

# RUSSIA MONITOR

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INSTITUTE

SOURCE: EDGAR KREMLIN POOL/EPA/EFE

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SOURCE: STRUCTURE.MIL.RU

10 February 2023

## **RUSSIA RACES AGAINST CLOCK BEFORE MUCH-AWAITED OFFENSIVE**

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**In January, Western officials and military analysts believed a new Russian ground offensive to begin in March if not later. A renewed Russian offensive in the east of Ukraine is underway in February. Why did Russia's much-awaited offensive begin now and where a renewed push could be observed? Does it hint at any breakthrough in Moscow's war with Ukraine?**

**W**hile Ukraine's international allies have given it billions of dollars' worth of weapons that included armored vehicles and tanks since the war began, Russia began

amassing troops and building up its military presence to speed up an offensive. A significant new package of security assistance for Ukraine will increase its military's offensive capabilities. The Kremlin thus decided not to wait until late spring and stage an offensive now, possibly until mid-March. Ukraine's frozen ground is expected to thaw in some four or five weeks. It is extremely unlikely Russia will attempt another offensive on Kyiv from the north as in February 2022. Russia is not ready for a full-scale military operation as it is short of troops, among others. Some 300,000 Russian ground troops were currently deployed against Ukraine, which is not enough to stage a ground offensive. The Kremlin has some 200,000 additional soldiers in reserve, some in training and others prepared to join the fight. It might take weeks to deploy them to the front, far too long for Russia. According to Western and Ukrainian military experts, the offensive now will look different than the one before. Russia is unlikely to mount a full-scale offensive at one point--instead, it is believed to deploy more troops and matériel to the front line. Many believe that Luhansk province will be high on Russia's priority list. That makes most sense to the Kremlin. Russia is unlikely to deviate from a key goal in the war — to fully occupy a swathe of Ukraine stretching from the east to the south coast that Ukraine reclaimed back in

August and September. Russia could attempt to encircle Ukrainian troops in Donetsk province--from Lyman in the north, through Bakhmut in the center, to Vulhedar in the south. Should the Russians succeed in advancing significantly westward in the Luhansk region, the threat of cutting off the Ukrainians by striking from Iziun to Sloviansk and Kramatorsk will return. A possible assault in Luhansk province could pose a renewed threat to Kharkiv. Russia has amassed troops in Kupyansk province, part of the Kharkiv region, and in northeastern Ukraine close to Luhansk. A big advantage of Russia is that its troops are flanked by Russian territory from the rear. The Secretary of the National Security and Defense Council of Ukraine, Oleksiy Danilov, told Sky News a renewed Russian offensive can be expected soon in Ukraine's Kharkiv and Zaporizhzhia provinces. Ukrainian officials have only pointed to a security threat in Donbas. As for a potential offensive, Ukrainian President Volodymyr Zelenskyy put it bluntly, pointing to a threat in southern Ukraine. Indeed, Russia is building a large army base in the captured port city of Mariupol in east Ukraine whose troops could move to Donbas as well. Perhaps it is also a Russian safeguard in case of a Ukrainian strike in the Zaporizhzhia region, south to Melitopol and Berdyansk. ■



SOURCE: MID.RU

13 February 2023

## LAVROV VISITS SUDAN TO CONCLUDE RED SEA NAVAL BASE AGREEMENT

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Following the visit of Russian Foreign Minister Sergey Lavrov to Sudan last week, Moscow and Khartoum have finalized the terms of an agreement on establishing a logistical center for the Russian Navy in Sudan, concluded a few years ago. The deal was somewhat derailed due to an unstable situation in Sudan. Sudan has been without a parliament after a popular uprising led to the military overthrow of longtime autocrat Omar al Bashir. Russian officials get on well with the Sudanese military junta while some top Sudanese generals have benefitted from collaboration with the shadowy military contractor Wagner Group.

Russian Foreign Minister Sergey Lavrov met Sudanese officials in Khartoum on February 9, including top Sudanese generals: Abdel Fattah al-Burhan, who now chairs the military government, and Mohammed Dagalo, commander of the powerful paramilitary Rapid Support Forces. Lavrov also held talks with Khartoum's acting foreign minister Ali al-Sadiq. While in the Sudanese capital, the top Russian diplomat concluded a review of an agreement with Sudan to build a navy base on the Red Sea in the African country. The agreement allows Russia to set up a naval base with up to 300 Russian troops, and to simultaneously keep up to four navy ships, including nuclear-powered ones, in strategic Port Sudan on the Red Sea. The agreement is to last for 25 years, with automatic extensions for 10-year periods. Russia will benefit from the port that gives it easy access to the Indian Ocean. In exchange, Russia is to provide Sudan with weapons and military equipment. In December 2020, Moscow struck a deal with Khartoum to establish its first naval outpost at Port Sudan

on the Red Sea. Yet it took many months to seal the deal. Sudan officially recognized Russia's annexation of Crimea. The shadowy private military company known as Wagner Group started operating in Sudan in 2018 to provide training to the military and secure investments owned by Yevgeny Prigozhin. Through Meroe Gold, which is associated with Prigozhin, Russian mercenaries are accused of colluding with the Sudanese military to exploit Sudan's gold reserves. A top figure is Gen. Mohammed Dagalo, who has long been in favor of a Sudanese-Russian alliance. He even visited Moscow the day before Russia invaded Ukraine. Russia also helped the military crush anti-government rallies. Dagalo and his family members have colluded with Russia to exploit Sudan's gold reserves, perhaps benefiting from these gold dealings. A new Russian naval base at Port Sudan will bolster its influence both throughout the Horn of Africa and the entire continent, where Russia has built its foothold in the Central African Republic, Mali, Burkina Faso, and Libya. ■

14 February 2023

## **RUSSIA CELEBRATES INVASION WITH RALLY AND FEDERAL ASSEMBLY ADDRESS**

**The Russian propaganda machine is exploiting one year exactly since Russia recognized two breakaway republics in Donbas and its full-scale invasion of Ukraine to unify Russian people around the leader. There will be an effort to mobilize people in Russia with Putin's Federal Assembly speech and a concert in the Luzhniki stadium in Moscow. Chances are that Russian forces will advance some gains in Ukraine such as the seizing of Bakhmut, which could be further exploited in Putin's speeches.**



