

Meeting or Failing Strategic Goals?

Assessing the Impact on Russia of the War in Ukraine

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Summary

- **Domestic impact:** Russia's war against Ukraine has weakened domestic stability and cohesion among the elite, while sacrificing long-term prosperity in order to sustain the Kremlin's war effort.
- **European influence:** Despite exercising covert influence in Europe, Russia has lost deeper commercial and energy ties, undermining its long-term systematic leverage over the European countries.
- **Global posture:** Russia has advanced its vision of a post-Western multipolar world order but at the cost of creating new dependencies on uncontrollable great powers, including the PRC or India.
- **European counterstrategy:** European countries can thus force Russia to turn its attention more inward by implementing a robust combination of measures that create a polycrisis, weakening its capacity to pursue an aggressive foreign policy.



Recommendations for European Policy-Makers

1. Divide the elite and encourage dissent

Overt and clandestine measures to deepen and exploit existing Russian elite-level discontent with the war will limit the regime's ability to wage the war in the long-term. Currently, the survival of the elite largely depends on the outcome of the war. To survive, the regime has no alternative to delivering some form of what they could define as a "victory". If disenfranchised members of the elite are enticed to revolt, including by being offered a "safe passage" out of the regime, frictions will deepen and internal paranoia will further hinder the regime's operations. Sowing divisions among the elite should be accompanied by robust and discreet empowerment of dissatisfied citizens to augment pressure on the regime from below.

2. Entice and empower Russia's non-Western partners to exploit Moscow's dependencies.

As Russia's dependence on non-Western allies has increased, these should be enticed through diplomatic and financial means to exploit the dependence in their favour and thus against Russia. This should be done by offering tangible benefits instead of arguing about abstract values that are not credible in the non-Western world. Instead, non-Western countries should be helped to achieve their objectives more cheaply and quickly at Russia's expense, provided these objectives do not directly harm Europe's interests. At the same time, the EU should offer tangible benefits and concrete rewards for countries' support of the sanctions regime, or at least refusal to cooperate in bypassing sanctions.

3. Empower the EU to project strength vis-à-vis adversaries while fostering its positive image in the non-Western world.

EU-level and national policy-makers need to abandon the illusion that values and words can provide for security or change the behaviour of adversarial powers. Thus, the EU as a whole, and individual states, need to use all available tools of their considerable power – economic, regulatory, diplomatic, cyber, and if needs be military – to promote European interests. Given the institutional limitations of the EU, European countries must be ready to work in built-for-purpose coalitions to efficiently and forcefully act against Russia across diverse offline and online domains of state power. The policy-level change of approach must be accompanied by a whole-of-society campaign to increase societal resilience. Finally, attractive tangible measures should counter Russia's influence in the post-Soviet space to entice the populations into the Western sphere of influence, including via a flexible engagement policy and offering a fitting model of cooperation for each partner. Each model should serve Europe's interests, project its power, and signal its resolve.

4. Foster a long-term polycrisis that forces the regime to turn its attention and resources inward.

The regime's stability depends on the social contract which is supposed to provide stable provision of basic services and goods in exchange for active support, or at least tacit acceptance, of the political course. It is therefore suitable to use diverse overt and covert tools to disrupt energy supply chains, food production, transport infrastructure, online-based services, and other basic state-administered targets. At the same time, it is of key importance for the West to reflect and communicate the domestic discontent by highlighting the tensions inside of the society and the faultlines of life in Putin's Russia. The disruptions will bring the costs of the aggressive foreign policy home and, simultaneously, weaken the image of the would-be strong regime. Such a polycrisis will inevitably turn the attention and resources of the Kremlin inwards to ensure their most fundamental objective, regime survival. European countries need to fill the space vacated by Russia.



Introduction

Through the ongoing war in Ukraine, Russia pursues strategic goals at three levels: domestically, vis-à-vis Europe, and on the global scene. All three are subordinated to one ultimate objective: the regime's survival and continuation. To understand how the Kremlin evaluates *strategic* outcomes of the war, it is imperative to understand these objectives, and to evaluate them against hard data without ideological presuppositions.

Such an assessment of the strategic successes, or lack thereof, of Moscow's war against Ukraine will reveal where Russia's real worries and weaknesses lie. It will point to directions in which Russia's adversaries can considerably increase the pressure on the Putin regime. In parallel, the assessment will indicate what policies are futile as they have only limited impact on changing Moscow's behaviour and calculations.



1 Russia's Goals at Home: Unity, Stability & Independence

1.1 Societal Unity

The metaobjective of the Putin regime is its survival. To that effect, the Kremlin uses the war effort to strengthen the sense of societal unity. The unity is being reinforced through a systematic, consistent, and robust public narrative about an aggressive foreign enemy at Russia's gates. To withstand the aggression, the regime argues, the whole of society must unite behind the Kremlin. The all-encompassing Kremlin-led *power vertical* struggles to impose its will, and exercise control, over all federal government agencies, regional administrations, the media, big business, and the tamed remnants of the civil society.

Those who fail to *unite* behind the Kremlin and to unequivocally demonstrate their support of the war effort are labelled "extremist" and "foreign agents," ostracized and marginalised. Thus, the war has further reinforced the long-standing approach of Putin's Kremlin that "you're either with us, or against us." But is the approach succeeding? Has the war really brought the elite and the population closer together than ever?

