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RUSSIA: Arctic Oil Development Likely Signals Greater Cooperation with Beijing

Summary: Moscow's Vostok Oil exports and Northern Sea Route expansion will probably secure direct commercial access to Asia-Pacific markets. In turn, Beijing's arctic infrastructure investments and resource demand will almost certainly deepen bilateral economic alignment.

Development: On 21 September, the Vostok Oil project commissioned the first shipment of crude oil loaded onto the ice-class tanker Valentin Pikul, according to *The Moscow Times*. The Vostok project, commissioned by Russian President Vladimir Putin, leads the region as the largest and most expansive oil network in the Arctic, according to *Rosneft*. With the construction of the 490-mile Vankor-Payakha-Bukhta Sever pipeline, the system now has an annual production capacity of 100 million tons, according to *High North News*. Arctic industrial infrastructure grew to 50,000 people and 16,280 pieces of equipment currently deployed, according to *High North News*. Moscow's stated objective is exporting 30 million tons of Arctic crude oil. Most of the oil continues to go to Asian and Pacific markets, according to *Xinde Marine News*.

Analysis: Moscow's financial, operational, and motivational capabilities through the Vostok oil project will likely enable Moscow to accomplish its Arctic export goals on schedule. In turn, Beijing will likely continue to purchase Vostok oil to fulfill its energy needs. The ongoing trade almost certainly deepens economic interdependence between the two nations. This relationship will likely provide Moscow with strategic leverage to unlock new foreign cooperation in the Pacific. Securing long-term revenue from non-Western nations probably allows Moscow to ignore sanctions and strengthen its bargaining power.

[Sophia Robbins]

RUSSIA: Sustained Refinery Strikes Likely to Deepen Fuel Shortages

Summary: Kyiv's drone campaign against Russian oil refineries will very likely continue or intensify through at least September as harvest-season demand outpaces refinery repairs. Continued strikes will likely deepen Russian reliance on fuel imports.

Development: On 20 September, Kyiv struck Russian oil refineries with over 1,000 drones, continuing the precedent of striking oil enrichment facilities to weaken the Russian economy. On 31 August, Moscow released a decree stating that Russian gas stations may start selling gasoline and diesel fuel classified as Euro-2, Euro-3, and Euro-4. These fuels burn much dirtier than the contemporary Euro-6 standard and have largely fallen out of use since the early 2010s. The Russian energy ministry stated this decree will remain in effect until 30 June 2027. The Energy Ministry framed it as a tool to respond quickly to fuel-market conditions and reduce shortage risk. They also stated that stations will have to disclose the environmental class of the fuel to customers. This change comes amid the latest wave of the Russian fuel crisis, with domestic gasoline outputs falling to 70% of demand, according to *The Japan Times*. Nearly all of Russia's 83 regions are seeing gasoline shortages or supply disruptions, with many gas stations imposing rationing, according to CNN. As of late June, 60% of Russians said economic conditions were worsening, the highest level recorded in two decades of surveys, according to Gallup polling. The latest round of refinery shutdowns from these strikes coincides with the start of harvest season this September, which typically drives a sharp jump in fuel demand.

Analysis: Kyiv will very likely continue or increase its current tempo of drone strikes on Russian oil refineries through at least September, as harvest season drives petrol demand upward and Russian refiners struggle to keep pace with repairs. Moscow's decision to authorize the sale of lower-grade Euro-2, Euro-3, and Euro-4 fuel grades, which it had avoided selling since the 2010s, is almost certainly a signal that the strikes are achieving their intended effect. This will likely reinforce Kyiv's assessment that sustained pressure on refining capacity is worth maintaining. If strikes continue at this pace, growing Russian reliance on fuel imports will likely create new external dependencies. The current fuel crisis will almost certainly deepen amid continued strikes and the increased demand caused by the harvest season.

[Riley Callan]

RUSSIA: Digital Infrastructure Strikes Likely to Increase During Winter Campaign

Summary: The strikes on Ukrainian digital infrastructure will likely increase during Moscow's winter strike campaign, potentially weakening Kyiv's military capacity and providing Moscow with a favorable relative position.