SOURCE: KREMLIN.RU

Russian President Vladimir Putin will deliver his state of the nation address on February 21, Kremlin spokesman Dmitry Peskov told journalists. Putin's speech will mostly concentrate on what he referred to as current affairs, including Russia's economy and society. The date marks exactly one year since Russia recognized the two breakaway Ukrainian states of Donetsk and Luhansk as independent states—a key precursor to Moscow's full-scale invasion of Ukraine on February 24. While the Russian Constitution requires the president to address the Federal Assembly at least once a year, Putin did not deliver any speech in 2022. The Kremlin does not have any problem with that, saying Putin missed an address in 2017,

too. Vladimir Putin will give his belated annual address to Russia's Federal Assembly on or around February 21, and will participate in a large-scale concert and rally event at Moscow's Luzhniki stadium the following day. The last time he delivered any speech was at the same stadium in Moscow on March 18, 2022, three weeks into the Russian invasion of Ukraine, in an event marking the eighth anniversary of Russia's annexation of Crimea. The February 22 rally is expected to be a "continuation" of Putin's address. Some 200,000 people are slated to attend, some of whom are offered 500 roubles (\$7). Some universities ask students to arrive and take their friends to boost attendance. ■



SOURCE: VK.COM/GAZPROM

14 February 2023

## RUSSIA CUTS OIL OUTPUT AS SANCTIONS BITE

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**Russia will cut crude oil production by half a million barrels per day starting in March. That means the country's major challenge is to export crude oil. Reduced export volumes for crude means that Russia is unable to sell as much of its oil-- even at a discounted price – as before the price cap and the EU embargo came into effect.**

**I**n January, Russia produced some 10.9 million barrels per day (bpd), slightly off the 11 million benchmark back in February 2022. Before the EU embargo came into effect in November, Russian oil output totaled 11 million bpd. In December Russian oil output stalled before seeing a 0.4 percent drop in January compared to November 2022. Russia will

voluntarily reduce production by 500,000 bpd in March, according to Deputy Prime Minister Alexander Novak. The cut is equivalent to about 5 percent of Russian oil output. What is the reason? “We will not sell oil to those who directly or indirectly adhere to the principles of the price ceiling,” Russian Deputy Prime Minister Alexander Novak said in a statement.



This suggests that Russia should reduce its oil exports. The move threatens renewed turmoil in an oil market that has otherwise taken in its stride the EU bans on most seaborne imports of Russian oil, Novak argued. Russia decided to curb oil output as it had failed to ship its oil elsewhere, to countries that have not introduced a price cap on Russian crude oil. In December, the Group of Seven (G7) nations, Australia and the European Union agreed on a \$60 per barrel price cap on Russian seaborne crude oil. Earlier, the European Union had

launched its ban on imports of Russian diesel fuel. An EU ban on Russian oil product imports came into effect on February 5. The price cap for diesel and gasoline stands at \$100 per barrel at \$45 for heavy fuel oil, including mazut. Revenue from oil and gas fell 46 percent year on year in January, the finance ministry said, blaming the drop on falling prices for Urals. The Urals price was sharply lower--between \$38 and 50--than \$80 per barrel for the international Brent benchmark. ■

## 15 February 2023

# STAFF RESHUFFLES IN RUSSIA'S SECURITY COUNCIL

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**It was long ago when Russia's Security Council saw major staff changes. They may undermine the reputation of Nikolay Patrushev, its chairman. Recent appointees include people from outside the inner circle of the former FSB chief. In addition, a new person linked to Vladimir Putin took a job at the Council. Perhaps the institution saw some personnel changes ahead of the forthcoming Federal Assembly address. Or possibly Putin is seeking to chasten some hawkish officials within the Council.**

**T**he Russian leader announced a series of staff changes within the country's Security Council. In early February, Russian President Vladimir Putin appointed Rashid Nurgaliyev as First Deputy Secretary of the Security Council of the Russian Federation. Nurgaliyev served as Russia's interior minister in 2004–2012. He spoke against the mounting influence of the FSB within power structures. Aleksey Shevtsov was appointed Deputy Secretary of the Security Council by another decree. While Nurgaliyev

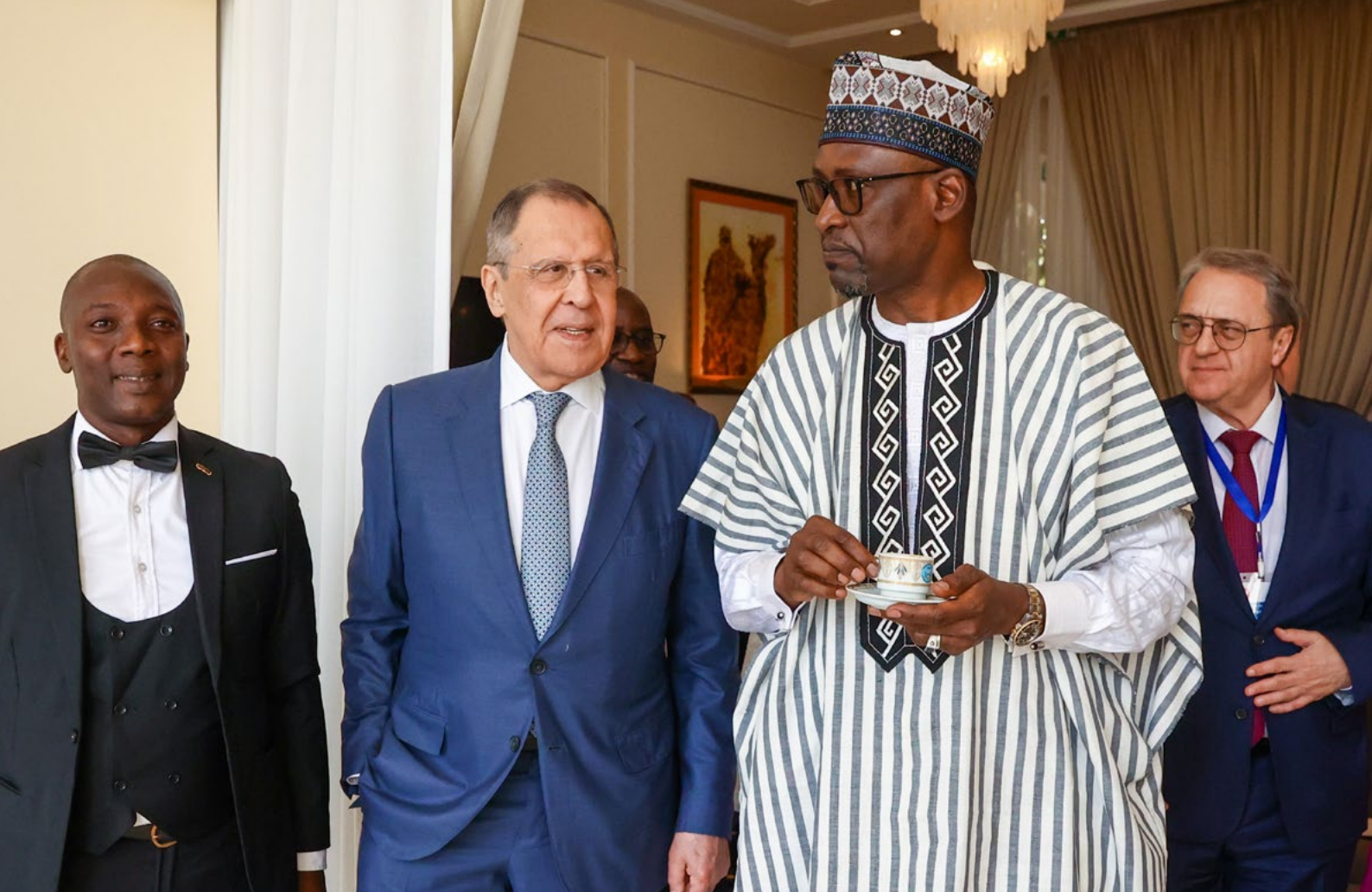
hails from power structures, Shevtsov is a political scientist and an economist. A graduate of the Moscow State Institute of International Relations, his research interests include Russian–Belarusian relations. He also worked for VEB, one of Russia's biggest banks. Earlier Putin dismissed Russian Deputy Secretary of the Security Council Yuri Averyanov. The Russian president has thus signed a decree that includes his departure from office and stipulates that Averyanov, 73, will now go on



