

Política Internacional e Geopolítica a policrise do mundo globalizado

**INSTITUTO CULTURAL
D. ANTÓNIO FERREIRA GOMES
José Pedro Teixeira Fernandes
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PARTE I – TEMA PRINCIPAL

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (1) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]

Electrostates v. petrostates. Clarifying a tricky distinction.

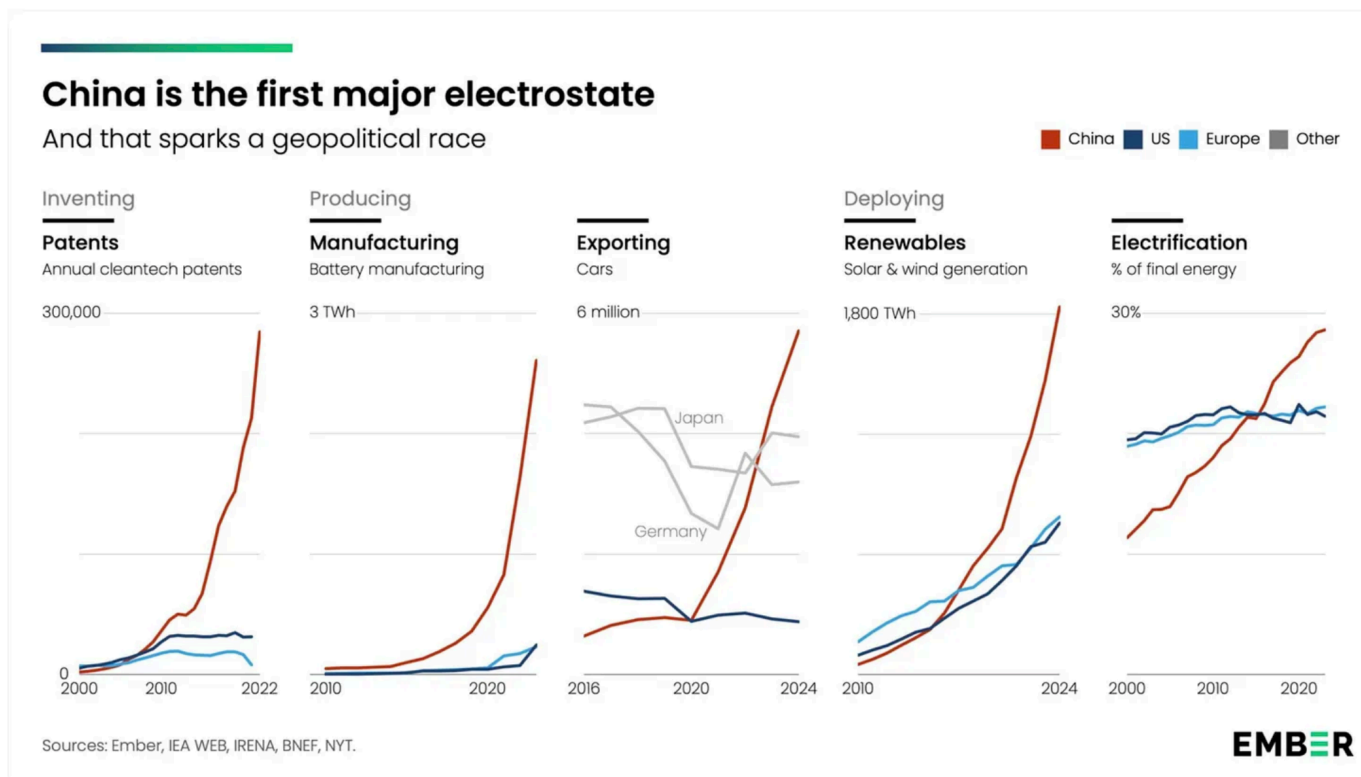


Some time last year a distinction began to be drawn between electrostates and petrostates. China was the key instance of an electrostate. The US under Donald Trump has made a spectacle out of its commitment to fossil fuels. The result have been a spate of headlines and articles pitting electrostates v. petrostates. I made my own contribution to the genre with the title of my LRB talk in the fall.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (2) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]

Since then I've become increasingly worried about the proliferating uses of the contrast. Because, as compelling as it may be for leader writers, it is a distinction that needs to be handled with care.

We call a country an electrostate, if it draws a large and increasing share of its total final energy consumption in the form of electricity.



“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (3) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]

This is opposed to a society that relies heavily on burning gas, oil or fuel directly, whether in industrial or domestic uses or in cars, trucks, ships and airplanes. How you get your energy delivered matters, because in the clean energy transition, the key mantra is “electrify everything”. Electricity is one form of power that we know how to produce by clean means. In most places that is still far from true for much of electricity generation, but it is the prospect of the energy transition that gives significance to the question of electrification and supercharges the idea of an “electrostate”.

China has been singled out as the archetypal electrostate. It has been expanding the share of its final energy use which is delivered in the form of electricity. Added to which, in the last five years, renewables have taken over as the most rapidly expanding form of electricity generation. Furthermore, Chinese manufacturers dominate the EV business, bringing the prospect into view that the internal combustion engine will be rapidly displaced. Ultra high-speed (electrified) railways compete with inter-regional flying inside China. And China, of course, is very much a mixed economy with the state playing a key role. So China ticks all the boxes of an ElectroState.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (4)

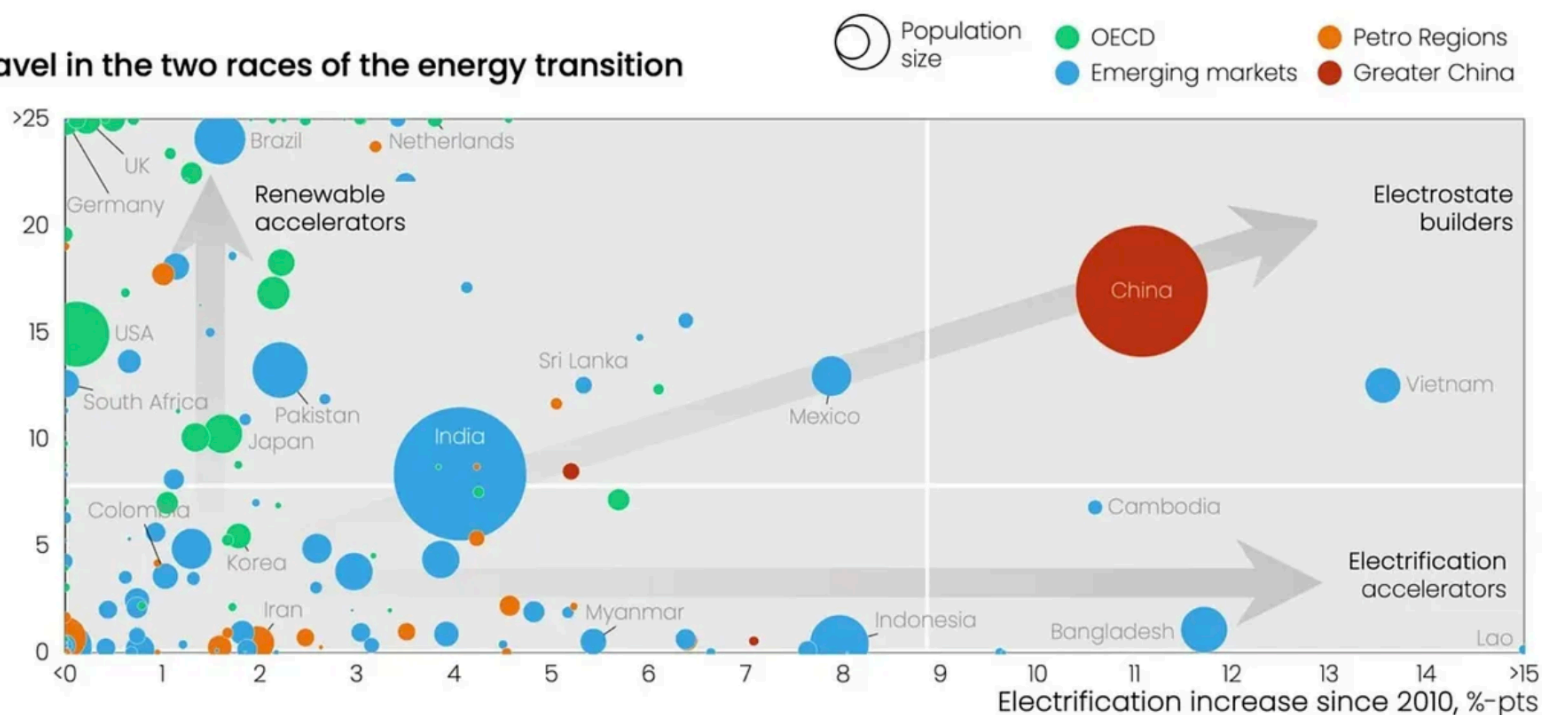
[FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]

The electrification imperative

Many countries are building renewables; few an electrostate

Direction of travel in the two races of the energy transition

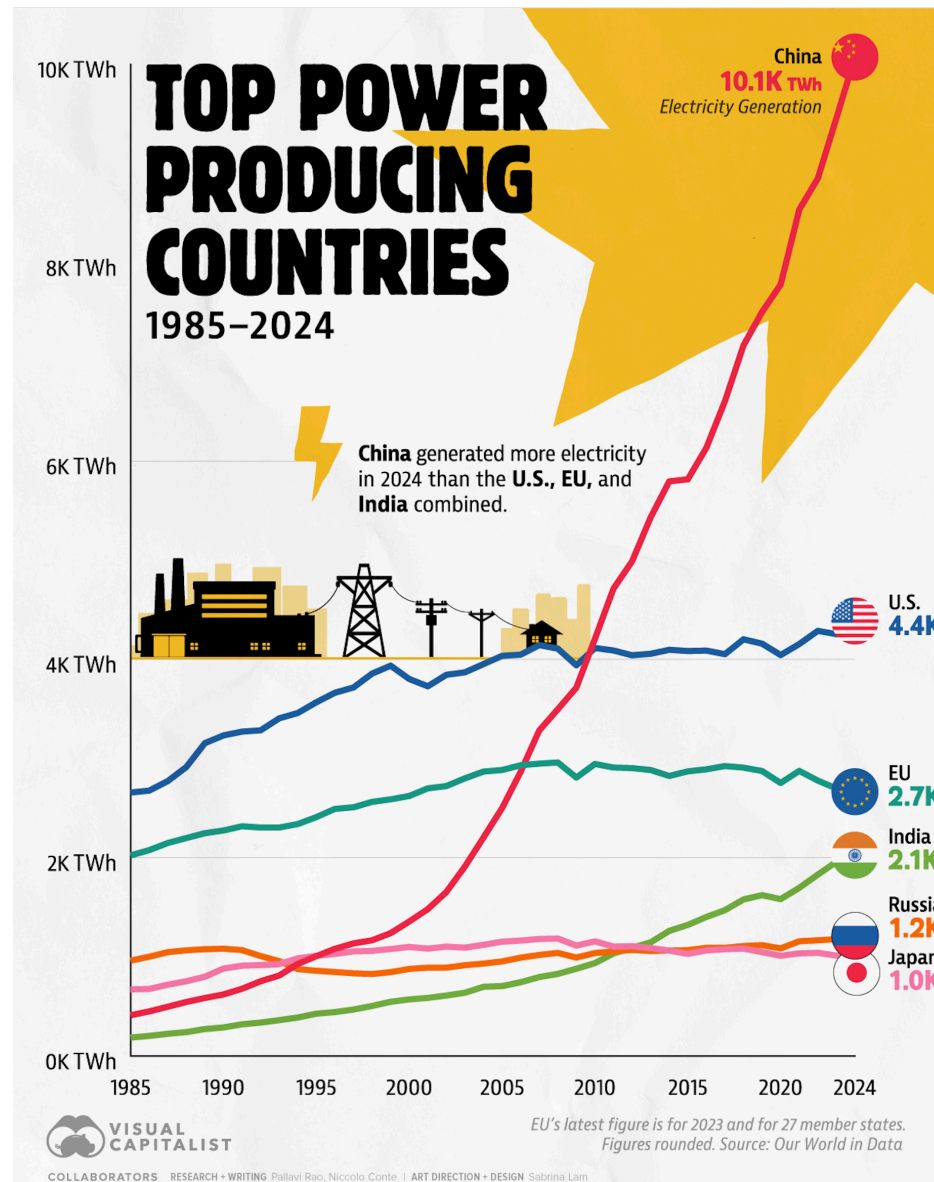
Wind & solar generation share increase since 2010, %-pt