Development: On 17 September, the Russian military conducted a series of coordinated strikes against several regions in Ukraine, including Kyiv, Zaporizhia, and Odessa. These strikes targeted digital, energy, and other critical infrastructure in an effort to disrupt Ukraine's essential services. One of these strikes disabled the De Novo Data Center in Kyiv, which Russian officials claim supported server equipment for military purposes, notably processing, transmitting, and storing intelligence data for the Ukrainian Army, according to *Izvestia*. Along with its alleged military use, De Novo also hosts civilian data and sites, such as some of the country's largest banks, according to *Data Center Dynamics*. Moscow has previously targeted Ukrainian critical infrastructure during winter campaigns, including efforts during 2025-26 to disrupt Ukraine's energy grid, according to the Institute for the Study of War. Ukraine's digital infrastructure remains similarly vulnerable, as multiple data centers and telecommunications facilities support critical civilian and government services. Oleg Tsarev, a former Russian official, characterized the recent strikes as part of an emerging effort to target Ukraine's digital infrastructure, according to *EurAsia Daily*.

Analysis: The disabling strikes against the De Novo Data Center will likely precede further attacks on Kyiv's digital infrastructure during Moscow's Winter Campaign. Tsarev's statement indicates that Moscow will target other data centers in Kyiv. Continued strikes against data centers, telecommunications facilities, and other network infrastructure will likely disrupt Ukraine's military and civilian services. Kyiv will likely need to divert military and government resources to allocate them toward protecting and restoring these systems, potentially reducing resources available for other military and civilian requirements and providing Moscow with a favorable relative position. However, Kyiv's ability to restore or harden affected infrastructure could mitigate the operational effects of subsequent strikes.

[Hunter Varin]

JAPAN: Joint Military Operations Likely to Increase Tensions Within East China Sea

Summary: Japanese Air Self-Defense Force (JASDF) and Ground Self-Defense Force (JSDF) began participation in two separate training operations, which will likely cause Beijing to increase political pressure due to its contested territorial claims within the East China Sea.

Development: On 8 September, JASDF and JSDF started participating in separate training operations. In addition, on 14 September, Tokyo launched Orient Shield 26, a multinational army joint training operation coordinated by the JSDF with United States and Australian Army units, according to a Chinese Ministry of National Defense post. Chinese Defense Minister Senior Colonel Jiang Bin voiced direct opposition to Orient Shield 26, stating that the exercise, “undermines security interests of other countries” and poses a “serious threat to regional peace”. Also on 14 September, Pegase 26 arrived in Hyakuri Air Base, Japan, according to the *EurAsianTimes*. Pegase 26 is a 25,000-mile global flight in which French fighter and support aircraft encourage joint operations with nine military aviation branches, including the JASDF, according to *MiGFLUG* magazine.

Analysis: Beijing will likely increase political pressure on Tokyo as Pegase 26 trains in JASDF airspace and beyond, based on prior sorties the People’s Liberation Army Air Force (PLAAF) have conducted within contested airspaces. As a result, Beijing will likely release a carefully worded statement as Pegase 26 operates within the Indo-Pacific Area of Responsibility (AOR), avoiding recognition of French assets as Indo-Pacific actors. Beijing will likely order PLAAF assets to monitor Orient Shield 26 as it progresses using freedom of overflight privileges for intelligence collection, counter-posturing methodology, and routine presence.

[Edwin J. Ferrell]

About GSIS

Embry-Riddle Aeronautical University's (ERAU) Bachelor of Science in Global Security & Intelligence Studies (GSIS) degree program at our Prescott Campus blends both academic and professional studies to equip students with the knowledge and skills necessary to become future leaders in intelligence, security, and law enforcement. The program provides students with a sound foundation in the liberal arts, including international relations, foreign languages and cultures, international law, foreign policy, political and military history, and other essential topics.

About EE

Eagle Eye Intelligence (EE) is an intelligence and research organization led by the students of the GSIS program at ERAU in Prescott, Arizona.

Dr. Philip E. Jones founded EE and Embry-Riddle's GSIS program in 2002, following a career with the Central Intelligence Agency and consulting work in international development and global security. Currently, Professor Dale R. Avery, a former career intelligence analyst, serves as EE's faculty advisor.

EE strives to provide actionable intelligence and analysis to its customers during the academic year. We are driven by a number of goals – continuous development, nonpartisanship, interdisciplinary studies, global awareness, and professionalism.

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Christina Muchow, a Senior in the GSIS program, currently serves as EE's Editor in Chief. For questions or comments, contact the team at pregleye@erau.edu or Professor Avery at 928.777.4708. If you use material from this publication, you should attribute: Eagle Eye Intelligence Edition 501, a publication created by students at Embry-Riddle Aeronautical University in Prescott, Arizona.



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