



# ANKASAM

## bulletin

August 2026  
ISSUE: 2026/8



### From Robots to Grids: The New Front in the US-China AI Competition

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## ANKASAM ANALYSIS

### From the Strait of Hormuz to Global Crises: The Caspian, Malacca, and Others



Dr. Cenk TAMER

As the world now lives in an "Age of Unpeace"[1], or "Age of Global Crises," with constant chaos and conflict in different regions, hopes for a collaborative world order are diminishing. Although actors emphasizing building together for the future and the shared destiny of humanity exist within the United Nations system, they often prove ineffective, particularly in the face of crises and events, and become the root cause of the problem. The unjust structure of the UN Security Council, tasked with maintaining world peace, ensures that the system remains dominated by a constant state of anarchy.

The Russia-Ukraine crisis that erupted in Europe has triggered a global political, economic, and security crisis encompassing Eurasia, the Pacific, the Middle East, and Africa. The multi-vector political, economic, and security crises in international politics demonstrate that there are no longer local or regional conflicts; instead, we must speak of global crises. Crises in different parts of the world are now creating a "domino effect," shifting to other geopolitical basins and severely disrupting interstate relations wherever they reach.

As in the case of Ukraine, the crisis that erupted in the Strait of Hormuz in February 2026 has begun to shake both the global economy and geopolitical balances. The ongoing attacks against Iran, coordinated by Israel and the United States, have altered the balances in the Middle East, particularly in Lebanon, Yemen, and Syria, and have put actors, especially those in the Asia-Pacific region, who are dependent on energy imports from the Strait of Hormuz, in a very difficult position. From this point on, one of the most debated issues has been in which region a new crisis might erupt after the one in Hormuz.

In this regard, while Iran's attempts to close the Bab al-Mandeb Strait through the Houthis are noteworthy, attention has also turned to what other tools the US might use to pressure Iran. In this context, while the US, which is trying to completely block Iranian oil sales by imposing an embargo in the Strait of Hormuz, keeps the option of direct military intervention on the table, it is primarily focusing on a "multi-faceted containment strategy." Although under naval encirclement, Iran maintains its connection with the world by land. Therefore, from the perspective of US strategy, creating secondary crisis areas and zones of instability in Iran's near and far surroundings is of vital importance. It can be argued that Iran's biggest geopolitical supporters are Russia and China. Therefore, the US may be focusing on keeping Russia and China preoccupied with new "crises/problems" in order to weaken Iran's economic and defense resilience.

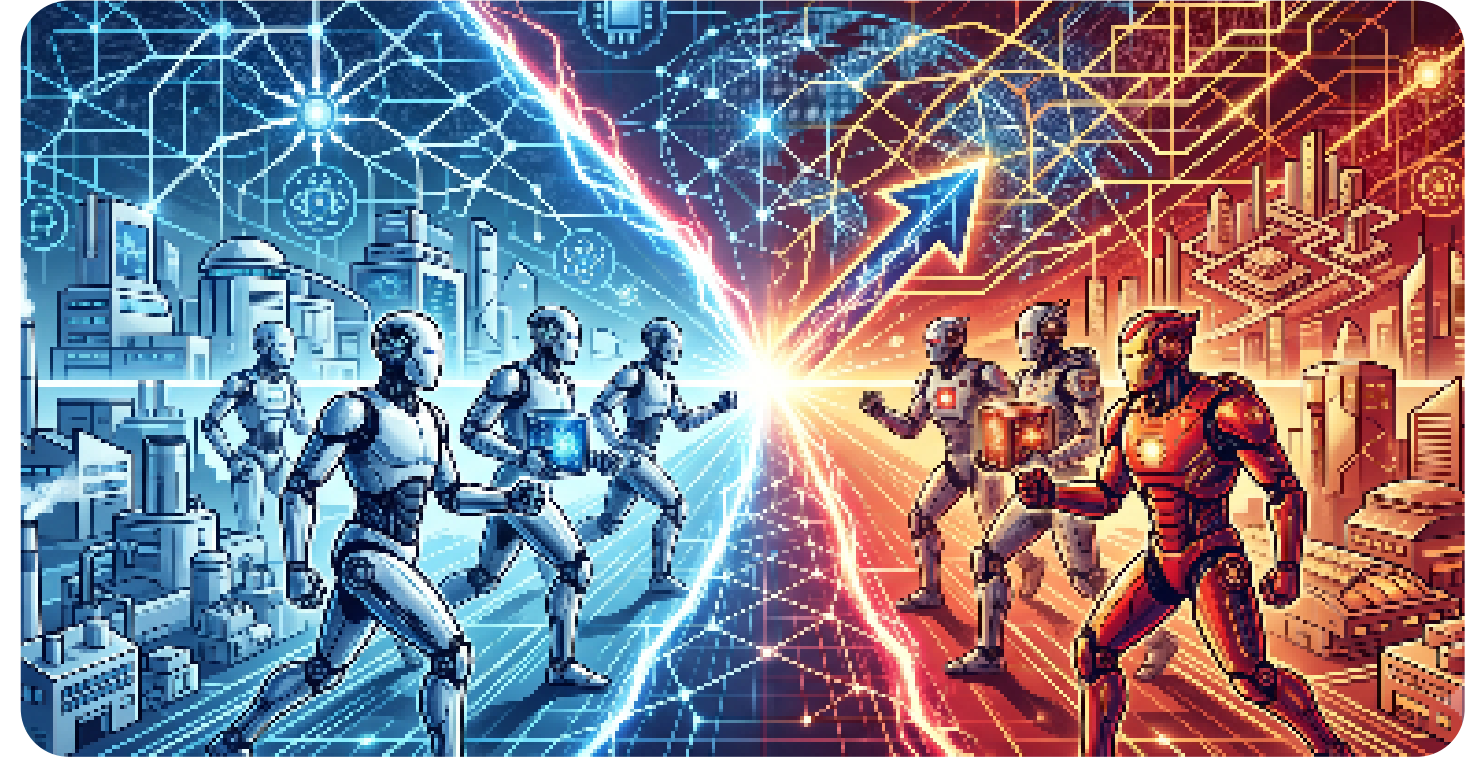
The attack by Ukraine on an Iranian ship in the Caspian Sea on July 25, 2026, can also be cited as an example of these new crises. This example essentially sends a significant message that the US is closely monitoring the connections between Iran and Russia and that these connections could be targeted “when necessary.” The attack in the Caspian Sea can also be seen as an attempt to target China’s Central Corridor extending to Europe.<sup>[ii]</sup> Therefore, there is a geopolitical environment in which China’s westward corridors—northern (Russia), central (Caspian), and southern (Iran)—are threatened by various crises. Consequently, the security of the Strait of Malacca, a critical bottleneck in China’s Maritime Silk Road, may also be jeopardized in the near future. The current geopolitical landscape currently constrained by the Caspian and Hormuz straits, may trigger new areas of crisis in the coming period. The simultaneous insecurity of the Strait of Hormuz and Bab al-Mandeb makes the Cyprus-centered Eastern Mediterranean basin a key location for energy transit. On the other hand, the disruption of China’s land-based energy and trade corridors (Northern, Central, and Southern) due to crises may force Beijing to take radical steps to guarantee the security of the Maritime Silk Road. This situation could pave the way for increased pressure on Taiwan and an escalation of tensions in the Taiwan Strait and the South China Sea. The potential US blockade of the Malacca Strait in response to a possible Chinese operation, particularly against Taiwan, would force China to turn to the Sunda or Lombok straits under Indonesian control; this would create a massive maritime security crisis encompassing the entire Southeast Asian region.

A unified geopolitical encirclement may emerge, where China and the Eurasian bloc’s westward and southward-facing global trade and logistics routes are simultaneously pressured by crises on the Northern Axis (Russia-Ukraine war), the Central Axis (Caspian and Caucasus), the Southern Axis (Iran, Hormuz, and the Eastern Mediterranean), and the Eastern/Pacific Axis (Malacca and Taiwan). In this conjuncture, where land and sea corridors are simultaneously destabilized, it becomes difficult for the global system to emerge from the “Age of Unpeace”; crises cease to be mere local conflicts and transform into fundamental tools for reshaping and managing global power balances.

