

INTERNATIONAL SECURITY AND ESTONIA 2026



Estonian Foreign
Intelligence Service

FOREWORD



DEAR READER,

On 10 January, the war reached its 1,417th day – exactly the same length as the Second World War on the Eastern Front between the Soviet Union and Nazi Germany. In nearly four years, Russia has exhausted most of the military stockpiles it inherited from the Soviet Union, lost around one million soldiers killed or severely injured at the front, and inflicted untold suffering on Ukrainians. And yet Ukraine endures.

Despite Russia's frustrated efforts, there are no signs of change within the regime's leadership. Vladimir Putin, the Kremlin's figurehead, remains convinced that Russia, with its supposedly unique global role, is following a "special path". Russia therefore continues its pursuit of Ukraine's complete subjugation.

Through repression, Russia's ruler has created the illusion that there is no alternative to him – that the choice is between Putin and an abyss of uncertainty. But no one is irreplaceable. The war in Ukraine has brought severe hardship to Russia, and although Russians have cultivated a myth of themselves as masters of suffering, their tolerance for pain is not unlimited. A declining economy, empty fuel tanks, and the return of murderers and rapists from the front are hitting ordinary Russians with increasing force. History shows that when the screws are tightened too far, Russians have at times found the courage to leap into the unknown.

Equally Potemkin-like is the notion of Russia's omnipotence. What does the Kremlin have to show after almost four years of war? On the one side stand a rearming Europe and a more determinedly independent Ukraine than ever before, recalling the Russian proverb that urges one to measure oneself by the might of one's enemies. On the other side lie a faltering domestic economy, hundreds of thousands of maimed and traumatised citizens, and ever-deepening repression. This is the true face of the "Russkiy Mir".

Nor has the Kremlin succeeded in breaking allied unity. Its repeated failures show that Russia's ruling elite is simply incapable of doing so. Although Russian acts of sabotage and influence efforts do occur, we should not conjure threats where none exist: not every event reflects a cunning plan or the omnipotent hand of the Kremlin – often, it is simply a coincidence.

As for Russia's own alliances, recent developments involving Iran and Venezuela have made it clear that alignment with Russia offers little benefit. These cases show that Moscow tends to forget its allies in times of need.

Russia remains dangerous despite its incompetence, and vigilance is essential to prevent the expansion of the "Russian World". While sanctions clearly affect the Russian economy, loopholes remain that must be closed through targeted measures and cooperation among Western countries – whether the issue is the smuggling of dual-use goods to Russia, vulnerabilities in its explosives industry, or the critical technological leaps that NATO will require to counter Russia's growing reliance on unmanned military systems.

There is, however, no cause for panic. In the Estonian Foreign Intelligence Service's assessment, Russia has no intention of militarily attacking Estonia or any other NATO member state in the coming year. We are likely to reach a similar assessment next year because Estonia and Europe have taken steps that compel the Kremlin to calculate very carefully what, if anything, it can risk attempting. Even if no such intention exists today, our task is to ensure that this remains the case tomorrow and in the future. Russia's military reform will enhance the capabilities of its armed forces in the years ahead. To counter this, Estonia and NATO must continue investing in defence. Russia's calculations of the balance of power must always work to our advantage.

It is firm and steady preparedness that truly deters Russia. By maintaining it, we demonstrate to Russia the qualities it fears most – that we are free, resolute and resilient, and that we make our own choices without coercion or pressure from anyone.

Kaupo Rosin
Director General of the Estonian Foreign Intelligence Service
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TABLE OF CONTENTS

CHAPTER 1: RUSSIAN FOREIGN POLICY	9
Russia attempts to use peace talks as a tool for manipulation	10
Russia targets the 'global majority' and the Commonwealth of Independent States	13
The Kremlin's lost battle in Moldova	15
The West scores a points victory in the South Caucasus	18
CHAPTER 2: RUSSIAN INFLUENCE ACTIVITIES	21
Russia's leaking 'research vessel' stranded in NATO-dominated waters	22
'War and Peace' – the Nobel Peace Prize, Russian-style	26
Russia uses deception to recruit African students to fight in Ukraine	29
CHAPTER 3: RUSSIAN DOMESTIC POLITICS	33
War is exhausting Russia	34
Repressive pressure intensifies	36
Russia's economy faces only bad options	40
CHAPTER 4: RUSSIAN SPECIAL SERVICES	45
GRU involvement in importing dual-use goods	46
CHAPTER 5: RUSSIAN ARMED FORCES	53
Russia is adapting its armed forces for unmanned warfare	54
Russia expands large-calibre ammunition production and stockpiles for potential future conflicts	57
The moral decline of Russian armed forces	60
CHAPTER 6: ASIA	65
North Korea steps up on several fronts	66
China and Russia – allies without a treaty	69
Chinese artificial intelligence distorts perceptions	72
CHAPTER 7: PROTECTION OF CLASSIFIED INFORMATION	77
What should we know about AI risks?	78
Risk assessment is key to protecting classified information	81

