrial locations meant much of European industry either moved abroad or came to an end due to not being able to compete with such nations. This led to tensions in some countries as the political leaders blamed immigration for the loss of such industries, rather than not being able to compete with the likes of China. This became a regular feature with politicians blaming immigration for problems such as unsustainable social security budgets, public sector's rising costs and the problems in healthcare. After 9/11 and the subsequent terrorist attacks across Europe, European leaders blamed immigration from the Muslim world as a security threat.

The global financial crisis in 2008 saw many European governments impose austerity measures that severely undermined trust in mainstream political parties and institutions, creating fertile ground for populist parties across the ideological spectrum. Since then, confidence in the EU as a block, national political leaders and the social-political systems generally have been falling. This is due to them failing to tackle the rising costs of living. Confidence in democracy is today at rock-bottom. The 2014-16 refugee crisis accelerated this trend, with many Europeans perceiving the surge of refugee flows from North Africa and the Middle East as a threat to national identity and public safety. This trend is now gathering further pace on the back of a popular backlash against rising levels of migration, a sense of identity loss amid rapidly changing demographics in

Europe, a perceived cultural hegemony from the liberal left, rising costs of living, and growing costs for households and businesses associated with the green energy transition.

Against this backdrop, far-right parties once pushed to the margins of the political landscape have found fertile ground across Europe and begun entering governments across Europe — either at the head of ruling coalitions as seen in Italy or as junior partners as was the case in Finland and Sweden. While far-right parties in Spain, Denmark and Poland failed to garner enough support in recent elections to enter their countries' governments, they still performed strongly in those ballots — a trend set to continue.

Right-wing politics in Europe is today is a broad and diverse spectrum — ranging from mainstream conservative parties to populist-nationalist and even far-right movements. While each country has its own traditions and priorities, several core ideas run through most of Europe's right-wing politics. Some areas of agreement currently include:

- **Stop the boats**
- **Multiculturalism has gone too far**
- **Curtail Muslim migration**
- **Expel illegal refugees**
- **End mass immigration**

The right is also divided among themselves in terms of ideology and differences take place over:

- **Islam doesn't belong in Europe**
- **There must be mass deportations**
- **Stop all immigration**
- **Europe is only for white Christians (whiteness)**
- **The method for change is at the ballot box versus agitation and civil war**

Ethno-nationalists or white supremacists believe in a white Europe and national sovereignty and would send all non-white residents back and thus reverse mass migration of the post war era. Their stance is ideological and based on the belief that the white race is under threat and will be displaced by immigration and a faster reproducing immigrant population. If immigration is not stopped and reversed there will be race wars and blood on the streets of Europe because different races cannot co-exist, as the white race is superior.

Nationalists on the other hand do not believe in a white only Europe but insist that everyone legally in Europe adopts their identity. This would be assimilation, not just integration of immigrants. The experiment of multiculturalism for them must end. Mass immigration must end, and the White European population should be given priority in housing and public services.

Then there is the ideological far-right. Their method for change is protest, agitation, race riots, civil strife and even internal civil war as opposed to change via the ballot box. They are authoritarian and would ultimately force mass deportations to bring their nation into being. They see the left-wing ideology as the main obstacle to their goal rather than migrants themselves.

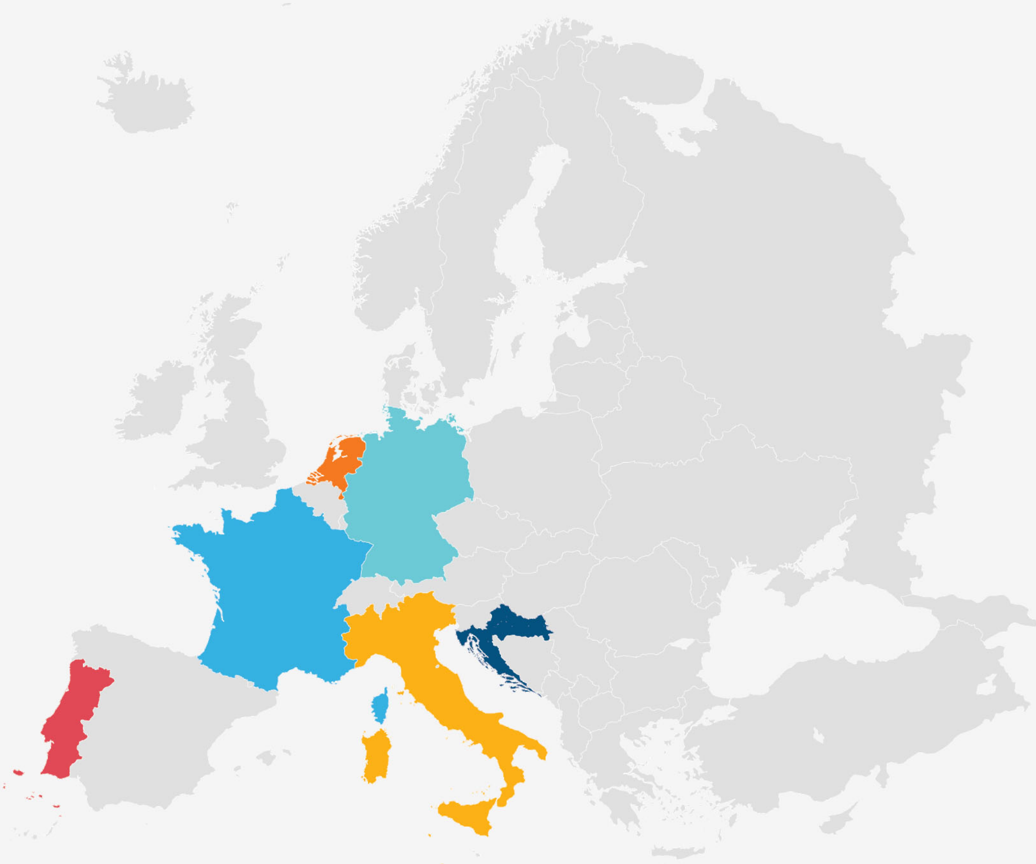
The political far-right is characterised by the way they want to achieve change, via the ballot box. They reluctantly accept some immigration as a necessary evil. There should be quotas, limits and restrictions on immigration and foreigners should only be allowed into Europe if they serve an economic benefit.

### When Ideology Meets Reality

Europe is a highly diverse place and each nation on the continent has had different experiences and has different political traditions to their neighbours. This is why the right across Europe are extremely divided and disagree on many things.

In northern Europe, far-right parties tend to be more libertarian and fiscally conservative, while in the south they often support more protectionist policies and oppose the spending limits posed by EU fiscal rules. Moreover, depending on their country's unique history or geography, far-right parties may be staunchly pro-NATO or favor more positive relations with Russia. Besides resulting in potentially very different policy outcomes at the national level, this heterogeneity makes it difficult for different far-right parties across Europe to coordinate action and form a coherent policy platform at the EU level — especially given that their ideology is typically rooted in nationalism, which inherently clashes with the concept of a supranational body like the European Union that demands compromise and collective decision-making.

# Right Wing party's Accross Europe



## ITALY

In September 2022, radical right-wing party Fratelli d'Italia (FdI) won 26 per cent of the vote in a snap general election. In the EU elections, FdI won 28 per cent of the vote.

## THE NETHERLANDS

In November 2023, the far-right Party for Freedom won 37 of the 150 seats in the Dutch parliament. The party more than doubled its 2021 tally and replaced the liberal VVD as the biggest party.

## PORTUGAL

In March 2024, the far-right Chega party quadrupled its parliamentary representation to 50 members of parliament, winning 18 per cent of the popular vote. However, the party won just two of Portugal's 21 seats in the European parliamentary elections in June.

## CROATIA

In May 2024, Prime Minister Andrej Plenković, of the ruling Croatian Democratic Union party, confirmed a coalition agreement with the far-right Homeland Movement following weeks of political uncertainty after an inconclusive parliamentary vote.

## FRANCE

In July 2024's snap election, the far-right National Rally, which won by a clear margin in the first round, came in third with 24.6 per cent of the vote.

## GERMANY

In September 2024 the far-right Alternative for Germany party won the most votes in regional elections in the eastern state of Thuringia and came second in a regional vote in Saxony.

What appears more evident is that far-right parties tend to temper many of their most radical ideas once they take power. In Italy, geopolitical and economic constraints have forced Prime Minister Giorgia Meloni's far-right government to embrace a more pragmatic approach and abandon the more radical, eurosceptic stances and economically unsustainable proposals that led to her Brothers of Italy party's victory in the 2022 election.

***"What appears more evident is that far-right parties tend to temper many of their most radical ideas once they take power."***

Similarly in the Netherlands the far-right Party for Freedom won the national election in 2023 and was then forced to water-down several policies. It maintained its rhetoric on immigration, which in the end triggered a breakdown of the coalition and then their loss in the November 2025 election.

### When the Far-Right Becomes Mainstream

Mainstream political parties across the world have failed in solving a number of social issues, which has then allowed the right to present their one-dimensional solutions as credible policies. Mainstream parties have had an open-door policy to immigration as they needed workers and as the demographics of white Europeans continues to fall. None of the countries experiencing demographic decline have been able to solve this challenge and knock on effects of this.

Mainstream parties have supported policies that have aided rich and large Corporations, and this has created wealth inequality. This inequality is then blamed on immigration, something the right have long advocated, but this prognosis is incorrect from its origin. Despite this the right promotes this idea of wealth inequality being the result of immigration rather than government policy being in line with the rich elite.

When it comes to identity politics, mainstream parties have justified the loss of whiteness in order to pander to the right. As this deflects from questions on mainstream political parties' performance, they promote such an idea, which has led to European citizens turning against immigrants.

Much of the ideas of the far right are based on emotion and emotive issues that are based on flimsy evidence. While this allows far right parties to do well at polls, many rarely get to power, but the constant demonisation and deflection to immigration, means many turn against immigrants and this creates tension in Europe, which is given so much attention by the continent's media that many cannot see beyond immigration. The underlying problems remain unresolved and will continue to do so.

## Conclusions

Europe is currently a mess; its economy has been struggling since the 2008 global economic crisis and unified  action and agreement on anything remains a struggle. European leaders refuse to believe the global situation and transatlantic relations are changing and continue to use outdated principles and thinking to guide their actions. Europe now needs to make some difficult and strategic decisions. The US has abandoned them and thrown the Ukraine war to them to deal with. Europe needs to fix its economy, industry and stand on its own feet. If it doesn't it's likely the Far Right will be seen as the suitable solution to the challenges the Europeans perceive that are necessary

## 2026

**Power is shifting from West to East -** Whilst the West has been the epicentre of the world for over 500 years, power is now moving to the East and Europe needs to decide which side it will be on. For decades Europe sided with the US, who now has put them on notice. If Europe abandons the US and sides with China, that would be the beginning of a new order where Europe plays a central role and keeps her relevant. This will likely be unpalatable to many.

**Does Europe have solutions to the continent's problems? -** Economics, demographics, debt, education and infrastructure seem to be an endless challenge that European leaders seem to be in constant failure. Europe's failure in this endeavour has led to anti-EU sentiment to grow and the rise of the Far Right. In 2026 Europe's centre and mainstream parties need to solve the continent's problems, otherwise the masses will turn even further to the Far right.

**Europe needs to decide its future -** Europe is currently in the middle of the world's great power battle. On one side is the sitting great power the US, who Europe has a long history with as an ally. Then there is the rising power, China, who is writing about the future. Europe needs to decide which power is likely to win this battle and which power will go into decline. This is the strategic choice the continent now faces.

# The Death of the West's Sacred Cows

For decades, the West stood as the torchbearer of liberal values—championing free speech, human rights, democracy, international law, and a rules-based global order. Its sacred cows, those foundational beliefs rarely questioned and fervently defended, defined its global identity and soft power. After emerging victorious from the Cold War, the West, led by the United States, became the world's undisputed superpower. But today, not even three decades later, many of these once-revered principles lie slaughtered. Not by external invasion, not by ideological competitors, but by the contradictions and hypocrisies of the West itself. From Gaza to TikTok, from universities to courtrooms, the West has slaughtered its own sacred cows.

### 1. Free Speech—Silenced by Zionism

Freedom of speech is a principle that supports the freedom of an individual to articulate their opinions and ideas without fear of retaliation, censorship, or legal sanction. The right to freedom of speech was recognised as a human right in the Universal Declaration of Human Rights and international human rights law.

But today, Freedom of speech, once the cornerstone of Western liberalism, has come under unprecedented assault. Across the US and Europe, voices critical of Israel—whether academic, artistic, or activist—are being systematically silenced. Journalists fired, scientists dismissed, celebrities cancelled, students deported. Entire careers have been destroyed over a tweet or a placard.

In the UK former England Football Captain Gary Lineker was hounded for his public criticism of Israel, whilst in the US, Rachel Zegler, the lead actress in Disney's Snow White movie was pressured to delete her tweet: "*And always remember, free Palestine,*" by Disney executives.[12] In the US, the advocacy organisation Palestine Legal reported that they've responded to over 260 cases of *"...people's livelihoods or careers"* being targeted. In many cases people have been fired due to social media posts criticising Israel or highlighting the Palestinian plight. Artforum's top editor David Velasco was fired by his publisher, Penske Media, after posting an open letter calling for a cease-fire and suggesting Israel is responsible for the genocide. Michael Eisen was removed as editor-in-chief of the science journal eLife after retweeting a satirical article critical of Israel. Whilst Bella Hadid the American and Palestinian supermodel lost a contract with Adidas due to her heritage.

What began as censorship has now metastasised into coercion. Even major legislation, such as the US TikTok ban, was influenced by pro-Israel lobbying due to the app's visibility into Israel's actions in Gaza.[13] Free speech is no longer universal—only permissible when it aligns with select geopolitical interests.

## 2. The Right to Protest—Unless it's Against Israel

The right to protest was once the heartbeat of Western democracy—now it is strangled by double standards. Peaceful protests in support of Palestinians are met with bans, arrests, and even terrorism designations. The UK's proscription of Palestine Action as a terrorist group marks an unprecedented conflation of nonviolent civil action with terrorism.

Activists from Palestine Action broke into RAF Brize Norton—the UK's largest airbase—and sprayed red paint into aircraft engines, causing around £7 million in damage. The group had also been targeting Elbit Systems who supplied components to the Israeli military machine. Israel had been lobbying for the group to be banned due to the impact it was having on its supply chains.

Despite Britain's long history of direct-action groups and support for foreign direct-action groups, Palestine Action is the first ever direct-action group to be proscribed as a terrorist group. Civil disobedience has now been conflated with terrorism and paint-spraying has been equated with suicide bombings.

Across Europe the right to protest is being banned in order to maintain the continent's relationship with Israel. France ordered a blanket ban on pro-Palestinian marches, citing concerns about public disorder. In Germany, Berlin and other city administrations barred most pro-Palestine rallies and deported EU and non-citizen protestors for alleged support of Palestine, even without criminal convictions. In Belgium displaying Palestinian flags and keffiyehs led to fines.