Consequently, the “selective” application and violation of international law rules is creating a “norm erosion” not only regionally but also globally. Due to Iran’s actions, other bottleneck coastal states around the world may further increase their de facto control over strategic straits, restrict passage, or impose economic obligations. This could increase the costs of global maritime trade, leading to instability in many sectors, particularly energy supply security. While the US attempts to pressure Iran, the world may face a much more challenging situation in terms of global trade.

[i]. The term is used in reference to Mark Leonard’s book “The Age of Unpeace”.

[ii]. For more, see “Jeopolitik Kırılma Eşiğinde “İstanbul 2.0 Vizyonu”nun Kaçınılmazlığı ve “Genişletilmiş Karadeniz Havzası Güvenlik Kuşağı”, ANKASAM, <https://www.ankasam.org/jeopolitik-kirilma-esiginde-istanbul-2-0-vizyonunun-kacinilmazligi-ve-genisletilmis-karadeniz-havzasi-guvenlik-kusagi/>, (Date Accessed: 31.07.2026).



## ANKASAM ANALYSIS

# From Robots to Grids: The New Front in the US-China AI Competition



Göktaş ÇALIŞKAN

The United States’ decision, announced on July 28, 2026, marks a new phase in the Washington-Beijing technology competition, extending from screens to factories and the power grid.<sup>[i]</sup> The Federal Communications Commission added power converters connected to advanced robotic devices manufactured abroad to its list of prohibited items for safety reasons. The regulation largely prevents the importation, marketing, and sale of new, unapproved models in the US. The use and sale of previously approved devices, however, continues.

While the political target of the decision is Chinese manufacturers, the legal scope is broader than the manufacturer’s nationality. The text classifies relevant devices manufactured in foreign countries according to their place of manufacture and leaves room for conditional authorization for products officially determined to be safe. Defense or homeland security authorities may grant exceptions for power converters, and the defense authority for robots. This structure gives Washington selective access based on country, company, and product class.<sup>[ii]</sup>

The importance of this step stems from the fact that robots serve as the application layer of artificial intelligence in the physical world. While large language models produce information, advanced robots perceive the environment, translate decisions into action, and work with people in shared spaces. A platform carrying a camera, microphone, location data, lidar, motion sensor and cloud connection is a mobile computer that constantly collects data. A security vulnerability in the software in such a device may cause consequences such as stopping the production line, opening doors or harming people.

The prominence of humanoid and quadruped robots in the security debate stems from their mobility. While humanoid systems can be used in warehouses, factories, and service areas designed for human labor, quadruped models can navigate irregular terrain such as stairs, tunnels, power plants, and disaster zones. These same characteristics make them valuable for monitoring critical facilities, military reconnaissance, border surveillance, and missions in hazardous areas. A remotely controlled machine, or one connected to external servers, combines data security with physical security in a single device.

China's advantage in this field does not appear to be limited to a single popular brand. The country's extensive electronics manufacturing network, battery capacity, motor and actuator supply, rapid prototyping capabilities, and large domestic market provide scale for robot manufacturers. In 2024, of the 542,000 industrial robots installed worldwide, 295,000 were commissioned in China, accounting for 54% of global installations.<sup>[iii]</sup> The number of active industrial robots in Chinese factories has also exceeded 2 million. While these figures do not directly represent the size of the humanoid robot market, they demonstrate the industrial depth required for mass production.

For the U.S., the risk extends beyond Chinese companies entering the market with cheaper robots. A platform that becomes widespread early on may bring its own software ecosystem, maintenance network, training data, and parts standard. Once factories are configured according to a specific robot architecture, changing suppliers becomes very costly. Therefore, instead of intervening after market share is established, Washington is trying to influence today which technology will shape future systems.

The integration of power converters with robots highlights the energy dimension of the decision. These devices convert direct current (DC) generated by solar panels and batteries into alternating current (AC) usable by the grid and data center equipment. Next-generation models feature internet connectivity for remote monitoring, software updates, and grid management. Unauthorized access could allow an attacker to alter power flow, collect data, or shut down multiple devices simultaneously. A digital breach could thus translate into physical consequences such as outages, equipment damage, and fire.

This vulnerability becomes more critical with the rapidly growing electricity needs of artificial intelligence infrastructure. In the USA, data centers consumed approximately 4.4 percent of total electricity in 2023. It is estimated that this rate may increase between 6.7 percent and 12 percent in 2028.<sup>[iv]</sup> The security of converters operating between renewable generation, battery storage, and data centers therefore directly impacts the continuity of AI capabilities. It is not enough to protect chip access; the control layer of the electricity that powers the chip must also be secured.

Washington's approach demonstrates the expansion of regulatory tools developed for telecommunications security to include robotics and energy technologies. The scope previously applied to communications equipment, surveillance systems, drones, and routers. Now, similar authority is being applied to mobile machinery and devices that manage the flow of electricity. Thus, the Federal Communications Commission is transforming from a classic communications regulator into a more powerful security actor overseeing the gateway to the market for critical digital hardware.

The decision could create a protected domestic market for American robotics companies. Limiting the price and production advantages of Chinese competitors could make it easier for domestic startups to find investment and increase order volume. Conversely, the cost of robot research, training, logistics, and use in small businesses may increase. Reduced competitive pressure could slow down product development. Furthermore, the inability of domestic production of power converters to quickly meet demand could create delivery time and cost pressures in solar energy, storage, and data center projects.

Excluding existing models from the scope of the program, while smoothing the transition, creates a different security issue. Devices in the field will remain dependent on the manufacturer for maintenance, spare parts, and software updates. Closing update channels could lead to the growth of vulnerabilities, while keeping them open could allow the disputed remote access to continue. Without inventorying devices, isolating them from networks, restricting data flow, and implementing independent security audits, halting new sales alone will not eliminate the established risks.

How the conditional authorization mechanism is implemented will determine the reliability of the decision. A broad restriction based on the country of manufacture, while providing quick protection, could place technically secure products in the same category as weak ones. Clearly published criteria such as source code review, software component list, location of update servers, data localization, remote shutdown authorization, and supplier ownership are required. If a transparent testing regime is established, exceptions can be prevented from appearing as a political bargaining tool.

The response of allies will also influence the direction of the global market. Europe, Japan, and South Korea may seek conditional permission to protect their manufacturers' access to the US market. If safety requirements are harmonized, a network of reliable suppliers of robotics and energy equipment could emerge. If each country develops its own standards, manufacturers will have to comply with different software, communication module, and data management rules. This fragmentation, while increasing costs, could push China to establish an alternative market around its own technical standards.

Beijing's response could be shaped by export permits, critical components, or the activities of American companies in China. Robots rely on a complex chain of motors, sensors, batteries, rare earth magnets, semiconductors, and precision machining equipment. Even if the US restricts the final product, China-based intermediate goods could remain in production in the short term. Effective restructuring requires component manufacturing alongside domestic assembly, a skilled workforce, secure software, and commitments to large-scale procurement.

In conclusion, the decision demonstrates that the AI competition has transcended the algorithm and chip race, reaching instead the machines that move and the hardware that manages electricity. Who sees the data collected by the robots, who can remotely control the machines, and which software powers the converters that supply energy to data centers are becoming strategic power factors. Washington's success will depend not on closing the import channel, but on establishing a secure, competitive, and scalable manufacturing ecosystem. Otherwise, restrictions imposed for security reasons could increase costs and shift technological dependency to other links in the chain.

[i]. Alexandra Alper ve David Shepardson, "Trump administration bans new Chinese humanoid robots, to protect US AI buildout", Reuters, <https://www.reuters.com/world/trump-administration-ban-new-chinese-robots-inverters-protecting-us-ai-buildout-2026-07-28/>, (Date Accessed: 29.07.2026).

[ii]. "Addition of Foreign-Produced Power Inverters and Advanced Robotic Devices to FCC Covered List", DA 26-786, Federal Communications Commission, <https://docs.fcc.gov/public/attachments/DA-26-786A1.pdf>, (Date Accessed: 29.07.2026).

[iii]. "Global Robot Demand in Factories Doubles Over 10 Years", International Federation of Robotics, <https://ifr.org/ifr-press-releases/news/global-robot-demand-in-factories-doubles-over-10-years>, (Date Accessed: 29.07.2026).