SOURCE: KREMLIN.RU

to “perform other functions also as an official” of the Russian government. Azeryanov was appointed deputy secretary to the chairman of the Security Council and former president of the country, Dmitry Medvedev, but will now go on to perform the functions of a parliamentary advisor to Andrey Turchak in charge of the Working Group to Coordinate Interaction between the Authorities and Organisations on Mobilisation Training and Social and Legal Protection of the Citizens of the Russian

Federation Involved in the Special Military Operation and Their Families. Interestingly enough, Mikhail Kovalchuk, whose brother Yuri is known as the Russian leader’s personal banker, was appointed chairman of a Security Council committee. His new job at the Security Council could somewhat cripple the position of Nikolay Patrushev while promoting Putin himself. Mikhail Kovalchuk has tremendous influence on Putin and how he sees the world. ■



SOURCE: MID.RU

15 February 2023

## RUSSIA BOOSTS PRESENCE IN MALI

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The Malian junta appointed several pro-Russian figures to high-ranking military positions, indicating growing Russian influence over the Malian government. In addition, Russian Foreign Minister Sergey Lavrov traveled to Bamako, the Malian capital, where he was awarded one of the highest Malian orders. All this points to the growing influence of Moscow in the African country.

**J**unta leader Assimi Goita replaced several of Mali's top military leaders with pro-Russian figures in a mini purge on February 8. He notably appointed the Malian ambassador to

Russia as chief of staff of the army and replaced Mali's chief of staff of the national guard, who had significant French ties. Interestingly, the move came a day after Russian Foreign

Minister Sergei Lavrov's first visit to Mali. The top Russian diplomat was honored by Mali as Commander of the National Order of Mali--the third-highest distinction in this African country. He allegedly concluded a batch of new security agreements. Mali's ruling junta said that it was expelling the head of the human rights division of MINUSMA, the UN mission there, giving him 48 hours to leave the country. The decision comes after a Malian rights activist last month denounced the security situation in the country in a speech to a UN gathering on January 31, and accused the regime's new Russian military partners, or the shadowy private military company Wagner Group, of serious rights violations. The appointments and their timing indicate that Mali will likely expand its partnerships with Russia and Wagner Group.

Russian-linked outlets in Mali also began an information operation calling for more Wagner bases in the country. The Malian junta could be planning to use increased Russian assistance in a northern Mali offensive. The Russian military group will allegedly play a crucial role in the operation. A government offensive yet would unlikely be more successful than previous failed government efforts to assert control over northern Mali amid its problems in the country's south. With Russian mercenaries in Mali, the Malian junta will safeguard its rules rather than defeat jihadists in the country. As in the Central African Republic, where Wagner mercenaries failed to bring any breakthrough to the civil war but protected the incumbent president. ■

## 15 February 2023

# RUSSIAN FORCES DESTROYED NEAR UKRAINE'S VUHLEDAR

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**Russia made a failed attempt to encircle and capture the strategically located town of Vuhledar in the south of Donetsk province. Russian forces have sustained their biggest defeat so far near the eastern Ukrainian town, according to sources in Russia.**

Vuhledar, a Ukrainian-held bastion at the strategic intersection between the eastern and southern front lines, has seen some of the bloodiest fightings of the war since late January as Russia continues a relentless assault on the

eastern front. Vuhledar sits a nearby railroad that links Donetsk with Russian-occupied Crimea allowing Russian forces to move troops between the eastern and southern fronts. As some bloody fighting took place in Bakhmut,



SOURCE: FACEBOOK GENERAL STAFF OF THE ARMED FORCES OF UKRAINE

a town located several dozen kilometers away, it was the relative calm near Vuhledar. Russia staged a major attack on Vuhledar on January 26. The 155th and 40th Guards Naval Infantry Brigades, “Kaskad” DNR formations, the 36th Motor Rifle Brigade within the 29th Army of the Eastern Military District, and the 14th Special Purpose Brigade were all present in the Vuhledar area. Further attacks followed. Consequently, Russia likely lost 130 armored vehicles, including 36 tanks, in just a week. The 155th Guards Naval Infantry Brigade has been nearly destroyed as between 150 and 300 marines per day were killed in Russia’s assault on the Ukrainian town. On February 6, Russia

lost 30 military vehicles, including fifteen T-72 and T-80 tanks. Video evidence shows Russia has suffered catastrophic military losses after its armored vehicles were ambushed. While some vehicles drove on mines, others tried to swerve and got detonated as well before coming under enemy fire in what turned out to be one of Russia’s biggest military defeats so far in Ukraine, like when Russian troops were wiped out while attempting to cross the Seversky Donets River last May. The 155th brigade had to undergo a new wave of restaffing after suffering defeats in Bucha, Irpin, and now Vuhledar, according to the Ukrainian military. ■