Sources: IEA WEB; Ember; Ember analysis • Note: Shown values cut off at 0-25% for wind & solar and 0-15% for electrification rates



“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (5) [FONTE: Visual Capitalist, 2024]

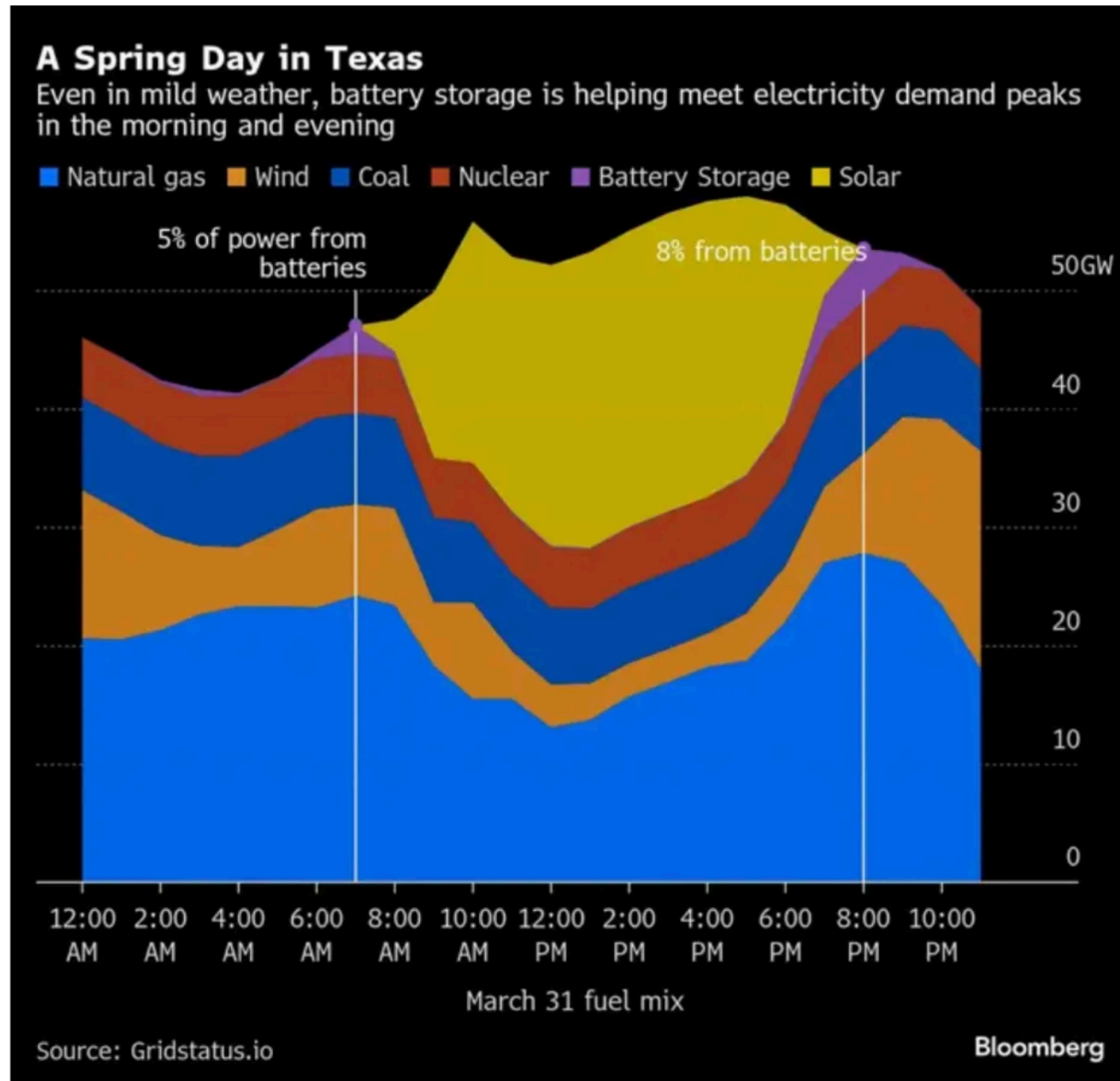


“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (6) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]

But think for a second about it, and you realize that the vision of electrostate development is not inherently confined to particular states and countries. When coal and hydro were the cheapest means of generating electricity and gas could not be shipped long-distance except by pipeline, the advantage in electrification was with mountainous countries with suitable rivers and with those with large coal deposits. But the advent of LNG and the arrival of renewables and batteries mean that electrification is now an option for everyone, everywhere.

Who would not choose versatile electric power, especially if it can be provided from clean and cheap sources? The Soviet Union was an electrical engineering powerhouse, where the PRC's first generation of electrical engineers learned their trade. Brazil is a hydro power. The Gulf states have been eager importers of Chinese solar panels and batteries. In the United States, the state of Texas is the leading generator of utility scale renewable energy. For long stretches of the day, America's largest producer of oil and gas, runs its electricity grid heavily on solar and wind supported by batteries.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (7) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]



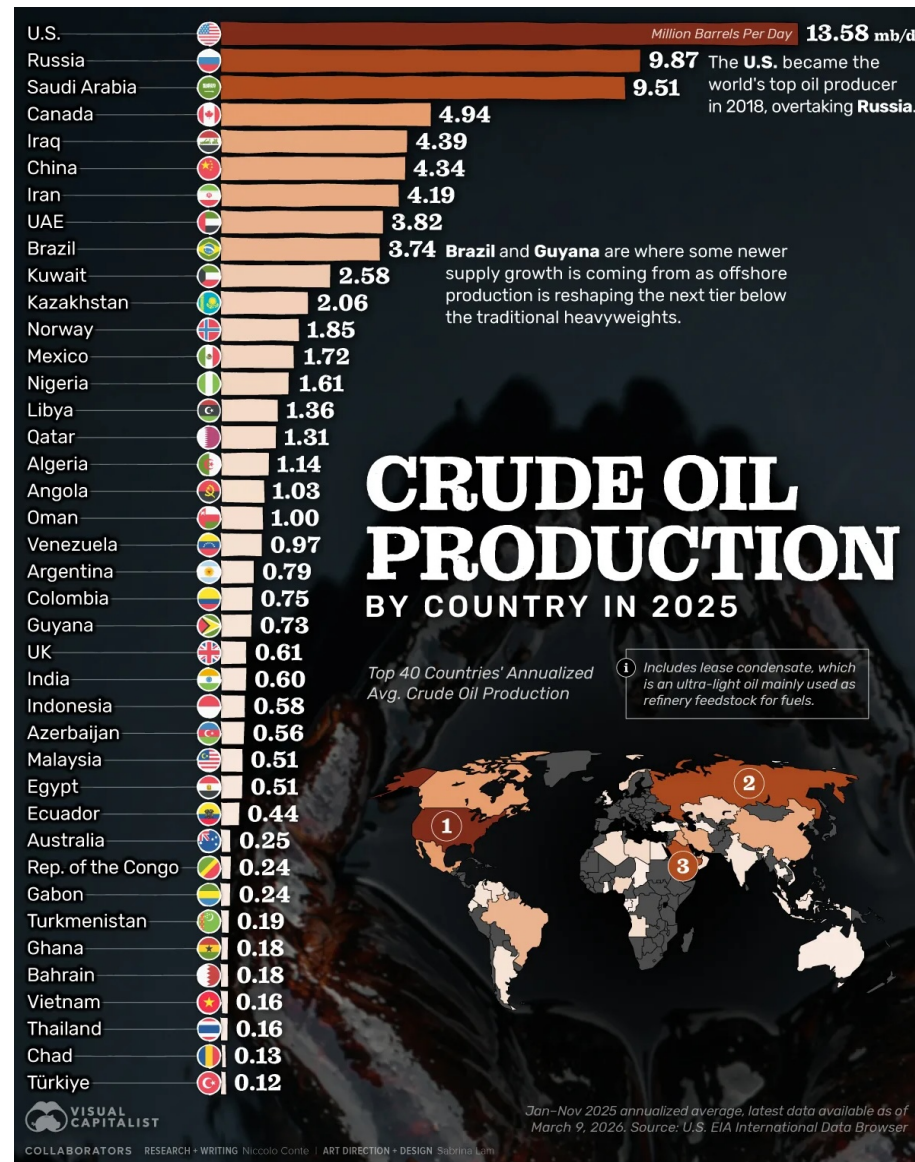
“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (8) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]

In short, any economy can be an electrostate. Whether you produce huge quantities of oil, gas or coal, makes no difference. The degree to which you are an electrostate is an expression not of underlying factor endowments, or of economic structure, but of economic and governmental rationality. It is a complex index of your capacity for modern economic and technological development. The US is not not an electrostate. It is an electrostate, just one that is slouching rather than racing towards the new era of ultra-low cost electric power.

Nevertheless, it has been increasingly common to dub the US a petrostate. Generally, this isn't meant kindly. Why?

The shale revolution has turned the United States into the leading oil and gas producer in the world. And into a major exporter. But the term “petrostate” was generally a designation reserved for economies and states that are dependent on oil and gas to generate rents (GDP), valued added (GDP), export earnings (dollars), or government revenue (taxes), or all four. To be designated a petrostate, in other words, means that you were at a relatively low level of economic development, or a low-level of state capacity.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (9) [FONTE: Visual Capitalist, 2025]



“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (10) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]