The staunchly Putinist speaker of the Duma, Vyacheslav Volodin, clearly argues that the war has indeed united the Russians. He boasts that "*efforts to tear apart our country have utterly failed.*"¹ On the contrary, continues Volodin, the "society has consolidated itself around president Putin. Having overcome all challenges, Russia is stronger than ever. And our strength is in unity!" concludes the notoriously unsophisticated politician.

Major Russian polls suggest that Volodin might be correct. According to the Levada Center, a pollster, by the end of 2025, 67% of Russians considered the country to be on the right track; 78% supported the war in Ukraine; and as many as 85% expressed satisfaction with Vladimir Putin's actions. However, there are clear methodological and practical limitations to the accuracy of polls conducted in wartime Russia under the omnipresent monitoring of the would-be united Russian state. Polls organised by the hyper-biased, powerless, and fragmented Russians in exile are similarly, if not more, unreliable. However, there are other indications of significant cracks under the façade of unity.

According to leaked polls organised by the Kremlin for their internal use, war fatigue spiked from 47% (2024) to 56% (2025). Over a half of the electorate wants the war to end, albeit only on Russia's terms. The twofold pressure creates a vicious circle for the Kremlin: they need to end the war, but must keep on fighting to deliver a victory that would seemingly justify the massive costs. Thus, the regime finds itself in a trap of its own making.²

Furthermore, around one million Russians have left the country since the outbreak of the war because they disapproved of the Kremlin's course.³ They are anything but united behind the Kremlin. The massive exodus has further exacerbated demographic risks facing the Kremlin, the short-term labour shortage in the war economy production, and the long-term population decline.

Even among those who have for various reasons remained in Russia, many show signs of discontent. Negative war sentiments on social media and in private

¹ Vyacheslav Volodin (@vv_volodin), "S Dnyom narodnogo edinstva! Istoriya i znachenie prazdnika," Telegram, November 4, 2024, https://t.me/vv_volodin/935.

² Levada-Center, "Polozhenie del v strane," accessed February 14, 2026, <https://www.levada.ru/indikatory/polozhenie-del-v-strane/>.

³ "Russians Have Emigrated in Huge Numbers since the War in Ukraine," *The Economist*, August 23, 2023, <https://www.economist.com/graphic-detail/2023/08/23/russians-have-emigrated-in-huge-numbers-since-the-war-in-ukraine>.



conversations significantly contrast with the supposed consensus presented by polling.

The Russian state relentlessly tracks these sentiments including through massive investments into the surveillance capabilities of the *Roskomnadzor* and the *Federalnaya Sluzhba Bezopasnosti* (FSB). As a result, the number of charges for “extremism” has soared,⁴ even as the definition of extremist (and terrorist) behaviour has kept broadening to cover virtually all divergence from the official narrative on war-related matters. Similarly, the number of designated “foreign agents” has almost quadrupled since 2022 to over 1,400 entities with media platforms at the very top.⁵ More broadly, even the official polling indicates that almost one in ten Russians would join political protests if they take place. Many others would follow suit if the protest movement were to gain momentum, as historic patterns show.

Unity is fractured also on the elite level. Several key regime figures have publicly dissented since the war’s escalation. Thus, the one-time coordinator of Russia’s destabilization campaign after Russia’s annexation of Crimea, Vladislav Surkov, found himself under house arrest for his disapproval of the full-scale invasion. Evgeny Prigozhin infamously challenged the very leadership of the Kremlin with his failed “march on Moscow” and paid with his life. Prigozhin’s sheer belief that the march could succeed gives strong indications that he had allies within the Putin power structures – allies who backed off at the last minute, but who perhaps remain there ready for the next, and arguably better, opportunity to revolt. Most recently, Putin’s career-long colleague and a personal friend, Dmitry Kozak, left the presidential administration under dubious circumstances.

These elite revolts must be viewed against the background of ongoing purges of disloyalists under the guise (often merited) of corruption charges. The purges extend across the breadth and the hierarchy of Russia’s vast bureaucracy.

1.2 Economic Stability

The Putin regime has built its legitimacy and popularity on delivering economic stability. Since the early 2000s, it has always contrasted the relative stability to the chaotic 1990s. Russia’s historic experiences with economic and social turmoil have been at the core of Putin’s narrative; the strong ruler guarantees stability and protects citizens against the horrors of yet another *smuta*, a dangerous and destructive power vacuum.

The regime’s intensive fear of instability was revealed, for instance, by Putin himself even as Prigozhin attempted to march on Moscow. “Any domestic *smuta*,” warned the visibly shaken president, “is a mortal threat to our statehood. Our responses will be most tough.”⁶ And yet, the greatest threat to stability built over two and a half decades is now presented by the very regime itself and the war it has launched.