SOURCE: VK.COM/GAZPROM

16 February 2023

## AUSTRIA, NETHERLANDS INCREASE HYDROCARBONS IMPORTS FROM RUSSIA

**While the EU ban on Russian fuel is biting Moscow, Russia has been delivering some crude to EU countries. Among those that bought oil from Russia were Austria and the Netherlands.**

**A**lexander Shulgin, the Russian ambassador to the Hague and the permanent representative to the OPCW, told Russian

news agency RIA Novosti that the Netherlands continued to buy Russian liquefied natural gas, adding the country increased Russian

oil imports later in 2022 before the EU-wide embargo came into effect. The transport ban for Russian seaborne oil to third countries came into force on December 5, 2022, for crude oil and February 5, 2023, for fuel. The price cap, together with the EU ban on Russian oil product imports, are part of a broader agreement among the G7 countries. In addition, the EU banned all seaborne crude products from Russia. The European Union imposed its toughest sanctions yet on Russia last summer. Meanwhile, Austria increased gas imports from Russia. The European Network of Transmission System Operators for Gas and the Austrian energy regulator announced that the share of Russian gas in the country's total imports increased to 71 percent in December 2022, according to Der Standard. According to Der Standard, between May and October 2022, gas supplies from the Russian Federation to

the country gradually fell from 70 percent to less than 20 percent of total imports. However, the growth began again in November when the nation's share of the Russian product was 40 percent and exceeded 70 percent in December 2022. The reason for the increase in those months was the decrease in imports from Germany and Italy, with relatively stable gas flows from Russia, according to the source. Russian gas exports slumped by 25.1 percent to 184.4bn m3 in 2022, Deputy Prime Minister Alexander Novak said. LNG exports soared to 45.7 billion m3, up 7.9 percent, he added. Russia is seeking to make up for a drop in gas exports to European by redirecting flows into the domestic market, Novak added. Russia is planning to increase the level of gasification from 73 percent in early 2023 to 74.7 percent in 2024, and 82.9 percent in 2030. ■

## 17 February 2023

# ISRAEL MAKES SLIGHT SHIFT IN UKRAINE POLICY

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**Israeli Foreign Minister Eli Cohen on February 16 visited Kyiv, where he met with Ukrainian President Volodymyr Zelensky and Foreign Minister Dmytro Kuleba. Another focus of Cohen's visit was the official reopening of the Israeli Embassy in Kyiv, which had been moved to Poland a few weeks after the Russian invasion. It is the first time a senior Israeli official has visited the country since the Russian invasion a year ago. Cohen's visit marks a slight shift in the Israeli policy on Ukraine.**

Upon arrival at the Ukrainian capital, Cohen visited the Kyiv suburb of Bucha, where Russian forces slaughtered 450 civilians last year. Cohen also paid his respects at

Kyiv's Babi Yar memorial to the 30,000 Jews massacred in 1941. Israeli Foreign Minister Eli Cohen has stated that his government intends to support the peace formula proposed by



SOURCE: PRESIDENT.GOV.UA

President Volodymyr Zelenskyy. He added his country was “committed to the sovereignty” of Ukraine. The top Israeli diplomat also promised more financial and humanitarian aid. But Kyiv is hoping to get more military equipment, notably air defense systems. The Ukrainian government sent Israel an official request for air defense systems Iron Dome and David Sling as well as anti-ballistic missiles Arrow. Ukraine is still hoping to get a smart early-warning air raid system for civilians Israel had pledged to deliver some time ago. When Israeli Prime Minister Naftali Bennett and Foreign Minister Yair Lapid were in power, they served as an unlikely mediator between Kyiv and Moscow. Ukraine’s president has voiced disappointment on Israel’s “failure to supply arms” to his country amid the ongoing war with Russia. Benjamin Netanyahu, who secured a mandate in November to form a new government, said he would also be willing to mediate. However, he also began to focus

on different things. In January, Israel carried out a drone attack on a military factory in Iran, a move that Ukraine believed was an indirect sign of support. While in Kyiv, the Israeli foreign minister did not publicly condemn Russia. Netanyahu, as for him, is playing a delicate game as he cannot start a war with the Kremlin because Israel can conduct strikes on Iranian targets in Syria with the tacit approval of Moscow. Israel is increasingly concerned about the dangerous rapprochement between Russia and Iran. Russia is providing ‘unprecedented’ military support to Iran in exchange for suicide drones to attack Ukraine, which is somewhat alarming for Israel. There is a U.S. factor, too. The U.S. administration has voiced concerns over appointing some far-right ministers to the new Israeli government and a forthcoming judicial reform. With Israel’s assistance to war-torn Ukraine, Netanyahu could be seeking to appease the White House. ■





SOURCE: PRESIDENT.GOV.UA

20 February 2023

## WAR IN UKRAINE DOMINATES MUNICH SECURITY CONFERENCE

**The Russian invasion of Ukraine topped the agenda of the Munich Security Conference this year. The summit gathered top leaders including Polish President Andrzej Duda, German Chancellor Olaf Scholz, French President Emmanuel Macron, and U.S. Vice President Kamala Harris. Ukrainian President Volodymyr Zelensky addressed the conference via a video link.**