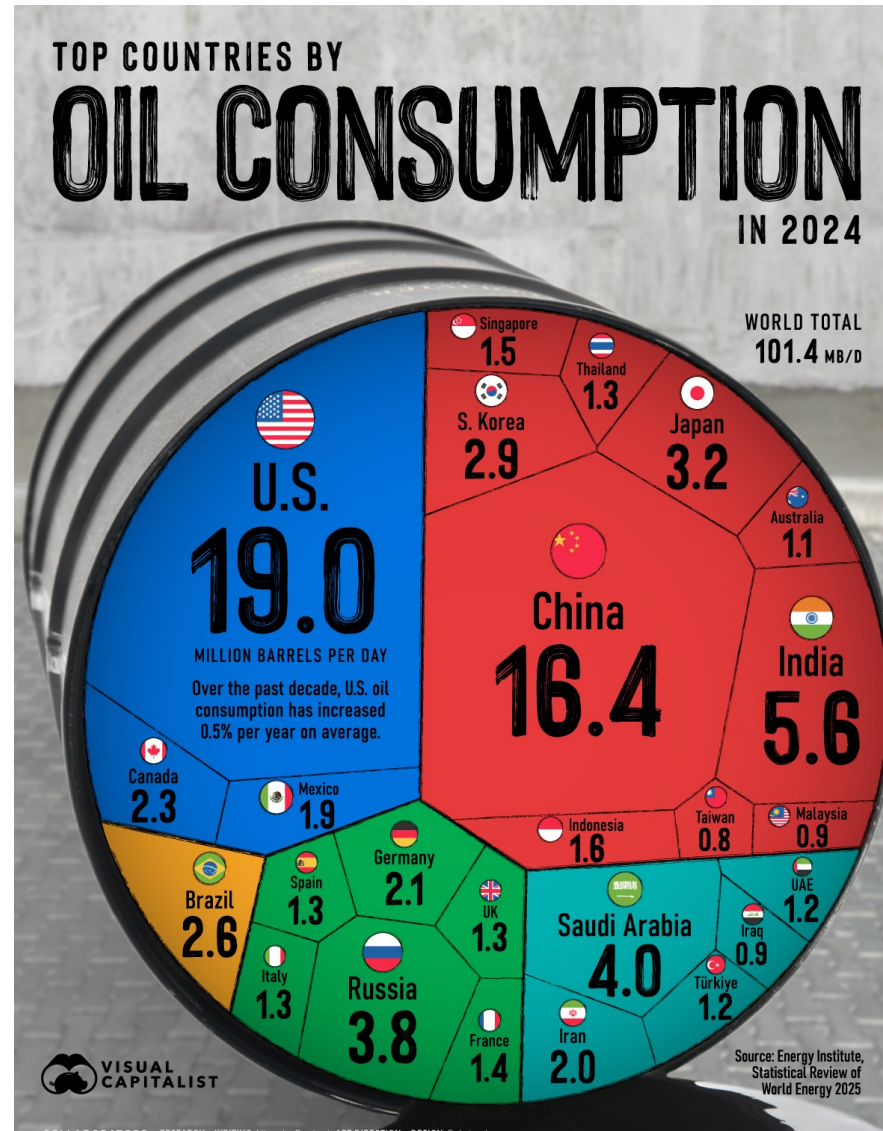
The designation of petrostate applies to an economy like that of Angola. It can be sensibly applied to the Gulf states, though they have worked hard to diversify their economies. Officially, oil and gas account for “only” somewhere between 40 and 50 percent of the Saudi economy. Saudi Arabia isn’t a city state. It is a county of 32 million inhabitants. At a pinch the designation as “petrostate” can be applied to Russia, particularly on the government revenue and export earnings side. But in the classic sense, it really does not make much sense when applied to the US. The American Petroleum Institute credits its own lobby - the oil and gas industry - with a \$1.8 trillion contribution to US GDP 2021 or 7-8 percent. In Texas, oil and gas account for 15-16 percent of GDP. That is significant but not large enough to qualify even Texas as a petrostate in the strong sense of the word. If pundits and politicians choose to talk about the US as though it were a “petrostate” that is for political reasons. It is a matter of “discursive construction”, rather than an obvious economic fact. The strength of the US fossil fuel lobby needs explaining not taking for granted. And as for the contrast to electrostates is concerned, Texas may be responsible for 42 percent of US oil and gas production. But it is also America’s leading producer of renewable electricity and a pioneer in the deployment of battery power. Why? Because it makes economic sense.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (11) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]

What is truly distinctive about the USA as an oil and gas producer, and what puts the designation as a “petrostate” back in play, is not so much the production side, as the demand-side. The US economy is not just the leading oil producer in the world, producing over 13 m barrels per day, it is also the number one oil consumer, with demand running at c. 19-20 m barrels per day, roughly 20 percent of global demand. By comparison China consumers 15-16 m barrels, and produces at home no more than 4 m barrels. The EU consumes 10 m barrels per day and produces barely half a million. Saudi Arabia produces around 9.5 m barrels per day and consumers only 3.5 m barrels. Russia produces just short of 9 m barrels per day and consumes around 3.9 m barrels.

So this sets up three different positions with regard to the fossil fuel future. China and the EU have every reason to look for ways to replace imported oil with home generated (clean) electric power. Hence the compelling logic of China’s electrostate development and the puzzle as to why Europe is not pushing far harder in the same direction. In any case, the trend seems clear. Expect the EU and China to conform ever more comprehensively to the electrostate model.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (12) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]



“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (13) [FONTE: Adam Tooze, Chartbook /Substack, 2/04/2026]

If this were to be the future it would be highly significant not only for its immediate impact, but also for the way that it scrambles normal models of causation. The petrostate designation was after all based on a naturalistic model of economic development driven by factor endowments. Petrostates precisely in being determined by their natural endowments were also in some more “primitive” than diversified economies that survived and prospered through finding niche in the division of labour. If the United States chooses to use its endowment of fossil fuels and the size of its economy to freeze in place the early 20th-century status quo and thus to fall more and more out of step with global electrotech development, that will not be a natural fact, but a matter of political choice. The US would be the pioneer of a novel form of “closed petrostate”.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (14) [FONTE: FT,10/10/2025]

Energy sector [Add to myFT](#)

The ‘profound’ global impact of China’s rise as an electrostate

The country’s companies now dominate many clean technology industries



© Xu Changliang/VCG via Getty Images

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (15) [FONTE: FT,10/10/2025]

Chinese solar panel exports reached 236GW in 2024, more than triple the volume of 2019, and should hit a new record high again this year, according to data from French bank Natixis and Ember Research, a UK think-tank. In Africa, imports of Chinese-made solar panels in the year to the end of June topped 15GW, an increase of 60 per cent from the prior 12 months, Ember data also showed.

The statistics, however, highlight just one of a panoply of clean-technology industries now dominated by China.

Similar trends — of booming Chinese cleantech exports — can be found across electric vehicles and trucks, batteries, wind and gas turbines, and small-scale nuclear reactors as well as transformers and other key electricity transmission equipment for modern power grids.

Tim Buckley, director of Climate Energy Finance, a Sydney-based research group focused on China, says the country’s long-term cleantech ambition is “profound” and stands in stark contrast to Beijing’s rival superpower, the US, where President Donald Trump has embraced fossil fuel industries and gutted his predecessor’s support for renewable energy.

“I think China is using it in a very, very geopolitically savvy way, taking advantage of America’s stupidity and regression back into a petrostate,” he says, adding: “China just wins. America has abrogated the playing field.”

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (16) [FONTE: FT,10/10/2025]

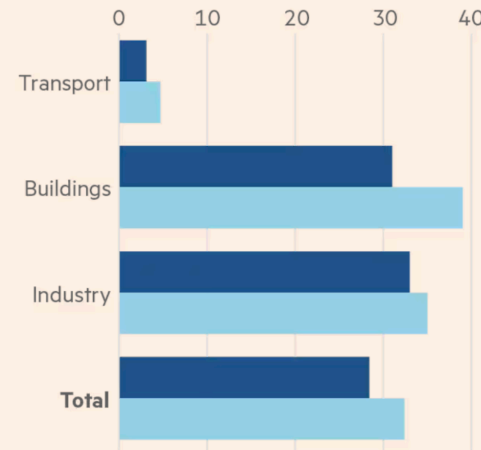
“I think China is using it in a very, very geopolitically savvy way, taking advantage of America’s stupidity and regression back into a petrostate,” he says, adding: “China just wins. America has abrogated the playing field.”

China’s clean energy development

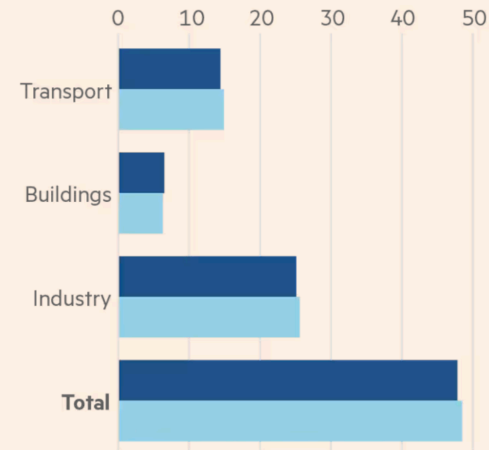
Electrification



Electricity as a % of total final energy consumption



Final fossil fuel energy consumption (exajoule)



Source: China Energy Transition Review 2025
© FT

From one perspective, China’s path to electrification and consequent dominance of clean tech industries makes for impressive, if not alarming, reading.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (17) [FONTE: FT,10/10/2025]

Taken together, these achievements have led to analysts referring to China as the world’s first significant “electrostate”, a global manufacturing superpower with a rising share of industry coming from electricity — rather than fossil fuels — and an economy increasingly driven by clean technologies.

Recommended



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says, adding: “China is serious about this shift. When it sets a direction and commits, it rarely turns back.”

While China’s energy transition has been welcomed by environmental groups, Christoph Nedopil Wang, a China energy and finance expert with Australia’s Griffith University, in the Ember report highlights the underlying strategic reasons for Beijing’s decarbonisation efforts.

“First, it locks in China’s role as the global manufacturing hub for the clean energy age. Second, it fixes a major vulnerability — reliance on imported fossil fuels,” he

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (18) [FONTE: FT,10/10/2025]

And yet from a different perspective, on the ground in China, the path to becoming an electrostate has myriad complexities that are far from being resolved.

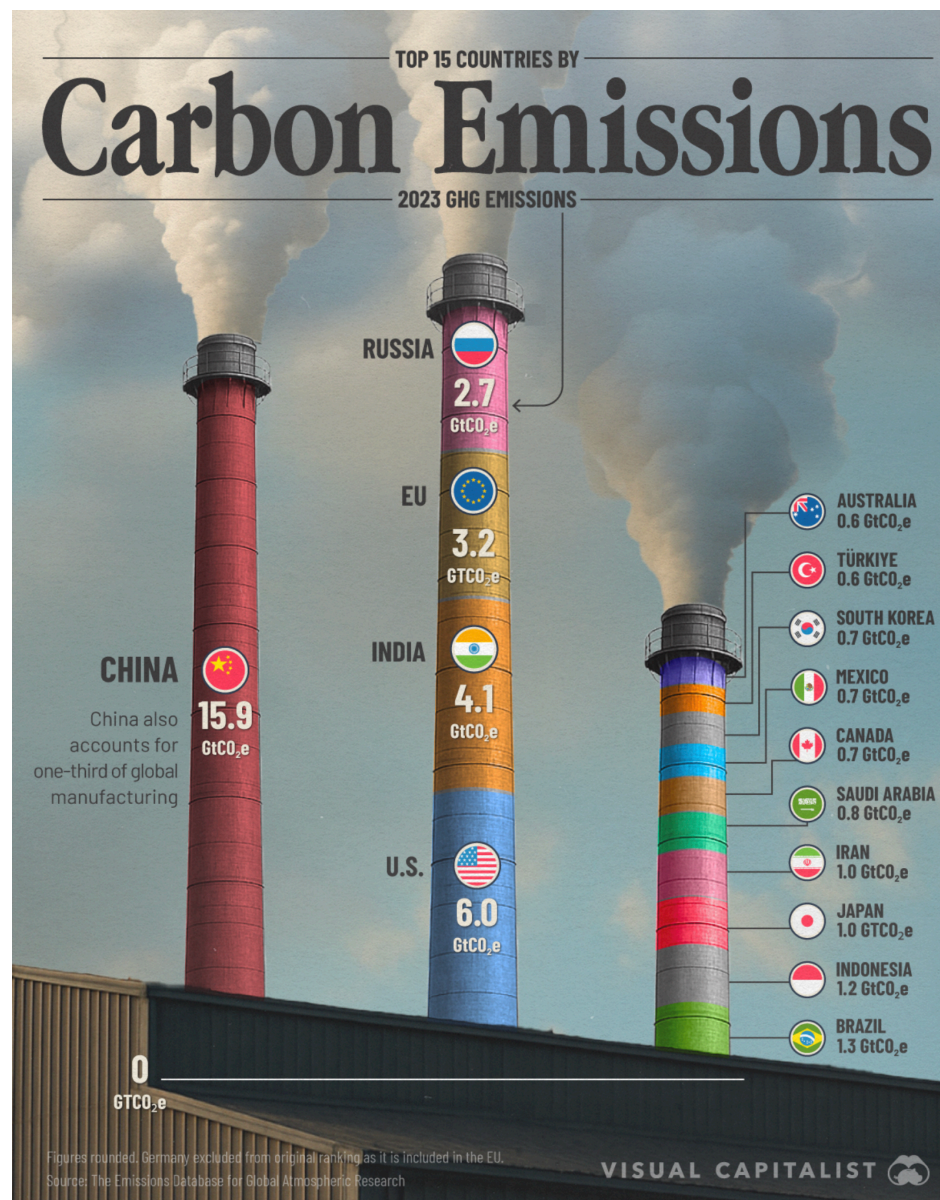


The development of cleantech in China will enable it to eradicate its reliance on fossil fuels such as coal © China OUT/AFP via Getty Images

Among the key challenges is reducing the use of coal in electricity generation and for thermal use in the country’s heavy industries, including making steel and cement.