High inflation cuts Russians’ hard-earned savings, if indeed they have any. Furthermore, it forces them into current consumption instead of investments into their future – from home buying, to entrepreneurial endeavours to strategic corporate investment. Both among households and companies, the ethos of “living for the now” has trumped long-term planning. Furthermore, GDP growth in 2025 shrank to 1% as war-fuelled sources of growth are becoming exhausted. The war effort, moreover, increasingly strains public finances. Armaments production,

⁴ Alesya Sokolova, “V spisok ‘terroristov i ekstremistov’ popadaet v srednem 300 chelovek v mesiaty,” *Novaya Gazeta Europe*, October 24, 2025, <https://novayagazeta.eu/articles/2025/10/24/v-spisok-terroristov-i-ekstremistov-popadaet-v-srednem-300-chelovek-v-mesiaty>; Emilia Gabdullina, “Chislo osuzhdennykh za terrorizm i ekstremizm vozroslo v pervom polugodii 2025 goda,” *Kommersant*, October 20, 2025, <https://www.kommersant.ru/doc/8138991>.

⁵ OVD-Info, “Inostrannye agenty,” accessed February 14, 2026, <https://data-scripts.ovd.info/agents/>.

⁶ “Eto udar v spinu nashey strane: Putin nazval myatezh Prigozhina izmenoy i sravnil ego s sobytiyami 1917 goda,” *Current Time*, June 24, 2023, <https://www.currenttime.tv/a/32473523.html>.



welfare, and offsetting sanctions have forced the government to quadruple the budget deficit compared to the 2021 level to 3%.⁷

The aforementioned macroeconomic data might not be worrying when assessed in isolation. The GDP continues to grow, albeit modestly, and the budget deficit remains the lowest among G20 countries. However, when contextualized with other indicators and interpreted in the light of Russia's future prospects, the data points to profound risks to the country's stability.

First, the government budget remains excessively dependent on carbohydrates-related revenues which still cover a third of the budget even as volumes of production have decreased.^{8,9} Second, tax increases levied on energy companies in 2026, combined with the technological and financial impacts of sanctions, limit the companies' abilities to innovate, thereby threatening future government revenues. Third, the extra revenue extracted through higher taxation is immediately consumed through welfare and war-related spending. Defence and security will consume a staggering 38% of government expenditure in 2026, a massive increase from the already high base of 24% in 2021.¹⁰ However, the high defence and security spending is not sustainable. A drop will inevitably create dissatisfaction among many currently well-provided-for security personnel who will, in turn, pose risks to the regime as they will seek new, potentially illicit, sources of income.

The war has become so expensive that even the tax increases and higher borrowing still cannot cover the needs. Hence, Russia has been repeatedly forced to tap into the previously untouchable *National Welfare Fund*, a rainy-day vehicle designed to accumulate energy-related profits and provide for economic stability in a turmoil. The savings, which had grown for two decades, are now being aggressively pumped into the war machine. As a result, the total value of the Fund shrank from 10 trillion rubles prior to the escalation to a mere 3.8 billion by the end of 2025. In effect, Russia keeps sacrificing its future stability and prosperity on the altar of the war.

1.3 Sovereign Independence

The Putin regime has sought to free Russia from any dependence on the collective West. It sees economic, trade, financing, and other links with the West as vulnerabilities that weaken Russia's sovereignty. The repeated waves of ever stricter sanctions after Crimea have only accelerated the Kremlin's efforts to sever exposure to the West.

The effort climaxed in the aftermath of the full-scale invasion. As foreign minister Sergei Lavrov instructed the Russian bureaucracy, "we need to act so that if our Western partners do not feel like working with us, we will still never lack any

⁷ Bank of Russia, "Macroeconomic Survey of the Bank of Russia," accessed February 14, 2026, https://www.cbr.ru/eng/statistics/ddkp/mo_br/.

⁸ Vaibhav Raghunandan, Petras Katinas, and Luke Wickenden, "December 2025—Monthly Analysis of Russian Fossil Fuel Exports and Sanctions," Centre for Research on Energy and Clean Air (CREA), January 22, 2026, <https://energyandcleanair.org/december-2025-monthly-analysis-of-russian-fossil-fuel-exports-and-sanctions/>.

⁹ Vitaly Yermakov, "Fiscal Flex: Russia's Oil and Gas Revenues in 2024," *Oxford Energy Comment*, Oxford Institute for Energy Studies, February 2025, <https://www.oxfordenergy.org/wpcms/wp-content/uploads/2025/02/Comment-Fiscal-Flex.pdf>.

¹⁰ Darya Korsunskaya and Vladimir Soldatkin, "Russia's Oil and Gas Budget Revenue Falls by Third Year-on-Year in June," *Reuters*, July 3, 2025, <https://www.reuters.com/business/energy/russias-oil-gas-budget-revenue-falls-by-third-year-on-year-june-2025-07-03/>; Pavel Luzin, "Russia's Year of Truth: The Runaway Military Budget," *Europe's Edge*, Center for European Policy Analysis (CEPA), January 22, 2025, <https://cepa.org/article/russias-year-of-truth-the-runaway-military-budget/>; Iwona Wiśniewska, "Russia's Budget for 2025: War Above All," *OSW Commentary* (Centre for Eastern Studies, November 22, 2024), <https://www.osw.waw.pl/en/publikacje/osw-commentary/2024-11-22/russias-budget-2025-war-above-all>.



technological components or materials. Then, let them screw themselves,” concluded the diplomat-in-chief undiplomatically.¹¹ So, to what extent has Russia succeeded in becoming an autarkic sovereign island unto itself?