The case of Mahmud Khalil in the US, who was the lead negotiator for the encampment in the Columbia University pro-Palestinian campus protests, has been very revealing. Khalil had committed no crime, and still today has not been charged with any crime. But he became the first known deportation effort in the US related to pro-Palestine activism. The defence of Israel now includes KGB tactics that even include using a Cold War era law, The Immigration and Nationality Act of 1952, which provides that migrants in the US may be removed if the Secretary of State believes their presence will have serious negative consequences for US foreign policy.

What Mahmud Khalil, Palestine Action and protests in support of Palestinians have in common is Western governments can no longer intellectually defend Israel. The crackdown is reminiscent of Cold War paranoia. When Western governments cannot defend Israel morally, they resort to authoritarian tactics to protect it.

> ***"What Mahmud Khalil, Palestine Action and protests in support of Palestinians have in common is Western governments can no longer intellectually defend Israel. The crackdown is reminiscent of Cold War paranoia."***

## 3. Starving Into Submission

Starvation as a method of warfare was supposedly consigned to history—outlawed in the wake of two world wars and enshrined as a war crime. Yet, in Gaza, Israel has openly declared and enacted a siege strategy, denying food, water, and electricity to civilians.

Israeli officials immediately after the events of October 7th, made public statements expressing their aim to deprive civilians in Gaza of food, water, and fuel. The Israeli Defense Minister at the time, Yoav Gallant ordered "…a complete siege on the Gaza Strip," saying "…there will be no electricity, no food, no fuel, everything is closed." Amid the war in which tens of thousands of civilians have been killed by more direct means, Israel's serial blockade of Gaza for long got little global media coverage. Western leaders argued Israel has the right to defend itself.

This collective punishment is not only tolerated but actively supported by the US, which ignored the findings of its own agencies about Israel's deliberate blockade of humanitarian aid. In April 2024, the US government's leading agencies on humanitarian assistance concluded that Israel was deliberately blocking entry of food and medicine into Gaza. The US Foreign Assistance Act requires the government to suspend military assistance to any country that "…restricts, directly or indirectly, the transport or delivery of United States humanitarian assistance". The Secretary of State Anthony Blinken just ignored the evidence provided by his own government. *"We do not currently assess that the Israeli government is prohibiting or otherwise restricting the transport or delivery of US humanitarian assistance,"* he informed Congress.

**"Senior US senator Lindsey Graham let the cat out of the bag, after the ICC issued warrants for Israeli leader Benjamin Netanyahu. He arrogantly explained: "The Rome Statute doesn't apply to Israel, or the United States, or France, or Germany, or Great Britain, because it wasn't conceived to come after us."**

The West's complicity in mass civilian suffering exposes a staggering moral collapse. Israeli officials have been so open about what they want to do to the Palestinians, they have not even hidden what they are doing. This is why the International Criminal Court issued arrest warrants in November 2024 for Israeli Prime Minister Benjamin Netanyahu and former defence minister Yoav Gallant due to *'reasonable grounds' that they bear criminal responsibility for "…the war crime of starvation as a method of warfare."*

## 4. 'International Law Wasn't Conceived to Come After Us'

The West has long used international law as a weapon against foes, be it African dictators or Russian generals. But when these same laws are applied to Israel, the West turns hostile. Arrest warrants by the International Criminal Court for Israeli leaders triggered threats, sanctions, and even intimidation of ICC officials' families by US lawmakers.

The bloodshed of WW1 spurred the creation of international organisations in international law. The League of Nations was founded to safeguard peace and security after WW1 and after WW2 the United Nations (UN) was established to replace the League, with the aim of maintaining collective security.
A more robust international legal order followed, buttressed by institutions such as the International Court of Justice (ICJ) and the UN Security Council (UNSC). The International Law Commission (ILC) was established in 1947 to develop and codify international law.
The West championed international law which was used against African dictators and against Serbian leaders during the Balkan wars in the 1990s. Western leaders lined up to use international law and global institutions against Russia when it invaded Ukraine from 2014. Despite Russia not being a member state to many of these organisations, these mattered little to western leaders. In fact according to them international law was in working order when it went after Russia's leader.

But in the case of Israel, we are witnessing the death knell of this sacred cow as Israel faces little consequences for its repeated breaches of UN resolutions, the ICJ's provisional measures, and the Geneva Conventions on occupation and treatment of civilians. Senior US senator Lindsey Graham let the cat out of the bag, after the ICC issued warrants for Israeli leader Benjamin Netanyahu. He arrogantly explained: *"The Rome Statute doesn't apply to Israel, or the United States, or France, or Germany, or Great Britain, because it wasn't conceived to come after us."*[14]

This reveals the colonial arrogance embedded in the Western approach to justice: accountability is for others. Rather than proving Israel's innocence and challenging the evidence, like any lawyer or innocent party would do, what has transpired is what happens

in gang warfare – the targeting of individuals. The US has sanctioned the ICC and ICJ for issuing arrest warrants and beginning cases against Israel, when it's actually doing the job it was created for. US president Donald Trump sanctioned the ICC chief prosecutor Karim Khan, including his family for targeting Israel. Then the US has targeted Francesca Albanese, the United Nations Special Rapporteur on the occupied Palestinian territories.

The sacred cow of international law now lies dismembered.

### 5. The World's First Televised Genocide

Israel's war on Gaza is unfolding as the world's first televised genocide. The full weight of international law was brought down upon Serbian leaders, Rwanda's leaders and Cambodia's leaders. Now all the institutions created to monitor and document genocides, all the human rights organisations who monitor atrocities and numerous historians and experts now accuse Israel of systematic efforts to destroy a people.

In March 2025 the UN concluded Israel targeted fertility clinics and embryo facilities in Gaza in its assault over the last year. In its 49-page report on sexual and gender-based violence drawn up by the UN's Independent International Commission of Inquiry on the Occupied Palestinian Territory, Including East Jerusalem, it detailed attacks on maternity wards and other healthcare facilities for women, the destruction of an IVF clinic and controls on the entry of food and medical supplies into Gaza that together *"…destroyed in part the reproductive capacity of Palestinians in Gaza as a group"*.[15] Carrying out actions to affect the birth rate of a people is one of the five acts that constitute a genocide.

The response of the West has been sickening. Israel's war in Gaza is chipping away at so much of what the US and the international community had agreed upon as acceptable, from the rules governing freedom of speech to the very laws of armed conflict. It began with the western world's lack of resolve to rein in Israel's war in Gaza. It escalated when no one lifted a finger to stop hospitals being bombed. It expanded when mass starvation became a weapon of war. And it is peaking at a time when total war is no longer viewed as a human abhorrence but is instead the deliberate policy of Israel.

Israel has not hidden its genocidal agenda. Israel's Defense Minister Katz declared the intention to pack all Palestinians remaining in Gaza into a closed zone along the border with Egypt. Katz ordered Israel's military to draw up plans to build what he called a *"humanitarian city"* in Rafah, Gaza's southernmost city. It has been heavily damaged by the war and is largely uninhabited and uninhabitable. Before entering the zone, all Palestinians would be vetted in order to *"...separate and isolate Hamas"*. Furthermore, under the plan, Palestinians would not be able to leave once they enter the zone. The Israeli military would forcibly move 600,000 Palestinians, with the express aim of transferring them to Rafah. This is no different to when the Nazi's forcibly moved the Jews of Europe into concentration camps in Auschwitz, Bergen-Belsen and Buchenwald.

Western governments continue to shield Israel with vetoes, aid, and diplomatic cover. If the West is prepared to look the other way as Israel implements its final solution, then Russia has every right to clear Eastern Ukraine, China has every right over Taiwan. The slogan "never again" has now become a cruel punchline.

### 6. Expansion Through Conquest

Expansion through conquest was outlawed after WW2 in response to the devastating impact of imperialism, colonialism, and especially the World Wars. The shift reflected a growing international consensus that using war to seize land threatened global stability and contradicted evolving norms of sovereignty and human rights. The UN Charter, adopted in 1945, explicitly outlawed the use of force to acquire territory.

Russia's annexation of Crimea 2014 and parts of Ukraine from 2022 was widely condemned as a violation of international law, reinforcing that conquest is no longer accepted as legitimate. But once again, the sacred cow has been slaughtered at the altar.

Under the guise of security, Israel has been expanding, conquering, acquiring and seizing territory. Israel has done this since its inception, but the difference today is the brazenness of doing this in and with full western support. In fact, western leaders have repeated Israel's justification of security and buffer zones for the defence of its people.

But this is the same reasoning Russia has given for expanding into Ukraine, this is the same reasoning China has provided regarding Taiwan. In fact Turkey, Pakistan, Serbia and Indonesia could claim the very same reason for expanding their national borders.

The era of using international law to settle land and border disputes is now officially over and what Israel has shown is its expansion through conquest is a legitimate right of all nations. This provides every right to Mexico to take back Texas, Arizona, New Mexico and California. China and Russia also have numerous claims against surrounding nations and therefore have every right to expand through conquest.

### 7. When An Empire Doesn't Know If It's Coming or Going

In a moment of comic absurdity, US officials announced two contradictory visa policies: one banning foreign nationals who criticise Israel, and the other banning those who censor free speech.

Many empires throughout history declined when its leaders came to the point of doing things which made little sense and were often contradictory. Such actions usually do not stop the inevitable and in fact make things worse. Glasnost and Perestroika were attempts by the USSR to stop the decline and malaise, but they only made things worse. The US has now just had its Glasnost and Perestroika moment.

The US Secretary of State Marco Rubio announced in May 2025 a vigorous new visa policy in order to prevent people from entering the US who were critical of Israel. Rubio said that the US will hold *"…international organisations and nations accountable for rhetoric against Israel,* by preventing Israeli critics from entering the US.[16]

Then, in a contradictory move and on the same day, Rubio also announced a new policy to prevent foreign nationals who have been involved in censoring the speech of Americans from obtaining visas. Rubio said: *"Today, I am announcing a new visa restriction policy that will apply to foreign nationals who are responsible for censorship of protected expression in the United States. It is unacceptable for foreign officials to issue or threaten arrest warrants on US citizens or US residents for social media posts on American platforms."*[17]

So, if you criticise Israel then you do not have free speech. But at the same time if you censure criticism, then you will be penalised. You have free speech to criticise the US in the US, but not Israel. If you criticise Israel you cannot come to the US, but if you criticise the US then you can come as its free speech.

The US now legislates in contradiction, speaking liberty while enforcing censorship, promoting democracy while undermining dissent. It no longer believes in its own principles—it performs them. This is the very feature of decline.

> ***"The era of using international law to settle land and border disputes is now officially over and what Israel has shown is its expansion through conquest is a legitimate right of all nations."***

### 8. The US is the New USSR

In a historical irony, the US now mirrors the very Soviet Union it once defeated. A senile figurehead president. Decisions signed by autopen. A collapsing empire addicted to foreign interventions. A population disillusioned with elites and riddled with internal fractures, today the global superpower is looking more and more like its former foe.

In the last two decades of the USSR, Soviet leaders either died in office or became too physically or mentally frail to govern effectively. This contributed to political stagnation and institutional decay at a time when the USSR was facing major internal and external challenges. In the US, President Joe Biden was so mentally unsound that his official documents were signed with an autopen. The use of an automatic signature tool allowed aides to sign pardons, memos and other important documents on Biden's behalf. Neera Tanden, the former director of Biden's Domestic Policy Council, testified in front of the House Oversight Committee, which investigated the former president's mental acuity. During Tanden's interview before Congress, she confirmed that in her role as staff secretary and senior advisor to the former president between 2021 and 2023, she was authorized to direct autopen signatures on behalf of Biden.

The Communist party in 1985 turned to an outsider and relatively young politician, Mikael Gorbachev to lead the USSR during its era of decline and malaise. Despite his attempts to halt the decline and implement reforms the USSR crumbled within 6 years. In the US the American people have turned to reality TV star and real estate mogul Donald Trump to navigate them out of the challenges the US faces. Trump faces more broader and deeper challenges than Gorbachev did and it remains to be seen if he will go down in history as America's saviour or will he become America's Gorbachev.

In the USSR in the 1970s the debate became whether Russia should maintain the burden of the Soviet Union or focus on nationalism and put Russia first. Reforms led to open elections which saw the emergence of Russian nationalism and the rise of Boris Yeltsin who argued for nationalism over the USSR. In the US Donald Trump and his supporters believe the US should focus on America and end the forever wars and prioritise the US over its empire. The US is literally having the same debate the USSR had in the 1980s.
One of the first acts of Mikael Gorbachev in 1985 was to end the Soviet war in Afghanistan, which was draining Soviet resources. When the final Soviet soldier left Afghanistan in 1989, the Soviet Union collapsed two years later. Donald Trump was the US president who agreed to a peace deal with the Taliban after a two-decade long occupation. All the recent global powers from the Soviets to the British, declined after leaving Afghanistan in defeat. This doesn't bode well for the US.

> ***"The US is today also facing its own Berlin wall moment which will confirm the US is no longer the global superpower."***

The Soviet Union was in huge debt in the 1980s. It was overstretched and could no longer maintain its position in the world after the decades long Cold War. The US is also, much like the USSR, overreaching and in huge debt. The Afghan and Iraq wars consumed US resources which has led to questions over its global position. The US is now living on debt and continues to borrow to repay existing debt. This destroyed the Soviet Union in the 1980s. The US now is looking like the USSR.

When the Berlin wall was torn down in 1989, everyone expected a Red Army intervention, which had become normal practice. When this did not occur, it confirmed that Moscow was no longer the power it was. The US is today also facing its own Berlin wall moment which will confirm the US is no longer the global superpower. America's global presence has cost it dearly at home, which has led to calls to end its forever wars. Unlike the USSR, the US Berlin Wall moment is growing in number and it's now really a matter of when and which US failure will make its decline official. The US is now officially the new USSR.

### 9. Tariffing Through Decline

Globalisation—the crown jewel of Western economic leadership—is being gutted by the very country that created it.

The deal the US made with the world after WW2 was that the US navy would protect the global sea lanes and tariff free trade or near zero trade will lead to prosperity. When the Cold War ended in 1991 the US pushed this economic order calling it globalisation. Former Soviet republics all joined one after the other and academics, economists and experts all produced report after report championing the benefits of open markets, free trade and globalisation.

This world is now history and firmly in the past. The US under Donald Trump now sees economic protectionism over free trade, nationalism over globalisation and ripping up international law rather than abiding by it. The US approach to global trade is now one of tariffs rather than free trade or comparative advantage.

The US is now tearing up the institutions, order and global economy it built and convinced the world to join. The reason it's doing this reveals where the US is today and it doesn't bode well for her. This move is due to recognising the "relative decline" of US power vis-à-vis the power of other states, primarily due to the rise of China, which has left the US in doubt as to whether it will continue to be able to lead multinational organisations. In response, it sees no need for these multinational organisations anymore, and instead is pivoting to a "bilateral approach" where it deals with individual nations on a one-on-one basis, where the power imbalance, and consequently US leverage is maximized.