China consumes about half the world’s coal and has long faced criticism from western officials and climate campaigners that, despite its progress in renewable energy, it remains too slow in cutting coal use.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (19) [FONTE: Visual capitalist, 2023]



“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (20)

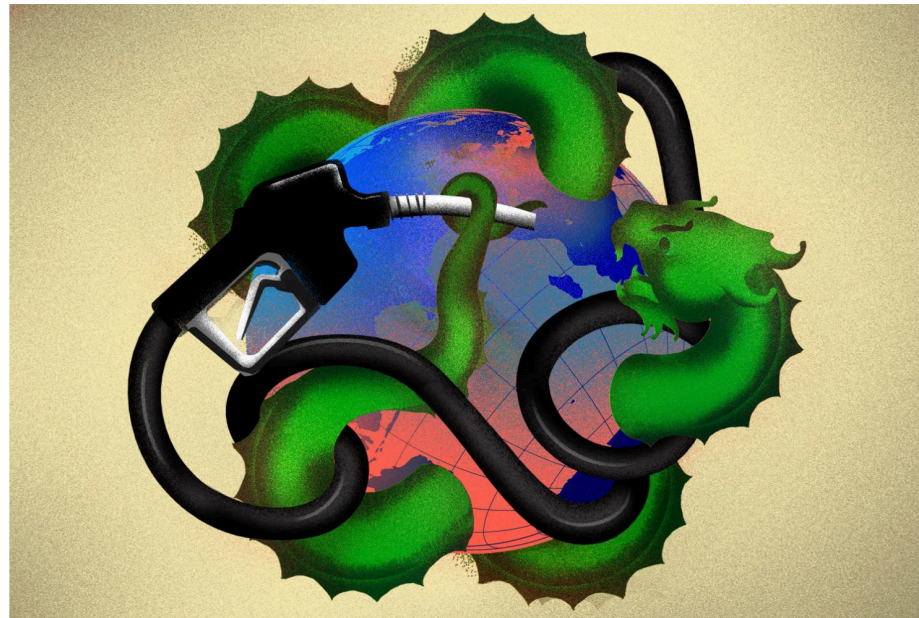
[FONTE: Nils Gilman /

Foreign Policy, 23/03/2026]

Electrostates vs. Petrostates

China is building a new green bloc, while the United States is doubling down on oil.

March 23, 2026, 12:02 AM



An illustration shows a green dragon grappling with a gas pump, both wrapped around a globe.

Brian Stauffer illustration for Foreign Policy

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (21) [FONTE: Nils Gilman / Foreign Policy, 23/03/2026]

Canadian Prime Minister Mark Carney didn't come to the World Economic Forum in Davos, Switzerland, in January to offer hope. He came to pronounce a death. The liberal international order—that elaborate architecture of institutions, norms, and U.S.-guaranteed public goods constructed in the aftermath of World War II—was over, he announced, and the rupture was irreversible. But Carney's [eulogy](#), sober and precise as it was, understated the depth of the break.

U.S. President Donald Trump isn't merely ending a set of diplomatic arrangements or a particular configuration of great-power relations. He is presiding over the end of the fossil-fueled model of industrial civilization that made the liberal order possible, profitable, and, for a time, politically sustainable. Trump didn't initiate the decline of fossil fuels' global metabolic hegemony; it was instigated by the manifest instability posed by climate change and rivalrous oil-access impediments like the U.S.-Israeli war on Iran. But he has ensured a rivalrous competition, rather than a smooth transition, to replace it.

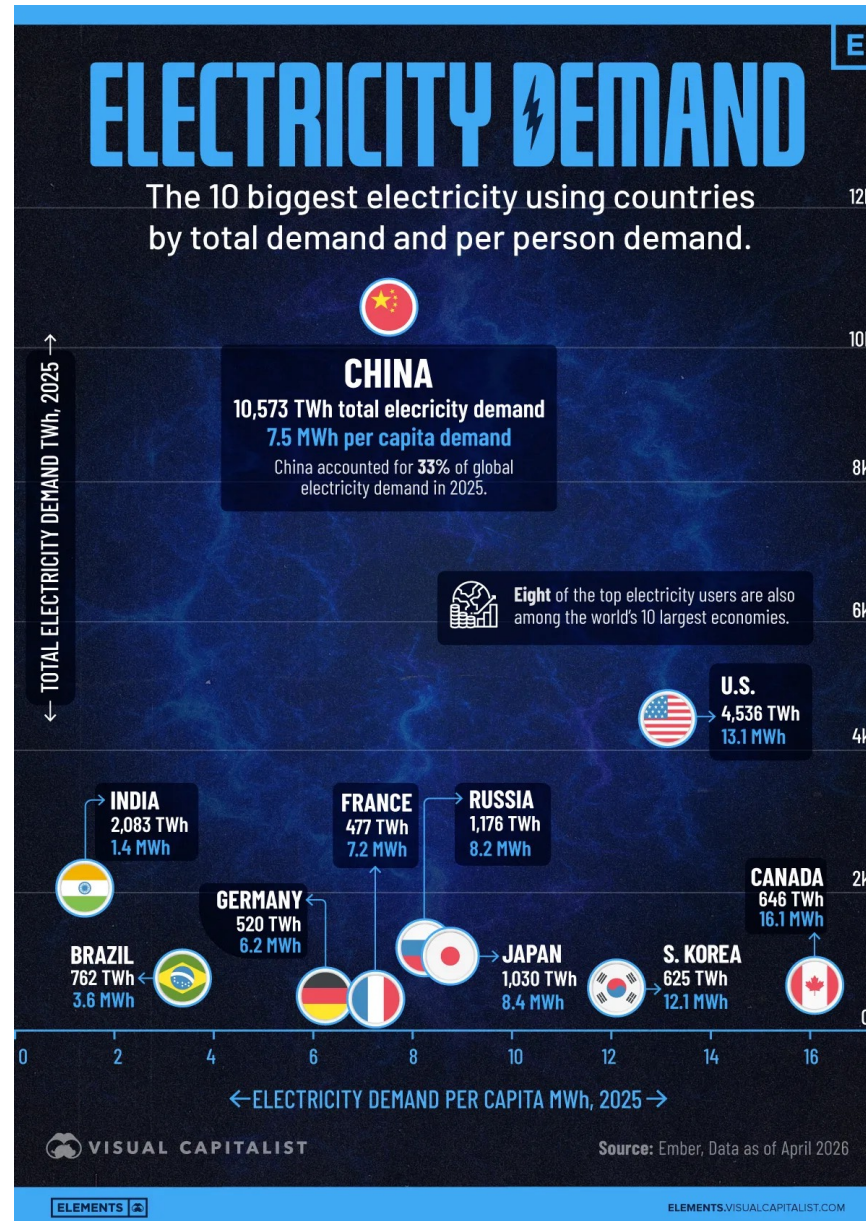
“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (22) [FONTE: Nils Gilman / Foreign Policy, 23/03/2026]

The liberal international order’s replacement thus won’t be negotiated in Geneva or adjudicated in The Hague. It will be determined by who controls the energy flows, mineral deposits, and technological systems on which all modern life now depends.

This is an **ecological cold war**, and it differs from its predecessor in ways that matter enormously. The original Cold War was a contest between liberal capitalism and Soviet communism—between two theories of how human societies should develop themselves economically and organize themselves politically. The new cold war is a contest between competing metabolisms.

On one side, the Green Entente: China and an emerging electrostate bloc, which has bet its industrial future on solar panels, batteries, and the vast mineral supply chains that feed them. On the other, the Axis of Petrostates: the United States under Trump, Russia, and the Gulf monarchies, which have staked their power and fiscal survival on prolonging the fossil fuel era and weaponizing energy abundance against those who would end it.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (23) [FONTE: Visual Capitalist, 2025]



“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (24) [FONTE: Nils Gilman / Foreign Policy, 23/03/2026]

Ideology still matters at the margins—but it cuts across these blocs rather than defines them. As during the Cold War, the winner in the struggle may well be determined not as much by the actions of the superpowers themselves as by the choices of the nations caught between them: what Carney called, with characteristic understatement, the middle powers.



A giant oil refinery at night with a U.S. flag on it.

An aerial view of Marathon Petroleum's refinery in Carson, California, one of the largest oil refineries in North America, on March 10. David McNew/Getty Images

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (25)

[FONTE: Nils Gilman /

Foreign Policy, 23/03/2026]



Workers wearing red walk through water underneath rows and rows of solar panels.

Workers check solar panels installed in a lake in Tianchang, in China's eastern Anhui province, on Jan. 12. AFP via Getty Images

Opposing the petrostates will be the Green Entente, dominated by China. While the United States and its new compadres retreat into retro fuels, Beijing has positioned itself to dominate the emergent post-carbon energy system.

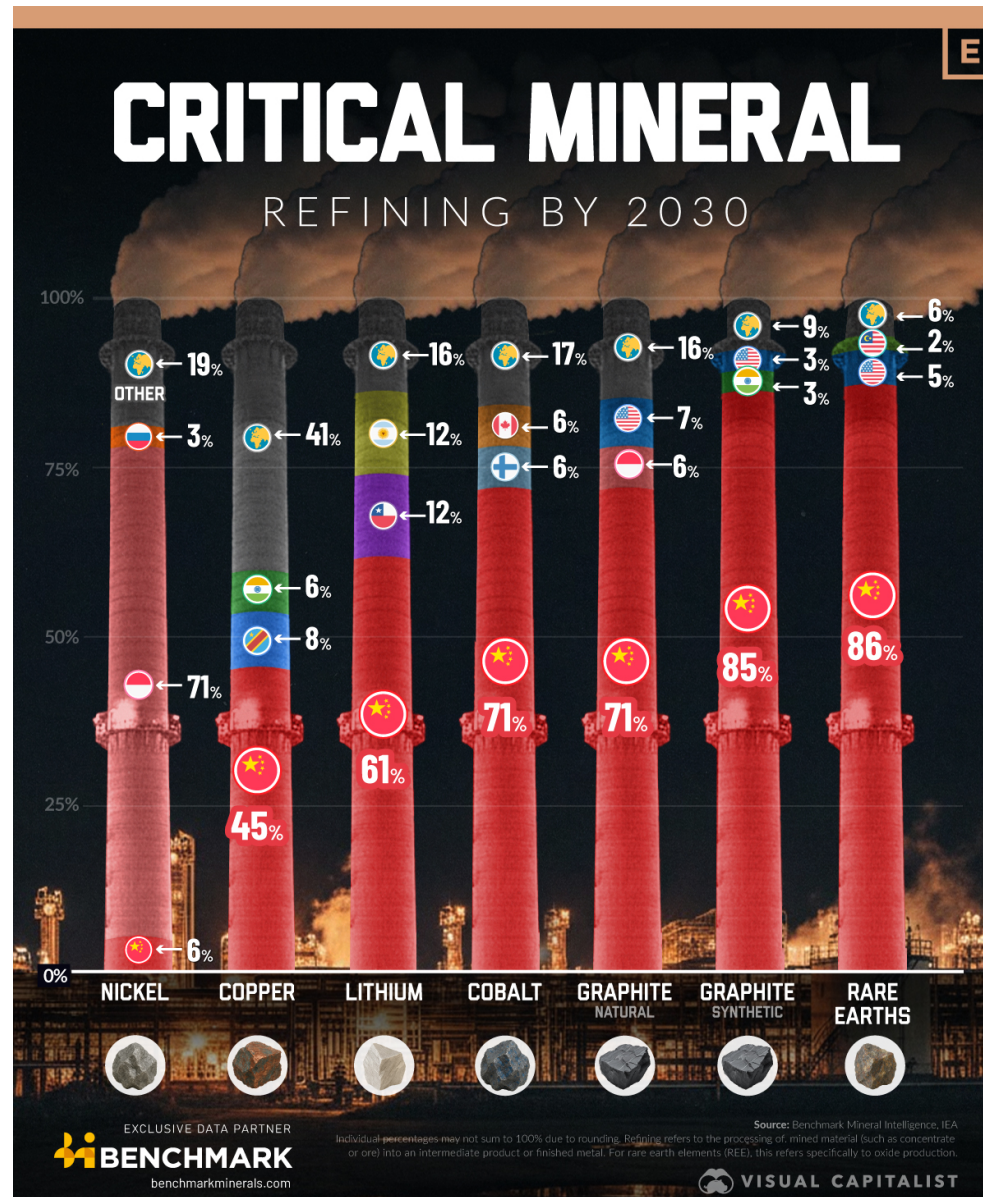
“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (26)