In his plea for more Western weapons, Zelensky compared Ukraine's struggle against the Russian invasion to the biblical fight between David and Goliath. The Ukrainian leader again urged Western allies to hurry up with the delivery of military equipment. Zelensky reiterated that victory against Russia means restoring Ukraine's internationally recognized borders, including part of Donbas and Crimea that Russia unlawfully seized back in 2014. The president stressed Ukraine should not be expected to compromise with Moscow. French President Emmanuel Macron and German Chancellor Olaf Scholz told attendees of the conference that there could be no peace in Ukraine until Russia is defeated. They urged fellow Western countries to help Ukraine until Kyiv brought Moscow to the negotiating table on its own terms. The leaders of France and Germany believe that there is not only a military solution to the conflict while being against a full defeat of Russia. Yet but for such a defeat, Russia will never see any reforms as did Germany after 1945 when it was fully disarmed. "The only durable peace in the Euro-Atlantic space will

become possible after Russia poses no threat to the Euro-Atlantic space. And to achieve that, we need Russia to change," Ukrainian Foreign Minister Dmytro Kuleba told the conference. All Western leaders seem to speak with the same voice on Ukraine. "If President Putin wins in Ukraine, it will be a tragedy for Ukrainians. But it will be also dangerous for all of us, because then the message to him and other authoritarian leaders is that when they use military force they can achieve their goals," NATO Secretary General was quoted as saying. Ukraine has to get what it needs to safeguard its statehood and simply survive. The U.S. has formally determined that Russia had committed crimes against humanity in Ukraine, US Vice-President Kamala Harris has said. "But if Putin thinks he can wait us out, he is badly mistaken. Time is not on his side," the U.S. official added. Russian government officials were not invited to this year's Munich Security Conference--for the second consecutive year. Back in 2007, Vladimir Putin delivered a speech in which he criticized what he referred to as anti-Western expansion. ■

21 February 2023

## **RUSSIA'S HYDROCARBON EXPORTS IN 2022: MOSCOW BETS ON BIGGER LNG OUTPUT**

**Last year saw somewhat bittersweet results in Russia's hydrocarbon exports and related figures. Although the country sold more oil, the situation will now deteriorate. Russia saw more modest gas sales figures, but the liquefied natural gas sector stands out.**

Russia's gas exports were down 25.1 percent to 184.4 billion cubic meters (bcm) in 2022 due to sabotage on the Nord Stream gas

pipelines and European customers shunning Russian supplies, Deputy Prime Minister Alexander Novak said. He added that Russian



SOURCE: NOVATEK.RU

supplies to China through the Power of Siberia 1 had increased 48 percent in 2022, reaching a record of 15.4 billion m<sup>3</sup>. In 2022 oil exports rose 7.6 percent, to 242 million tons. Russian oil production rose 2 percent to 535.2 million tons. “At the same time, due to the modernization of refineries, production of motor gasoline and diesel fuel increased by 4.4 percent to 42.6 million tons and 6 percent to 85 million tons, respectively,” Novak said in the column. Russia plans to sell more than 80 percent of its oil exports to what it calls “friendly” countries in 2023, Deputy Prime Minister Alexander Novak said. He added that these countries would also receive 75 percent of Russia’s refined oil products. “As for supplies to states that support illegitimate price restrictions, here our position is widely known and remains unchanged: such countries will not receive Russian oil,” he said. Against a decline in total gas exports, there was a soar in liquefied natural gas exports. “We place a high priority on developing liquefied natural gas technologies and increasing domestic output. Last year, LNG exports soared to 45.7 billion m<sup>3</sup>, up 7.9 percent. The

world market is now fully global so LNG will be the priority fuel due to enhanced mobility,” Novak added. The Russian official says Russian LNG projects are among the world’s most competitive due to low mining and supply chain costs. According to Novak, Russian liquefied natural gas has a low carbon footprint. Despite some constraints, Russia places full emphasis on its LNG projects. Novatek noted that despite falling production and exports, Russia continued to launch new gas fields and increase its LNG production. Russia is planning to build gas liquefaction plants and the government had set aside 1 billion roubles for developing domestic gas liquefaction technologies. Novak promised to launch and partially finance four LNG facilities to produce gas on a both medium and large scale. There are 18 LNG projects planned in Russia. Yamal liquefaction plant relies upon Russian-patented Arctic Cascade liquefaction technology. A key element of the Russian LNG sector is the Northern Sea Route, where Russian export capabilities are the biggest. ■



SOURCE: STRUCTURE.MIL.RU

21 February 2023

## **RUSSIA MOVES TROOPS FROM FAR NORTH TO UKRAINE**

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**The Norwegian and Estonian intelligence agencies recently presented their open threat and risk assessments in 2023. Both emphasized that Russia poses the greatest threat to European security. Interestingly, Russia has relocated large ground forces from the High North to Ukraine, according to both reports.**

**T**he Norwegian Intelligence Service, the Police's security service and the National Security Authority as well Estonia's intelligence agency (Välisluureame) presented their risk assessments in two separate papers, saying there is a minimal chance of Russian aggression in the region. That is because Russia redeployed most of its troops from the Far North and the Baltic to Ukraine. The land forces on Kola are reduced to a fifth of their original numbers before the invasion of Ukraine as 80 percent

of them were deployed to Ukraine. Additional to the 200th Brigade in Pechenga, the land forces on the Kola Peninsula consist of the 61st Naval Infantry Brigade in Sputnik and the 80th Arctic Motor Rifle Brigade in Alakurtti. The men with the 200th Separate Motor Rifle Brigade suffered the biggest losses in Ukraine. Soldiers from the 200th Separate Motor Rifle Brigade were deployed to Kharkiv during the first stage of the Russian invasion. By last fall, it lost two battalion tactical groups, or 1,500 soldiers.

About half of the troops from Murmansk region were lost. The Northern Fleet has in addition lost up to 100 tanks and armored vehicles. The Norwegian Intelligence Service writes that the Northern Fleet's naval forces are essentially intact. Russia also moved its strategic bombers from Engels air base to an air base south of Murmansk when it became clear they might be targeted by Ukrainian drones. Russia's land forces in the Western Military District--normally in charge of an operational area in Estonia--also saw a severe depletion.

"A military attack against Estonia is unlikely in 2023" due to Russia's invasion of Ukraine, but "in the mid-to-long term, Russia's belligerence and foreign policy ambitions have significantly increased the security risks for Estonia," the Estonian service said in its annual report. Ukraine's assault brigade also successfully took on the Pskov-based 6th Army and 76th Guards Air Assault Division, leaving many dead. Last fall, mobilization hit hardest Russia's Pskov and Leningrad provinces, where thousands of men were drafted. ■

## 24 February 2023

# MARKING ONE YEAR OF RUSSIA'S FULL-SCALE INVASION OF UKRAINE

**As Russian leader Vladimir Putin gave orders for a military assault on February 24, 2022, Russian troops mounted attacks in multiple cities throughout Ukraine. The idea was to seize Kyiv and install a Moscow-loyal puppet government in Ukraine. A Russian blitzkrieg operation actually succeeded in the south where Russian forces advanced from Crimea to capture territory equal to the area of Switzerland. No sooner than in March did they have to withdraw from northern Ukraine while Ukrainian forces made gradual efforts to recapture more swathes of territory. That has been possible through Western military aid to Ukraine.**

**T**he biggest heroes and Ukrainian troops and law enforcement officers. President Volodymyr Zelenskyy awarded medals to members of his country's military at a ceremony in Kyiv on the anniversary of Russia's invasion. "Whether Ukraine will survive is in your hands," the president told soldiers. Around 100,000 Ukrainian soldiers have been killed or injured in the war in Ukraine, according to estimates.