> ***"In the end, the West did not need an enemy to destroy its sacred cows. It butchered them itself."***

We now live in a world where the former communist nation, China, is advocating free trade at the World Economic Forum (WEF) summit and advocating capitalist positions, whilst the US is sounding more and more protectionist. It's the US now that sounds increasingly like the USSR—paranoid, inward, and unable to compete on equal terms. In fact, the US seems to have taken on the USSR's perspective on many of its global positions.

The US may want to take a note from history. The USSR twisted and pulled communism in the 1980's to maintain its global position. In the end the Soviets themselves ended the USSR.

### 10. The Final Nail—The Rules-Based Order is Dead

The myth of a global rules-based order has been shattered. Whether in Ukraine or Gaza, the West applies its own rules selectively. Courts are sanctioned, journalists silenced, and laws rewritten in real-time to shield allies and punish adversaries. The West's sacred cows—once symbols of moral superiority—have been slaughtered by the very hands that raised them. Free speech, protest, law, order, justice—all hollowed out to serve political expediency.

With Israel's genocidal war in Gaza and South Africa taking the case to the ICJ, the West is now acting like the mafia against the very order it created and for long promoted. The US House of Representatives voted to pass legislation that will sanction the International Criminal Court (ICC) after its prosecutor applied for arrest warrants against Israeli officials. A group of Republican US senators even sent a letter to International Criminal Court (ICC) Chief Prosecutor Karim Khan threatening his family! Whether it is the UN, the ICC or even the ICJ they are now labelled as antisemitic and are being threatened for investigating and carrying out their job of investigating crimes against humanity. The West supported the court when it issued arrest warrants for Vladimir Putin, but the US has done the most to destroy and undermine the global order than any person ever could.

### Conclusion: The Butcher is Within

The West's sacred cows were not slain by a rival ideology, nor toppled in a new Cold War, nor overwhelmed by an ascendant civilisation. Ironically, their demise came not from abroad but from within. Despite emerging triumphant from the Cold War and facing no serious ideological contender, the West—led by an increasingly hubristic US—is now drowning in its own contradictions. Its once-vaunted economic model has birthed obscene inequality, concentrating wealth in the hands of a global elite. Its military dominance lies discredited in the wreckage of Iraq and the retreat from Afghanistan. The democratic ideals it once evangelised now ring hollow amid political dysfunction, declining trust, and a cultural landscape consumed by identity fractures and woke culture. In the end, the West did not need an enemy to destroy its sacred cows. It butchered them itself.

# Rare Earth Geopolitics

For decades, rare-earth elements (REEs), comprising 17 chemical elements, were treated as commodities, and their significance was underestimated. But today they play a vital role in modern technologies from cell phones to windmill magnets. The complacency over REE ended abruptly in 2010, when China exploited its market dominance to cut off exports during a dispute with Japan. The episode served as a wake-up call, revealing their importance in modern technology and the extent to which critical minerals could be weaponised in great-power competition. Today, China's dominance of REE mining and production is a central axis of strategic rivalry between Washington and Beijing.

At first glance, the term 'rare earths' is misleading. Elements such as neodymium, praseodymium, and cerium are relatively abundant in the earth's crust. What makes them 'rare' is the geological reality that they seldom appear in concentrated, economically viable deposits, and that their extraction and separation is complex and environmentally taxing. It is not their scarcity that matters geopolitically, but their extraordinary properties (magnetic, luminescent, and electrical), which are impossible to replicate at scale with substitutes. These properties make rare earth materials indispensable to a wide range of civilian and military applications. In fact, they permeate everyday life. Rare earths are present in smartphones, laptops, and headphones. Also, in green tech, rare earths are indispensable.

An offshore wind turbine requires up to two metric tons of permanent magnets per megawatt of capacity, while electric vehicles contain significant critical minerals. The F-35 fighter jet contains 400 kilograms of rare earths, distributed across its radar arrays, actuators, stealth coatings and electronic warfare systems. Each Virginia class submarine contains an estimated 417 kilograms of rare earths, crucial for sonar and weapons control. Similarly, Tomahawk missiles, air-defense radars, drones, and precision-guided munitions all depend on rare earth components to operate reliably. Innovations in the defence and military sectors are impossible to sustain without safe access to rare earth elements.


CHINA'S GRIP ON
CRITICAL MINERALS
MINERAL
LEADING PRODUCER
SHARE OF GLOBAL PRODUCTION (%)
China controls key materials such as graphite, rare earths, and gallium—essential for green technologies and defense industries.
GALLIUM 98.7%
MAGNESIUM 95.0%
NIOBIUM 90.9%
TUNGSTEN 82.7%
BISMUTH 81.3%
GRAPHITE 79.4%
SILICON 76.3%
COBALT 75.9%
PLATINUM 70.6%
INDIUM 70.4%
VANADIUM 70.0%
RARE EARTHS 69.2%
FLUORSPAR 68.4%
ANTIMONY 60.0%
ALUMINUM 59.7%
NICKEL 59.5%
BERYLLIUM 50.0%
ARSENIC 46.6%
TELLURIUM 46.5%
CHROMIUM 44.7%
TANTALUM 41.9%
PALLADIUM 39.5%
MANGANESE 37.0%
LITHIUM 36.7%
ZINC 33.3%
BARITE 31.7%
TIN 23.0%

## How did the US lose its lead

Historically, in the California desert, Mountain Pass was the one of the original rare earth elements mines the US used. It was discovered in 1949 by the Molybdenum Corporation of America, where its production peaked from the mid-1960s to the 1980s. At the time the US controlled the market. However, challenges appeared in the form of environmental movements, regulatory pressures and globalisation. This led companies to explore alternatives which saw many relocate their industries to China.

For most of the latter half of the 20th century, Mountain Pass in the US was the world's main supplier of rare earth metals. When China's open and reform era was launched in 1979 and took off in the 1980s, China was looking to become a dominant player in an industry, it was looking to corner a global industry, but it didn't have the technology for any such global industry. Deng Xiaoping's vision outlined in 1992 aimed for China to lead the world in the rare earth industry, famously saying that, *"The Middle East has oil, China has rare earth."* Magnequench, a rare earth-specialised company and subsidiary of General Motors, was acquired by a Chinese state-owned enterprise during the late 1990s, with Deng Xiaoping's son-in-law serving as the new leader of the company. China chose REEs as most facilities were already closing down around the world and the process, although dirty and costly, didn't require particularly complex technology.

What also allowed China to become the global master in REEs was at the same time, Japan closed some rare-earth facilities and transferred its technology to China, advancing Chinese dominance of the market further and increasing the reliance of other countries on Beijing for supply. This dependence on Chinese processors, coupled with environmental concerns, led to the halt of production at America's Mountain Pass in 2002. China flooded the global market with low-priced REEs and the Chinese government provided low costs, subsidies and lax standards. This was the death knell for US domestic REE production.

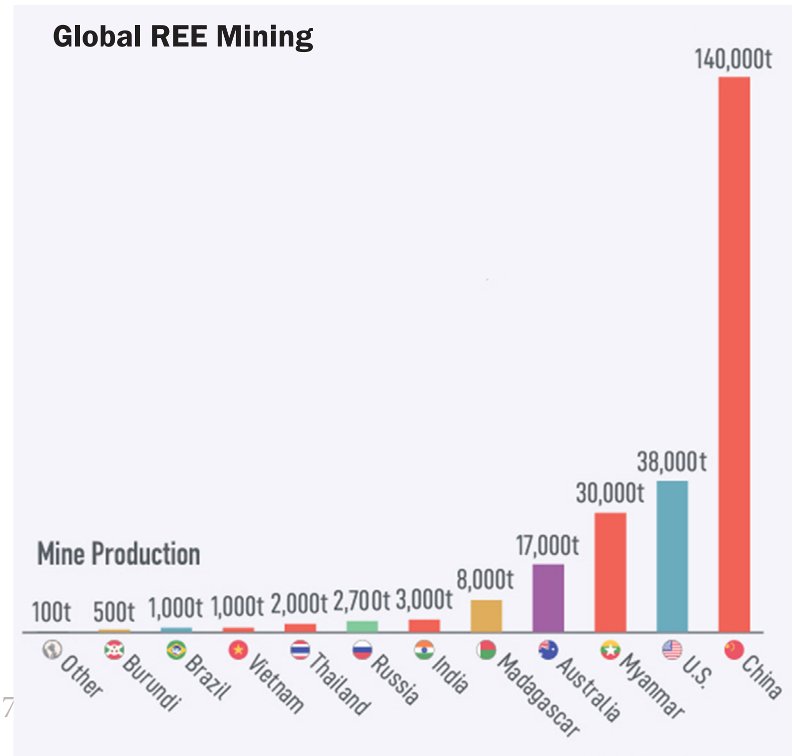
By the turn of the 21st century China had become the dominant force in rare earth production. Accounting for 95% of the global supply, and leveraging its abundant resources, China strategically utilised rare earths for technological innovation across sectors like space, defence and energy. By 2010 China accounted for 95% of the world's rare earth oxides.


Mountain Pass, California

## REE Politics

China's restrictions on REE exports and their use by third parties in response to US tariffs and trade restrictions now means China can hold the world hostage as a policy tool. This is not the first time China has done this. In 2010 a Chinese fishing trawler collided with two Japanese Coast Guard vessels near the disputed Senkaku Islands. Following the collision, the Japanese Coast Guard detained the Chinese captain, accusing him of intentionally hitting the Japanese ships, and China vehemently protested the captain's arrest and demanded his immediate release. The clash escalated diplomatic tensions between China and Japan, leading to a series of protests and strong rhetoric from both sides. As part of the backlash, China temporarily halted its rare earth exports to Japan, using its dominance in the rare earth market as a diplomatic tool.

The incident caused prices to surge by up to 500% in 2011 and 2012, driven by speculation, and this propelled heightened awareness in the West about Chinese dominance, resulting in the start of over 200 new projects globally to diversify the supply chain. The USA's Mountain Pass mine was revived in 2012 as a result.



## Supply Chains

Although called REE's they are not rare and are found in the earth's crust across the world. REEs are byproducts of mining for other metals such as nickel, copper and uranium. While not rare on Earth, they are rarely found in sufficient abundance in a single location for their mining to be economically viable. The real challenging aspect lies in the refining process, which is dirty and toxic, time-consuming, and costly. The process is also not particularly complex, and many nations could start their own REE industry if they wanted to do so.

Going from the raw ore found in mines to magnet is a multi-step process and today the technology and process used are from the 1930's. The first stage involves mining the raw material, crushing it at a mill to form a fine powder. Once you have the main metal you're after, you have a lot of waste left over, where another run of crushing is undertaken to concentrate the material further, getting you closer to REE.

During the second stage— the concentrate is run through a process of roasting, leaching and chemical separation that purifies the high-value minerals. This process is dirty, very polluting and takes a long time. Here the Australian and Brazilian mines would ship their individual oxides in the form of a fine powder to China for them to complete the final stage

In the final stage of the process the oxides are converted to the metals, alloys and finished magnets by dissolving them in large tanks of acid and the remnants of this are repeated multiple times, over months until your tons of oxides become an ounce of rare earth.

China was able to corner this market as no one across the world wanted to undertake this toxic process. Those that were doing it during the 1990's closed their plants. Today no US facilities do this work. This is why China currently controls more than 85% of global rare earth processing capacity and over 90% of permanent magnet production, China accounts for 92% of metal, alloy and magnetics conversion. The rare earth alloys and magnets that China controls are critical components in missiles, firearms, radars and stealth aircraft.

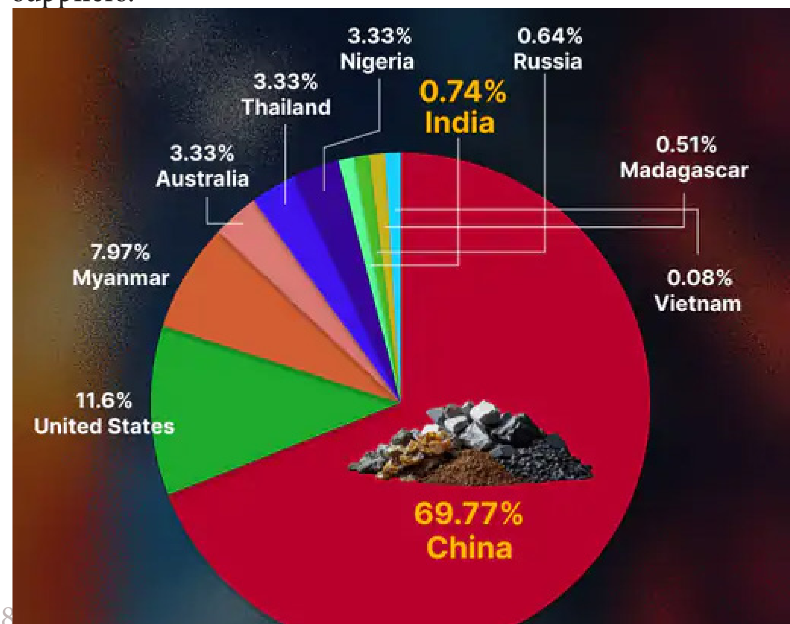
## China's Dominance

China's dominance of mining, processing and exports of REE is overwhelming. Whilst China has used non-market tactics to achieve this, ultimately Chinese domestic needs have been its priority and this is likely to continue. Even much of Chinese rare earths exports return to China at some point as components for electronics and advanced machinery that China needs to keep its other export sectors going and especially to continue its climb up the manufacturing value chain.