[FONTE: Nils Gilman /

Foreign Policy, 23/03/2026]

Born of a technocratic ambition to secure regime legitimacy and capture the industries of the future, China dominates every link in the green industrial value chain: According to the International Energy Agency, China **controls** more than 90 percent of global processing of rare earths and 94 percent of the production of permanent magnets (essential for electric vehicle motors and wind turbines); its share in manufacturing solar panels **exceeds** 80 percent; and it **produces** more than 70 percent of all EV batteries and also **accounts for** over 70 percent of global EV production. Nine-tenths of China's **investment growth** in 2025 was in the green energy sector. It has also decoupled this growth from Western demand: Some 47 percent of China's green tech exports now **flow to emerging markets**, making it the indispensable partner for countries across the global south, from **Africa** to **Latin America**. In short, by leveraging its **authoritarian developmental state**, China has gone in less than a generation from the world's greatest environmental villain to its green tech hegemon.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (27) [FONTE: Visual Capitalist, 2025]



“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (28)

[FONTE: Nils Gilman /

Foreign Policy, 23/03/2026]

The European Union, having suffered from its reliance on Russian natural gas and now facing a [parallel dependence](#) on a belligerent United States (which also happens to have tens of thousands of troops stationed on European soil), has a strong strategic incentive to join the Green Entente. The logic behind this alignment would be pragmatic: Europe provides affluent markets, while China provides the industrial muscle. The same applies to countries such as India and Japan, respectively the fourth- and fifth-biggest economies in the world, which rely on imports for most of their oil.

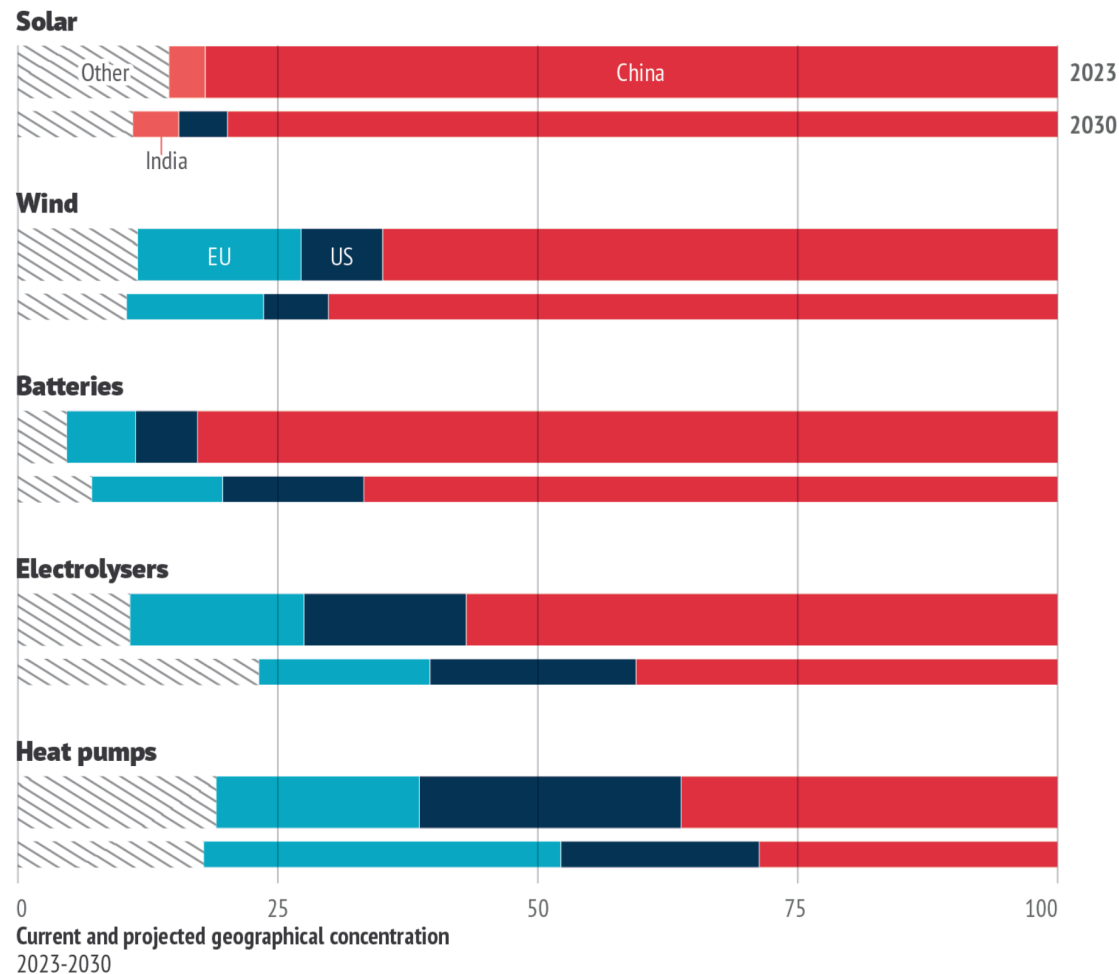
The trouble, of course, is that joining this bloc isn't a simple trade agreement; it effectively means entering a hierarchical system led by Beijing. Because China has secured a massive (perhaps even [insurmountable](#)) lead in both green power generation and transport systems, any country seeking to go green is essentially forced to adopt Chinese hardware and standards. From this perspective, the Green Entente could represent the emergence of what Joel Wainwright and Geoff Mann have labeled the “[Climate Leviathan](#)”: a global system where the climate emergency is used as a pretext for a new form of command-and-control dominance, in which tribute is paid in technological dependency and the risk of political blackmail at the hands of what is also a deeply illiberal and nationalistic regime in Beijing.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (29) [FONTE: European Union

Institute for Security Studies, 8/05/2024]

Clean tech hubs

The EU trails far behind China in manufacturing clean technologies



“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (30)

[FONTE: European

Environment Agency, 23/04/2026]

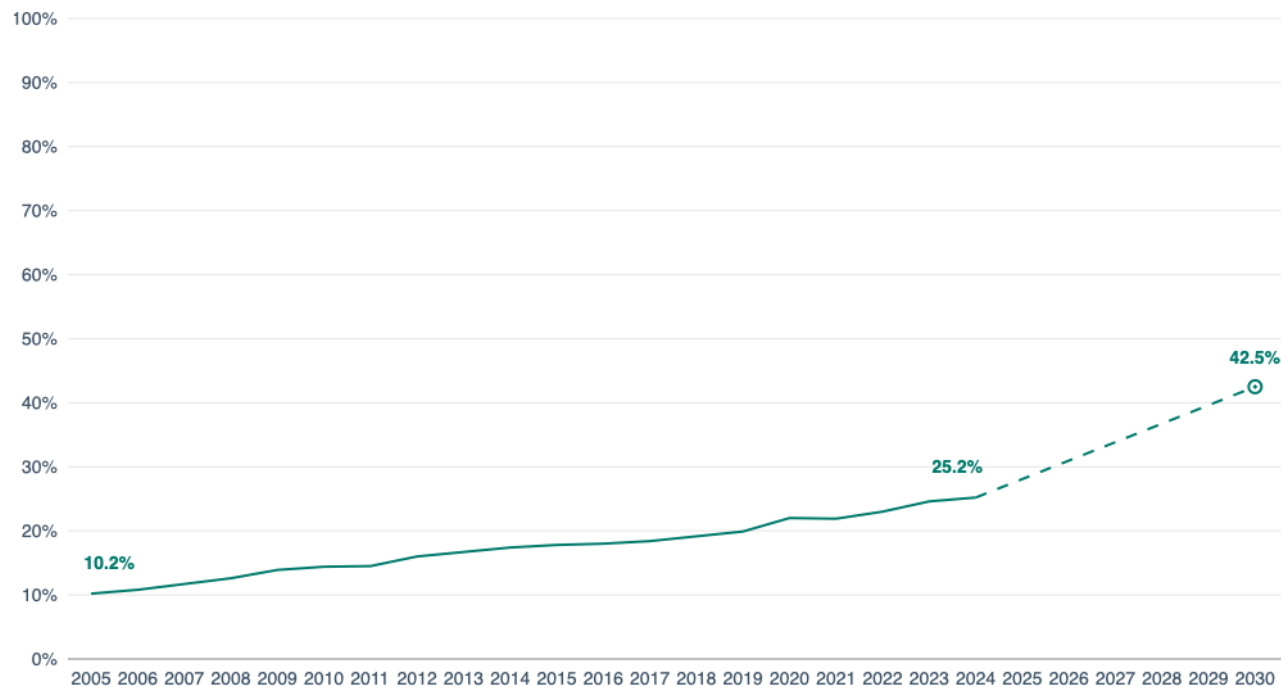


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Share of energy consumption from renewable sources in Europe