[iv]. "DOE Releases New Report Evaluating Increase in Electricity Demand from Data Centers", U.S. Department of Energy, <https://www.energy.gov/articles/doe-releases-new-report-evaluating-increase-electricity-demand-data-centers>, (Date Accessed: 29.07.2026).



## ANKASAM ANALYSIS

## Brazil–Mexico Rapprochement in the Face of the Trump Administration



Ali Caner İNCESU

The fact that the United States' policy toward Latin America has taken on a more interventionist character during Donald Trump's second presidential term is reshaping the balance of power in the region. Washington's simultaneous use of various tools such as trade, security, visa policies, and military cooperation is taking US–Latin American relations beyond traditional diplomatic negotiations and placing them squarely at the center of a debate over sovereignty and strategic autonomy. In this context, the increasing frequency of contacts between Brazilian President Luiz Inácio Lula da Silva and Mexican President Claudia Sheinbaum reflects not only an ideological convergence between the two left-wing governments but also the efforts of the region's two largest economies to expand their room for maneuver in the face of Washington.

The economic and political clout that Brazil and Mexico wield in this process clearly sets the two countries apart from other nations in Latin America. The fact that these two countries which account for a significant portion of the region's population and economic output are facing pressure from Washington at the same time underscores the strategic nature of their bilateral relations. The efforts of the Lula and Sheinbaum administrations to strengthen commercial and diplomatic ties are aimed at creating alternative avenues for maneuver in foreign policy rather than provoking a direct bloc confrontation with the US. Consequently, the Brazil–Mexico rapprochement is taking shape not so much as a new ideological alliance but rather as a pragmatic collaboration aimed at preserving strategic autonomy in the face of a shifting regional balance of power.

However, it cannot be said that the two countries have the same level of resilience in the face of Washington. The relationships Brazil has developed with various economic partners particularly China provide the country with greater room for maneuver vis-à-vis the United States. Brazil's position within BRICS, its large domestic market, its natural resource capacity, and the diplomatic ties it has established with countries of the Global South also support this capacity for autonomy. Mexico, on the other hand, is in a much deeper relationship of mutual dependence with the US economy due to its production chains, export markets, and geographic location. Consequently, the policy developed by the Sheinbaum administration toward Washington requires a more carefully balanced strategy than the one pursued by the Lula administration.

The similarity in the tools used by the Trump administration against both countries is striking. The threat of trade sanctions or additional tariffs, visa restrictions, the designation of organized crime groups as terrorist organizations, and the raising of the possibility of direct intervention on security grounds demonstrate that economic and military pressure have become complementary elements. In particular, the classification of criminal organizations as terrorist groups is not merely a matter of security policy for Brazil and Mexico. The possibility that such a designation could be used in the future as a legal and political justification for cross-border military operations heightens both governments' sensitivities regarding sovereignty.

Lula's more pronounced emphasis on the rhetoric of national sovereignty in this context is also significant for Brazil's domestic politics. Lula, who argues that Brazil's defense capabilities must be strengthened, has emphasized the production of unmanned aerial vehicles to protect the country's borders, demonstrating that foreign policy and defense policy are becoming increasingly integrated. Lula's statement that Brazil must possess a defense capability that will not allow "anyone to invade this country and kidnap the president" reveals that the example of Venezuela has directly influenced Brazil's perception of security.<sup>[i]</sup> Thus, the concept of sovereignty is no longer merely an abstract diplomatic principle but is being given concrete form through defense investments, border security, and technological capabilities.

These developments are also turning the elections to be held in Brazil in October 2026 into a contest with international implications. The fact that the race between Lula and Flavio Bolsonaro is extremely close heightens the significance of tensions between Washington and Brazil in domestic politics. The political ties forged by the Trump administration with the Bolsonaro family make it difficult to view the Brazilian elections solely as a contest among domestic political actors. The Lula administration is therefore making national sovereignty a central element of its election campaign and linking the debate over foreign interference to the issue of political independence.

From Mexico's perspective, the fundamental issue differs because the cost of a confrontation with Washington is much higher than it is for Brazil. While the Sheinbaum administration seeks to maintain cooperation with the US on security and trade issues, it is also drawing a line against demands that could infringe upon the country's sovereignty. The integration of the Mexican economy into US supply chains makes Washington's trade pressure tools extremely effective. For this reason, the Sheinbaum administration's efforts to keep diplomatic channels open and avoid direct personal conflict represent a balancing policy implemented within the structural constraints created by economic dependence, rather than a sign of weakness.

This is also where the significance of the growing rapprochement between Brazil and Mexico comes to the fore. Neither government aims to sever ties with Washington or form a direct anti-US front. On the contrary, both countries are striving to establish a model of relations with the US one in which unilateral pressure will not be accepted while maintaining their economic and diplomatic ties with the US. This approach points to a concept of strategic autonomy in Latin America that differs from the bloc logic of the Cold War era. Countries can continue to cooperate with Washington while simultaneously developing relations with alternative economic partners, such as China, and strengthening their regional partnerships.

In this context, rather than whether the Brazil–Mexico rapprochement will evolve into an institutional alliance in the future, what is gaining importance is the extent to which the two countries can enhance each other's capacity for strategic autonomy. The cooperation developed between Petrobras and Pemex in the energy sector demonstrates that economic ties can provide a concrete foundation for political rapprochement. Trade diversification, energy cooperation, diplomatic coordination, and the development of a common stance on regional issues are emerging as tools that could enhance the two countries' bargaining power vis-à-vis Washington. However, particularly due to Mexico's dependence on the US economy, it does not appear feasible in the short term for this rapprochement to create an alternative bloc capable of countering American influence.

Consequently, the fundamental challenge facing the Lula and Sheinbaum administrations is to develop a foreign policy that can limit Washington's capacity for unilateral pressure without severing ties with the US. While Brazil seeks to achieve this through economic diversification, relations with China, enhanced defense capabilities, and the principle of reciprocity, Mexico constrained by the limitations imposed by economic integration has adopted a strategy of diplomacy, controlled cooperation, and establishing clear red lines regarding sovereignty. Rather than driving the two countries apart, this difference holds the potential to make their distinct power elements complementary.

[i] Galarraga Gortázar, Naiara, and Carlos S. Maldonado. "Brasil y México plantan cara a la hostilidad y las injerencias de Trump y las derechas latinoamericanas." El País, <https://elpais.com/america/2026-08-16/brasil-y-mexico-plantan-cara-a-la-hostilidad-y-las-injerencias-de-trump-y-las-derechas-latinoamericanas.html>, (Date of Access: 16.08.2026).



## ANKASAM ANALYSIS

## KEI Fellow Tom Ramage: "South Korea May Become More of a Global Leader in AI"



Banu YAKUBOVA

The Ankara Center for Crisis and Policy Studies (ANKASAM) presents its interview with Tom Ramage, Fellow and Economic Policy Analyst at the Korea Economic Institute of America (KEI), on South Korea's evolving role in the global AI semiconductor supply chain, the impact of its expanding production capacity on global supply chains, and the future of the country's role in the AI semiconductor ecosystem.

1. What does the recent San Francisco AI Summit indicate about South Korea's evolving role in the global AI semiconductor supply chain?

More than anything, the recent San Francisco AI Summit indicates that Korea is an indispensable partner for the global roll-out of AI and the AI supply chain. What the summit shows is that, increasingly, the President of Korea is a major figure to consult and meet with for U.S. tech companies as they make plans for AI, owing to Korea's technical specialization in high-bandwidth memory chips as well as broad ecosystem for tech startups and IoT infrastructure.

The deals and agreements signed to build out data center sites in Korea as well as cooperation for provision of HBM chips from Korea to U.S. companies as well as U.S. GPUs to Korean companies signals that Korea is not only a high-tech market for the widespread adoption of U.S. AI technologies, but also that Korean technology is a support pillar for U.S. AI hardware in itself.

2. How could the expansion of South Korean production affect the resilience and geographical diversification of global semiconductor supply chains?