Direct trade with the EU has fallen dramatically, from 52% of Russia’s total in 2021 to 7.8% in 2025. Trade with the US is less than 1%.¹² Considerable volumes are still being traded via intermediaries, circumventing sanctions. Thus, Russian drones and rockets remain empowered by European and US components, while the value of carbohydrates purchased by the EU from Russia between 2022—2025 exceeds Europe’s total aid to Ukraine.¹³

Despite these short-term aberrations, Russia has decidedly re-oriented towards non-Western markets. China and India have together covered a half of Russia’s trade, while Russia has been importing military materials from Iran and North Korea and more generally, the wider Global South. Thus, Russia has significantly decreased its dependence on the West. In doing so, however, it has created new dependencies on countries that, at a minimum, match Russia’s might and therefore will not be easily subjugated to the Kremlin’s will. At the same time, with the exception of PRC, their ability to supply Russia with high-end technologies is highly limited.

1.4 Section Conclusion

The Putin regime has invested into both security and propaganda to enforce popular and elite unity. Under the façade of relative cohesion, there are profound cracks that stand ready to be cleverly widened and exploited by Russia’s adversaries.

Russia’s current ability to keep the robust war machine running threatens future economic stability and prosperity. Some costs associated with the war effort are offset by expanding commercial ties to non-Western countries. They have brought much needed economic stimuli while creating dependencies that limit the Kremlin’s policy options.

While the war is important for Europe, it has become existential for the Putin regime. Given the length and the sacrifices, the Putin regime has tied its survival to achievement of at least some of the relatively maximalist objectives it set out four years ago. Accordingly, the Kremlin has limited maneuvering space for compromise, while their willingness to escalate, a function of survival, surpasses that of Ukraine’s partners. The fixation on survival, however, can be exploited by creating a polycrisis in Russia and forcing the regime to turn inward.

¹¹ “Lavrov: RF nado sdelat’ tak, chtoby nikogda bol’she ne zaviset’ ot zarubezhnykh postavok,” *TASS*, March 23, 2022, <https://tass.ru/ekonomika/14154523>.

¹² Eurostat, “EU Trade with Russia – Latest Developments,” *Statistics Explained*, Accessed February 16, 2026, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=EU_trade_with_Russia_-_latest_developments.

¹³ Kateryna Denisova, “Over 100,000 Western-Made Parts Found in Drones, Missiles Used in Russian Recent Attack, Zelensky Says,” *Kyiv Independent*, October 6, 2025, <https://kyivindependent.com/over-100-000-western-made-parts-found-in-drones-missiles-used-in-russian-recent-attack/>; Vitaly Shevchenko, “How the West Is Helping Russia to Fund Its War on Ukraine,” *BBC News*, May 30, 2025, <https://www.bbc.com/news/articles/cdxk454kxz8o>.



2 Europe From the “Russia World” Perspective

Europe has traditionally played a key role in Russia’s societal, political, and philosophical thinking about its own place in the world. Russia’s position vis-à-vis Europe has long been a divisive factor for Russia’s political, economic and intellectual elite. The Russian regime has, at least since the early 2000s, tried to answer the dilemma by presenting Russia as a unique civilisational-philosophical concept operating both outside of Europe on the one hand, but also not as part of Asia on the other.¹⁴

This line of thought of an ambivalent approach to Europe remained present in Russian political thinking in the build up to February 2022. The clash over Ukraine,¹⁵ in place since at least 2014, but increasing massively in scale in the post-February 2022 period, finally brought an ultimate collapse of bilateral ties.

2.1 Dividing Europe and the West

The Kremlin has sought to sow chaos and to create, or deepen, divisions among EU member states. Further, Moscow has recruited allies to undermine the fragile unity of the European block from within. Since the EU foreign and security policy is based on the principle of unanimity, the Kremlin’s “divide and rule” strategy can be relatively efficient. In the words of the Kremlin foreign policy advisor Sergey Karaganov, “peace on the European continent will come only when we break Europe’s neck, as we did through our victories against Napoleon and Hitler.”¹⁶ Accordingly, Moscow has worked to undermine the strength of the EU’s external action and response, already limited by relatively weak competences, and simultaneously developed ideological and pragmatic partnerships with willing national politicians.

Despite that, the Kremlin has at least so far proved unable to divide (and rule) the EU to the extent that it would prevent the past 19 sanctions’ packages against its war economy and more than 2,500 institutions, companies and individuals responsible for the aggression.¹⁷ Russia’s failure was in spite of minor tactical victories. For instance, Hungary managed to get several representatives of the Russian elite off the EU’s sanctions list.¹⁸ Nevertheless, the Hungarian example illustrates the efforts of the Kremlin to infiltrate and influence key decision-makers in the EU-27 in order to undermine EU unity and resilience. To succeed, Russia needs to convince only a few stake-holders who might have disproportionate influence due to the EU’s internal decision-making and information-sharing mechanisms.

In any case, the direction of Russian influence seems to be clear from the words of Vladimir Putin who on the occasion of his bilateral meeting with the Hungarian PM Viktor Orbán in October 2022 remarked: “*Even though our opportunities to maintain contacts and develop relations are limited due to the current geopolitical*

¹⁴ S. V. Volodenkov, “Obrazovanie i kul'tura,” in *Gosudarstvo*, vol. 2 (Runivers, 2024), 13, <https://runivers.ru/bookreader/book644351/>.