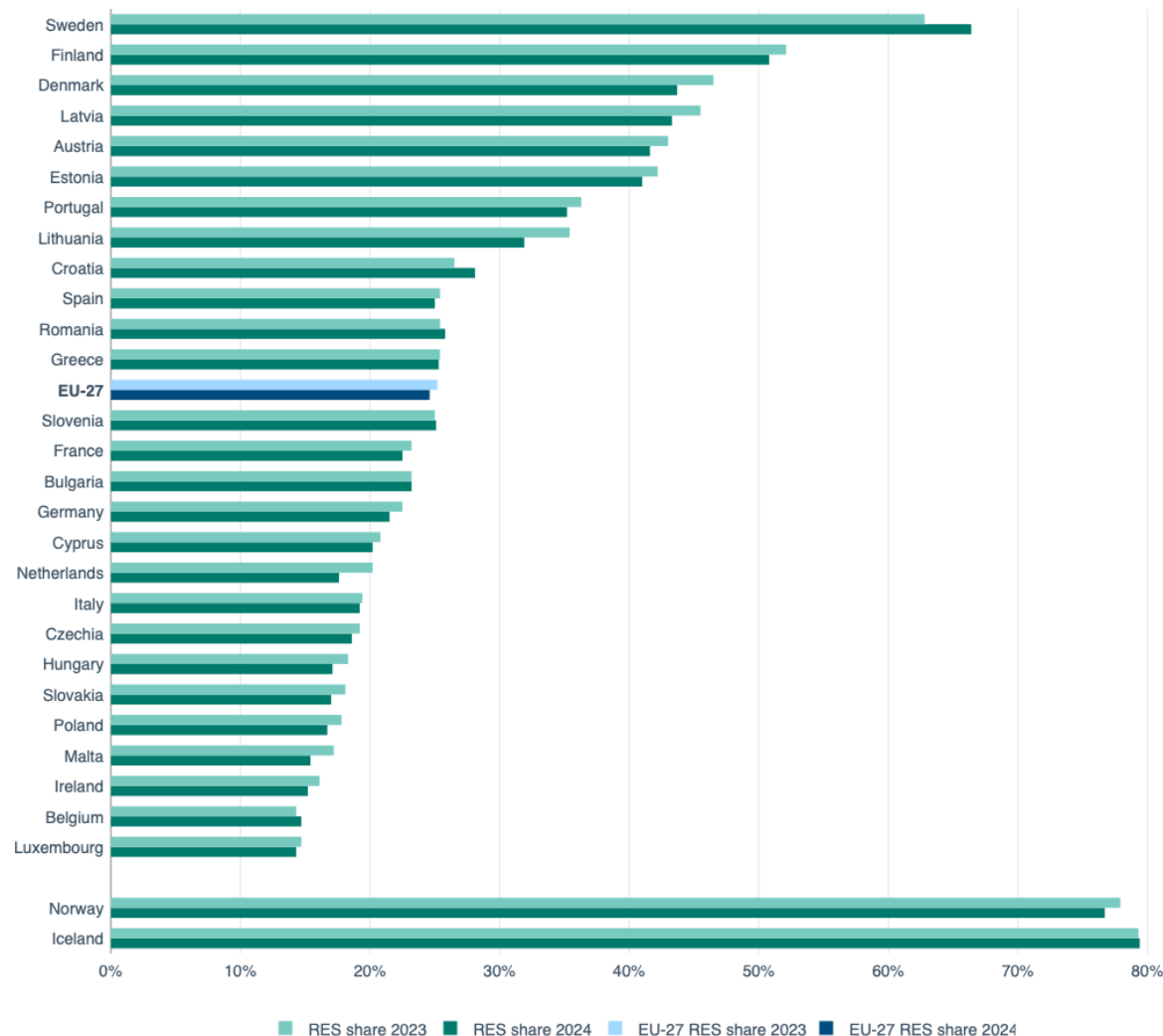
Published 23 Apr 2026



— Share of renewable energy sources (RES) - - Linear trajectory to 2030 RES target ○ RES target for 2030

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (31) [FONTE: European Environment Agency, 23/04/2026]

Share of energy from renewable sources, by country



“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (32) [FONTE: Nils Gilman / Foreign Policy, 23/03/2026]

Ultimately, the choice for the middle powers comes down to what kind of modernity they want to inhabit. The petrostate bloc offers a backward-looking, carbon-intensive vision in which the weak and the small are firmly subordinated to the strong and the large—a world where energy abundance is weaponized as clientelism, where cheap oil buys loyalty, and where the infrastructural lock-in of a thousand procurement contracts slowly forecloses the future.

Joining a China-led Green Entente offers something formally more progressive: a forward-looking, post-carbon model that takes seriously the physical constraints of a warming planet. But it, too, carries a dark shadow—the potential subordination of national metabolic sovereignty to a Beijing-centered supply chain architecture that trades one form of dependency for another. This is a strategic abyss: to align with the aggressive, decaying past or the efficient, neo-totalitarian future.

What makes this moment historically distinctive is that the choice isn't primarily ideological. The original Cold War was, at its core, a contest between competing theories of how human societies should organize themselves—democracy versus communism, markets versus planning, individual liberty versus collective mobilization.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (33) [FONTE: George Gessert / Noema, 16/03/2026]

Climate Leviathan

George Gessert • 16 March 2026



Violet Ray, The Book of Job, 2018

Geoff Mann and Joel Wainwright, *Climate Leviathan*, London and New York, Verso, 2018. ISBN-13: 978-1-78663-431-3 (UK EBK)

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (34) [FONTE: George Gessert / Noema, 16/03/2026]

Geoff Mann and Joel Wainwright, both professors of Geography, consider how climate change may fundamentally reshape societies. They ground their projections in Marx and Gramsci, and in Hobbes, who maintained that human beings collectively dread civil war more than anything else. To avoid a war of all against all, people invest power in a sovereign who can maintain the peace.

Hobbes called this sovereign “Leviathan”, or the multitude united in one person. For Hobbes, Leviathan was a king. For Carl Schmitt Leviathan was Hitler. Schmitt was a 20th century German political theorist who admired Hobbes, and whom Mann and Wainwright cite frequently. Other Leviathans are possible, including democratically elected ones, and Leviathans consisting of groups of peers.

The authors ask what sorts of sovereigns climate change will bring about. Or alternatively, is it possible that climate change will allow for the emergence of social systems without sovereigns, systems such as our hunter-gatherer ancestors had, and, contrary to Hobbes, many indigenous peoples still have today? Mann and Wainwright make the necessary disclaimers – our knowledge is imperfect, we cannot know the future, and so on – but predict that waves of climate-caused shocks and disruptions will undermine and eventually destroy enough of our present-day arrangements that new kinds of sovereigns will emerge.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (35) [FONTE: George Gessert / Noema, 16/03/2026]

Both capitalism and climate change are global, so the most probable sovereign, according to the authors, will be planetary, possibly emerging from the United Nations. The authors call this global sovereign “Climate Leviathan.” It would consist of a “collection of peers coordinated to ‘save the planet’” who will decide “what and who must be sacrificed in the interests of life on Earth.”

The authors do not spell out these sacrifices, except to say that “ways of life and communities will be lost” and that Leviathan “will determine whose lives will be sacrificed in the universal interest.” How many lives will be lost? Thousands? Millions? Billions? Would Climate Leviathan maintain oases of affluence in a wrecked Earth? Mann and Wainwright do not engage in such speculation, but assure us that many of today’s elites already favor something like Climate Leviathan, which they see as a means of retaining their wealth and power.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (36)

[FONTE: George Gessert

/ Noema, 16/03/2026]

Like all sovereigns, Climate Leviathan would aim for hegemony, and could conceivably achieve it for an enormous span of time through geo-engineering, in particular solar radiation management (SRM). SRM involves injecting sulfate aerosols into the atmosphere to modify Earth's albedo. These synthetic aerosols would reflect sunlight away from Earth's surface, and if all went well, would lower temperatures. The operative word here is “if”. SRM is rife with uncertainties. It would be a radical experiment on the planet, undertaken so that we do not have to fundamentally change our political-economic system. Under the umbrella of SRM, the capitalist system, which is predicated on unlimited growth, might continue to pour greenhouse gases into the atmosphere, and thus lock our species into managing Earth's atmosphere for millenia.

A second response to climate change could be Climate Behemoth. Unlike Leviathan, which would be global and in some circumstances might heed science and observe democratic forms, Behemoth would be nationalistic, authoritarian, and impervious to reason. Arguably a form of Behemoth has come into being in the US today under Trump, whose power rests on an alliance between those portions of the capitalist class with ties to fossil fuels, and allies among the middle and working classes who are nationalistic and dependent on fossil fuels for jobs and inexpensive goods and services.

“Electro-Estados versus Petro-Estados”: a nova geopolítica da energia (37)

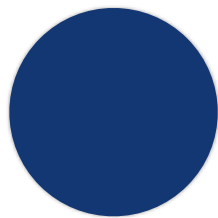
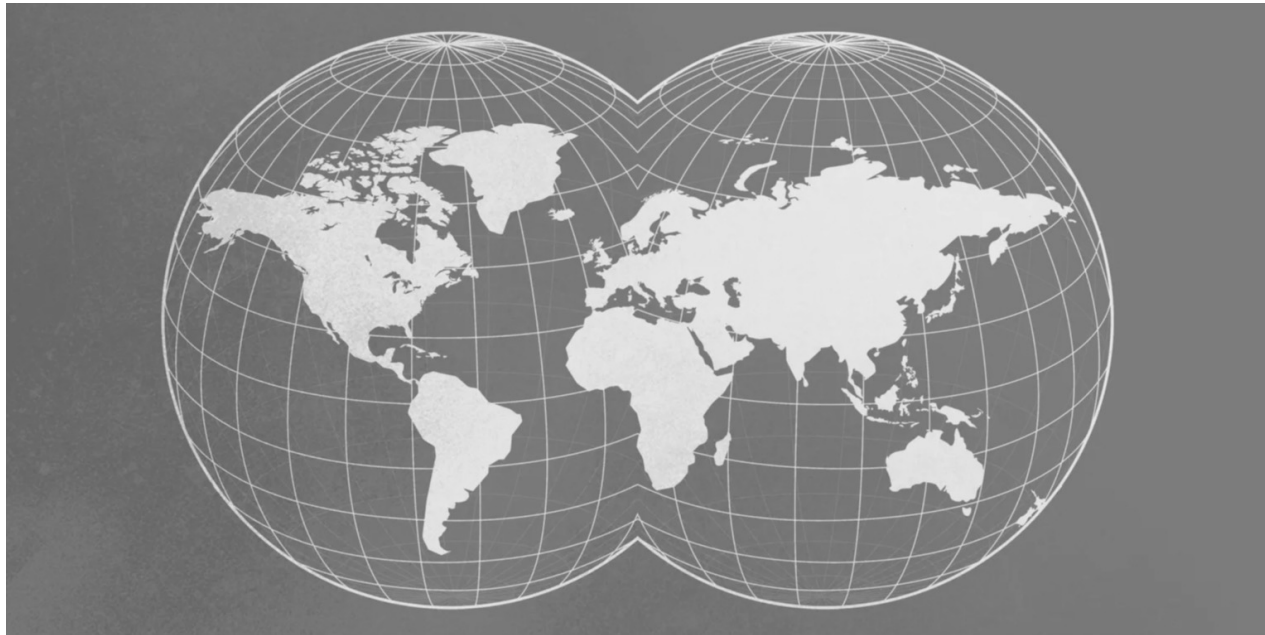
[FONTE: George Gessert

/ Noema, 16/03/2026]

Islam, according to the authors, tends toward Behemoth. They quote bin Laden to suggest that an Islamic Behemoth might respond to climate change with religious justifications for terror and unrestricted killing of nonbelievers. This possibility deserves careful study, but the authors do not provide it. They devote only a few pages to religion.

A third possible future is Climate Mao, or “a non capitalist authority along Maoist lines... [that uses] just terror in the interests of the future of the collective.” The appeal of Climate Mao is that it might answer the need for very rapid state-led reductions in greenhouse gas emissions in time to avoid the worst outcomes. At present China is moving toward capitalism, which would imply a Chinese Leviathan or Behemoth. However, according to the authors Climate Mao could still arise in China.

The fourth and last possibility, which the authors favor even while acknowledging its improbability, is Climate X. This would be “a just response” characterized by equality, inclusiveness, and solidarity without sovereignty. Diverse expressions of Climate X can be found in Naomi Klein’s *This Changes Everything*, Pope Francis’s *Laudato Si*, writings and statements of indigenous peoples, and the climate justice movement.