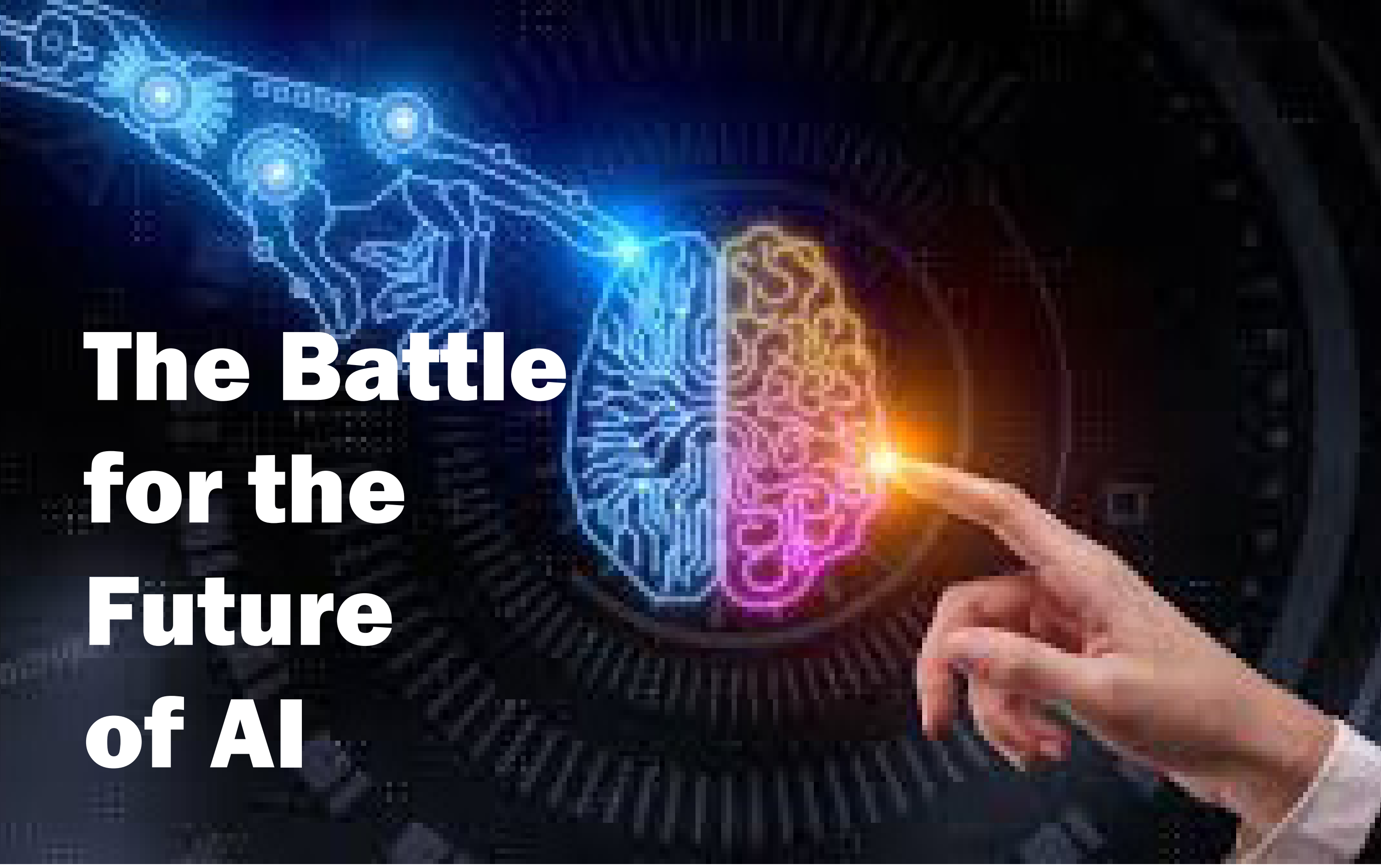
> ***"Deng Xiaoping's vision outlined in 1992 aimed for China to lead the world in the rare earth industry, famously saying that, "The Middle East has oil, China has rare earth."***

Chinese domestic demand for rare earths is already extremely high. China has grand plans for many technological developments from making the vast majority of its vehicle fleet electric by 2035, reaching 1,000 gigawatts of wind power generation by 2050, and building out the missile, submarine and air power capabilities needed to reach military parity with the US. China's demand for REE is only going to increase.

For the US rare earths and other critical minerals are indispensable to the US military-industrial base. Washington imports the vast majority of its critical materials, exposing its supply chains to foreign coercion. The US Department of Defense has announced a landmark agreement with MP Materials, which owns the only rare earth mine in the United States, at Mountain Pass, California. The deal, unveiled on July 10th, 2025, represents the largest US government investment ever made in the rare earths sector, underscoring Washington's growing recognition of the strategic vulnerabilities posed by reliance on Chinese suppliers.




REE Production



# The Battle for the Future of AI

As artificial intelligence (AI) accelerates into every sector of the economy, the US and Europe are moving in starkly different directions on how to govern it. While Washington under the Trump administration is tearing down what few rules existed in favour of an aggressively pro-innovation agenda, Brussels continues to press ahead with a far-reaching regulatory framework aimed at managing risk and ensuring safety. The transatlantic divide over AI governance has become one of the defining policy cleavages of the West's new leadership era, reflecting deeper philosophical and political differences about how power, innovation and responsibility should be distributed in the digital age.

## America's Deregulatory Turn

In January 2025, President Donald Trump signed his first major technology directive, the Executive Order on Removing Barriers to American Leadership in Artificial Intelligence. The document framed AI leadership as essential to human flourishing, economic competitiveness, and national security, while promising to strip away ideological bias and social agendas in AI systems — a clear reference to Republican complaints about content moderation and liberal guardrails embedded in chatbots and online platforms.

The order repealed former President Biden's 2023 AI executive order, which had largely relied on voluntary commitments for transparency and testing rather than hard rules. While Biden's framework had already been light-touch, Trump cast it as an overreach, accusing it of stifling innovation and censoring conservative voices. His new order signalled an even looser approach: minimal federal intervention, heavy emphasis on private-sector leadership, and a commitment to double down on R&D investment to ensure US dominance in AI.

At the February 2025 AI Action Summit in Paris, Vice President J.D. Vance made the administration's stance explicit, urging allies to prioritize innovation over regulation. Tech executives echoed the sentiment: Google CEO Sundar Pichai warned that the biggest risk could be missing out. Within weeks, several companies updated internal guidelines to align with the administration's position — most notably OpenAI, which revised its Model Spec to embrace intellectual freedom in outputs, a move widely interpreted as easing content restrictions.

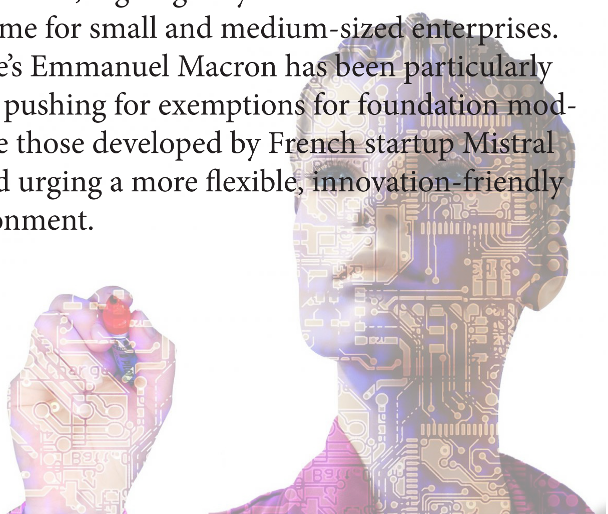
Trump's approach is consistent with the broader America First technology doctrine: promote domestic AI champions, limit regulatory friction, and treat safety frameworks as optional. While few new rules are being proposed, the administration is considering enforcement action through agencies like the Federal Trade Commission to challenge what it sees as politically motivated content moderation. State-level activity continues, with California and Colorado introducing limited AI bills, but the federal government has made clear it will not impose new mandates on developers. Instead, future policy will focus on large-scale AI infrastructure, export controls on China, and incentives for private investment rather than public safety standards.

## Europe's Regulatory Experiment

Across the Atlantic, the European Union is attempting something very different. The EU's Artificial Intelligence Act, which entered into force in 2024, represents the world's first comprehensive legal framework for AI. Building on the Digital Services Act and General Data Protection Regulation (GDPR), it seeks to classify AI systems by risk, from unacceptable (such as social scoring or mass surveillance) to minimal, and impose obligations accordingly. Developers of high-risk or systemic models face extensive documentation, testing, and cybersecurity requirements, with fines of up to 7% of global revenue for violations.

The AI Act's ambition is clear: to set the global standard for trustworthy AI. But it comes at a time when Europe's industrial competitiveness is under growing strain. Former European Central Bank President Mario Draghi's 2024 Report on the Future of European Competitiveness warned that excessive regulation could cripple innovation. His findings, echoed by leaders in France, Germany, and Italy, have sparked calls to streamline or delay aspects of the AI Act to prevent Europe from falling further behind the United States and China.

Even European Commission President Ursula von der Leyen's centre-right European People's Party has begun to question Brussels' regulatory zeal. In January 2025, it called for pauses on several major frameworks, arguing they were excessive and burdensome for small and medium-sized enterprises. France's Emmanuel Macron has been particularly vocal, pushing for exemptions for foundation models like those developed by French startup Mistral AI and urging a more flexible, innovation-friendly environment.



Despite internal dissent, the European Commission is moving forward with implementation. The first bans — covering unacceptable risk AI — took effect in early 2025, with requirements for high-risk systems due in 2026 and full compliance by 2027. The Commission's AI Code of Practice, released in mid-2025, offers voluntary guidance ahead of enforcement. Yet critics argue it merely adds confusion: the Computer and Communications Industry Association, representing firms like Amazon and Meta, claims it imposes disproportionate burdens and may undermine competitiveness.

Adding to the pressure, more than 45 major European corporations, including Airbus, ASML and Mistral, have jointly called for a two-year moratorium on enforcement. They warn that compliance costs and uncertainty could drive AI companies to treat Europe as a secondary market — a place to test regulations, not innovation. The US government has also intervened, urging Brussels to delay implementation and arguing that the Code of Practice discriminates against American firms. So far, the European Commission has refused to yield, but the confrontation highlights a widening rift in transatlantic digital governance.

## Diverging Philosophies, Converging Challenges

At the heart of this divergence are two competing visions of technological modernity. The US views AI as a frontier of economic and geopolitical power — something to be unleashed, guided by market forces, and lightly coordinated through voluntary standards. The European Union, shaped by its experience regulating data privacy, seeks to tame the technology through oversight and classification before its risks spiral out of control.

These differing instincts are rooted in deeper structural and political realities.

**Economic structure:** The US benefits from a concentrated ecosystem of powerful AI firms — OpenAI, Anthropic, Google, Meta — with vast capital and data resources. Regulation is seen as a potential brake on national advantage. The EU, lacking similar tech giants, leans on regulation to exert normative power and protect citizens.
**Political culture:** US debates frame AI around free speech, censorship, and innovation; European debates focus on ethics, safety, and accountability.

**Strategic competition:** Both sides cite China as the ultimate benchmark. For Washington, deregulation is a weapon in the race for dominance; for Brussels, rules are a way to set global norms before Beijing does.

Ironically, despite their rhetorical contrast, both jurisdictions are now adjusting. The US is quietly retaining several Biden-era initiatives, such as federal AI research funding and infrastructure acceleration. The EU, under mounting internal and external pressure, is exploring ways to simplify compliance and delay key provisions of the AI Act. In both cases, pragmatism is overtaking ideology.

### The Road Ahead: Fragmentation or Convergence?

The next few years will determine whether transatlantic AI regulation converges around shared standards or diverges into rival regimes. Several forces will shape the outcome.

First, business pressure is mounting on both sides. In the US, even pro-Trump executives recognise the need for some guardrails to manage liability and public trust. In Europe, corporate lobbying for regulatory relief is intensifying, with major firms warning they may relocate development to the US or UK if compliance costs remain excessive.

Second, global competition will keep both sides cautious. The rapid advance of Chinese AI firms, particularly in applied sectors like robotics, surveillance, and chip design, has injected urgency into Western strategies. Washington's AI action plan, expected later in 2025, is likely to focus less on regulation and more on export controls, semiconductor dominance, and supply-chain resilience. Brussels, meanwhile, has announced a €20 billion investment in AI data centres to boost its industrial base.

Third, political transitions within Europe may soften the bloc's regulatory stance. As the European Parliament and Commission recalibrate their economic agenda for the late 2020s, Draghi's competitiveness report will continue to frame the debate. A more flexible, tiered approach, retaining core safety rules while relaxing burdens for startups, is already under discussion.

Yet uncertainty will persist. Companies operating in Europe face overlapping obligations under the AI Act, GDPR, and national laws, while U.S. firms risk political scrutiny at home over AI bias and misinformation. The risk is a patchwork of incompatible standards, where developers must tailor systems to each jurisdiction — fragmenting the Western AI ecosystem just as China pushes for unified leadership in its own market.

> ***"At the heart of this divergence are two competing visions of technological modernity. The US views AI as a frontier of economic and geopolitical power — something to be unleashed, guided by market forces, and lightly coordinated through voluntary standards. The European Union, shaped by its experience regulating data privacy, seeks to tame the technology through oversight and classification before its risks spiral out of control."***

### Toward a Transatlantic Compromise?

Despite tensions, a middle path is possible. Both sides share interests in preventing catastrophic misuse, maintaining data security, and ensuring their AI industries outpace authoritarian competitors. Coordination mechanisms, such as joint research initiatives, reciprocal safety standards, and trusted data flows, could bridge the gap. The 2025 EU-U.S. digital trade framework, though still vague, provides an early platform for such dialogue.

Ultimately, the fate of Western AI governance may hinge on trust — between governments and industry, and across the Atlantic itself. If the US continues to deregulate while Europe enforces without flexibility, fragmentation will deepen, giving China and other powers space to set their own norms. If, however, Washington and Brussels can align innovation incentives with minimal but credible oversight, they could together define the global standard for responsible AI.

## Conclusion: Regulation in an Age of Acceleration

AI's trajectory is moving faster than any previous technological revolution, and both sides of the Atlantic are struggling to keep pace. The US is betting that freedom to innovate will secure leadership; the EU is betting that legitimacy and safety will secure longevity. Neither approach alone will suffice. As AI evolves from experimental tools to critical infrastructure, regulation, or the lack of it, will shape not just markets but the geopolitical balance of power. The West's challenge is to prove that openness and oversight can coexist — before others decide the rules.

# Gaza: The War That's Breaking Israel and the West

On October 7th, 2025, two years passed since the events of October 7th, 2023, when Hamas's surprise attack triggered a war that has transformed Gaza, Israel, and the entire region. What began as a campaign to restore Israeli deterrence has spiralled into something much larger: the devastation of Gaza, the erosion of Israel's international credibility, unprecedented charges of genocide, and even direct clashes with Iran.

For Israel, the war has been framed as an existential struggle. For Palestinians, it has meant death, famine, and displacement on a scale unseen in decades. For the West, it has been a brutal mirror: exposing hypocrisies, shredding the myth of a rules-based order, and showing how far governments will go to defend a state accused of atrocities. As the conflict enters its third year, the question is no longer simply about Gaza. It is about whether Israel is using this moment to pursue its long-standing dream of a Greater Israel — and whether the region itself is being remade around it.

## Israel's Credibility Crisis

On the two-year anniversary of October 7th, Israel's narrative that the Zionist entity faces an existential struggle and it is trying to secure its security to ensure another October 7th never occurs again has lost all credibility. Despite pushing this narrative for two years, Israel is today facing the biggest credibility crisis in its history

Israel's problems began soon after October 7th, when one-by-one its claims about the October 7th atrocities were debunked and discredited. Israeli officials one after the other fell over themselves to spell out what they planned to do to the Palestinians. Politicians made use of biblical prophecies, they openly proclaimed cutting water, electricity and food to the Palestinians and mentioned dropping a nuclear bomb on the people. When Israel began to deliver on these promises and images and videos circulated on social media, many in the western world looked on in shock and horror.

Israel's propaganda machine went into 5th gear. We were constantly told by Israeli officials and its supporters in western governments and in the media that Israel is acting in self-defence in Gaza. Its objective was to free hostages held by Hamas, and to re-establish order and security by destroying Hamas' military capabilities. Many saw through this and only saw the complete destruction of Gaza. One-by-one Israeli officials and its supporters took to the media struggling in the face of news reporters questioning their motives and explanations. Zionists cried anti-semitism and abused the concept, but the relentless onslaught for Israel to defend itself has seen Israel lose what credibility it had left. When the United Nations Secretary-General Antonio Guterres said, *"It is important to also recognise the attacks by Hamas did not happen in a vacuum..."* and *"The Palestinian people have been subjected to 56 years of suffocating occupation,"* Israel lost the very institution that created it.