¹⁵ Pavel Havlíček, *Czech-Russian Escalation as a Case of Deeper EU-Russia Crisis: Time for a United and Credible Action*, Policy Paper (EUROPEUM Brussels Office, December 2021), <https://www.europeum.org/wp-content/uploads/pavel-havlicek.pdf>.

¹⁶ Sergei Karaganov, “Slomat' khrebet Evrope: kakoy dolzhna byt' politika Rossii v otnoshenii Zapada,” *Rossiia v global'noy politike*, January 22, 2025, <https://globalaffairs.ru/articles/slomat-hrebet-evrope-karaganov/>.

¹⁷ Pavel Havlíček, Boris Kaliský, and Lukáš Kraus, *Options for Better Sanctions Implementation for the Next Czech Government*, Policy Paper (Asociace pro mezinárodní otázky [AMO], October 9, 2025), https://www.amo.cz/wp-content/uploads/2025/10/AMO_Sanctions_web.pdf.

¹⁸ “Hungary Seeks to Remove Three Russian Oligarchs from EU Sanctions List, Reports RFE/RL,” *bne IntelliNews*, February 25, 2025, <https://www.intellinews.com/hungary-seeks-to-remove-three-russian-oligarchs-from-eu-sanctions-list-reports-rfe-rl-369280/>.



situation, it is satisfying that we maintain and develop relations with many countries in Europe. Hungary is one of these countries.”¹⁹

Despite the pressures, the EU has so far maintained its unity on major policy directions. At lower levels, political views have increasingly diverged as the Kremlin keeps using covert means of financial and informational influence over local European stake-holders who have sought benefits for themselves.

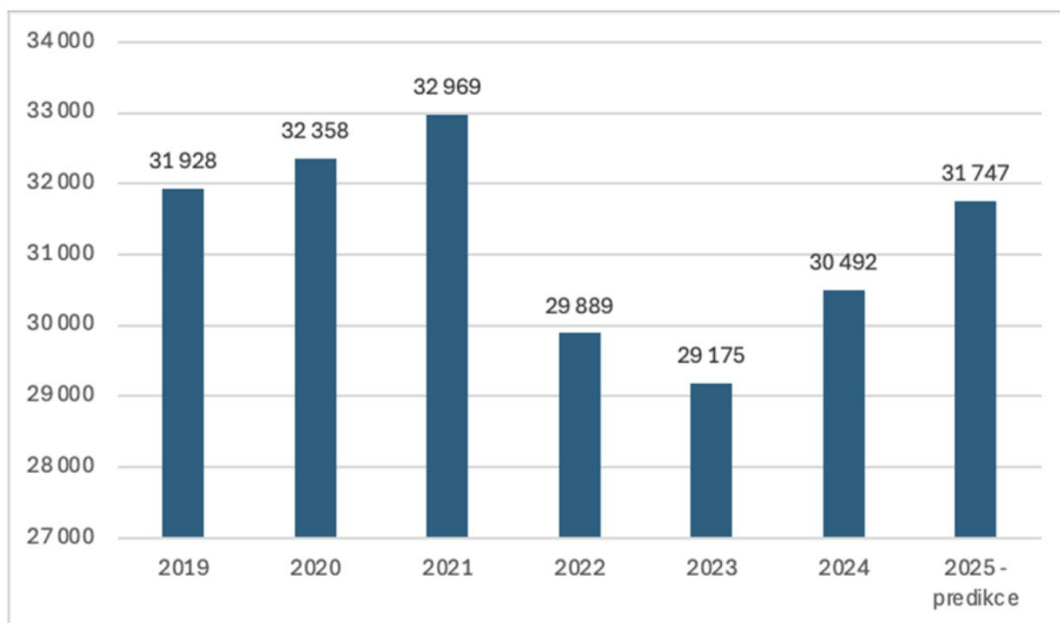
2.2 Energy and Economy

European economic success has been to a large degree built on cheap deliveries of Russian energy resources, particularly natural gas but also crude oil, which has stimulated economic growth and provided a competitive advantage over rivals.

At the same time, however, Russia has over time demonstratively started abusing its position as the number one energy provider for its own political and strategic goals. This reached its peak in 2022 when the EU proved largely vulnerable to Russian energy blackmail and was forced to invest to overcome a substantial energy and socio-economic crisis taking a toll on the lives of European citizens and their standard of living.

In the words of Vladimir Putin, the EU made a grave mistake reorienting from Russia towards other global markets: *“The European Union has embarked on a suicidal energy policy. It rejected stable and affordable supplies of Russian gas and instead relies on more expensive and less reliable sources, which has led to an energy crisis in Europe.”*²⁰

Development of real wages in the Czech Republic in between 2019 and 2025



Source: Ministry of Finance of the Czech Republic²¹

¹⁹ The Kremlin, “Meeting with Prime Minister of Hungary Viktor Orban”, <http://en.kremlin.ru/catalog/persons/424/events/72516>, Beijing, China, October 2023.