PARTE II – NOTAS BREVES

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (1)

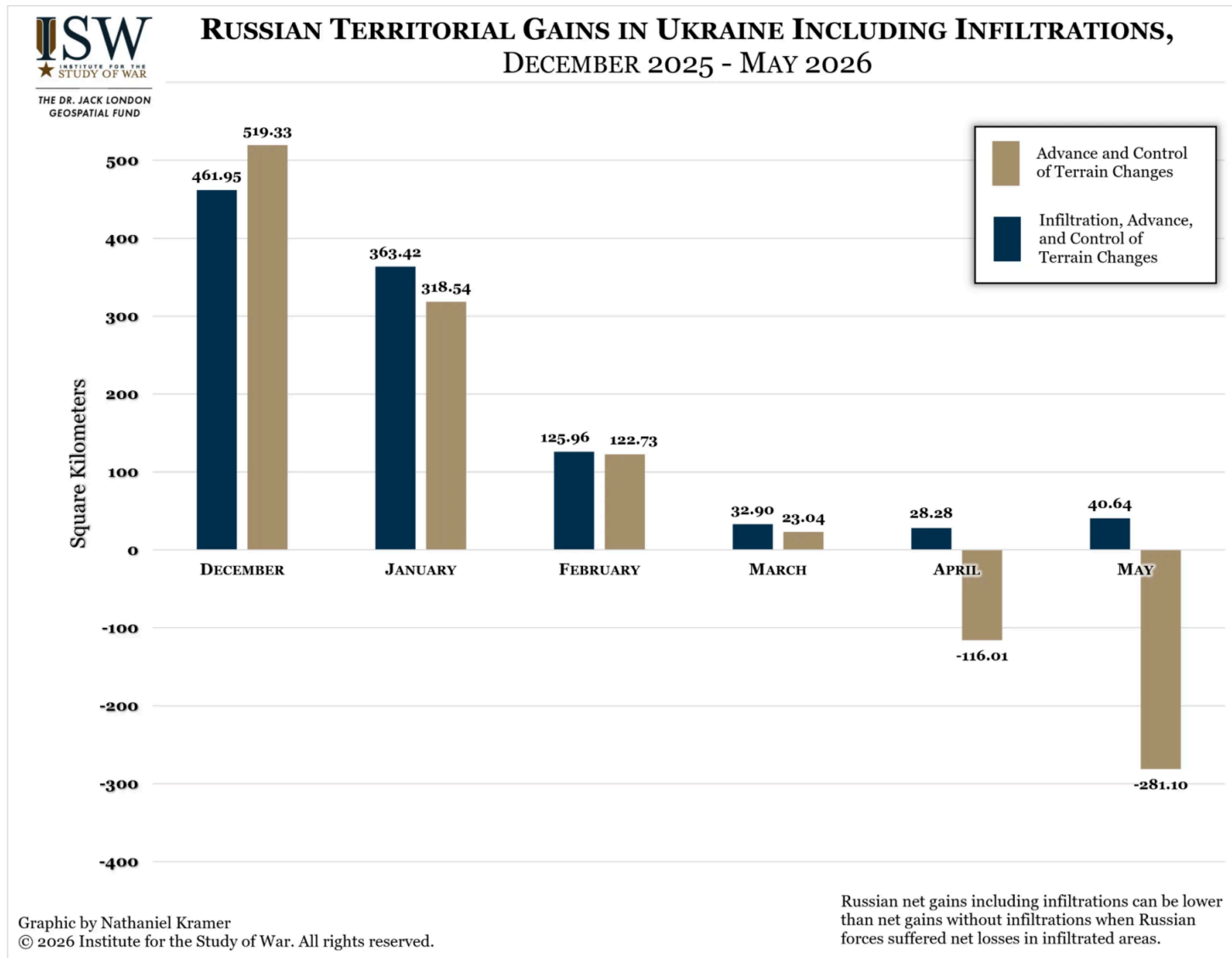
[FONTE: ISW, 31/05/2026]

Key Takeaways

1. Ukrainian forces have largely halted the Russian Spring-Summer 2026 offensive so far, and Russian forces in May 2026 have gained a presence in only a fraction of the territory they did in May 2026.
2. Other sources with different methodologies are also recording a slow Russian rate of advance in May 2026.
3. Russia's declining gains appear to be unrelated to the seasonal weather shifts that traditionally hinder advances but is likely the result of more comprehensive battlefield shifts in 2026.
4. Russian President Vladimir Putin is reportedly resisting pressure to reduce defense spending and end his war against Ukraine despite increased warnings from economic officials about the unsustainable strain his war effort is putting on the Russian economy.
5. Putin's unwillingness to cut defense spending and scale down his war effort suggests that Putin believes that he will be able to win the war in the near to medium term and that the Russian economy is able to hold on until then.
6. Ukrainian forces advanced in the Pokrovsk direction.
7. Russian forces launched 265 long-range drones at Ukraine overnight.

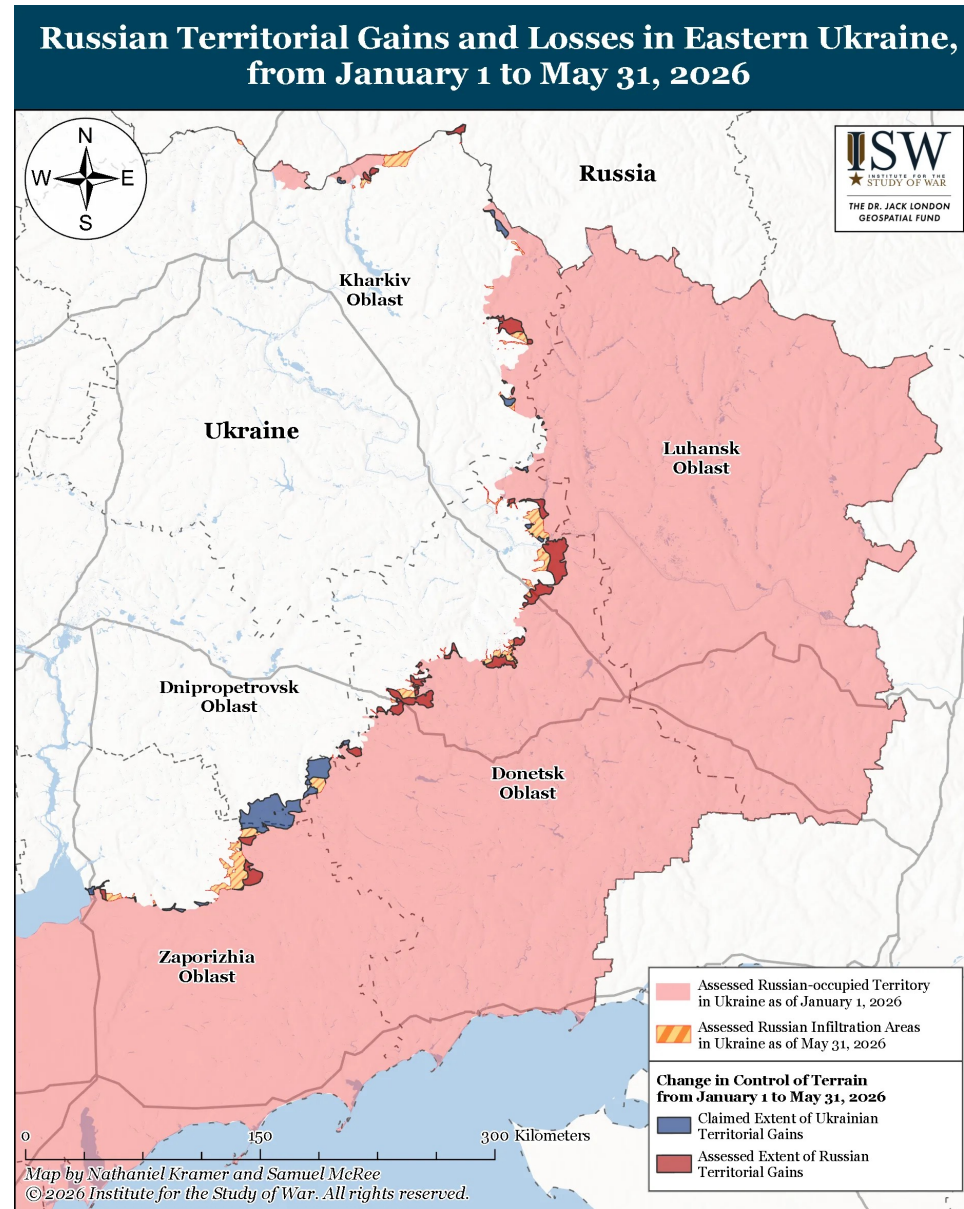
Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (2)

[FONTE: ISW, 1/06/2026]



Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (3)

[FONTE: ISW, 1/06/2026]



Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (4)

[FONTE: ISW, 1/06/2026]

Other sources with different methodologies are also recording a slow Russian rate of advance in May 2026.

A source reportedly affiliated with Ukrainian military intelligence reported on June 1 that Russian forces occupied only 14 additional square kilometers of territory in May 2026.[1] The source noted, however, that it has delayed publishing information about Ukrainian advances due to security reasons and that Russia's advances in May were actually negative. The current battlefield situation, in which Ukrainian and Russian positions are often interspersed and the "kill zone" is expanding, makes precise calculations about Russian and Ukrainian gains and losses difficult. ISW's methodology differs from that of the Ukrainian military intelligence-affiliated source, leading to different calculations about how many square kilometers Russian forces have seized in May. The source's overall assessment is nonetheless consistent with ISW's.

Russia's declining gains appear to be unrelated to the seasonal weather shifts that traditionally hinder advances, but is likely the result of more comprehensive battlefield shifts in 2026. ISW assessed that Russian forces suffered a net loss of territory controlled in April 2026 but that this may have been in part related to annual seasonal patterns.[2] Russia's April 2026 decline may have been related to the muddy *rasputitsa* season when snow melts and rains degrade conditions for mechanized movement. Russian forces have historically increased their advances in May and June as the ground dries — as was the case in 2025. Russian gains in May 2026, however, are not following a similar pattern, suggesting that Russia's declining advances in 2026 have not been related to seasonal weather conditions. Russia's slower advances are likely related to wider changes on the battlefield, including Ukrainian ground counterattacks, Ukrainian mid-range strikes, the February 2026 block on Russia's use of Starlink terminals in Ukraine, and the Kremlin's throttling of Telegram.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (5)

[FONTE: BBC, 27/05/2026]

Russia ramps up threats against Ukraine. What does that say about the war?



Russia carried out major strikes against Kyiv over the weekend and has threatened more

Moscow has stepped up its threats to Ukraine, warning of "consistent, systematic strikes on Kyiv targeting its military industrial complex".

It has also warned foreign citizens and diplomatic staff to leave the city "as soon as possible".

It sounds ominous, but does it signal something new? By ramping up its rhetoric, is Russia also about to intensify its war?

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (6)

[FONTE: BBC, 27/05/2026]

But Ivan Stupak, a military analyst and former Ukrainian intelligence officer, believes it is a sign that Moscow is struggling to control the narrative of the war.

He says: "When you have problems with the economy and Russian society, then there's pressure for revenge."

The rhetoric may well reflect growing frustration and anger in the Kremlin, but Andrii Kovalenko of Ukraine's National Security and Defence Council believes there are other reasons for the threats, unrelated to the Luhansk attack.

The first is Russia's lack of success on the battlefield, he says, adding: "In the absence of strategic results on the front, the Kremlin is trying to exert psychological pressure on Ukraine."

He believes that pressure is also being applied to Ukraine's allies, with Moscow warning diplomatic staff to leave Kyiv.

Strong European support for Ukraine, both politically and military, has long been seen in the Kremlin as a major obstacle to its war aims.

Thirdly, Kovalenko says, there "is an attempt to divert attention from Ukraine's long-range strikes on Russian territory and its own ability to defend its own territories, including Moscow".

In short, the war - now entering its fifth year - is currently not going in the right direction for Moscow.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (7)

[FONTE: BBC, 27/05/2026]



Ukrainian leaders warn the air defence missiles needed to protect Kyiv and elsewhere are in short supply

The Washington-based Institute for the Study of War has assessed "the character of the war is shifting in favour of Ukrainian forces - at least for now".

It says Russia is losing more soldiers to make fewer gains. Russian casualties have been outpacing its monthly recruitment figures for five months.

The pressure is increasing in Moscow.

Nigel Gould-Davies, of the International Institute of Strategic Studies, says with Russia "facing growing industrial and manpower constraints, it must soon decide whether to forcibly mobilise its economy and society".