Put simply, what Israeli propagandists told the world, was simply not what the world was seeing. Many around the world saw the large discrepancy between what they were hearing and seeing. What everyone saw was the complete destruction and collective punishment of Gaza. The fundamental issue for Israel has been the fact that it's trying to defend the indefensible and it doesn't help when Israeli officials keep making genocidal calls and then try to deny that was what they meant.

### Israel's Man-Made Famine

In the immediate aftermath of the October 7th attacks, Israeli Defense Minister Yoav Gallant declared a complete siege of Gaza, stating, *"...there will be no electricity, no food, no fuel."* This marked a shift from blockade to comprehensive deprivation. Israeli ministers expressed similar sentiments, advocating total restriction until hostages were released. Although Gaza has long endured constrained access to aid, the images of starvation and famine conditions triggered global concern, even among some of Israel's traditional allies.

Israel's propaganda machine continues to blame the UN and aid agencies for not doing their job and distributing food and aid inefficiently. Israel has also resorted to the trope of blaming Hamas for stealing aid and being the sole cause of the man-made famine in Gaza. Israeli officials have constantly denied the existence of mass starvation and blame Hamas, but the evidence has stacked up against Israel.

> ***"Put simply, what Israeli propagandists told the world, was simply not what the world was seeing. Many around the world saw the large discrepancy between what they were hearing and seeing."***

Israel's policies in Gaza constitute a multi-pronged strategy in which starvation and deprivation are used as tools of war. By combining aid obstruction, collusion with criminal gangs, the dismantling of aid infrastructure, and the creation of a militarised proxy relief operation, the Israeli government has built what can only be described as an *"architecture of starvation."* As international criticism mounts and humanitarian needs reach catastrophic levels, public opinion has turned against Israel and its supporters as many call for urgent intervention and the restoration of neutral aid distribution and the safeguarding of civilian lives.

Starvation as a war strategy has been a tactic used since ancient times, this was why when the shocking images came out of Gaza the International Criminal Court issued arrest warrants for Israeli prime minister Benjamin Netanyahu and former defence minister Yoav Gallant due to 'reasonable grounds' that they bear criminal responsibility for 'the war crime of starvation as a method of warfare.' The evidence against Israel is that by publicly declaring Israel's intention to impose a total siege of Gaza and then enforcing measures that deprive Gazans of food and other goods that are indispensable to civilians' survival, Israeli leaders Netanyahu and Gallant have committed the war crime of starvation. The ICCs charge is the first time in history that a major court has centred a war crimes prosecution on mass starvation.

### When Genocide Victims Become Offenders

Israel was created in the name of those who survived the genocide committed by the Nazis. But two years since the events of October 7th all the institutions created to monitor and document genocides, all the human rights organisations who monitor atrocities and numerous historians and experts now assert that Israel is committing a genocide.

From Amnesty International to Human Rights Watch (HRW), from Israeli human-rights organisations to the world's leading association of genocide scholars the International Association of Genocide Scholars (IAGS) have all stated that Israel's conduct meets the legal definition as laid out in the UN convention on genocide.

In March 2025 the UN concluded Israel targeted fertility clinics and embryo facilities in Gaza in its assault. In its 49-page report on sexual and gender-based violence drawn up by the UN's Independent International Commission of Inquiry on the Occupied Palestinian Territory, Including East Jerusalem, it detailed attacks on maternity wards and other healthcare facilities for women, the destruction of an IVF clinic and controls on the entry of food and medical supplies into Gaza that together *"…destroyed in part the reproductive capacity of Palestinians in Gaza as a group"*. Carrying out actions to affect the birth rate of a people is one of the five acts that constitute a genocide.

The evidence all these organisations and many others relied upon is the support among Israeli leaders for the forced expulsion of all Palestinians from Gaza, alongside Israel's near-total demolition of housing in the territory. The statements by Israeli leaders dehumanising Palestinians in Gaza, characterising them all as the enemy, alongside promises to 'flatten Gaza' and turn it into 'hell' are all indicators of intent.

Israel broke another record on the 15th of March 2025 when it sabotaged the ceasefire agreement and refused to negotiate the second phase. Israel cut electricity and food into Gaza, and then on the day the ceasefire ended on 18th March 2025, Israel pounded Gaza and added another record to its genocidal credentials. Israel carried out the largest massacre of children in 24 hours in modern history. Haaretz called it the day when *"Israel … committed the largest child massacre in its history. Two hundred children and 100 women were killed in one day."*[18]

The genocide label is no longer fringe. It is mainstream.

### Israel's Occupation Consensus

Protests in Israel regularly take place including at Benjamin Netenyahu's residence. Many Israelis want a deal so Israeli hostages can come home. There has for long been a perception that Israel has been hijacked by a fanatical religious far-right minority—one that has gained extraordinary leverage and influence by helping Netanyahu cling to power despite his legal predicaments. Polls have consistently found that, if new elections were held today, Israelis would oust the current leadership. If only the government were more aligned with public opinion, the country would be taken in a decidedly different direction.

But the assumption that a post-Netanyahu Israel can chart a new course misses the extent to which Israelis concur with the government on many deeper, longer-term issues. Based on a number of surveys over the years and throughout the current war, both the anti-Netanyahu public and the main opposition parties differ little from the current leadership on the future status of Palestinians, the inevitability of ongoing Israeli occupation in general, and the acceptability of denying self-determination, or civil rights to Palestinians in the territories, among other issues. Polls show that, like their current leaders, the large majority of Israeli Jews do not empathize with the suffering of Palestinians in Gaza, which Israeli television and mainstream newspapers barely cover. Many believe civilian deaths and harms are the fault of Hamas and are exaggerated or even fabricated, as government and Israeli commentators constantly claim.

What all the surveys of Israeli public opinion have confirmed is no matter how much politicians and commentators focus on Netanyahu, the fact is that when it comes to Israeli intransigence regarding Palestinians, the prime minister alone is not the problem. The problem is Israeli society, politics, and culture as it has evolved over decades.

When Netanyahu opposes the two-state solution he is reflecting the attitudes of a firm majority of Jewish voters. Hardly any of Israel's mainstream opposition leaders risk contradicting him. Israeli security hawks such as Benny Gantz, the Israeli general who was considered a moderate member of Netanyahu's "war cabinet" during the first eight months of the war, are highly agnostic about Palestinian statehood; leaders of the secular right, such as Avigdor Lieberman, openly oppose it. Former Prime Minister Naftali Bennett, who polls show as a front-runner among opposition candidates, has in the past been to the right of Netanyahu and has always opposed a two-state solution. Israel's centrist parties are little different. Even Israel's consolidated Zionist left-wing party, the Democrats, led by Yair Golan, a major general and a former IDF deputy chief of staff, mostly avoid discussing a Palestinian state or the two-state solution. Yair Lapid, the official head of Israel's opposition and leader of the centrist Yesh Atid party, has similarly mostly avoided the issue since the war started, although he was the last Israeli prime minister to support a two-state solution publicly during his brief term in late 2022. Only the leaders of Arab parties speak freely in support of Palestinian statehood.

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The hardening of views about Palestinians reflects longer-term trends in Israeli society. As a matter of political orientation, a decisive majority—60 percent—of Jewish Israelis now identify as right wing, compared with 12 percent who consider themselves left and just over 25 percent who say they are in the center, according to a June 2025 survey by the Israel Democracy Institute. But these trends did not begin with October 7th. Already in the run-up to the 2022 election, hardly anyone—candidates or most of the Jewish Israeli public—would talk about the Palestinians or about Israel's nearly six-decade occupation regime.

### Who Really Cares About the Hostages?

Around 251 hostages were taken on October 7th and 148 were subsequently released as part of peace deals and hostage swaps. 8 hostages were rescued by Israel whilst up to 49 bodies have been returned to Israel. Today somewhere up to around 60 hostages are believed still to be in Gaza, with Israel believing half are likely already dead.

Israeli leaders from the day October 7th took place made it clear that until the capture of all its hostages, its war with Hamas will continue. Israeli leaders went to great pains from the earliest days to make its invasion and occupation of Gaza all about the hostages. However, the actions that ensued raise numerous questions on where the hostages really sit with the regime in Tel Aviv amongst its list of priorities.

Israeli families who have hostages in Gaza now carry out regular protests and consensus has grown amongst Israeli society that a deal should be made with Hamas to release the remaining hostages, despite Tel Aviv starting a new operation to invade Gaza in September 2025.

Israel's strategy to rescue its hostages has largely rested on military pressure. Israel launched an extensive aerial bombardment and then ground invasion. Part of the stated aim was to weaken Hamas militarily, disrupt its control, and create pressure to force hostage releases. The IDF also carried out special operations deep inside Gaza to locate and attempt rescues of hostages held in tunnels or civilian areas. These missions were high-risk and sometimes resulted in both hostage and soldier casualties. A major part of Israel's military focus has been on destroying Hamas' tunnel network — since many hostages are believed to have been held underground.

Israel's Shin Bet and IDF used a mix of surveillance, interrogation of captured Hamas fighters, intercepted communications, and technology (drones, AI-assisted analysis) to track hostages' possible movements. There was also coordination with allies with close intelligence cooperation with the US and the UK, who provided satellite imagery, signals intelligence, negotiators and aerial flights.

Despite the military pressure, Israel was forced into negotiations to release the majority of its hostages. These were undertaken indirectly with Egypt, Qatar and the US acting as mediators. In the November 2023 truce, over 100 Israeli hostages were freed in exchange for Palestinian prisoners. Despite this, Israeli officials insisted on continuing its military strategy, aware of its limited success. Hamas has only put one condition to releasing all the hostages, that the release of all the hostages should be tied to a permanent ceasefire, something Israel refuses to do. In fact, Israel insists on continuing its military strategy which has led to the deaths of its hostages!

Despite Israeli public opinion supporting a ceasefire that frees the hostages, Israeli officials have other plans. Israel's Finance Minister Bezalel Smotrich made clear in April 2025 that bringing the hostages back from Gaza was "...not the most important…" goal of the government. Speaking to Radio Galey Israel, the far-right minister said: *"We have to say the truth, returning the hostages is not the most important thing. It is obviously a very important goal, but if you want to destroy Hamas so that there can't be another October 7th, you need to understand that there can't be a situation where Hamas remains in Gaza."*[19]

As the families of the hostages carry out ever larger protests, Israeli officials regularly demean, vilify and insult their families. Netanyahu has repeatedly said he is not willing to end the war until Hamas is completely overthrown. Israel's far-right heritage minister said the hostages – most of whom are civilians, snatched from their beds or from the Nova music festival – should be considered prisoners of war, whose return should only come after the war in Gaza ends, even if that takes many more months.[20]

Though polls show that most Israelis support ending the war in exchange for the hostages,' Israeli officials see the hostages not as a priority but as a problem – an inconvenience to larger ambitions like building settlements in Gaza and expelling Palestinians.

## Post-War Gaza: Plans Without Palestinians

The day after the Gaza war ends has seen a number of proposals. What has emerged over the past two years is Hamas will play no role, and the Palestinians will also not be part of the discussion, but merely subjects.

When Israel launched and focused on its invasion and slaughter of Gaza, many in the West became critical of Israel for not having a day after plan. The first plan that emerged was the Egyptian plan that proposed a five-year reconstruction plan with phases: early recovery (6 months), then multi-year rebuilding. Then the clearing of debris would take place which would allow the building of permanent infrastructure. The Israelis and then the US criticised the proposal as it didn't go far enough in dealing with the security situation.

Benjamin Netanyahu then came up with his day-after plan. The plan emphasised demilitarising Gaza, the removal of military-terrorist capabilities beyond what's needed for internal public order. It proposed permanent Israeli control over security and would place restrictions on border crossings. It saw Palestinian local officials with no links to groups hostile to Israel to run the enclave day-to-day, under Israeli oversight. But the plan received major pushback from Gazans and the Arab leaders.

The most recent proposal has been Trump's Riviera plan. This consists of large-scale urban development, with Gazans relocated for the duration, multilateral trusteeship and external oversight of Gaza, as well as the disarmament of Hamas. Former British Prime Minister Tony Blair has been involved in coming up with the details of this plan. But everyone sees this plan as the expulsion of the people.

The only considerations for post-War Gaza are Israel's security concerns. Israel continues to obstruct every ceasefire and agreement as it wants to depopulate Gaza. The needs of the Palestinians and the broader region remain secondary for the West and Israel. Most of the post-war plans envisaged the relocation of the population.

## The Greater Israel Agenda

At the two-year anniversary of October 7th Israeli officials have been unable to hide their agenda and the prospects for greater Israel. They have in fact been very open and arrogant about the plans for expansion that they are openly proclaiming Gaza is just the beginning.

Israel has always been against the two state solution, as they do not want to give up any territory but want to conquer, annex and expel the Palestinians. Netanyahu in an interview publicly alluded to saying he was "very" connected to the idea of greater Israel. This means Netanyahu is saying to the surrounding Arab rulers that Israel has eyes on their countries and wants to conquer them in order for Israel to have security.

Greater Israel has always been the Zionist aim; it envisions Israel's borders going from the Nile in Egypt to the Euphrates. When Israel carried out its initial expulsion in 1948, which they like to call their war of liberation, Israel's future survival was still in doubt so Israeli leaders focused on taking territory from historic Palestine. Then they focused on dealing with the threats on their periphery and subsequently Israel went to war with Egypt, Jordan and Syria. From the 1980s, Israel saw its position in the region secure, especially as Egypt has signed a peace treaty.

The events of October 7th have seen Israel win over many US policy makers for Israel to expand in order for it to achieve the security it desires. This began with the onslaught in Gaza and then expanded into Lebanon and then Syria. In Lebanon, Israel has established military bases (which it calls observation posts) and has used the cover of 'security' to maintain its position there. Now Israeli officials admit they have no intention of ever leaving. In Syria, Israel has been working with the Allawis who lost power when the al-Assad regime fell and the Druze minority in the South of Syria to interfere in the country. Israel has now annexed the Golan heights and is arguing the whole South of Syria should be demilitarised. Israel now regularly conducts air strikes and ground assaults into greater Damascus.

Greater Israel will require the expulsion of the Palestinians in both Gaza and the West Bank and Israel is doing this by making the West bank and Gaza uninhabitable. This will force the Palestinians into Jordan and the Sinai, and Israel will use 'security' as a cover to interfere in these areas.

Israel is today altering the security and strategic landscape in the region. It has decimated Hezbollah and Hamas. It has cut Iran's supply lines that went through Syria into Lebanon. Israel has convinced the US of this agenda and proven to her that this is in the best interests of the US too. The attack on Qatar was confirmation of this strategy. The Middle East that was crafted after WW2 is now finished and Israel, with US support is creating a new region, with Israel at the centre.