But Russia lost twice as many people. The first year of the Russian invasion of Ukraine has entered multiple stages so far, the first one covering the period from February to May 2022. Russia withdrew more forces from northern Ukraine and seized part of Kharkiv province in the east while not advancing much in Donbas. Russian invaders occupied most of the southern Ukrainian province of Kherson and



SOURCE: УЧАСТЬ ПРЕЗИДЕНТА УКРАЇНИ У ДЕРЖАВНИХ ЗАХОДАХ  
З НАГОДИ РІЧНИЦІ НЕЗЛАМНОСТІ — ОФІЦІЙНЕ ІНТЕРНЕТ-  
ПРЕДСТАВНИЦТВО ПРЕЗИДЕНТА УКРАЇНИ (PRESIDENT.GOV.UA)

parts of Donetsk province, including the city of Mariupol. The second phase of the Russian invasion of Ukraine covers the period from May to August 2022. Much of the fighting was concentrated around Donbas, where Russian troops staged an offensive operation. Russian forces had occupied all of Luhansk province, including Severodonetsk, or the epicenter of the bloody battle for Ukraine's eastern Donbas region, and made some territorial gains in Donetsk province. The third phase of war lasted from September to November 2022, with a major Ukrainian counter-offensive as Kyiv

got weapons from the West. In September, the Ukrainian counter-offensive liberated almost the entire area of Kharkiv and part of Donbas from Russian forces. In November, Ukraine recaptured the city of Kherson, on the western bank of the Dnieper River. The fourth phase of war began last November. Although Russia staged an offensive campaign in Luhansk and around Bakhmut in February, the front line has stalled for months now. That is now about positional warfare—perhaps until Ukraine mounts a new offensive operation. ■



SOURCE: ПАО НОВАТЭК БИЗНЕС : ПРОЕКТ «АРКТИК СПГ 2» | АРКТИК СПГ 2 (NOVATEK.RU)

24 February 2023

## NOVATEK PLANS TO LAUNCH ARCTIC LNG 2 THIS YEAR

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**Russia's largest private gas firm aims at expanding its flagship project Arctic LNG 2, which is on schedule to begin operating by the end of 2023. War and international sanctions notwithstanding, the Russian natural gas company forges ahead with the development of its grand Arctic projects.**

Company owner and CEO Mikhelson this week reiterated that the Arctic LNG 2 is proceeding according to plans and that the first of the project's three trains will be ready for operations in late 2023 while the second and the third trains will be launched in 2024

and 2026, respectively. "We plan to launch production at the first train at the end of the year," he told the press during the India Energy Week. Mikhelson added that the first and the second trains have full capacity to launch production. Arctic LNG 2 is the second-largest

liquefied natural gas project of Russia's biggest private company only to its flagship Yamal LNG. The Arctic LNG 2 plant will utilize natural gas from the nearby Utrennoye field on the Gydan peninsula for its Ura Bay terminal, some 40 km from Murmansk. Arctic LNG 2 envisages constructing three LNG liquefaction trains of 6.6 million tons per annum each. The total LNG capacity of the three liquefaction trains will be 19.8 million tons. The reloading terminal on the Barents Sea coast is to be completed in 2023. When fully completed, the Arctic LNG 2 will be Russia's biggest project of its kind. The Ura Bay is today first of all known for its nuclear submarine base. The fjord has deep waters and does not freeze in wintertime. The reloading terminal will consist of floating

facilities that can hold up to 360,000 tons of LNG each and simultaneously serve two LNG tankers. The new logistical scheme will cut costs and provide efficient transportation of liquefied natural gas from the Arctic LNG 2 to Europe. When ready, ice-class carriers will shuttle between the terminals and LNG plants in the Yamal and Gydan Peninsulas. Volumes will be then collected by regular carriers as the gulf does not freeze. The terminal will have the capacity to handle about 20 million tons per year. It will be built by the Korean yard Daewoo Shipbuilding & Marine Engineering. The Arctic LNG 2 is due to deliver its liquefied natural gas both to customers in Asia, along the Northern Sea Route. ■

27 February 2023

## PUTIN PULLS BACK FROM RESET-ERA NUCLEAR ARMS CONTROL DEAL

**What Western countries learned from the recent address of the Russian president is that Moscow is willing to pull back from a nuclear arms control deal. Vladimir Putin indeed said that Moscow is “suspending” its participation in New START, the last remaining nuclear arms reduction deal between the U.S. and Russia since 2010. It is just a formality as Moscow no longer complies with the nuclear deal.**

The agreement was signed by then-U.S. President Barack Obama and his Russian counterpart Dmitry Medvedev in April 2010 in a U.S. attempt to improve relations with Moscow. The reset policy eventually misled the West. The end of Medvedev's phony liberal presidency brought Putin back into power in 2012--two

years later, Russia seized Crimea and part of Ukraine's Donbas region. Since then, Russia's ties with the West decayed. In the past, the Trump administration halted U.S. compliance with another nuclear arms control treaty with Russia, citing Moscow's noncompliance under the treaty. The Biden administration echoed