Forcing people to sign up to join the military "would be highly disruptive and unpopular", he says, and could carry major risks for Russia's stability.

But none of this alters the threat to Ukraine.

Kyiv is still recovering from Russia's most recent "revenge attack" over the weekend, when Russia launched nearly 600 drones and 90 missiles, most of them directed at the capital.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (8)

[FONTE: TWZ-The War Zone, 29/05/2026]

Russian Drone Impacts Apartment Building In NATO State Romania, Injuring Civilians

The incident raises fresh questions about NATO's ability to counter even very small volumes of Russian drones.

Thomas Newdick, Howard Altman Published • May 29, 2026 1:24 PM EDT Add TWZ



Photo by Daniel MIHAILESCU / AFP via Getty Images

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (9)

[FONTE: TWZ-The War Zone, 29/05/2026]

In what appears to be the first incident of its kind, a Russian kamikaze drone strayed into Romanian airspace before striking a residential building, injuring civilians. While Russian drones flying into NATO airspace, [whether accidental or deliberate](#), have become [a feature of the war in Ukraine](#), this marks a notable milestone, although the nature of the repercussions remains unclear.

The Russian drone was part of a barrage involved in an overnight attack on Ukraine. It strayed into Romanian airspace before crashing into the roof of a residential building in Galați on the River Danube, in eastern Romania. The Romanian Ministry of Defense assesses that the drone was intended to attack one of several Ukrainian targets in the vicinity of the river border with Romania.

A senior NATO official confirmed to *TWZ* that it had detected and tracked the Russian drone, but it entered Romanian airspace only minutes before striking the apartment building. "To put this in context, you are talking about something that is travelling nearly 200km/h [124 miles per hour] over a populated area less than 15km [nine miles] from the border. Nonetheless, we are assessing what more can be done now to optimize Romania and NATO's network of sensors and shooters to safely neutralize such threats," the official added.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (10)

[FONTE: TWZ-The War Zone, 29/05/2026]



A map showing the approximate location of Galați on the River Danube, in eastern Romania, close to the borders with Ukraine and Moldova. *Google Earth*

The impact sparked a fire, injured two people, and forced the evacuation of several other residents.

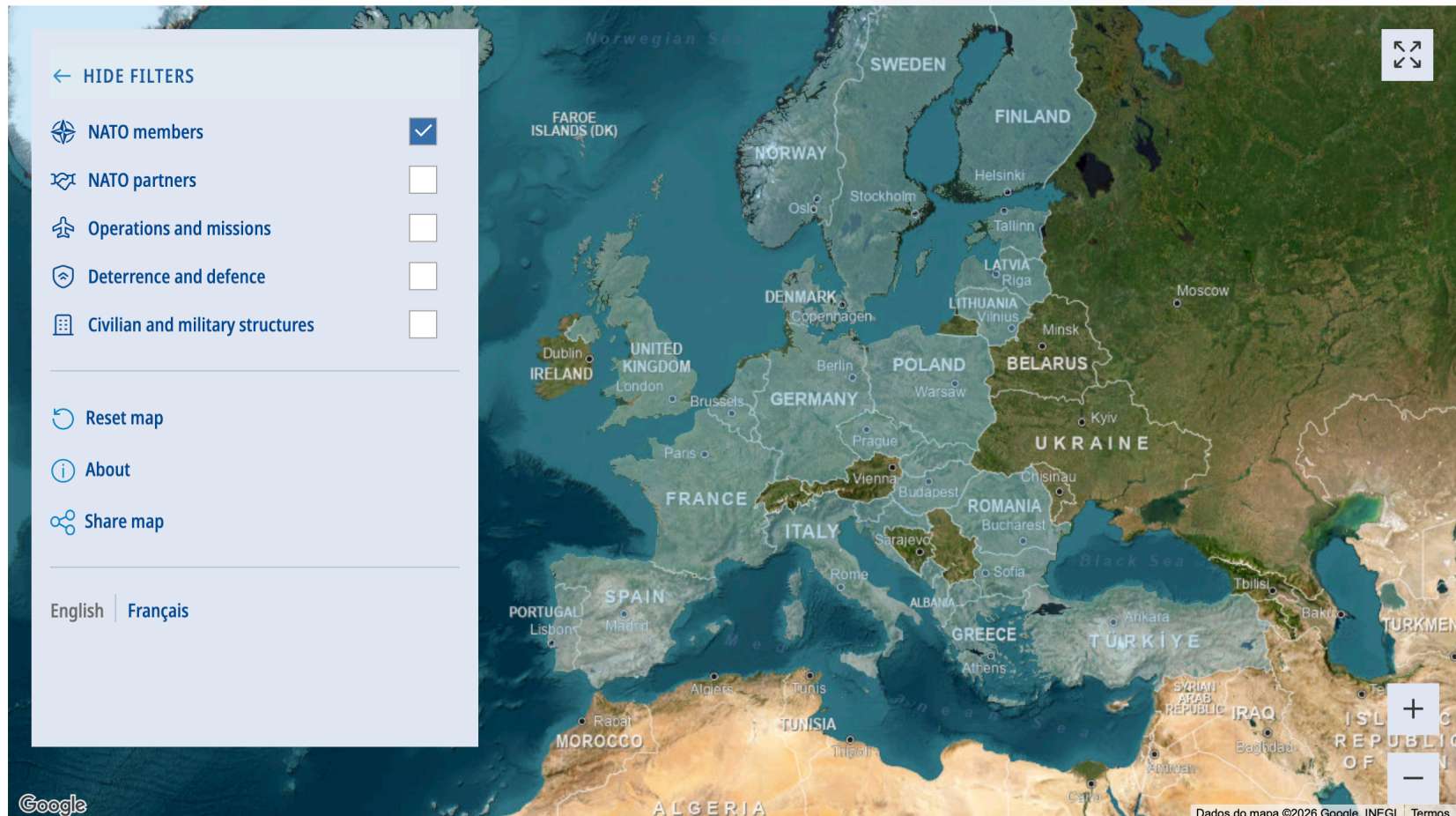
The Romanian Ministry of Defense said the drone had been tracked by radar in Romanian airspace.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (11)

[FONTE: NATO]

NATO on the Map

This interactive map shows NATO's member countries and partners. It also provides an overview of the Alliance's major activities, and its civilian and military structures. Use the side navigation menu to explore the map and learn more about NATO.



Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (12)

[FONTE: Celeste Wallander / Foreign Affairs, 28/05/2026]

The Coming Crisis of NATO Deterrence

Nuclear Guarantees Cannot Replace U.S. Forces in Europe

CELESTE A. WALLANDER

May 28, 2026



A NATO exercise in Bemowo Piskie, Poland, May 2026

KUBA STEZYCKI / REUTERS

CELESTE A. WALLANDER is Executive Director of Penn Washington and an Adjunct Senior Fellow at the Center for a New American Security. She was Assistant Secretary of Defense for International Security Affairs and oversaw U.S. military assistance to Ukraine during the Biden administration.

[More by Celeste A. Wallander →](#)

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (13)

[FONTE: Celeste Wallander / Foreign Affairs, 28/05/2026]

President Donald Trump is making a dangerous bet in Europe. This month, the United States announced that it was canceling the deployment of a long-range precision strike battalion to Germany and withdrawing some 5,000 troops from the country. It also abruptly canceled a rotational 4,000-to-5,000-strong combat team bound for Poland, following the earlier cancellation of a similar deployment to Romania in 2025. (The White House has suggested that new forces may still go to Poland but has not specified whether those would come from the United States or be redirected from Germany.) This week, European allies have told media that the Pentagon has informed NATO that it will shrink the forces Washington would rapidly deploy to Europe in a crisis—that is, in the event of a Russian attack on alliance territory.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (14)

[FONTE: Celeste Wallander / Foreign Affairs, 28/05/2026]

Rather than reinforcing stability in Europe, the Trump administration's approach invites Russia to test NATO's escalation dominance—that is, the ability to impose unacceptable costs or failure on the adversary at every step on the escalation ladder, forcing it to back down rather than escalate. Drawing down U.S. forces reduces that dominance and weakens deterrence against Russian aggression in Europe. Over time, a cycle of escalation could leave an American president with an unenviable choice: back down or risk nuclear conflict.

The key to deterring Moscow lies not at the top of the escalation ladder, where nuclear weapons are in play, but on its lower rungs, where conventional weapons are what matters. The goal should be to deter Russian President Vladimir Putin from ordering any move against NATO. By the time Russia has seized limited territory on the alliance's eastern flank and dared Washington to risk nuclear war to reverse its gains, the United States will be left with only the worst options.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (15)

[FONTE: Gideon Rachman / FT, 1/06/2026]

Putin could pay a personal price for failure in Ukraine

History suggests that military defeat often leads to radical political change in Moscow



© James Ferguson

Did Victory Day signal defeat? The symbolism of the scaled-down military parade held in Moscow on May 9 was stark. The Kremlin decided not to risk the customary display of tanks and heavy equipment on Red Square for fear of strikes by Ukrainian drones. The decision illustrated that Vladimir Putin's "special military operation" had not only failed to defeat Ukraine. The Russian army was now at risk in Moscow itself.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (16)

[FONTE: Gideon Rachman / FT, 1/06/2026]

Unable to deliver victory after four years of all-out war, the Kremlin had sought to at least insulate Moscow and Saint Petersburg from the consequences. But the war has now reached the Russian capital. Security concerns have led to frequent closures of Moscow's main airports and [shutdowns](#) of mobile internet. Generals have been assassinated on the streets of the capital. Fuel prices are [rising](#) across Russia because of successful Ukrainian attacks on Russian oil refineries.

For Russia, as a whole, the costs of the conflict have been staggering and tragic. Anne Keast-Butler, the head of Britain's GCHQ intelligence agency, [said](#) recently that almost 500,000 Russians have been killed in the conflict — and many more have been grievously wounded. That is an obvious threat to the future of a country whose population was already declining before the war.

If a glorious victory was just around the corner, those costs might seem bearable. But Russia has now been fighting in Ukraine for longer than the Soviet Union fought Germany in the second world war. It has still failed to conquer the whole of the Donbas and, in April, the Russians actually lost territory.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (17)

[FONTE: Gideon Rachman / FT, 1/06/2026]

Russian history suggests Putin should be worried — not just about the progress of the war but about his own position. Russian military setbacks have often led to radical changes of political direction in Moscow. Defeat in the Russo-Japanese War in 1905 contributed to popular unrest and moves towards a constitutional monarchy. Failure in the first world war formed the backdrop to the Russian Revolution. The removal of Nikita Khrushchev as leader of the Soviet Union in 1964 was closely related to his perceived failure in the Cuban Missile Crisis. The endless Afghanistan war was an important part of the malaise that led to the collapse of the Soviet Union.

Those precedents suggest that failure in Ukraine could easily lead to the downfall of Putin, who is now 73 years old. But identifying the precise mechanism for his removal is much harder.

Uma nova fase da guerra na Ucrânia e a (in)segurança no flanco leste da NATO (18)

[FONTE: Gideon Rachman / FT, 1/06/2026]

Men with guns have a better chance of toppling Putin than unarmed civilians. The 2023 uprising led by Yevgeny Prigozhin, the founder of the Wagner group, was the closest Putin has come to losing power since he became president of Russia in December 1999. But the mutiny failed and Prigozhin died in a not very mysterious plane crash shortly afterwards. Since then, Putin has ensured he has tight control over all armed forces in the country.

Nonetheless, a split within the Russian elite still seems the most likely way of getting rid of Putin. What would be needed is a critical mass of people who agree the war is going badly and that Russia needs it to end. These people would also understand that negotiating a peace with Ukraine — and a rapprochement with Europe — would be much easier if there were a new face and fresh thinking in the Kremlin. Indeed European governments should now be doing their utmost to get that message across in elite circles in Russia.

Bibliografia