## Israel has Been Provoking Iran for a Regional War

Israel, even before the events of October 7th was in a shadow war with Iran. This was where both nations avoided direct confrontation but, in the shadows, they carried out assassinations, cyber-attacks and supported proxy groups. Israel has for long viewed Iran as a hostile regional actor, a state sponsor of terrorism who wishes to wipe Israel off the map. After 7th October, Israel has been trying to provoke Iran into a regionwide war, safe in the hope that the events of October 7th and the support of the US would allow Israel to once and for all cripple the clerical regime in Tehran.

Israel began with carrying out a strike in Syria in April 2024 targeting the Iranian consulate in Damascus. In response Iran spent a week telegraphing its plan to respond to Israel. Iran provided daily commentary running up to the attack of its intention to do so. At the same time Iran and the US entered into dialogue. Iran's Foreign Minister Hossein Amir-Abdollahian at that time summoned the Swiss diplomat who represents US interests in Iran. He said at the time that through the backdoor channel: *"…an important message was sent to the American government as a supporter of the Zionist regime."* The New York Times confirmed that among informed defence analysts the dominant view became that Iran would strike Israel in a way that would allow it to save face, but measured enough to not arouse an even fiercer counterstrike. The US and Iran communicated and ensured Iran's response was measured and didn't lead to a regional war, something Israel wanted, but not something both the US and Iran wanted.

Then on 31st July 2024 Israel assassinated Ismail Haniyeh who was in Tehran attending the inauguration of Iran's new president Masoud Pezeshkian. He was killed in his guesthouse/residence. Iran offered lots of rhetoric but did not respond militarily to Israel.

In June 2025, what is now called the 12-day war took place. Israel launched major strikes on Iranian territory that hit multiple sites reported to include Natanz, research/nuclear-adjacent sites, missile infrastructure and senior commanders. This took place when Iran was in direct talks with the US; Steve Witkoff, Trump's real Secretary of State and Iran's foreign minister were in face-to-face meetings to come to a nuclear agreement. Iran responded with ballistic missiles and drones in a multi-day exchange that caused casualties and disrupted regional air traffic. After a week of tit-for-tat attacks and missiles raining upon Tel Aviv, the US intervened. A high-ranking Iranian confirmed in an Amwaj report that the Trump administration conveyed that it did not seek an all-out confrontation. The senior source also confirmed that the targeted sites were evacuated, with 'most' of Iran's stockpile of enriched uranium kept in secure locations.

When US B-2 bombers crossed into Iranian airspace, Trump's special envoy Steve Witkoff in a phone call with Abbas Araghchi, Iran's foreign minister, made clear that the operation was a one-off and limited strictly to Iran's nuclear program. Witkoff emphasised to Araghchi that the US still seeks a diplomatic resolution. Witkof informed the Iranians in advance of the coming attack.

Then, Iran launched missiles at Al Udeid US air base in Qatar in retaliation for the attack. Before the missiles were launched Iran gave the US advance warning such that any casualties could be avoided. US President Trump thanked Iran for giving the United States notice prior to shooting missiles at its military base in Qatar, which he said made it possible for no lives to be lost. *"I want to thank Iran for giving us early notice, which made it possible for no lives to be lost, and nobody to be injured."*

A leaked DIA report confirmed that some components of Iran's nuclear program could be restarted in months. US experts confirmed much was moved or buried under damaged sites. What has become clear is the attack did not cripple Iran's nuclear programme, and the communication between the US and Iran ensured this would not be the case. What the US did was, take over Israel's bombing campaign and show that it had cripped Iran's nuclear program, so Israel now has no reason to attempt this again.

The US and Iran collaborated, by sending each other messages to ensure Israel's bellicose behaviour didn't spiral out of control into a regional war. Despite Israel's provocations, Iran has restrained itself from responding in a way that could cripple Israel or lead to a broader regional war.

## Conclusions — A Region Reshaped

Two years after October 7th, Gaza lies in ruins. Famine has been weaponised, genocide charged, and Israel's credibility shattered. Yet Israel is stronger militarily, more unapologetic politically, and more ambitious regionally. The West, meanwhile, has seen its values gutted by its own contradictions. Free speech, protest, and international law were not defeated by rival ideologies — they were sacrificed to defend an ally at any cost. A new Middle East is emerging, built on expansion, occupation, and survival of the fittest. Israel, with American cover, stands at its centre. The sacred cows of the old order are dead. The question now is what, if anything, will rise in their place.

# Which Nations are Running out of People?

People are essential for a society to exist and whilst societies in different forms have always existed the nation state, today's most dominant model of organising society has only been around for a fraction of the time humans have existed. But today there are a number of nations whose population decline has reached the point that there are question marks if the nations will continue to exist.

The causes, factors and similarities are surprising. Of the 10 nations likely to disappear all of them are the world's largest economies, they have all industrialised and urbanised and one would think having developed they would not have such social issues.

A nation needs on average, a fertility rate of 2.1 children per woman to maintain a stable population, any higher the national population grows, any lower than the nation's population begins to shrink. A shrinking population has so many adverse effects. A shrinking population means a shrinking labour force, which means a fall in taxes for the national government, it also means less people in the army to defend the nation. A shrinking population means a lack of replacement for those who pass away, which affects the national economy. There is no technological solution to declining demographics currently and that's why if you're running out of people, you will likely cease to exist in the long run.

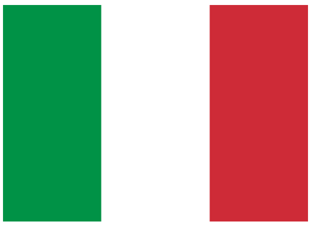
**Germany –** Germany has the worst demographics in the world. It's already in demographic decline and has been so for decades. So, everything we are used to about the Germans, from industry, quality and exports are all under threat in the long run. It all started out good for the Germans, they came into existence as a nation in 1871, rapidly industrialised and despite the defeats in WW1 and WW2 they became a global innovator, with global brands dominating the world. But it's all gone horribly wrong.

As Germany rose from the ashes of WW2, economic modernisation led to urbanisation and to more and more women joining the work force and delaying childbearing. After reunification these factors got even worse and today Germany has more people over 45, then under. The German fertility rate has dropped from its peak in 1965 and fell below the replacement rate in 1970. Today the German fertility rate of 1.5 children per woman is well below the replacement rate. Germany has for decades relied upon immigration as its labour force has been shrinking. The future of Germany looks extremely bleak.

**Japan –** If Germany didn't exist, Japan would have the worst demographics. Japan urbanised around the same time as Germany and achieved this much faster than them. After WW2 Japan became the manufacturing hub of the world and many considered it would be Japan that would knock the US off from being the world's largest economy. But then it went horribly wrong.

Japan's fertility rate has been dropping since 1970 as many took part in Japan's economic miracle with a hard-core work culture that prioritised work over everything else. This led to delays in having children. The economic crash from 1990 led to high costs of living and high housing costs which led to the Japanese reaching retirement without having many children.

Today, Japan's fertility rate has fallen to 1.15. This has resulted in 30% of Japan's population being over 65, there are more people over the age of 50 in Japan than under. Japan has a population today of 123 million, this is expected to fall to half – 63 million by the end of the century. The future of Japan is as bleak as Germany's.



**Italy –** Italy became a nation in 1861 when dozens of independent kingdoms, duchies, and city-states on the Italian peninsula were consolidated into a single state. Each region of the Italian peninsula had different economies, regional development and resources and this led to major challenges in developing the country. Southern Italy has struggled economically compared to the north of Italy and this remains a major problem even today.

Italy's fertility rate has been falling since 1975, its youth unemployment has always remained high and that's why Italy has struggled to fund 25% of its population that's over the retirement age. Italy's retired population outnumbered children (those under 14) back in 2005. Italy today has more people over 47 than under, and this will rise to 52 by 2050. It remains to be seen if Italy will still exist in 2100

**Russia –** Russia has been through so many upheavals in its modern history and this has led to major problems with its population growth and structure. Of the 60 million deaths in WW2, Russian deaths were half of these. It took the Soviet Union until the 1970s to reach the replacement rate, but this took significant Soviet social programs. But the decline of the USSR in the 1980s and then collapse in 1991 led to the 1990s becoming the lost decade. Poverty went from 2 million to 60 million, a 3000% increase. UNICEF noted that this resulted in 500,000 'extra' deaths per year.

Russia has had a fertility rate below 2.1 since the late 1980's, today Russia has more people aged over 41 then under. Russia is losing nearly 400,000 workers every year and its current population of 144 million will fall to below 130 million by 2046 if current trends continue.

**China –** China for long was the world's largest populated nation, but the communist era was a disaster in the country, which was only reversed after the open and reform era in 1979. Due to China's population being out of control, China instituted a one-child policy to bring its population growth under control. Whilst China's population growth did indeed fall, nevertheless China's population continued to increase, just at a much slower rate.

But for the last 3 years China's population has been declining. China's one child policy reduced the fertility from ~6.0 in the 1960s to below 1.6 today. Rapid industrialisation led to rural workers moving to cities who delayed marriage and childbirth. This has now caused a major headache for China. The one-child policy has created a major population imbalance, 1 in 3 Chinese in the next few years will be over 65. This means China's labour force is already shrinking and less and less people will have to support a growing retired population. This all comes at the worst possible time for China who wants to make domestic consumption its economic model and move away from an export driven economy. As its labour force is shrinking, and its overall population is shrinking China's economic rise may very well be premature

**South Korea –** South officially has one of the lowest fertility rates in the world at 0.7 children per woman. It's also officially the fastest-falling fertility nation in history. South Korea earned the title economic tiger during the 1970's with its rapid economic development and export driven economy. But it's the way this was achieved that has now come to haunt the economic tiger.

South Korea Industrialised and urbanised so quickly that in just two generations large-family traditions were dismantled. Women joined the workforce, and the culture of delaying children and marriage made the country's demographics even worse. South Korea has more people over 45, then under. At the current rate South Korea's population will drop from 51 million today to below 30 million by 2100.

**US –** The US will be celebrating its 250th anniversary in 2026. Whilst the US founding fathers needed to grow the nascent nation's population and expand back in 1776, they will probably be turning in their graves with the divisions the US currently faces and its demographic prospects. Unlike the nations already outlined, the US doesn't face an acute demographic problem, but it nevertheless faces some challenges with regards to its population that is already causing fractures. The US fertility rate peaked at 3.77 in 1957 and dropped below the replacement rate in 1973, the same year Roe v. Wade legalised abortion as a right. Through immigration the US was able to increase its fertility rate from the 1980s-2000, only for it to fall below the replacement rate in the early 2000s.

The average age at first birth in the US is now 30 and singlehood has resulted in falling marriage rates. The US population is getting old, but it will not reach the problems other nations are facing anytime soon. What the US is facing is another problem. By 2050 the Caucasian population in the US will be a minority, outnumbered by Latinos, blacks and immigrants. This is already causing problems in the US and is something that led to the rise of Donald Trump. The US now depends on immigration for its workforce and to replace its elderly.

**Greece –** Like much of Europe Greece urbanised and this led to the decline of the traditional family. Greece's fertility rate fell below the replacement rate in the 1980s and the economic crisis and austerity in the 2010s caused youth emigration that compounded matters.

Greece today has the highest average age at birth in Europe of 31. As a result, there are more Greeks over 46 than under. Without immigration or sustained pro-family reform, Greece's population is expected to fall below 8 million by 2100.

**Portugal –** Despite the perception of sun and sea, Portugal like the other developed nations has seen its demographics change as it urbanised and many delayed having children. Portugal's fertility rate dropped below the replacement rate in the 1980s, with an average age at first birth of 31.

Joining the EU has resulted in emigration out of the country. The UN projects Portugal's population to fall to 8.1 million by 2100. By mid-century, one in three citizens will be over 65.

**Spain –** Spain's fertility rate dropped below the replacement rate in 1980. After four decades of low fertility Spain has come to depend on immigration to maintain its workforce. The 2008 financial crisis and its long aftermath devastated youth employment—unemployment exceeded 40% among the young—delaying marriage and childbearing for a generation. Spain currently has more people over 45, than under. 20% of Spaniards are over 65, and that share is rising steadily. As one of Europe's greying south economies, Spain's ageing will feed into EU-wide debates over fiscal transfers, debt rules and economic reform.

# The Geopolitics of the High North

The Arctic is shifting from a remote frontier to a strategic arena. Rapid ice melt is unlocking seasonal sea lanes, revealing hydrocarbons and minerals, redrawing ecological patterns and shortening intercontinental routes by thousands of nautical miles. Those changes are inviting more ships, rigs, sensors and soldiers into one of the world's harshest environments—where weather, distance and darkness punish even the best-equipped forces. The result is a crowded chessboard with rules that exist, but enforcement that is fragile.

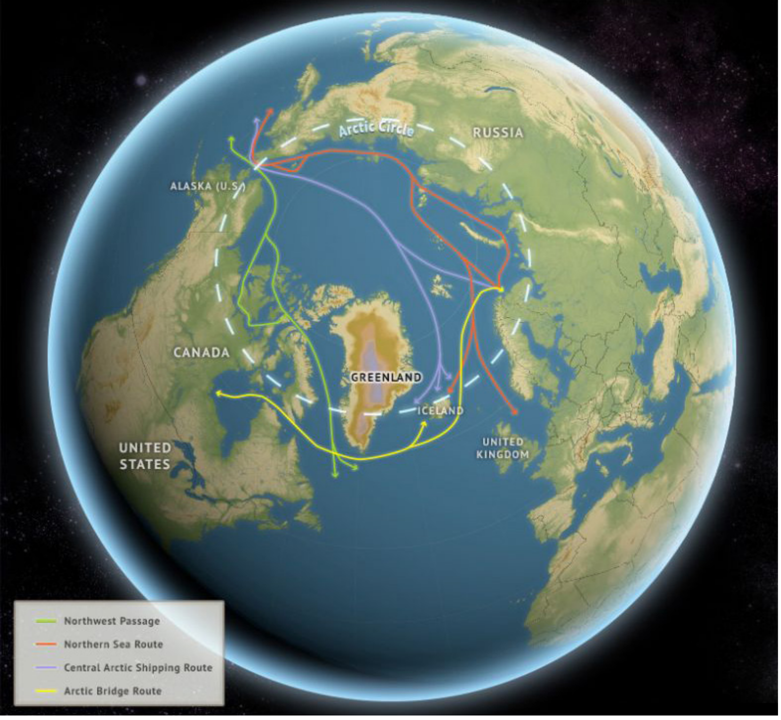
## Why the Arctic Matters Now

The Arctic is warming at least twice as fast as the global average (Arctic amplification). Summer sea ice is shrinking in extent and thickness; some scenarios now anticipate late-summer ice-free conditions for weeks within the 2030s–2050s. Melting exposes darker land and water, lowering albedo and reinforcing warming. Communities across Alaska, Canada and Russia are relocating as coasts erode; species ranges are reshuffling and fish stocks are moving north.

Seasonal openings on the Northern Sea Route (NSR) along Russia's Siberian coast and the Northwest Passage (NWP) across the Canadian archipelago can shave about 40% off the Europe–Asia distance versus the Suez or Panama. The first unescorted cargo transit through the NWP occurred in 2014; traffic across the High North has grown steadily, with the NSR now open several months a year.