For one thing, expansion of semiconductor production in Korea, as the Korean government has committed to, would do well to help alleviate a persisting global memory chip shortage, and for the short-to-medium term would help to provide countries like the United States a "trusted partner" outside of China to work with to support its demand for AI hardware, particularly as the market looks to expand—perhaps even double in the case of HBM—into the not-so-distant future.

Still, the expansion of production in Korea does not provide a true geographical diversification of chip production that would be needed to fully shelter the chip industry from broader risks or black swan type events. A doubling down of concentration on chip production in Korea could inadvertently work to present undue exposure to global chip supplies in the event of a potential global geopolitical conflict or other such scenarios which would cause disruptions to global shipping.

Instead, chip sector investments that Korea is making in the United States through the recent U.S.-Korea tariff MOU may indirectly provide the type of geographical diversification needed to build resilience against events which would disrupt supply chains, but this hinges on the continued close cooperation between the U.S. and Korean tech sectors as well as long-term Washington-Seoul alignment.

3. Looking ahead, how do you expect South Korea's role within the global AI semiconductor ecosystem to evolve alongside the complementary strengths of the United States, Taiwan, Japan and Europe?

Korea's growing importance in the field of AI is, among other things, allowing it to take a leading role in how digital governance standards will be developed and which safeguards will be put in place to protect against malicious use. One thing which the summit accomplished is the announcement of the "San Francisco AI Declaration" by Lee Jae Myung, calling for the responsible use of AI and its equitable deployment across different countries.

Where the United States has made substantial inroads toward finding common ground and consensus with other countries on AI Safety, such as through the creation of the International Network of AI Safety Institutes in 2024, as well as dialogue and discussions on the responsible use of AI at this year's G7, Korea will likely increasingly be a part of these efforts.

As countries around the world work toward some form of unitary alignment on AI Safety and digital governance, Korea's domestic approach toward AI governance (such as through its domestic laws on AI, through the recently implemented "AI Basic Act," or through its early adoption of a "Digital Bill of Rights" for its citizens) may serve as something of a blueprint for other highly tech integrated countries to look toward when developing a model of their own, while (as in the case of the San Francisco AI Declaration) Korea may become a more of a global leader in itself in developing standards and consensus on AI issues.



## ANKASAM ANALYSIS

## Russia's Afghanistan Policy: The Recognition of the Taliban and Its Regional Implications



Nodirjon MURADOV

Russia's formal recognition of the Taliban government on 3 July 2025 marked the culmination of a gradual transformation in Moscow's Afghanistan policy. Afghanistan has rarely occupied a central place in Russian foreign policy; however, its strategic importance has increased considerably since the Taliban's return to power in 2021. Russia was among the first major powers to reopen diplomatic channels with Kabul, gradually expanding political dialogue, economic relations, and security cooperation with the Taliban, and ultimately removing the group from its list of terrorist organizations.<sup>[i]</sup>

On 27 May 2026, Russian Security Council Secretary Sergei Shoigu and the Taliban's acting Minister of Defense, Mohammad Yaqoob, signed an agreement on military-technical cooperation.<sup>[ii]</sup> At first glance, Russia's decision to recognize the Taliban appears to be a major diplomatic shift. However, Russia's policy represents a calculated adaptation to changing regional realities rather than a fundamental strategic transformation. Moscow views cooperation with the Taliban as the most practical way to safeguard its security interests, expand regional connectivity, and sustain its influence in Central Asia.

The first key dynamic shaping Russia's policy shift is regional connectivity and infrastructure projects. Following the deterioration of its relations with the West as a result of the war in Ukraine, Russia has accelerated its search for alternative trade and transport corridors linking it to South Asia and the Middle East. As heavy sanctions have forced Moscow to redirect its trade from Europe toward Asia, the International North-South Transport Corridor (INSTC) has emerged as a strategic priority. Although the corridor's western branch continues to run through Azerbaijan, ongoing instability in the South Caucasus and the Middle East has heightened the importance of route diversification. In this context, Afghanistan has begun to stand out not merely as a security concern but as a potential transit country.

For Moscow, Afghanistan represents the missing geographic link connecting Central Asia to Pakistani ports through the proposed Trans-Afghan Railway. Uzbekistan has actively supported the project as a means of connecting Central Asia to the Arabian Sea, while Kazakhstan and Turkmenistan have likewise shown interest in extending their transport links southward.<sup>[iii]</sup> Moscow regards these initiatives as strategically significant for its own regional connectivity objectives. Access to South Asian markets holds the potential to expand Russia's commercial options at a time when Western sanctions continue to reshape Eurasian trade. Although these projects remain at an early stage, it appears that Moscow wishes to support them rather than remain a passive observer. In other words, while Russia's interest in regional connectivity is genuine, its underlying aim is to avoid being excluded from infrastructure projects built by others.

Security concerns constitute the second, and arguably the most pressing, dynamic shaping Russia's engagement with Afghanistan. The Kremlin's principal concern is not the Taliban itself but the security vacuum that could emerge should Afghanistan once again become a base for transnational armed groups. In this regard, Russia is particularly concerned about the growing activities of the terrorist organization ISIS-Khorasan Province (ISKP), as its expanding presence poses significant risks not only for Afghanistan but also for the security of Central Asia and Russia.<sup>[iv]</sup> The terrorist attack on Crocus City Hall in Moscow in March 2024 further reinforced these concerns, bringing renewed attention to the potential of Afghanistan-linked extremist networks to threaten Russian territory.

These security concerns also directly affect Central Asia, a region Russia regards as its own sphere of geopolitical influence. Tajikistan's long border with Afghanistan remains one of the region's most sensitive security frontiers, with drug trafficking and militant infiltration continuing to threaten border security.<sup>[v]</sup> Against this backdrop, Russia's decision to establish military-technical cooperation with the Taliban can be viewed as an attempt to strengthen communication channels with the administration that holds de facto authority in Afghanistan. From Moscow's perspective, controlled engagement carried out at limited cost and with limited geopolitical obligations is seen as a lower-risk option compared to diplomatic isolation.

Economic interests provide a third rationale. Afghanistan holds substantial reserves of copper, lithium, rare earth elements, and other critical minerals that are attracting growing international attention. Although China remains the country's largest foreign investor, Russia is seeking opportunities to participate in future mining and infrastructure projects. Expanding bilateral trade is equally important: commercial exchange between Russia and Afghanistan has grown steadily since 2021, reflecting a broader trend in which both governments are seeking to reduce economic isolation through regional partnerships. These developments suggest that economic pragmatism is increasingly complementing Russia's traditionally security-driven approach.

Russia's policy toward Afghanistan nevertheless has clear limits. The fact that Moscow's military resources are largely committed to the war in Ukraine restricts its capacity to take on new security responsibilities elsewhere. Western sanctions, meanwhile, continue to place pressure on Russia's financial and industrial capacity. Similarly, Afghanistan's limited economic capacity and weak state institutions present significant obstacles to a comprehensive strategic partnership. Under these conditions, Russia appears more likely to continue pursuing selective cooperation in areas such as transport, trade, counterterrorism, and technical support, rather than undertaking large-scale military commitments or major economic investments.

Russia's opening toward Afghanistan must also be assessed within a broader geopolitical context. As China continues to expand its economic presence in Afghanistan, Central Asian states are likewise pursuing more pragmatic policies toward Kabul through trade, humanitarian assistance, and infrastructure initiatives. Pakistan, Iran, and India are similarly seeking to advance their own strategic interests in Afghanistan. Moscow's policy is therefore shaped not only by developments within Afghanistan itself, but also by its goal of preserving regional influence and maintaining its position as an effective actor amid intensifying competition among external powers.

This development carries significant implications for Central Asia. Russia's normalization of relations with the Taliban does not mean that Uzbekistan, Kazakhstan, or other regional states will formally recognize the Taliban in the short term. Instead, it may encourage these states to increase practical cooperation with the Kabul administration while preserving their diplomatic room for maneuver. To date, Central Asian states have maintained a clear distinction between formal recognition and de facto cooperation, avoiding politically irreversible steps while choosing to keep channels of communication with Kabul open.

For these reasons, the transformation in Russia's Afghanistan policy can be understood as a pragmatic process of adaptation to changing geopolitical conditions. Regional connectivity, security concerns, and economic opportunities have driven Moscow away from an approach of diplomatic distance toward a policy based on selective cooperation. Russia aims to sustain its influence without assuming unlimited obligations, favoring flexible partnership models over formal alliances.