SOURCE: АРМИЯ РОССИИ (ФОТОВЗГЛЯД) : МИНИСТЕРСТВО ОБОРОНЫ  
РОССИЙСКОЙ ФЕДЕРАЦИИ (STRUCTURE.MIL.RU)

these claims last year though it said it wanted to preserve or even extend the deal. Under the agreement, Moscow and Washington are committed to deploying no more than 1,550 strategic nuclear warheads and a maximum of 700 long-range missiles and bombers. Each side could conduct up to 18 inspections of strategic nuclear weapons sites every year to ensure the other has not breached the treaty's limits. The United States and Russia were also required to exchange their updated strategic arsenal data every six months. Russia is not complying with its obligation under the New START Treaty to facilitate inspection activities on its

territory, according to the U.S. Department of State. Addressing the Federal Assembly on February 21, Putin suddenly announced that Russia was suspending its observation of the New START nuclear arms control. He added U.S. inspections of Russian nuclear weapons were “unacceptable”, though it is one of the provisions of the deal. “The announcement by Russia that it’s suspending participation is deeply unfortunate and irresponsible,” U.S. Secretary of State Antony Blinken told journalists. That paves the way for a redeveloped nuclear stockpile or even nuclear weapons testing, as suggested by Putin himself. ■



SOURCE: (ГЕНЕРАЛЬНИЙ ШТАБ ЗСУ (@GENERALSTAFFUA) / TWITTER

27 February 2023

## **RUSSIAN OFFENSIVE IN DONBAS DID NOT SCARE OFF UKRAINIANS**

**Instead of a lightning thrust, Moscow has dialed up offensives in a handful of spots, resulting in fighting that is slow and extremely tiring to both sides. Russia has commenced its long-awaited offensive as six months passed since Moscow's last gains in Ukraine's Donbas. This is where Russian forces are now advancing while seeking to control the southern front spanning from Dnipro to Melitopol in case of a Ukrainian counter-offensive effort.**

Moscow has partly recovered its military potential in Ukraine-- sufficiently to patch the holes in its battalions and strike more forcefully alongside a larger section of the frontline. This is yet not sufficient to break through the Ukrainian defense and force Ukrainian troops into a long retreat. What underpins Russian shortcomings and the military strength of Ukraine is recent developments in Donbas. In the south, a strike on the mining town of Vuhledar has seen some of the bloodiest battles so far, killing regular Russian troops instead of Wagner Group mercenaries or mobs. So what does it mean? Russia's urgency to make advances now underscores the poor training of recently mobilized soldiers. Around the settlement of Avdiivka and the western outskirts of Donetsk, there have been no major reshuffles since the beginning of Russia's full-scale invasion. The battle for the pivotal city of Bakhmut in Ukraine's eastern Donbas began last April when Russian forces stormed the region. Russian troops failed to secure any territorial gains in the area. They just approached the eastern outskirts of Bakhmut in the past ten months while capturing the salt mining town of Soledar. Russia is trying to cut the Ukrainian defenders'

vulnerable supply lines into the city and force them to surrender or withdraw, which is now unlikely to happen. Now the Russian military focus is on the north-- Lymansk and some border areas between the provinces of Donetsk, Luhansk, and Kharkiv. It also included Kupyansk that sits at the northern crossing of the provinces of Luhansk and Kharkiv and the Russian border. At stake is a major railway junction that enables the Russians to launch an attack on Kharkiv. Russian forces will renew ground attacks near Svatove in the north and Kreminna in the south, where a road and a railway line run parallel to each other. This is also where the Ukrainian counter-offensive operation was halted back in September. The Svatove-Kreminna line matters for both Ukraine and Russia. If Russian troops break it, they will sneak into the Kharkiv region to face a Ukrainian battalion stationed between Lyman, Sloviansk, Kramatorsk, and Bakhmut. But when the scales tip to Ukraine, its forces will pave their way towards the Luhansk region to recapture Severodonetsk and cut Russian soldiers off their Russian foothold. Russian forces have gained more areas than Ukrainian troops since November 2022, which is no breakthrough at all. ■

27 February 2023

## WITH RECORD-HIGH SALES, NOVATEK REVEALS AMBITIOUS PLANS

**In 2022, Russia's biggest private gas firm Novatek made a record net profit, up 50 percent from last year. That is due to soaring liquefied natural gas exports in Russia. In the past, unlike Gazprom, Novatek put a safe bet on LNG production and now benefits from that.**



SOURCE: ПАО НОВАТЭК ПРЕСС-ЦЕНТР : ФОТОГАЛЕРЕЯ (NOVATEK.RU)

According to Mikhelson, the company's profits grew by around 50 percent in 2022. Although no accurate figures are publicly available, the company made 433 billion roubles throughout 2021. "Importantly, we have no problems with selling all the products that we produce," Mikhelson was quoted as saying. The Russian gas firm approved a dividend policy of distributing not less than 50 percent of the consolidated net profit. Novatek expects to maintain gas and liquid hydrocarbons production in 2023 at the level of last year, Mikhelson told journalists. "We still have the same plans. Last year we produced somewhere a little more than 82 billion cubic meters of gas and about 12 million tons of liquid hydrocarbons. Our oil production is falling, but condensate production is increasing. And we will stay

somewhere at that level in 2023," Mikhelson said at India Energy Week. "The long-term contracts that we had, from all the buyers, we did not hear from anyone about the intention to terminate them," explained Mikhelson. "Buyers are happy with spot prices and we have no problems with selling all the products that we produce," according to Mikhelson. Unlike oil and pipeline gas imports, LNG deliveries from Russia have not been subject to sanctions. The Yamal LNG project is crucial for exports. Against a decline in total gas exports, there was a soar in liquefied natural gas exports, which fosters the firm's further expansion. Mikhelson also announced that its new flagship project Arctic LNG 2 is on schedule to begin operating by the end of 2023. ■



SOURCE: PRESIDENT.GOV.UA

28 February 2023

## **BIDEN'S KYIV VISIT SENDS STRONG MESSAGE TO MOSCOW AND WEST**

U.S. President Joe Biden made a surprise trip to Kyiv on February 20, ahead of the first anniversary of Russia's invasion of Ukraine. The visit carried huge symbolism as while in Kyiv, the U.S. president promised new military aid to Ukraine. Biden's trip to war-stricken Ukraine was a clear sign of strong support for Ukraine from the United States sent to both Russia and some Western states unwilling to provide assistance to Kyiv. Perhaps the Kremlin considered Biden's trip to Kyiv was no longer just an effort to save Ukraine but to smash Russia militarily.