²⁰ Vladimir Putin, remarks at the Russian Energy Week International Forum, Moscow, October 11, 2023.

²¹ Ministry of Finance of the Czech Republic, *Macroeconomic Prediction—April 2025*, April 2025, <https://www.mfcr.cz/cs/rozpocetova-politika/makroekonomika/makroekonomicka-predikce/2025/makroekonomicka-predikce-duben-2025-59451>, cited in Martin Zeman, *Trends in Real Wage Development in the Czech Republic*, Policy Paper (Institute for Politics and Society, June 2025), https://www.politikaspolecnost.cz/wp-content/uploads/2025/06/06_2025_Trends-in-Real-Wage-Development-in-the-Czech-Republic_IPPS_Martin-Zeman.pdf.



Despite that, most European countries did not give up on their support to Ukraine but had to pay the price of energy decoupling from Russia and reorientation of their energy supplies to other providers, particularly the US but also other international partners. Between 2022 and 2024, the EU's dependency on Russian gas imports dropped from around 45% to only 19%. The expiration of Ukraine's contract on the transportation of Russian gas via its territory on 31 December 2024 further accelerated the process of decoupling including, most notably, for the Central European countries.

To finish the process, however, the overall trajectory has to be enshrined also in the EU's strategic and conceptual documents²², as it has not been evenly followed among countries. Most notably Hungary and Slovakia have even increased their energy imports (particularly of crude oil) from Russia. Furthermore, in absolute numbers, there are many more countries that have benefitted from Russian energy supplies, including in western and southern parts of Europe such as France and Spain.²³ Thus, since the escalation of the war Europe has paid more for Russian fossil fuels than it has delivered to Ukraine in military and other aid.²⁴

In any case, it seems inevitable that the economic relations built around energy ties are seeing a gradual end and their replacement with other trade partnerships, including most recently with Latin American countries in the Mercosur agreement. The same, indeed, applies to Russia itself as Moscow has to reorient its fossil fuels exports to non-European markets.

In this sense, the Russian leadership is both squeezed by its partners, including PRC and India, and struggling to sustain its own energy model, bringing resources for the state to promote its interests. As an illustration, all major Russian energy companies, both state and non-state owned, faced difficulties as part of the diversification away from lucrative European buyers.²⁵ Overall, this leads to more economic problems for Russia²⁶ and less vulnerability for Europe, at least that coming from the Russian vector. However, in decoupling from Russia, Europe might have inadvertently created other dependencies on its rivals such as the PRC, or the US.

²² European Commission, Directorate-General for Communication, "Roadmap to Fully End EU Dependency on Russian Energy," May 6, 2025, https://commission.europa.eu/news-and-media/news/roadmap-fully-end-eu-dependency-russian-energy-2025-05-06_en.

²³ "India's crude imports drop to lowest levels since the price cap, while France and Spain's LNG imports rise by 18% and 27%, respectively.," Raghunandan, Katinas, and Wickenden, "December 2025—Monthly Analysis."

²⁴ Shevchenko, "How the West Is Helping Russia."

²⁵ Oksana Kobzeva, "Russia's Pipeline Gas Exports to Europe Fall by 44% to the Lowest in Decades," *Reuters*, December 30, 2025, <https://www.reuters.com/business/energy/russias-pipeline-gas-exports-europe-fall-by-44-lowest-decades-2025-12-30/>; Alexander Romanov, "Gazprom Shares Fall 4% over 2025, Risks Persist," *Logos Press*, January 5, 2026, <https://logos-pres.md/en/news/gazprom-shares-fall-4-over-2025-risks-persist/>; "Russia's Lukoil Profit Drops by Half in the First Six Months of 2025 Amid Sanctions, Export Curbs and Weaker Prices," *UAWire*, August 28, 2025, <https://www.uawire.org/russia-s-lukoil-profit-drops-by-half-in-the-first-six-months-of-2025-amid-sanctions-export-curbs-and-weaker-prices/>; "Rosneft's Net Profit Plunges 70% in First 9 Months of 2025 as Falling Oil Prices and Sanctions Bite," *The Moscow Times*, December 1, 2025, <https://www.themoscowtimes.com/2025/12/01/rosnefts-net-profit-plunges-70-in-first-9-months-of-2025-as-falling-oil-prices-and-sanctions-bite-a91296>.

²⁶ EZh (@ejdailyru), "Iz-za nedopolucheniya neftegazovykh dokhodov Minfin RF i vsled za nim TSB uvelichat prodazhi valyuty," Telegram, January 15, 2026, <https://t.me/ejdailyru/379862>; Sergey Aleksashenko, "The Price of Stability: What Awaits Russia's Economy in 2026?," *New Eurasian Strategies Centre*, January 6, 2026, <https://nestcentre.org/the-price-of-stability-what-awaits-russias-economy-in-2026/>; Bank of Russia, "Macroeconomic Survey"; Iwona Wiśniewska, *Russia's 2026 Budget: Mounting Financial Challenges and Economic Stagnation*, OSW Commentary (Centre for Eastern Studies, December 9, 2025), <https://www.osw.waw.pl/en/publikacje/osw-commentary/2025-12-09/russias-2026-budget-mounting-financial-challenges-and-economic>.