This policy does not signify that Russia has undertaken a strategic reorientation toward Afghanistan. On the contrary, Moscow's core objective is to preserve its influence over Afghanistan's future and to continue playing a role in shaping the broader security architecture of Central Asia, at a time when regional connectivity is expanding and Western influence is receding.

[i] "Russia becomes first state to recognise Afghanistan's Taliban government", BBC, <https://www.bbc.com/news/articles/c78n4wely9do>, (Accessed: 05.08.2026).

[ii] "Moscow Signs Military Partnership with the Taliban", The Moscow Times, <https://www.themoscowtimes.com/2026/05/28/moscow-signs-military-partnership-with-the-taliban-a92875>, (Accessed: 05.08.2026).

[iii] "Uzbek-Afghan-Pakistan transin corridor making progress", Euroasianet, <https://eurasianet.org/uzbek-afghan-pakistan-transit-corridor-making-progress>, (Accessed: 05.08.2026).

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## ANKASAM ANALYSIS

## The Transformation of Migration Policy in Europe: The New Era of the “Fortress Europe” Approach



Sena BİRİNCİ

In Europe, the issue of migration has transformed from a purely humanitarian problem into a strategic issue directly affecting security, border management, domestic politics, and the European Union's relations with third countries, since the 2015 refugee crisis. However, developments in the summer of 2026 indicate a new phase in European migration policy. The mass crossings in Ceuta, an autonomous city on the Spanish-Moroccan border, Greece's tightening of policies against irregular migration, and initiatives within the EU to strengthen return mechanisms, when considered together, reveal that concepts such as “refoulement,” “border security,” and “externalization” have become central to European migration management, alongside “protection” and “integration.”

The most striking example of this transformation is the developments in Ceuta. The influx of approximately 72,000 people from Morocco into Ceuta in late July created an extraordinary border crisis not only for Spain but also for the European Union. Considering that Ceuta's population is around 85,000, the emergence of a migration movement approaching the city's population in just a few days demonstrated just how fragile Europe's external borders can be. The British Parliament Library also confirms that more than 70,000 people will have crossed into Ceuta by the end of July 2026.<sup>[i]</sup>

Moreover, this mobility is not limited to just a few thousand people crossing the border.<sup>[ii]</sup> The crisis facing Europe has quickly transformed into a large-scale “return” operation. This also demonstrates a fundamental shift in European migration policy: for Europe, success is now measured not only by preventing border crossings, but also by sending back those who have crossed the border as quickly as possible.

However, what makes the Ceuta case particularly significant is the fact that approximately 1,100 unaccompanied children remain in the region.<sup>[iii]</sup> While it is possible to return a significant number of adults to Morocco, the legal status and protection obligations of the children make the process far more complex. Spanish authorities are discussing transferring some of these children to mainland Spain, while Morocco has stated its willingness to cooperate on the repatriation of the children.<sup>[iv]</sup>

It is precisely at this point that the European Commission's approach on August 18th, supporting the return of migrants in Ceuta, including unaccompanied children, to Morocco under certain legal conditions, becomes important. Because the issue is not only the future of the 1,100 children remaining in Ceuta. A precedent is being set here regarding which policy tool the European Union should prioritize in similar crises in the future. If return mechanisms become more easily implemented politically, the center of gravity of Europe's migration policy will shift even further towards a security-oriented approach.

The second pillar of this transformation is the increasing externalization of migration policy. Instead of controlling irregular migration solely within their own borders, European countries want migrants to be stopped before reaching European soil, and for third countries to assume greater responsibility in this process. Morocco has become one of the most important partners in this policy, while Libya is also a critical actor in the movement of migrants from North Africa towards Europe. Thus, Europe's border security is increasingly extending beyond its geographical borders.

This situation may seem rational for Europe in the short term. Stopping migrants before they reach Europe both reduces pressure on border capacities and allows governments to send a message to European public opinion that “we are in control.” However, in the long term, the EU's increased dependence on Morocco, Libya, and other transit countries could create a significant problem. This is because migration management is no longer just a domestic political issue, but is becoming a tool for foreign policy and diplomatic bargaining.<sup>[v]</sup>

The example of Greece shows that the same trend is emerging on another border of Europe. Behind Athens' hardening immigration policy lies a new migration route, particularly from Libya, towards Crete and Gavdos. The arrival of 8,552 refugees and asylum seekers in Crete and Gavdos in the first six months of 2026 demonstrates that this route is becoming increasingly important for Europe.<sup>[vi]</sup> This figure reveals that Crete is no longer a secondary route for migration to Greece, but has become one of the main entry points.

What is noteworthy here is that migration routes have not disappeared, only shifted. When Europe closes a route with security measures, migration often redirects to another route. The increasing importance of the Turkey-Greece line in the Eastern Mediterranean, as well as the Libya-Crete line, is an indication of this. Therefore, Europe's approach based solely on border control may struggle to produce a long-term solution because it does not eliminate the root causes of migration.

The transformation in Europe needs to be understood not only through government policies but also through political discourse. In recent years, while the harsh rhetoric of far-right parties on immigration has become central to European politics, center-right and even center-left parties have begun to adopt more security-oriented policies on immigration due to voter pressure. Therefore, explaining the change in Europe simply as “the rise of the far right” would be incomplete. The truly significant development is that some policy proposals previously advocated by the far right have become part of mainstream politics.

The Ceuta crisis, in this respect, also demonstrated Europe's political fragility. The extraordinary influx of 72,000 people reignited debates on border security in European public opinion, while the fact that the crisis was quickly managed by sending approximately 70,000 people back to Morocco revealed how central the return policy had become. However, the approximately 1,100 unaccompanied children left behind represent the point where security policies clash with human rights and international law.

Therefore, the fundamental problem facing Europe is not “stopping migration,” but maintaining a balance between migration management and Europe's liberal values. Border security is a legitimate right of states; however, there are legal limits to return policies, especially when it comes to children and those in need of international protection.<sup>[vii]</sup> It is no coincidence that children constitute a separate legal category in Ceuta. Europe's own legal system does not allow for the completely unrestricted application of return policies.

Public perception of migration in European politics is also changing. Migration is no longer discussed solely in terms of humanitarian aid or asylum rights; it is now considered in conjunction with security, housing, public services, border control, and national sovereignty. Consequently, political pressure on governments is increasing. The protests organized by the local population in Ceuta and the strain on the region's infrastructure due to the movement of thousands of people demonstrate that migration can have serious political consequences at the local level.

The summer of 2026 marks a significant turning point for European migration policy. The fact that 72,000 people crossed into European territory from Ceuta in a short period, approximately 70,000 were sent back, and 1,100 unaccompanied children remain facing legal and humanitarian protection issues, concretely illustrates the transformation taking place in European migration policy. The 8,552 people who reached Crete and Gavdos in Greece during the first half of the year demonstrate that migration routes are continuing to change.

Therefore, defining Europe's migration policy in 2026 simply as a “shift to the right” is insufficient. A more comprehensive transformation is underway. Europe is moving from a protection-centered model to a control-centered model in migration management; it is not only strengthening its borders but also trying to increase returns and transfer the management of migration to countries outside Europe. Europe's main test in the coming period will be how to strike a balance between security and human rights. If return and externalization policies are strengthened while legal and humanitarian mechanisms are not strengthened to the same extent,

Europe's "Fortress Europe" approach could become a permanent policy paradigm. However, this would change not only Europe's external borders but also its own political identity. Therefore, what happened in Ceuta is not a simple border crisis. The fact that 72,000 people headed towards Europe in a few days shows how fragile Europe's borders are; and the fact that 1,100 unaccompanied children were left behind shows how difficult a test Europe faces in terms of its own values. The migration policy Europe will pursue in the future will also be an indicator of what kind of Europe it wants to be.

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[iii]. Agnese Pacciardi, "The grim future of European migration policy", The Loop, <https://theloop.ecpr.eu/the-grim-future-of-european-migration-policy/>, (Date of Access: 17.08.2026).