Joe Biden's historic trip to Kyiv was a secret until the last minute. After touching down in Poland, he took a train ride into Kyiv. This was a severe blow to Russia, humiliated by a brave U.S. president the Kremlin would mock. Biden met his Ukrainian counterpart Volodymyr Zelensky almost one year after Russian President Vladimir Putin launched his invasion of Ukraine and recognized what is known as people's republics in Ukraine's Donbas. If the Kremlin sought to eclipse Biden's address in Poland, the U.S. president's trip in Kyiv was a nice preemptive blow dealt to Moscow. Although the visit was veiled in a cloak of secrecy, the U.S. notified Russia of President Biden's secret visit to Ukraine hours before his departure in an attempt to avoid sparking conflict when he was in Kyiv. During his short trip to Kyiv, Biden arrived to the Mariinsky Palace where he met with Zelensky and his wife and delivered a brief speech before driving back to Poland. Biden

promised new military aid for Ukraine worth \$500 million. Some Ukrainian media outlets reported Biden might pledge to give Ukraine F-16 fighter jets and long-range ATACAMS missiles, but the U.S. leader did not make such a promise. The latest assistance package includes more ammunition, anti-tank weapons, and air defense radars. Biden was intently focused on discussing the coming months of fighting when he sat down with Zelensky, according to national security advisor Jake Sullivan. The timing was crucial as Biden arrived in Kyiv as some Western states began to encourage Kyiv to start peace talks with Russia. Combined with a Warsaw speech and the Bucharest Nine summit in Poland, Western allies got a comfortable asset to help Ukraine while not forcing Kyiv into any concessions. Russian President Vladimir Putin made no mention of Biden's visit in his Federal Assembly address he delivered the next day. ■

28 February 2023

## BELARUS, GAZPROM SIGN GAS SUPPLY DEAL

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**Belarus' Ministry of Energy signed a protocol with Gazprom on the process of establishing prices for natural gas delivery to Belarus by 2025. The tariff is set at \$128.5 per 1,000 m<sup>3</sup>, as in 2022. A Gazprom-dependent gas intermediary and Gazprom also set some rules for natural gas supply to Belarus.**

“ A protocol was signed between Gazprom and the government of Belarus on the process for establishing prices for natural gas supply to Belarus and the level of markup on natural

gas sold by Gazprom Transgaz Belarus to buyers in the Republic of Belarus for the period 2023-2025,” according to a statement. The gas price for Belarus is determined in relation to



SOURCE: ГАЗПРОМ | VK

the Russian rouble and is based on the 2022 conditions. Prime Minister of Belarus Roman Golovchenko stated in December 2022 that Moscow and Minsk had agreed to set gas prices for the country for three years. Russian Minister of Energy Nikolay Shulginov in turn stated that the price of Russian gas for Belarus in 2023 has been agreed to be the same as last year (\$128.5 per 1,000 cubic meters) in Russian roubles. In February, Gazprom and its subsidiary Gazprom Transgaz Belarus extended contracts for gas supplies to Belarus for 2023-2025 and transit through its territory in 2023. In 2021, Russia sent 19.78 bcm of gas to Belarus compared

to 18.766 bcm in 2020, the Russian Federal Customs Service said in a statement. The total cost of transit through Belarus is estimated at 12 billion roubles in 2023, with the estimated cost of gas for 2023-2025 totaling 200 billion roubles per year. Gazprom Transgaz Belarus is a fully-fledged subsidiary of Gazprom. Belarus is fully dependent on gas supply carried out by exclusive importer Gazprom Transgaz Belarus. The company operates three underground storage facilities, among others. Russia and Belarus are both committed to establishing rules for a common gas market. ■



SOURCE: DUMA.GOV.RU

28 February 2023

## **RUSSIA PASSES LAW FIXING URALS RATE FOR TAX CALCULATIONS**

**Russia is struggling to stick to the federal budget in 2023. This year Moscow will see a modest cash inflow to the budget. Moscow will never get such a petrodollar lifeline as it got last spring. One idea to save the budget is through new tax calculations.**

**T**echnocrats within the Russian cabinet will struggle to find a golden measure—to give a lifeline to the budget while making new fees acceptable for the state economy. Thus the Russian finance ministry has introduced legislation that will change the rules for

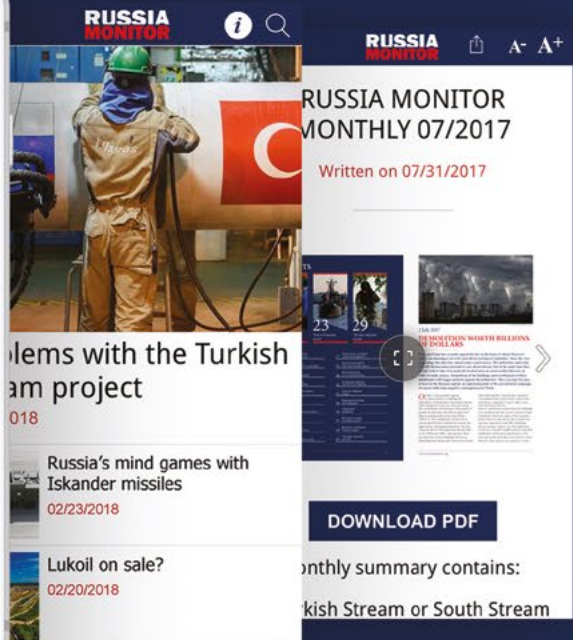


calculating taxes on oil companies. Instead of relying on a \$40 discount on Russia's Urals blend compared to benchmark Brent, Russia is therefore switching to a reference point based on a fixed differential to benchmark Brent crude. The finance ministry is seeking to set the cap at \$25--while oil-producing firms will be obliged to cash more in taxes. According to analysts, their profit will remain basically unchanged as the difference in prices is attributed to the companies themselves. More oil and gas sales are now going to Asia rather than Europe at a discounted rate below \$35-\$40. Those who actually benefit from that are

foreign-based subsidiaries of oil firms. Once the new formula is in force, oil companies are stripped of any possibilities to manipulate prices and thus contribute to the federal budget, according to the finance ministry. Under the new arrangements, Russia is expected to gain up to 700 billion roubles in additional revenue. This will increase the tax burden on oil companies and help ease Russia's budget deficit. That deficit is increasing in part due to a fall in oil and gas revenues – last month they were down 46 percent year on year in January 2023. The change would boost Russia's state budget by 8 trillion roubles (\$115 billion) in 2023. ■



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Review of the most important events relating to Russian security. Warsaw Institute experts monitor and analyze activities of the Kremlin and its subordinate services to anticipate their short-term and long-term consequences, particularly for neighboring countries and the Western world.

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