2.3 Russia's Divide and Rule Strategy in International Context

To drive a wedge between both sides of the Atlantic Ocean has been one of the strategic goals of the Kremlin for many years, especially so now, considering the possibility of a withdrawal of US soldiers from Europe, in Putin's words "a geopolitical vassal of the United States."²⁷ Severance of Europe/US ties would expose European vulnerability to Russia's power designs and at the same time undermine NATO from within.

This is also important since the US, even if withdrawing its direct military support to Ukraine, has still been engaged in sales of military equipment to the country at war. Concurrently, the US has at its disposal a number of strategic enablers that are still today out of European reach, including satellite coverage of the military theatre, a rich network of intelligence, robust logistics support and cyber capabilities that are helping Ukraine withstand the Russian pressure. Without the current level of support, Ukraine's defences would be further undermined, in many respects irreplaceably from the EU which exposes Europe as vulnerable and weak in bilateral negotiations with the US.

Thus, any further Transatlantic tension and potential conflict comes in very handy for the Kremlin in promoting its strategic interest of dividing Europeans from their allies and further isolating and undermining Ukraine's security and defence, including during the years to come in the post-war period.²⁸

In this way, the Kremlin also wants to dominate in Europe and rewrite the European security architecture in its favour.²⁹ Putin's Russia is trying to achieve this by exercising pressure, making use of European lack of resolve as well as outspending the European actors, as the IISS report suggests.³⁰ Even if European NATO allies have started investing massively in security and defence,³¹ they are still starting from a low base and years of strategic debts in their armed forces accumulated over years of reliance on the US security shield, which also makes them vulnerable and exposed to US decision-making.

2.4 Summary of the Section

From the Russian point of view, Moscow's strategic goals towards Europe have met with mixed success. With transatlantic tensions rising, the Kremlin is carefully preparing and waiting for an opportunity to further push its interests and make use of this opportunity to achieve its long-term political, economic and military goals towards Europe.³² The Putin regime has its allies inside of the EU too, and while it has been able to make use of these connections only to a limited extent, there might be a better opportunity for doing that in the future. Outcomes of national European elections will further alter the Kremlin's ability to exercise influence in Member States and, through them, in Brussels. The Putin regime's method of searching for weak spots, infiltration of key institutions and influencing decision-makers and leaders of European countries or big business will not disappear and will continue to

²⁷ Vladimir Putin, remarks at the St. Petersburg International Economic Forum, St. Petersburg, June 16, 2023.

²⁸ Kaja Kallas (@kajakallas), "China and Russia must be having a field day. They are the ones who benefit from divisions among Allies," X, January 17, 2026, <https://x.com/kajakallas/status/2012633517486702617>.

²⁹ Yordan Bozhilov and Mira Kaneva, *New European Security: The Evolution of the European Security Architecture in the Wake of the Russian War against Ukraine* (Friedrich Naumann Foundation for Freedom, 2024), <https://api.sofiaforum.bg/storage/files/post-65eed3321abc3bc47cc49eeb.pdf>.

³⁰ International Institute for Strategic Studies (IISS), *The Military Balance 2025* (Routledge, 2025), <https://www.iiss.org/publications/the-military-balance/2025/the-military-balance-2025/>.

³¹ NATO, "Defence Expenditure of NATO Countries (2014-2025)," Press Release, June 2025, <https://www.nato.int/content/dam/nato/webready/documents/finance/def-exp-2025-en.pdf>.

³² Sahaidachnyi Security Center, "The Everywhere War: Sub-Threshold Warfare Tracker," accessed February 14, 2026, <https://sahasec.org/tracker/>.



serve as one of the main channels of exercising influence in Europe. For these ends, the Kremlin has a number of instruments, including energy ties, economic benefits, ideological and anti-Western appeal, information and influence operations (FIMI), and many others. The availability of these tools has suffered due to European efforts to push Russia away from the continent. Yet robust, if more clandestine, networks remain in place and have systematically promoted Russia's objective to divide and rule Europe.

3 Russia's Goals in the World: Post-Western Multipolarity

Russia under Putin has gradually become a fully-fledged revisionist great power. To challenge what it perceives as an unfair, Western-centric world order, Moscow has built coalitions among the "global majority" against the so-called "golden billion," the collective West. In doing so, the Kremlin has leveraged inefficiencies in the obsolete global system of governance.

In lieu of the Western dominance, the Kremlin rallying call goes, there should come an age of multipolarity with many countries pursuing their interests individually and through built-for-purpose coalitions. In president Putin's summary, "multipolarity is an answer of the global system to the efforts to force every country into one hierarchy with Western countries at the very top."³³

Accordingly, Russia's quest for multipolarity is integrally tied to their vision of a post-Western world order. It perceives this order – and likes to spread the perception – as hypocritical, unjust, and immoral.³⁴ Moreover, the supposed Western decadence stands in stark contrast to Russia's self-image as a champion of traditional values, whatever these values might mean to different peoples and nations. The reality is, indeed, much more complex as Russia's own behaviour towards individual countries and societies of the Global South illustrates.³⁵

Russia has thus become a quintessential non-West. As the influential Kremlin security aide Nikolai Patrushev boasts, "the West has attempted to impose their values on us. But our nation and our leadership have understood that these values stand in direct contradiction to our values."³⁶

3.1 Post-Western Multipolar Order

Russia has succeeded, relatively, in gaining tolerance, or at least ignorance, for their actions in Ukraine from the majority of the global community. Thus, only 45 countries have sanctioned Russia and 29 have armed Ukraine.³⁷ This support mirrors, and reinforces, Russia's narrative about the collective West fighting Russia via the Ukrainian proxy - a narrative that wins traction in much of the Global South where lack of trust in the West is deeply rooted, in part based on the heritage of colonialism. Furthermore, Russia's efforts to promote a post-Western multipolarity have been abetted by unilateral actions with dubious legal credentials by some Western great powers.