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[v]. Luca Bertuzzi, "Security at the border: How the securitarian agenda came to dominate EU migration policy", Euronews, <https://www.euronews.com/my-europe/2026/08/11/security-at-the-border-how-the-securitarian-agenda-came-to-dominate-eu-migration-policy>, (Date of Access: 17.08.2026).

[vi]. Malcolm Brabant & Daphne Tolis, "Greece toughens stance on illegal migration with new deportation plan", pbs, <https://www.pbs.org/newshour/show/greece-toughens-stance-on-illegal-migration-with-new-deportation-plan>, (Date of Access: 17.08.2026).

[vii] Ibid.



#### ANKASAM ANALYSIS

## Japan's Opening to Central Asia and the Shifting Balance of Power in Eurasia



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The global geopolitical struggle of the 21st century is no longer read merely through the military fortification of geographical borders or the expansion of traditional pacts. The true battleground of today and the future is the control of critical raw materials—uranium, logistics lines, and rare earth elements—which are the driving force behind high technology, green energy transformation, and a nuclear renaissance. On this global eco-political chessboard, the collaborations established between Japan and Central Asian states emerge as a partnership model that reasserts global energy dependency maps.

Indeed, Central Asian states, within the framework of a balanced, multi-vector foreign policy, are striving to maximize their relations by combining their uranium, rare earth elements (REEs), and water-energy potential with Japan's technological capital and market power. This integration undoubtedly transforms the region into one of the most dynamic fronts of a multipolar world, extricating it from the sphere of influence of Russia and the under-construction strategic cooperation zone of China—the two traditional powers.

It is precisely at this point that Japan's financial strength and promise of technology transfer offer Central Asian capitals a historic leverage to consolidate their sovereignty and diversify their foreign policies. Therefore, this strategic move is not merely a regional supply chain operation, but a tectonic geopolitical shift that fundamentally shakes the balance of power in the heart of Eurasia. This deep interdependence acts as a structural lever enabling the parties to overcome their geopolitical isolation and raw material crises, while also making a significant contribution to the development of balanced, multi-dimensional foreign policy approaches by the countries of the region.

#### Leaders Summit and Global Funding Mechanism

Relations between the two sides have been elevated to the highest institutional level. In this context, the "Central Asia plus Japan Dialogue (CA+JAD) Leaders Summit," held for the first time at the leaders' level in Tokyo on December 19-20, 2025, with the aim of maximizing cooperation among member states, concretized the roadmap for this strategic rapprochement and drew attention to the asymmetrical symbiosis relationship between the parties.

As is known, Japan possesses advanced technology, enormous capital, and infrastructure engineering, but lacks the elements beneath its soil. Central Asia, on the other hand, is rich in elements and strategically located, but lacks the technology to transform this into added value. The perfect juxtaposition of these two structures has also accelerated Tokyo's financial commitments to the region.

At the leaders’ summit, Japan set a target of 3 trillion yen (approximately 19 billion dollars) in business projects over the next five years to drive green transformation, digitize logistics lines, and establish critical mineral supply chains across Central Asia. This target is supported by international financing mechanisms. The Japanese Ministry of Finance, in partnership with the World Bank, has launched funding programs such as RISE+ and DRIVE to build resilient supply chains in developing countries. These funds provide a financial safeguard to ensure that strategic minerals in Central Asia are processed to Western standards and transported safely to international markets.

Details of the Uranium Renaissance and Energy Partnership

A global uranium renaissance is underway, symbolizing a return to nuclear energy in the fight against the climate crisis worldwide. Following the Fukushima disaster, Japan, which has been gradually restarting its nuclear reactors, has turned to Central Asia to make its nuclear fuel cycle independent of Russia. This shift is the most concrete manifestation of a supply chain protectionism and risk reduction strategy in Japanese foreign policy. While strengthening its strategic security against Russia’s (via Rosatom) global dominance in nuclear fuel through this region, Tokyo is also establishing an integrated energy pipeline with other Central Asian states in the hydrocarbon and hydroelectric sectors..

In this context, Kazatomprom, the Kazakh state-owned company and the world’s largest producer of natural uranium, has signed a long-term supply contract for uranium oxide concentrate with Kansai Electric Power, one of Japan’s largest nuclear power operators. Kazakhstan’s production of approximately 40% of the world’s uranium alone provides a major guarantee for diversifying Japan’s energy mix.

Uzbekistan, the world’s fifth-largest uranium producer, hosts uranium supply agreements between Japan’s giant trading company ITOCHU Corporation and Navoi Mining Company. Simultaneously, the Japan Joint Metals and Energy Safety Agency (JOGMEC) plays an active role in the exploration and development of new uranium deposits in Uzbekistan. The Uzbekistan Nuclear Energy Agency (Uzatom) and its Japanese partners are implementing joint engineering programs on peaceful nuclear energy use and reactor safety technologies.

Having secured its uranium supply from Kazakhstan and Uzbekistan, Japan has chosen Turkmenistan as a key partner in the process of converting fossil fuels into clean energy. Japanese giants such as Kawasaki Heavy Industries, Mitsubishi Corporation, and Sojitz have built multi-billion dollar gas-chemical plants in Turkmenistan that process the country’s vast natural gas reserves, transforming them into value-added liquid fuels (GTG – Gas to Gasoline), high-purity fertilizers, and plastics. With this move, Tokyo is consolidating its nuclear cycle while freeing Turkmenistan from one-way dependence on China for its blue fuel and creating a multi-vector balance in the Eurasian energy architecture.

In addition to uranium and gas projects, Japan is positioning the hydropower potential of Kyrgyzstan and Tajikistan as a regional complement to a nuclear renaissance. The Japan International Cooperation Agency (JICA) is funding the modernization of micro-hydroelectric power plants and implementing green transformation projects in Kyrgyzstan. In Tajikistan, Tokyo is providing grants for the rehabilitation of transportation and energy corridors and aims to utilize the hydroelectric potential in the electrification of smart mining facilities in the region. Thus, Japan is building a holistic “Central Asian Energy Shield” encompassing everything from nuclear and hydrocarbon to hydraulic and green energy.

Rare Earth Elements and the “Midstream Processing” Revolution

Central Asia stands out as a critical partner for Japan, which seeks to break China’s global monopoly on rare earth elements, exceeding 70%. However, the most significant detail here is the region’s “resource sovereignty resistance” approach against past colonial mining models. Central Asian states refuse to simply extract raw ore and export it cheaply, as was done in the past. At the heart of the agreements with Japan is the establishment of “Midstream Processing” facilities directly on the region’s territory, meaning the separation, smelting, and processing of elements. Indeed, Uzbek President Mirziyoyev has set a visionary target of \$500 million for the development of rare earth element projects and, in line with this, has initiated partnerships with Japanese high-tech companies for the processing of high-purity components such as silicon and graphite, vital for semiconductors and batteries. On the Kazakh side, Japan is funding the “SmartMining Plus” project, aimed at digitizing Kazakh ore deposits with the help of artificial intelligence and extracting them sustainably. Kazakhstan is allocating its titanium, tantalum, and niobium processing capacity, particularly used in the aviation industry, to the Japanese industry through this partnership. The renewable energy potential in the rich mountainous basins of Kyrgyzstan and Tajikistan is also being mapped by Japanese geologists under the JOGMEC umbrella.

Logistics Congestion and a New Emerging Partner in the Middle Corridor

The most critical factor for this partnership to materialize and for the agreements on paper to become a physical reality is undoubtedly logistics. These strategic and sensitive materials originating from landlocked Central Asia must reach Japan safely. The northern route through Russia is out of the question due to global sanctions, and the southern route through Iran is also closed due to high geopolitical risks. At this point, the Trans-Caspian East-West Middle Corridor, with its structure completely bypassing Russian territory, has become the main lifeline of this alliance.

Japan is providing direct engineering and financial support for the digitalization of customs procedures and the modernization of port infrastructure at Kazakhstan’s Aktau Port. This diversification of logistics routes stands as the most concrete success story of the multi-vector energy diplomacy doctrine developed by the countries in the region in the face of their two giant neighbors. In this context, Japan’s approach of offering a “sovereign partnership” based on mutual technology transfer, rather than a relationship of unilateral dependence on regional states, plays a role in accelerating its emergence as a permanent and acceptable actor in the region.