The US Geological Survey estimates vast Arctic endowments, from 90 billion barrels of oil, up to 1,670 trillion cubic feet (Tcf) of natural gas and around 44 billion barrels of Natural-gas liquids, plus critical minerals such as nickel, zinc and rare earths. As technology advances and ice retreats, exploration and production become more feasible.

The Arctic is governed primarily by UNCLOS (exclusive economic zones to 200 nm, shelf extensions up to 350 nm) and an intergovernmental forum, the Arctic Council that consists of Canada, Denmark/Greenland, Finland, Iceland, Norway, Russia, Sweden and the US. Disputes are meant to be handled legally




and scientifically rather than by force. But Russia's 2022 invasion of Ukraine froze most Council work which Moscow has yet to recover.

The High North is ideal for polar-orbit ground stations, ISR and missile-tracking. As more satellites are launched this will thicken coverage and provide advantages to the nations that get there first.

### Russia: The Incumbent Arctic Superpower

Russia has the longest border with the Arctic and wants to dominate Arctic shipping and energy. It needs to do this to secure its frontier and secure its nuclear second-strike bastion on the Kola Peninsula. Russia has for at least a decade been working to build the infrastructure in the north of Russia in order to consolidate its position in the Arctic. Russia has by far the largest icebreaker fleet (including multiple nuclear icebreakers like Arktika and Sibir) to achieve this. It has reopened or started dozens of new bases, airfields and radars and has an Arctic Command with specialised brigades and regular cold-weather exercises.

Russia has made legal arguments to the Arctic. Russia argues it has expansive shelf claims—especially the Lomonosov Ridge—bolstered by a 2023 UN scientific finding that supports much (not all) of Moscow's submission. Russia treats portions of NSR straits as internal waters and requires foreign warships to seek permission, restricting transit to one at a time—directly challenging US views of international straits and innocent passage.
Russia currently has the mass, infrastructure and ice-class shipping to operate at scale. Its nuclear icebreakers can keep convoys moving when others pause; its bases and sensors provide domain awareness across the Barents–Kara–Laptev arc. Yet war losses in Ukraine, sanctions on technology and finance, and project delays pose constraints.

### US: Re-Entering the High North

The US claims to the arctic are based around Alaska, the protection of undersea cables and domain awareness and to avoid ceding strategic advantage to Russia and China. For the US there are major security dimensions with the Arctic with renewed focus on the GIUK gap and North Atlantic reinforcement routes, missile warning and subsea surveillance.

Historically the US lacked icebreaker capacity in this area but now it's seeking to scale with partners via an Ice Pact with Canada and Finland to co-produce dozens of modern polar vessels. The US has not ratified UNCLOS, complicating formal shelf claims, yet Washington asserted a large extended continental shelf in the Beaufort Sea in 2023—overlapping with Canada's view.

### Canada: Sovereignty First

For Canada the Arctic is important due to the Northwest Passage being its internal waters and ensuring access all year-round. Canada has developed a 25-year Arctic basing and logistics plan, and is building new remote airstrips and pre-positioned stocks. It's also making major investments in maritime sensors for underwater threats. Ottawa disputes the US view that the NWP is an international strait; it also contests parts of the Beaufort shelf claim.

For Norway, the arctic is about confronting Russia on its frequent patrols. Whilst for Denmark/Greenland the Arctic is about Arctic access and careful management of Greenland's autonomy and mineral interest. For Iceland, who has no standing military but critical geography, it's wary of a security vacuum in the GIUK.

For Finland and Sweden, the Arctic is about NATO and Arctic Depth. Both nations bring ice-hardened fleets, infrastructure and cold-weather expertise. Their accession to NATO tightens the alliance arc from the Baltic to the Barents, complicating Russian planning and improving allied logistics and domain awareness.

The European Union, although not an Arctic littoral power (apart from member states) , shapes sanctions, climate policy, fisheries and tech standards, and funds northern infrastructure. European industry from Norwegian energy, Finnish shipyards, Swedish mining benefits from the Arctic and anchors allied capability.

China has become a near-arctic stakeholder in Science and Commerce. China is an observer to the Arctic Council. China has modern icebreaker capabilities and is working on nuclear platforms. Beijing courts access to logistics nodes and data while treading carefully to avoid overt militarisation that would alarm NATO.

> ***"The Arctic is not a lawless scramble, rules do exist and most actors prefer them. But the increasing ice melt will keep raising the value of routes and resources faster than governance adapts."***

### Flashpoints and Friction Lines

As the Arctic is only now giving so many nations access a number of frictions are coming into view. A number of nations are using national laws over the law of the sea to make their claims. Russia requires prior notification and places limits on foreign warships, whilst the US and others push for freedom of navigation on the seas.

There are also disputes and claims over continental shelves and overlap claims. The Lomonosov Ridge, Beaufort Sea and the Barents are all disputed. Whilst scientific rulings provide guides, borders require state agreements, and this has been slow especially amid poor Russia-West relations.

The Arctic region and how it is used raises numerous security issues. Icebreakers, dual-use ports, radars and satellites are strategic signal platforms. Subsea cable security also becomes vital as traffic and data dependence grow.

The Arctic also has an agricultural element. Boundary disputes and quota issues already exist over mackerel, cod and capelin. Enforcement in darkness and ice is hard which makes illegal fishing and smuggling persistent risks.

As more ships traverse the northern Arctic route in harsher weather this will mean search-and-rescue and spill response, and this doesn't exist at the scale currently needed. Salvage, nuclear and LNG liability regimes are untested at Arctic tempo. A single stricken cruise ship or LNG incident could reshape rules overnight.

### Arctic Governance

The Arctic Council remains the essential forum for the growing importance of the Arctic. But the Russia–West rupture has driven work online and narrowed agendas. Meanwhile, UNCLOS keeps disputes in a legal lane, and this has been extremely slow.

As governance is expanding slowly and as traffic increases in the Arctic, states are leaning on alternative forums from coast Guard forums, SAR pacts, fisheries management bodies and insurance standards. This is leading to a fractured governance architecture in an area that's opening to many nations and one of the last regions to be opened up.

### Power Follows Presence

*"When the icemen come, they will come in force"* captures the Arctic's central truth: capability under extreme conditions is expensive and slow to build, but decisive. Russia currently has the thickest stack of Arctic-specific assets and the most integrated concept of operations. NATO and its partners are re-learning the theatre and investing to close gaps. China will remain a consequential "near-Arctic" actor seeking reliable seasonal access without triggering a balancing coalition.

The Arctic is not a lawless scramble, rules do exist and most actors prefer them. But the increasing ice melt will keep raising the value of routes and resources faster than governance adapts. The states that can operate safely, year-round, and at scale—with icebreakers, logistics and sensors will write the next chapter.

# Conclusions

As we pass the quarter point of the 21st century the world looks very different to what was forecasted at the beginning of the century. America's unilateral moment is over and China has emerged as a challenger to its position.

The US and the West, despite defeating communism, in their wars in Iraq and Afghanistan and now in their defence of Israel, have abandoned everything they stood for. 2025 is the year the West slaughtered all its sacred cows; the West is having its Berlin Wall moment.

For the US she has concluded that if China does not join and submit to the global rule based order, then the order no longer serves the US. So out with alliances, free trade and values and in comes transactionalism, bullying and nationalism. The nations of the world have since WW2 been told to join the western led order because it was better, more prosperous and free. The US abandonment of this order also means these values are no longer a part of international relations.

In Europe's latest war in Ukraine, Russia is on top and whilst the longer the war goes on one could argue it serves the US, but Russia has the resources to see this through. It's Europe and Ukraine that cannot afford, resource, supply and continue in the war. Everything the West has thrown at Russia, from sanctions, seizures, drones, missiles and isolation: Russia has stood up to them all and survived.

Any ideas the US has of doing a reverse of Nixon and splitting the Russians from the Chinese has also failed.

2025 has been a good year for China, the dragon is looking good, by supporting and supplying Russia in its war effort and it pulled off a stunning victory with its support of Pakistan in its war with India. But China has not turned into a true global power who solves and organises resolutions to global issues. In the Middle East, Europe or Africa we still cannot point to Chinese policies and solutions that are being executed. Until then, China remains a nation with prospects and potential future power, but not one currently.

Europe is struggling and may become irrelevant. The continent needs to make a historic and strategic decision on which side it wants to be as the world changes. Europe will likely become a battleground between China and the US. The global competition between the two powers is already playing out over rare-earth elements, the Arctic and AI and will expand to quantum computing, the military sphere, space and in different regions in the world.

The US has hard power, but it has slaughtered its soft power to maintain its empire. The US looks a lot like the USSR; it's strong, has lots of weapons, but it's in debt, lost its credibility and many already believe its best days are behind it.


2026
5

## End of the Global Order, What comes next

Donald Trump has declared the post-WW2 global order dead, arguing the US will no longer fund a system that yields no profit and which China refused to join. The question is what replaces it. In 2026 and beyond, the US is signalling a hegemonic framework built on “peace through strength:” align with Washington or face military coercion. Subordination or confrontation become the only options. This is a return to neoconservative methods — and risks the same disasters.

## New Nuclear Arms Race

The last treaty limiting US and Russian long-range nuclear arsenals expires in February 2026. Negotiating a replacement for New START is unlikely in time. Following Donald Trump’s announcement in November 2025 that America should resume nuclear testing, a new nuclear free-for-all is looming. China is rapidly expanding its arsenal, and America’s allies and adversaries alike are reconsidering nuclear options. From 2026 onwards, middle-tier states may pursue nuclear weapons to defend themselves in a new strategic era, dramatically elevating global risk.


## Military Competition in Space will Intensify in 2026

American generals once spoke in euphemisms about the possibility of fighting a war in space, preferring to talk about space “dominance” rather than the grim prospect of shattering satellites in orbit. Now they speak openly about the need to launch weapons from, within and towards space in any future conflict with Russia or China. The US plans to launch interceptors and weapons in space to deal with missiles that traverse space. The US also has plans to place laser based weapons in space. China has been launching satellites at a rapid rate and made visits to the moon. Russia is developing a space-based nuclear weapon capable of destroying large numbers of satellites in low-Earth orbit in one go. Space in 2026 and beyond is now officially an arena of great power competition.

## Hemispheric AI

AI continues to accelerate, and in 2026 we are likely to see the emergence of hemisphere-based AI ecosystems. The US is building a “national AI infrastructure” by integrating its semiconductor firms (NVID-

IA, AMD) with software players (OpenAI) and its cloud and hardware hubs (Microsoft's data centres). Washington intends to deploy this AI ecosystem largely within its own orbit, while China builds its own stack within its sphere. Rather than competing directly for customers, the two will compete for technological superiority. Whichever national AI infrastructure outperforms the other will grant the hemisphere it anchors a holistic strategic advantage.

### AI uptake by Corporate World Remains Low

Despite its marvel, businesses have been slow to adopt AI into their processes. For the moment data centres and ChatGPT are all the rage. But surveys all point to the fact that adoption is slow. According to America's Census Bureau just over 10% of businesses with more than 250 employees say they have embedded AI into their production processes. A survey by the Massachusetts Institute of Technology released in July 2025 found that 95% of businesses' AI pilots failed to generate a return at all. The hype and the hopes around AI have been like nothing the world has seen before, and the true nature of its impact is still unclear. In 2026 it remains to be seen will AI bring an economic revival, a financial bust or a social backlash, or some combination of the three.

### The Arctic Connects with the Global Economy

For decades the Arctic was the world's geopolitical outlier — distant from trade, commerce and conflict. That era is ending. With shipping, freight, military manoeuvres and new supply routes traversing the region, 2026 may be the year the Arctic fully connects to the global economy. The prospect of Russian and Chinese vessels travelling through the region with minimal Western interference has alarmed NATO planners. While institutions exist to manage territorial claims over the frozen north, the political contest is only just beginning, and 2026 may mark the moment the Arctic becomes the newest theatre of global struggle.

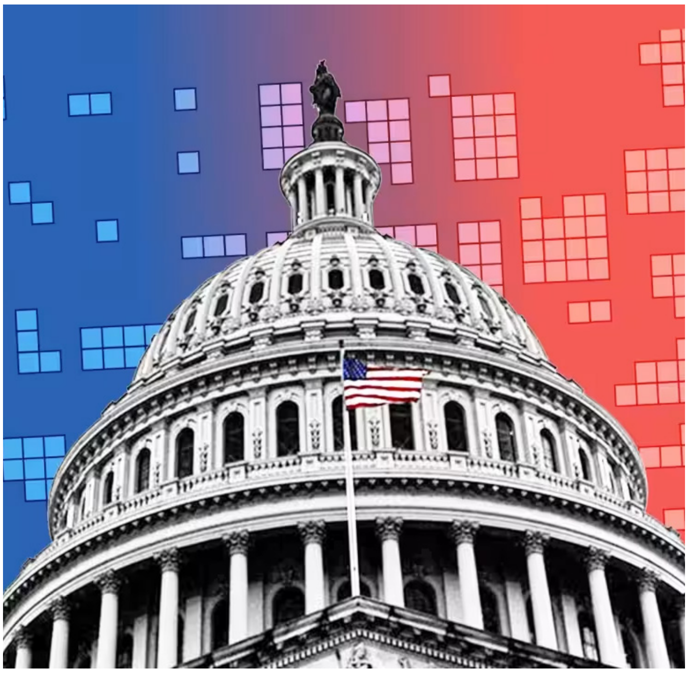
### Gen Z Protests

In 2025, protests led by Generation Z erupted worldwide — in Bangladesh, Serbia, Argentina, Kenya, Nepal, Indonesia, the Philippines, Peru, Tanzania and Morocco. These movements shared common traits: overwhelmingly young participants; decentralised, leaderless structures; and heavy use of digital tools. Their grievances centred on widening inequality,

economic precarity, corruption and state intrusion into personal lives. What makes these protests distinctive — and worth watching in 2026 — is whether a generation that has been failed by its leaders can translate demonstrations into meaningful political and social change.


### Has Trump's Tariff Strategy Run its Course?

In 2025, Trump's economic programme rested on aggressive tariffs to reset global trade. Trump has not even come close to achieving this. On the broader economy, Trump promised to revive manufacturing, protect American jobs and stop outsourcing to China. Behind the theatrics, the economic results are mixed. Manufacturing jobs grew in limited sectors, but not at the promised scale. Costs — higher consumer prices, supply disruptions, retaliatory tariffs — remain severe. Trump promised 90 trade deals in 90 days; by late 2025 he secured only four finalised agreements, including with the EU. In 2026, he will need a new strategy — but tariffs are all he has. Without an alternative method to restructure the global economy or confront China, history suggests escalation may end in conflict.



### US Mid-terms - America first vs Israel first

The November 2026 mid-term elections typically spell losses for the president's party. All 435 House seats and 35 Senate seats are contested. But these mid-terms may become a referendum on "America First" versus "Israel First." The pro-Israel lobby has long wielded influence and money to sustain America's blank cheque to Israel, but two years of televised carnage in Gaza has shifted US public opinion. New York's first Muslim mayor built his campaign in opposition to Israeli policy. Candidates have returned donations to AIPAC, whose money is increasingly toxic. As MAGA fractures over Israel's role in US foreign policy, 2026 may reveal that being pro-Israel has become an electoral liability rather than an asset.