³³ Aleksandr Kondratiev, "Drony nad Evropoy, moda na kokoshniki i yadernyy shchit Rossii: glavnoe iz rechi Putina na Valdaye," *Gazeta.ru*, October 2, 2025, <https://www.gazeta.ru/politics/2025/10/02/21796514.shtml>.

³⁴ Polina Martynova, "Patriarkh Kirill nazval prichinu protivostoyaniya Rossii i Zapada," *RBC*, April 10, 2023, <https://www.rbc.ru/politics/10/04/2023/643321a69a7947f41bd8445c>.

³⁵ Eilish Hart, "Russia's 'Disposable' Foreign Fighters," *Transitions*, January 29, 2026, <https://tol.org/client/article/russias-disposable-foreign-fighters.html>.

³⁶ Martynova, "Patriarkh Kirill."

³⁷ Peter Piatetsky, "What Are Countries Doing to Counter Russia's War?," *Castellum.AI*, accessed February 14, 2026, <https://www.castellum.ai/insights/which-countries-are-taking-action-on-ukraine>.



In its endeavours to redraw the global architecture and rules of the game, the Kremlin has aligned with powers with shared ambitions, willing to challenge the Western global dominance led by the United States. The reinvigorated SCO and the expanded BRICS+ have been at the forefront of these efforts. The Kremlin boasts that the members' collective GDP (PPP) now exceeds both that of the EU and of the G7.

Their members are united in their revisionist ideology, albeit to a different extent. In parallel, however, powers such as the PRC pursue their own objectives independently, hence weakening the overall cohesion of any non-Western bloc.

The sizable economic power of non-Western coalitions, combined with deeper ties between themselves, correlates with their populations' views of Russia and the West. According to ECFR, around 80% of Chinese and Indians perceive Russia as an ally. In contrast, the US and the EU are seen as such by less than 15%. Similarly, a majority of Indians and Chinese consider Western support for Ukraine as a rather self-interested endeavour to defend the Western dominance in the world. Their view of Russia's strength, and their respect for Russia, has increased as a function of the supposed ability of the Kremlin to withstand the concerted pressure of Western great powers.³⁸

It is clear that out of the current turmoil, Russia wants to emerge as one of the poles within the new global architecture in a newly reinforced shape and form, most of all at the expense of its Western - and above all European - rivals. Within the new multipolar global arena, the Kremlin wants to have its own sphere of influence and privileged national interest, which are above all to secure the longevity of its survival and further prosperity in the years and decades to come. For that, it wants to see a new security architecture with its place clearly secured around the table. It remains to be seen whether the Kremlin has the influence to shape a future international order to the extent it had so after the Soviet victory in World War II. The current Russia might find itself in a weaker position than the then superpower Soviet Union.

³⁸ Timothy Garton Ash, Ivan Krastev, and Mark Leonard, *United West, Divided from the Rest: Global Public Opinion One Year into Russia's War on Ukraine*, Policy Brief (European Council on Foreign Relations, February 22, 2023), <https://ecfr.eu/publication/united-west-divided-from-the-rest-global-public-opinion-one-year-into-russias-war-on-ukraine/>.



Conclusions

The Putin regime has chosen to devote all its power into getting Ukraine under its influence. And even if it might not succeed by military means, the Kremlin will not resign. It will continue interfering in domestic affairs of European would-be allies through a variety of measures. In parallel, the Kremlin will attempt to push its adversarially-minded Western competitors further away from its borders even as it continues to exercise a firm grip on Russia proper. Meanwhile, the Kremlin's non-Western partners have watched Russia's aggressive policy in relative ease – perhaps plotting their own expansionist plans.

Current global affairs and international relations are going through an extreme fragmentation merged with other turbulent developments, which might on the one hand benefit the rivals and challengers of the West. On the other hand, the tectonic shifts can stimulate a revival of Western might, which has for far too long relied on the norms of international law and institutional set-up that it helped to shape in the post-1945 world. The seemingly idyllic world order has ended and, to remain influential and secure, European countries and the EU need to use instruments of power to protect and promote their interests. While the system of international law should be used instrumentally to promote European interests, it needs to be backed by credible power. Thus, Europe has to re-learn the lessons of history – that power and strength are ultimately decisive in the anarchical international order. Otherwise it risks finding itself divided, weak, ignored, and left at the mercy of other great powers.



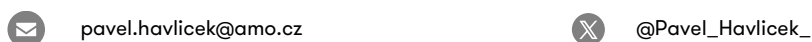
Association for International Affairs (AMO)

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