The Return of Japan and the Emergence of Movement in the “Great Game” Centered in Central Asia

Japan’s comprehensive and in-depth moves in Central Asia have undoubtedly not escaped the attention of Russia and China, which are already taking multifaceted countermeasures against this geo-economic expansion. In this context, Russia is attempting to establish a diplomatic veto power over Kazakhstan, Kyrgyzstan, and Tajikistan using institutional mechanisms such as the Collective Security Treaty Organization and the Eurasian Economic Union, while implicitly warning Central Asian capitals that “excessive closeness to external actors” will harm regional stability and historical ties. Continuing to maintain its hard power monopoly in the region through its military bases in Tajikistan and Kyrgyzstan, Moscow also reminds regional states of who truly owns the security architecture through joint military exercises conducted under the guise of border security and counter-terrorism.

China, on the other hand, within the SCO framework, codes the encroachment of Asia-Pacific actors into Central Asia as a “regional security threat” and draws attention to its common bloc vision, while offering its own processing facilities to the region at lower costs in response to Japan’s investments in REE (Rare Earth Elements) refining.

These counter-moves are elevating the classic colonial rivalry of the 19th century into a digital and technological version of the “Geo-Economic Great Game.” The region is becoming a new fault line of global polarization. The clearest consequence of this will be that the multi-vector foreign policy doctrine pursued by Central Asian states will be pushed to its limits. As pressures increase, the states in the region will be forced to use critical minerals, water resources, and energy pipelines not only as a source of income but also as an instrument of survival and bargaining (mineral and energy diplomacy) among the great powers. This sharpening of alliances will either transform the region into a fully independent global logistics hub or leave it in the midst of the economic sanctions and embargoes of the hegemons.

In this context, the following predictions can be made regarding how this strategic partnership will change global balances in the next ten years:

- Prediction 1: Central Asia Will Become the New Epicenter of Global Green Technology.

Thanks to the rare earth element processing and green energy infrastructure facilities that Japan will establish in the region, Central Asia will no longer be just a supplier of raw materials. In the early 2030s, Kazakhstan and Uzbekistan could emerge component producers; Kyrgyzstan and Tajikistan could become key links in the regional clean energy network (battery and hydropower).

- Prediction 2: The “CA+JAD Pact” will become the G7’s main anchor in the region.

The US and the European Union will follow this pioneering diplomatic path opened by Japan more aggressively in the coming period. The 3 trillion yen (approximately 19 billion dollars) trade volume pledged in Tokyo will form the economic infrastructure of the Western bloc’s strategy to structurally detach Central Asia from the Russian and Chinese axis.

- Prediction 3: The Era of “Japanese Standards” in Nuclear Safety and Infrastructure Will Begin.

Japan’s deep expertise in nuclear engineering, digital corridors, and disaster management will become the standard in planned nuclear power plants and smart city projects in the region. This will break Russia’s nuclear and technological monopoly in the region, bringing Central Asia closer to Western integration.

- Prediction 4: Digital and Smart Mining Will Become the Standard.

AI-powered mining and extraction projects, such as Japan-funded “SmartMining Plus,” will completely transform the cumbersome and Soviet-era mining culture in Central Asia. Environmentally friendly, low-carbon footprint, and high-efficiency mining will facilitate the region’s compliance with global ESG (Environmental, Social, and Governance) criteria.

Conclusion

Japan’s comprehensive Central Asian initiative, extending from the uranium deposits of Kazakhstan and Uzbekistan to the water-energy potential of Kyrgyzstan and Tajikistan, and the gas-chemical industry of Turkmenistan, has begun to attract attention as a tectonic shift that will shake global power balances, far beyond a simple trade agreement. This strategic move opens up enormous maneuvering space for Central Asian states in their multi-vector foreign policies, while providing Japan with a vital lifeline in global supply chain wars. When the uranium and rare earth elements beneath the ground are combined with post-European Union Tokyo’s technology and the logistical security of the Middle Corridor, the geopolitical heart of Eurasia will become one of the most strategic centers of the multipolar world. On the other hand, it is clear that this transformation will not be painless. In other words, the “New Great Game” centered in Central Asia seems likely to intensify. Because, in the coming period, partnerships established in these lands will determine not only the profitability rates of companies but also the leader of the global technology and energy regime. Ultimately, the future will belong not to those who possess raw materials alone, but to those who can process them with the smartest strategies and transform them into multifaceted geopolitical partnerships.

In this context, the collective and diplomatic stance of the five Central Asian states will largely determine not only the future borders and limits of independence of Eurasia, but also the direction, content, and name of global hegemony and the new international system. At this point, the most fundamental and primary goal for the Central Asian states is the continuation of their survival and their strong presence in this new system. Therefore, it is inevitable that the Central Asian capitals, which have managed to attract global capital to their territories while protecting their sovereign rights, will continue their multi-vector, balance-based policies in the coming period. In this context, Japan is recognized as a rising, late-blooming actor in the region. Indeed, we are all witnessing the construction of a new balance of power in the heart of Eurasia, which seems unlikely to be limited to Central Asia alone, but will also encompass both sides of the Caspian Sea and a significant portion of South Asia.



## ANKASAM ANALYSIS

## Norway's Arctic Energy Policy and European Energy Security



Başak ERTUNÇ

Norwegian Minister of Energy Terje Aasland's statement on August 24, 2026, that Norway will continue developing oil and natural gas resources in the Barents Sea regardless of the European Union's (EU) approach toward new hydrocarbon activities in the Arctic has once again brought Norway's position in European energy security to the forefront. Oslo aims to maintain oil and natural gas production at approximately current levels until at least 2035 and considers Arctic resources an important component of this objective. Aasland justifies this policy not only through Norway's national interests but also through Europe's energy security.<sup>[i]</sup> What makes this statement significant is that Norway, despite not being an EU member, continues to be one of Europe's most important energy suppliers while diverging from Brussels on one of its energy and environmental policy preferences. Therefore, the current debate requires an assessment not only of new drilling activities in the Arctic but also of the opportunities created by Norway's unique position within the European energy system and the future limits of this position.

The first factor distinguishing Norway's position is its high level of integration into the European energy market despite remaining outside the EU's political structure. As a member of the European Economic Area (EEA), Norway implements a significant part of EU energy legislation and has maintained regular energy dialogue with the EU since 2002. However, this integration does not create the same political relationship as EU membership. The Norwegian government also acknowledges in its 2026 foreign policy assessment that the EEA has become more important than ever for the country, while the difference between EEA membership and EU membership has become more visible as Europe expands into new policy areas.<sup>[ii]</sup> Thus, Norway can become a central actor in the functioning of the European energy order without being fully inside its decision-making mechanisms.

The strategic value of this position has increased particularly after 2022. Following Russia's full-scale invasion of Ukraine, the EU's reduction of dependence on Russian energy has given new importance to Norway's already significant supplier role. Russia's share of EU natural gas imports declined from 45 percent in 2021 to 12 percent in 2025; in the same year, Norway supplied 31 percent of the EU's total natural gas imports and 54 percent of pipeline imports.<sup>[iii]</sup> The European Commission also states that Norway plays a "critical" role in the process of moving away from Russian energy imports. Therefore, Norway's position in European energy security does not derive solely from its high export volume. Oslo has gained importance as a reliable and geographically close producer at a time when alternative energy suppliers have become a component of European security.

Norway's own policy documents also clearly define this role. The country's 2025 National Security Strategy identifies reliable natural gas supply as Norway's most important contribution to Europe's economic security and states that its position as a long-term energy supplier will be supported through new and profitable discoveries.<sup>[iv]</sup>

From this perspective, the exploration of new resources in the Barents Sea is not an alternative to Norway's role in European energy security; rather, it is one of the instruments that ensures the continuation of this role. The addition of 70 new blocks to the licensing area in May 2026, including 38 in the Barents Sea, and the government's association of this decision with European energy security demonstrate that this perception of Norway's role is reflected in concrete energy policy.<sup>[v]</sup>

However, Norway's role is not interpreted in the same way by all actors. From the EU's perspective, Norway is not merely one of the main providers enabling the reduction of dependence on Russian gas; it is also a broader energy partner. The EU-Norway Green Alliance, established in 2023, includes cooperation in clean energy, climate neutrality, and green industry, while placing particular emphasis on the precautionary principle in the Arctic. In contrast, International Energy Agency Executive Director Fatih Birol argues that current energy security conditions require the EU to reconsider its approach toward new Arctic oil and natural gas activities. Environmental actors, meanwhile, argue that newly discovered fields today would begin production during years when Europe's natural gas demand is expected to be lower, creating the risk of stranded assets. Thus, Norwegian production is evaluated through two competing perspectives: the continuation of European energy security on one side and the costs of long-term energy transition on the other.