### The Friend Trump Can't Escape

Donald Trump has survived an assassination attempt, impeachment, prison threats and scandals that would have ended any other political career. Yet he cannot escape allegations surrounding convicted sex offender Jeffrey Epstein. Trump promised the MAGA base he would release the files, then reversed course — prompting revolt — before passing the Epstein Files Transparency Act, forcing the FBI and

DOJ to disclose unclassified materials. The December 2025 release of some 20,000 estate records saw Trump's name appear repeatedly. In 2026, further revelations may emerge — and this unresolved issue remains one threat Trump cannot simply deflect.


### A Divided America Turns 250

2026 is the year-long commemoration of the semi-quincentennial of the US. The celebration comes as the country fractures over everything from what is a woman to foreign policy. Two national commissions are planning rival commemorations. Congress created "America250" in 2016, with bipartisan leadership and the Obamas and Bushes as honorary co-chairs. Trump countered by establishing "Task Force 250," chaired by himself and staffed entirely with his appointees. The past has become a partisan battleground in America with wildly diverging accounts of America's past, present and future, as Republicans and Democrats describe the same country in irreconcilably different terms.

### Is the US going to war of Venezuela

The drums of war are beating once again — but this time, not in the Middle East, but in the Caribbean. In October 2025, President Donald Trump deployed America's largest aircraft carrier off the coast of Venezuela, under the guise of a drug interdiction operation. The alleged culprits are Venezuelan "narco-terrorists" led by President Nicolás Maduro. With sanctions tightening and domestic dissent within the Venezuelan government mounting, Trump has everything in place for war. Maduro has offered talks, oil and access to the US, but the Trump administration continues to pile on the pressure. Trump does have a history of making deals and considering he wouldn't want to get the US into another quagmire or repeat the cycle that once turned Iraq into America's longest mistake. 2026 could be the year the US goes to war again.

### Can the American Empire Last?

From the moment Donald Trump re-entered the White House in 2025, he made clear that alliances and global commitments are subordinate to American profit. His foreign policy is transactional: he will engage with any government, at the right price, and demands resources in return. This approach delivered mineral agreements around the world in 2025, but it is unsustainable as a strategy for maintaining

US hegemony. If Washington is transactional, other states will be too. If this remains America's model, 2026 may be the year the US empire visibly begins to strain.

## Europe's Impossible position

Europe in 2026 faces a convergence of challenges. It seeks to increase defence spending, retain US favour, boost growth and address deficits — even as austerity fuels hard-right populism. It also wants to champion free trade and green technology. It cannot do all of this simultaneously. Most EU states lack the finance, industrial capacity or public consent. NATO's Mark Rutte has argued for deep cuts to welfare, education and healthcare to prepare for war. In 2026, Europe's leaders will need to make the strategic choice of what side they want to be on and whether they are prepared to make the sacrifices that are needed.

## Will MAGA Expand Abroad

A wave of movements across Europe now model themselves on America's MAGA populism. 2026 will reveal whether MAGA-style nationalists are poised to take power in major European economies. In Britain, Nigel Farage's Reform UK leads polling; local elections will test whether this translates into votes — and how likely a Prime Minister Farage becomes during the next general election. In France, another government collapse appears likely, which could prompt parliamentary elections and propel Jordan Bardella into office as prime minister from the populist right. In Germany, the question is whether the political "firewall" against Alternative für Deutschland can endure.

## Europe to Ready for 2030 War

The European Commission has told EU member states they have five years to prepare for war. The Defence Readiness Roadmap 2030 signals Brussels' growing role in military affairs, driven by Russia's invasion of Ukraine and Donald Trump's ambiguous commitment to European security. In 2026, the EU must find financing for defence industries. This is Europe's core dilemma: meaningful military expansion will require cuts to welfare, bitterly unpopular after a decade of austerity and a cost-of-living crisis. Europe faces contradictory choices it cannot easily reconcile.

### Will the EU Survive in 2026?

The EU has been through a torrid period for the last two decades. With the first member state leaving the union in 2021 and with opposition to the union growing in most member states as political parties gain in national polls with their anti-EU positions. The future of the EU looks bleak. In 2026 Bulgaria will adopt the euro as its currency, in place of the Bulgarian lev, and become the 21st member state of the eurozone, after several delays. The Euro was meant to challenge the dollar's dominance when it was launched back in 1999, but today it remains a regional currency, overwhelmingly used in Europe. The EUs justification and credibility has waned as the years have gone by as many in Europe see the EU as the problem rather than the solution.

### Will the German Leader Survive?

Just six months after taking office, German Chancellor Friedrich Merz is struggling to fulfill pledges to revive Europe's largest economy and fend off the far right, with only a fifth of Germans wanting to see him run for office again. Merz, who is now 70, took over from his unpopular predecessor Olaf Scholz in May 2025 vowing to boost growth, reduce irregular immigration and build up Europe's largest army in the face of security concerns about Russia. His popularity hovers at 25%, far below that of his predecessors. Growth stagnates and coalition debates over migration worsen. German business elites express dissatisfaction. With elections not due until 2028, Merz has time to recover, but critics say he must act soon to avoid the fate of Scholz, whose fractious, Social Democrat-led coalition collapsed in acrimony.

### Will Macron Still be President in 2026?

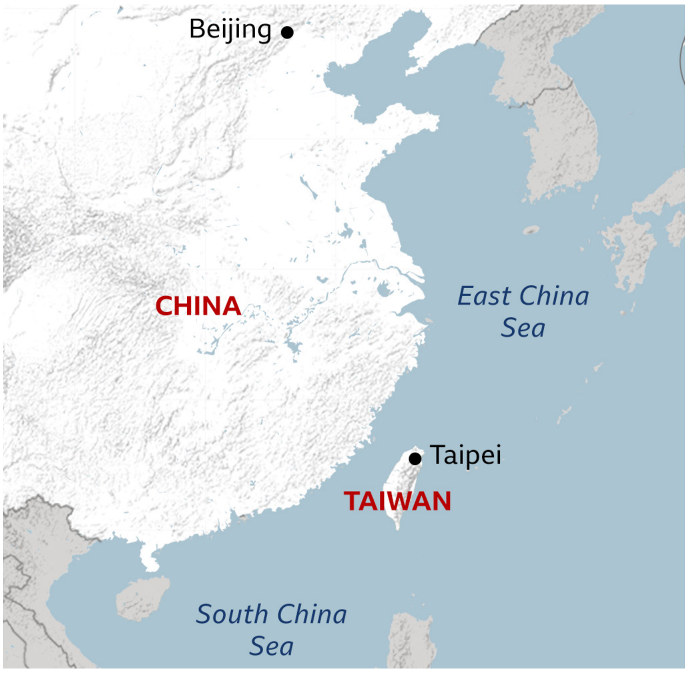
After eight years in office, Emmanuel Macron faces mounting pressure amid France's political crisis. A fragmented parliament, and personal rivalry among those hoping to succeed Macron, in the last 12 months France has gone through three different prime ministers, with the third of them—Sébastien Lecornu—reappointed to try again. France is drowning in debt and cannot pass a budget. Macron's horizon is shrinking: his remaining objective is to survive until April 2027's presidential election. If he endures 2026, it will be through inertia rather than strength.

### UK's Future in Doubt In 2026

Wales and Scotland will hold national elections, further straining the British union. The United Kingdom is a union between Scotland, Ireland, Wales and Northern Ireland, with devolved governments. Calls for independence have intensified since Brexit. Scotland's SNP is likely to retain control of Holyrood due to the unpopularity of the Labour government, extending its rule from 2007 to at least 2031 — a powerful claim for a new referendum. In Wales, Plaid Cymru, the Welsh nationalist party aims to oust Labour for the first time in the history of devolution. In Northern Ireland, Sinn Féin's Michelle O'Neill: the group that led an armed rebellion against London, already serves as First Minister. By late 2026, pro-separation parties may govern all three devolved nations.

### China's Opportunity

With the US abandoning its own global order and adopting bullying tactics, 2026 provides China a chance to craft its narrative. The US blocks Chinese tech, yet China pushes into next-generation systems. Washington imposes tariffs; Beijing has deep reserves and is the top trade partner for over 130 states. Trump slapped tariffs on Africa; China builds infrastructure and ports. Trump insults India; Xi courts it. American unpredictability is enabling China's soft power. 2026 may be the year Beijing is seen as a reliable partner where the US is not.




### Will China invade Taiwan 2026?

It's extremely unlikely China will do so, but this places a major question mark over China's claim that it's the sole and legitimate ruler over all of China. Taiwan is now the Israel of the Far East and an outpost for the US. Until China does not put an end to this, its claims of being a globe power will continue. Despite China's economic rise and its military ascent it's failed to win the hearts and minds of the Taiwanese people, who are now largely anti-Chinease. China has now run out options with Taiwan and an invasion seems like the last remaining option and the most risky.

### Israel's credibility Hits Rock Bottom

Israel is over seven decades old, yet its future remains uncertain. Despite being attacked on October 7th, it is Israel that stands accused globally of genocide, starvation and mass destruction. The narrative of self-defence collapsed against the images of Gaza's devastation. What Israeli propagandists have been trying to tell the world has fallen on deaf ears as it's just not what the world was seeing. Many around the world can see the large discrepancy between what they are hearing and seeing. Former supporters have abandoned it: US presidential candidate Kamala Harris blamed her defeat on backing Israel; conservative voices such as Tucker Carlson and Candace Owens have distanced themselves. Even the UN, which mid-wifed Israel's creation, has turned against it. Despite expanded territory and weakened Hamas and Hizbullah, Israel faces an existential crisis of its own making in 2026.

## Restructuring Middle East Architecture

The US seeks to reshape Middle Eastern security architecture to align with its competition with China. This required the US to force Iran back to its national borders and to disarm the armed groups in the region. After October 7th, Israel pursued these groups under a security pretext, with US backing and weapons. But public opinion has turned sharply against Israel and its destruction of Gaza. Governments may quietly support Washington, but the wider Muslim world opposes Israel's expansion. In 2026, the US faces rising regional anger, and its credibility is already at a historic low.

## What Now for the Palestinians

Dispossessed in 1948 and pushed into shrinking territory ever since, Palestinians pursued diplomacy, international law, protest movements and armed struggle — only to face mass violence. The last two years saw famine, bombardment and torture. Despite this, neither Israel nor its Western allies have imposed a permanent settlement. Palestinian visibility is now global, while Israel's legitimacy has never been weaker. In 2026, the question remains: can this diplomatic moment translate into tangible gains for Palestinians?

## Will Darfur be Partitioned?

South Sudan's separation in 2011 was orchestrated by the US, yet Sudan only became more unstable. Western Sudan rebelled against Khartoum despite numerous integration schemes. Today, Darfur is held by the Rapid Support Forces (RSF), a militia-turned-paramilitary that seized territory from the central government. In 2026, the RSF will likely push to legitimise its rule and entrench a breakaway Darfur, paving the way for partition — echoing the South Sudan precedent.

## India to Become World's 4th Largest Economy

India will replace Japan to become the world's 4th largest economy. In just a few years India has surpassed both the UK and France and its future prospects look impressive. But the GDP numbers reveal very little about the state of India and in fact the country falls short on almost every other measure. India may be seen as a rising nation but it has no say on global issues and Trump in his second term has come down hard on India. India's response was revealing in that it did not act like the 4th largest economy in its dealing with the US. In 2026 India either challenges the status quo and pushes its national interests in global institutions and demands to be at the decision making table. Or India is used by other nations in its plans and agenda's.

## Will Russia Win in 2026?

In February 2026 the Ukraine war will reach its 4th anniversary. On 10th June 2026 the war will have been longer than WW1. That conflict was supposed to have been over in a few weeks, but fighting became bogged down and the high command squandered men's lives in one doomed assault after another. In 1918 the allies used new tactics to break the German lines. Ukraine is today completely dependent on western support and whilst the US has effectively given the country notice that it's out, Europe continues to make promises that it's never going to be able to deliver on. Ukraine is bleeding soldiers and struggling to hold its lines, Russia on the other hand has thrown soldiers at the war and continues to supply its troops. In 2026 and beyond the spectre that's haunting Europe is the spectre of direct conflict with Russia. Cyber-attacks and incidents of sabotage are increasing. Russian drones are flying over Poland, Germany and Denmark, causing shutdowns of civilian airports. Baltic countries are practising mass evacuations in case Russia invades. In 2026 it remains to be seen if Russia can make the move that breaks the back of Ukraine.

## Bangladesh Elections

Ever since the long-term leader Sheikh Hasina was overthrown, Bangladesh has spent much time in political limbo. After months of delay, the interim

government finally revealed a package of reforms in October 2025, with elections due to take place in early 2026, but doubts linger over its implementation and legality. But whatever the outcome of the elections, the new government faces formidable challenges. The once-booming garment sector has been hit hard by American tariffs. Unemployment remains a big problem, especially among the young. It remains to be seen if Bangladesh's revolution can bear fruit.

### Syria's new Leader Needs to Start Delivering

Ahmed al-Sharaa emerged as Syria's new ruler with a weak hand and the daunting task of rebuilding the country. Almost immediately, Israel launched a brutal bombing campaign that destroyed Syria's heavy weaponry and military platforms. A UN report highlighted that Syria will require over $250 billion in reconstruction investment and decades of work to recover. Syria's industry, infrastructure and economy was devastated after 13 years of civil war. As al-Sharaa reached his first anniversary in December 2025 the outlook appeared bleak. He remains popular for now, largely because many Syrians are simply relieved the previous regime has fallen. But in 2026, unless he improves the economy, develops the country, and raises Syria's prospects, opposition to him and his government will only grow.

### Will the Iranian regime collapse in 2026?

In November 2025 the Iranian president in speech said "If rationing doesn't work, we may have to evacuate Tehran." Iran has been facing an unprecedented drought, which has been getting worse for the last 8 years. The Iranian regime has been facing numerous issues from economic, global sanctions, war and an energy industry that's crumbling, opposition has been growing for some time with protests now a regular occurrence in Iran's main cities. The clerical regime has run the country into the ground after four decades of rule and opposition to them is now widespread. Iran is at war with Israel, its proxies are in retreat and now its domestic issues are engulfing them to the point the Iranian president is saying the nation's capital may need to be evacuated as the regime cannot supply water. 2026 will likely be a crunch year for the clerical regime.

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Geopolity.com aims to help in making sense of this complex world.

At geopolity.com we look at the world through the lens of power and ideology. We see forces such as geography, politics, economics and military capability constrain world leaders and nations. Through understanding these forces, we believe we can make sense of what nations are attempting to achieve. We also believe by determining the ideology nations embrace we can appreciate why the US is interested in the Middle East and why much of the world worries about Pakistan's nuclear capability.

This allows us to filter out all the noise and focus on the important political actions, moves and developments.

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