SUMMARY

1. The Kremlin merely feigns interest in peace talks, hoping to restore its bilateral relations with the United States to their previous level and formalise Ukraine's defeat. Despite this illusory thaw, Russia continues to regard the US as its principal adversary. *Read more in Chapter 1.1.*
2. Aspiring to great-power status, Russia seeks to undermine the current international order by courting the so-called "global majority" and pressuring the Commonwealth of Independent States. *Read more in Chapter 1.2.*
3. Russia's attempt to topple Moldova's pro-Western government has failed, but it will not be the last: the Kremlin will almost certainly learn from its mistakes and make another attempt to hijack Moldova's statehood. *Read more in Chapter 1.3.*
4. A US-brokered breakthrough in Armenia–Azerbaijan relations undermines Russia's geopolitical interest. Russia is likely to launch an extensive influence campaign against Armenia in 2026. *Read more in Chapter 1.4.*
5. In Moscow's rhetoric, the Baltic Sea region is now described as the "Baltic–Scandinavian macro-region". Russia uses this label to obscure its efforts to influence countries in this region and re-establish contacts with researchers and policymakers in the area. *Read more in Chapter 2.1.*
6. Marginalised from respected Western political and cultural circles, Russia is constructing a parallel universe in which it awards its own peace prize on its own terms. The initiative illustrates how the Kremlin hopes covert influence can help shed its image as an aggressor state. *Read more in Chapter 2.2.*
7. Russia has diversified its foreign-policy engagement in Africa. Expanding cooperation allows Moscow to spread anti-Western narratives, secure resources without triggering sanctions and funnel trapped students to the front. *Read more in Chapter 2.3.*
8. Russia is facing increasingly severe economic challenges and is neglecting almost all non-military sectors as the war in Ukraine drags on. As a result, the risk of economic and social instability is set to rise in 2026. *Read more in Chapter 3.1.*
9. In 2026, Russia is likely to impose even harsher measures to restrict access to independent information in online media. The Kremlin is systematically intensifying its ideological influence and indoctrination efforts aimed at young people. In the face of ongoing suppression of freedom of opinion and expression, the Kremlin continues to stage farcical elections. During the 2026 State Duma elections, it is likely to employ even greater pressure and control tactics than in the past. *Read more in Chapter 3.2.*
10. Russia's economy has entered a downturn. The defence sector is expanding at the expense of a contracting civilian economy. A complete collapse of the Russian economy remains highly unlikely. *Read more in Chapter 3.3.*

11. Russia's sanctions-strained military-industrial complex continues to function thanks to Kremlin proxies who ensure the continued flow of goods essential to the defence industry. Russia's military intelligence service plays an active role in these efforts. *Read more in Chapter 4.1.*
12. Russia is establishing large numbers of unmanned systems units across all services and branches of its armed forces. In any future conflict with Russia, allies must be prepared to face an adversary that employs unmanned systems at scale – at strategic, operational and tactical levels, on land, in the air and at sea. *Read more in Chapter 5.1.*
13. Russia's military-industrial complex has increased artillery ammunition production more than seventeenfold since 2021. This indicates that Russia is highly likely preparing for future conflict even as its war against Ukraine continues. *Read more in Chapter 5.2.*
14. Russian army recruiters target socially vulnerable groups to meet quotas. Lawlessness, abuse of power and crime are widespread in the armed forces, posing a threat to both Russian society and neighbouring states. *Read more in Chapter 5.3.*
15. Pyongyang is expanding its efforts internationally: the state spies on its partners and raises funds for its weapons programmes through its overseas labour diaspora. *Read more in Chapter 6.1.*
16. China and Russia believe that the current era of geopolitical upheaval allows them to reshape the global balance of power in their favour. Although they mistrust one another, both believe they stand to gain more than they lose from cooperation. *Read more in Chapter 6.2.*
17. The spread of DeepSeek serves several Chinese objectives: it helps launch China's new industrial revolution and provides a channel for promoting Chinese propaganda in the West. *Read more in Chapter 6.3.*
18. AI carries a range of serious risks alongside its many benefits. Mitigating these risks must occur at both the state and organisational levels by applying an AI-use strategy and organisational, ethical, legal and technical measures derived from it. *Read more in Chapter 7.1.*
19. Estonia's framework of measures for protecting classified information is largely uniform and offers little flexibility; however, as risk assessments date quickly, risk management must be continuous. Protection measures should therefore be determined on a risk basis at the points where information is created and processed. *Read more in Chapter 7.2.*