This disagreement reveals the fundamental dilemma of Norway's current position. Oslo's strategic importance largely derives from its ability to reliably provide the oil and natural gas that Europe needs today, while the long-term objective of the European energy system is precisely to reduce dependence on these resources. Therefore, the challenge facing Norway is not only how long it will continue producing oil and natural gas. The more important question is through which instruments it can maintain the strategic position it currently holds through hydrocarbons if the European energy system transforms. Cooperation developed with the EU in clean energy, carbon capture and storage, and other low-carbon technologies can therefore be evaluated beyond environmental policy. These areas also represent instruments through which Norway may remain one of Europe's key energy partners after the energy transition.

Nevertheless, in the short and medium term, existing interdependence provides Norway with a certain degree of room for maneuver. Europe needs Norway's energy supply, while Norway remains highly dependent on the European market and energy system. However, this mutual dependence does not require both sides to share identical preferences across all aspects of energy policy. While Equinor has stated that oil and liquefied natural gas extracted from the Barents Sea could be directed to other markets if the EU does not want them, Aasland describes the development of these resources as a sovereign right of Norway. Therefore, Norway's importance does not provide Oslo with unlimited bargaining power over the EU; rather, it creates space for Norway to remain highly integrated into Europe's energy system while differing from Brussels in certain policy areas.

The timing of the Arctic debate is therefore also significant. The EU is updating its Arctic policy in 2026 in accordance with changing geopolitical and geoeconomic conditions. According to the European Parliament Research Service's assessment, energy security may gain a more prominent place in the security dimension of the new policy, and strengthening energy cooperation particularly with Norway may become part of efforts to diversify energy supplies. However, it remains unclear whether the EU will develop its energy security solely through green energy sources or whether it will also consider Arctic fossil fuels as part of this strategy.<sup>[vi]</sup> This situation moves Norway's position within the European energy order beyond the simple definition of an "energy supplier outside the EU." Although Norway remains outside the decision-making system, its energy capacity and integration into the European market make it a direct actor in debates concerning Europe's energy choices.

In conclusion, Norway's Arctic energy policy reveals a broader strategic position rather than merely a single policy disagreement with Europe. While the process of moving away from Russian gas has increased Norway's importance in European energy security, Norway's position outside the EU but within the European energy market allows Oslo to maintain both cooperation and policy autonomy simultaneously. Although this position is likely to continue in the short and medium term, one of the decisive long-term factors will be the trajectory of Europe's natural gas demand. As Europe's energy transition progresses, Norway's main challenge will not be simply preserving its current hydrocarbon advantage, but transferring its status as a reliable energy supplier into the new energy order. Therefore, the true significance of the Barents Sea debate lies not only in demonstrating Norway's current strength in European energy security but also in raising the question of how this strategic position can be maintained in a Europe where the importance of hydrocarbons is gradually declining.

<sup>[i]</sup> "Norway will drill in Arctic regardless of EU's position, says energy minister", Reuters, <https://www.reuters.com/business/energy/norway-will-drill-arctic-regardless-eus-position-says-energy-minister-2026-08-24/>, (Date of Access: 25.08.2026).

<sup>[ii]</sup> "Foreign policy address to the Storting 2026", Government of Norway, <https://www.regjeringen.no/en/whats-new/foreign-policy-address-to-the-storting-2026/id3150745/>, (Date of Access: 25.08.2026).

<sup>[iii]</sup> "Norway", European Commission, [https://energy.ec.europa.eu/topics/international-cooperation/key-partner-countries-and-regions/norway\\_en](https://energy.ec.europa.eu/topics/international-cooperation/key-partner-countries-and-regions/norway_en), (Date of Access: 25.08.2026).

<sup>[iv]</sup> "National Security Strategy", Government of Norway, [https://www.regjeringen.no/contentassets/3750a67cb19f4aac881401c5461773d8/en-gb/pdfs/national\\_security\\_strategy.pdf](https://www.regjeringen.no/contentassets/3750a67cb19f4aac881401c5461773d8/en-gb/pdfs/national_security_strategy.pdf), (Date of Access: 25.08.2026).

<sup>[v]</sup> "Announcement of APA 2026", Government of Norway, <https://www.regjeringen.no/en/whats-new/announcement-of-apa-2026/id3158497/>, (Date of Access: 25.08.2026).

<sup>[vi]</sup> "EU Arctic policy update", European Parliamentary Research Service, [https://www.europarl.europa.eu/RegData/etudes/BRIE/2026/789336/EPRS\\_BRI\(2026\)789336\\_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2026/789336/EPRS_BRI(2026)789336_EN.pdf), (Date of Access 25.08.2026).

# ANKASAM IN PRESS

## 6 August 2026

- ANKASAM President Prof. Dr. Mehmet Seyfettin Erol on TRT Voice of Türkiye Radio!

## 7 August 2026

- ANKASAM Secretary General Dr. Kadir Ertaç Çelik on Ülke TV!

## 8 August 2026

- “ANKASAM President Prof. Dr. Mehmet Seyfettin Erol Evaluated in Milliyet Newspaper: The ‘Mecca Pact’ can also be considered the clearest regional response to global power impositions.”

## 10 August 2026

- ANKASAM President Prof. Dr. Mehmet Seyfettin Erol on TRT Voice of Türkiye Radio!

## 12 August 2026

- ANKASAM President Prof. Dr. Mehmet Seyfettin Erol on TRT Voice of Türkiye Radio!

## 20 August 2026

- ANKASAM President Prof. Dr. Mehmet Seyfettin Erol on TRT Voice of Türkiye Radio!

## 23 August 2026

- ANKASAM President Prof. Mehmet Seyfettin Erol on TRT Voice of Türkiye Radio!

## 24 August 2026

- ANKASAM President Prof. Dr. Mehmet Seyfettin Erol Discussed the “Eternal Friendship Agreement” Between Azerbaijan and Uzbekistan on AZTV’s Noon News.
- ANKASAM President Prof. Dr. Mehmet Seyfettin Erol Discussed the “Eternal Friendship Agreement” Between Azerbaijan and Uzbekistan on AZTV’s Main News Bulletin.

## 25 August 2026

- ANKASAM President Prof. Dr. Mehmet Seyfettin Erol Discussed the “Eternal Friendship Agreement” Between Azerbaijan and Uzbekistan on AZTV’s Noon News.
- ANKASAM President Prof. Dr. Mehmet Seyfettin Erol Discussed the “Eternal Friendship Agreement” Between Azerbaijan and Uzbekistan on AZTV’s Main News Bulletin.

## 28 August 2026

- ANKASAM President Prof. Dr. Mehmet Seyfettin Erol Evaluated on Report.az: “The Azerbaijan–Uzbekistan Eternal Friendship Agreement is the Geopolitical Backbone of the Turkic World.”

## 30 August 2026

- ANKASAM President Prof. Dr. Mehmet Seyfettin EROL assessed the restructuring of the Kazakhstan Security Council and the emergence of a new key position for inbusiness.kz.



***The latest issue of the Journal of International Crisis and Policy Research, which is an international peer-reviewed journal operating within the Ankara Center for Crisis and Policy Studies (ANKASAM), has been published. Our international refereed journal, which is available to you open access and completely free of charge, is scanned by 12 indexes. These are; Index Copernicus, CEEOL, ASOS Index, Cite Factor, DRJI, Google Scholar, Ideal Online, Infobase, JIFACTOR, Journal Factor, Research Bible and Sindex.***

The Journal of International Crisis and Policy Research - Volume: X , Issue: 1

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The Journal of Regional Studies (JRS) - Volume: X , Issue: 1