

**Ukraine at a Strategic Crossroads:  
Security, Reflexive Control,  
and Post-War Reconstruction**

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***In Ukrainian Policymaker***

**December 2025**

Voiron, Louis L., and Yakushik, Valentin (2025) Ukraine at a Crossroads: Reflections on Security, Strategy, and Reconstruction. *Ukrainian Policymaker*, Volume 17: 134-142. [https:// doi.org/10.29202/up/17/10](https://doi.org/10.29202/up/17/10); [https:// www.ukrpolitic.com/journals/2026/17/UP\\_vol\\_17\\_VoironYakushik.pdf](https://www.ukrpolitic.com/journals/2026/17/UP_vol_17_VoironYakushik.pdf); [https:// www.ukrpolitic.com/journals/2026/17/UP\\_vol\\_17.pdf](https://www.ukrpolitic.com/journals/2026/17/UP_vol_17.pdf)

**UKRAINE  
FOUNDATION  
PUBLICATIONS**

# Ukraine at a Strategic Crossroads: Security, Reflexive Control, and Post-War Reconstruction

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Voiron, Louis L., and Valentin Yakushik (2025) Ukraine at a Crossroads: Reflections on Security, Strategy, and Reconstruction. *Ukrainian Policymaker*, Volume 17: 134-142. <https://doi.org/10.29202/up/17/10>

*This interview with Louis L. Voiron, Vice Chair and President of the Ukraine Foundation, explores the strategic evolution of the Russia–Ukraine conflict, the shifting dynamics of US–European engagement, and Ukraine’s long-term prospects for security, development, and integration. Drawing on two decades of experience in political consultancy, strategic forecasting, and international liaison, Louis Voiron reflects on the roots of the current geopolitical impasse, the role of reflexive control in shaping Western responses, and the emerging contours of a potential settlement. He also outlines opportunities for Ukraine’s defence industrial development, innovation ecosystem, and integration into global supply chains, while emphasising the importance of sustained Western cohesion. The interview concludes with an overview of the Ukraine Foundation’s ongoing initiatives and future priorities.*

*Keywords: Ukraine, US–Ukraine relations, European security, reflexive control, strategic forecasting, critical minerals, reconstruction*

Received: 17 September 2025 / Accepted: 2 December 2025 / Published: 30 December 2025

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## Interview

**Valentin Yakushik:** *How did you get involved with Ukraine?*

**Louis L. Voiron:**

While working in Washington, DC, in the early 2000s, the political consultancy I was co-managing came to play a leading role in the election of President Yushchenko. We provided both his Chief Personal Consultant and a seasoned team of high-calibre operatives who had previously run presidential campaigns across all continents. Together, they helped develop the mobilisation concept that later became known as the Orange Revolution.

Over the years, our team authored leadership analyses of key policymakers and maintained a number of strategic relationships across Ukraine and the Caucasus region. I developed an expertise in Russian and post-Soviet affairs at a time when many regarded them as second-order subjects. Russia was then widely seen as fighting for relevance through the remnants of its strategic arsenal and its role in energy and commodity markets.

My two preferred areas of focus gradually became policy benchmarking and strategic forecasting. For years, I warned key stakeholders of the return of conflictuality in Europe. As early as 2007, my interactions allowed me to forecast Russia's strategic objective of restoring a model of imperial rule – at least a mini-USSR that, in its leadership's view, would include Belarus, Ukraine, Moldova, and Georgia – through either direct asymmetric or deniable hybrid interventions, or indirect rule leveraging legacy structures and oligarchic networks. I saw Ukraine – much like the Baltic scenario – as the primary focus of Russia's efforts.

The memory of the United States' bold move in Kosovo, coupled with Western indecisiveness in Bucharest, convinced Russia's leadership that a window of opportunity existed. Meanwhile, the 2008 financial crisis sharpened China's awareness of Western financial imbalances and vulnerabilities. I witnessed China begin quiet coordination with Russia and develop a number of unequal deals that already signalled Russian acceptance of a junior partner position.

**Valentin Yakushik:** *How do you read the present situation in light of some of the hopes nourished at the time?*

**Louis L. Voiron:**

It is not possible to gain a sound understanding of the present situation in isolation, as it is largely the by-product of a broader global context. The initial project of including Ukraine through NATO in the Euro-Atlantic space had its own internal coherence – indeed as a policy option – but democracies sometimes lack consistency in maintaining focus and sustaining effort over the long run.

On the one hand, sustained US involvement in Iraq and Afghanistan became an oversized focus of American foreign engagement for more than a decade. It overstretched US capacity and created a strategic window that, combined with China's WTO accession and Western outsourcing, enabled China's rise as an economic powerhouse. Twenty-five years later, China stands as the only peer competitor both willing and capable of displacing US primacy.

On the other hand, Ukraine's Euro-Atlantic integration entered a pause. While the United States remained committed to Ukraine's NATO membership, France and Germany's opposition at the Bucharest Summit derailed the process. During the 2010s, the overstretch of US foreign

commitments prompted attempts to disengage from certain overseas engagements in order to pivot toward the Asia-Pacific theatre.

Yet policy programmes often develop their own internal dynamics. The United States – and, to a lesser extent, the United Kingdom – maintained efforts to strengthen Ukraine’s defence and intelligence capacities, disentangling them from Russia-aligned groups within Ukraine’s structures of force. This went a long way toward strengthening the country’s resilience in 2022, and nowhere has it been more timely and decisive than in Hostomel, whose outcome left the seizure of Kyiv out of reach in the early days of the full-scale invasion.

A decade ago, US strategists began discussing a “Kissinger-in-reverse” strategy aimed at driving a wedge between China’s industrial and workforce power on the one hand, and Russia’s vast territory and mineral resources on the other. Initially confined to limited policy circles, these analyses went on to inform the policies of both Trump administrations. At the time, the United States was not a party to the Trilateral Contact Group or to the Normandy format. Russia sought to involve the United States in discussions over Crimea. The objective was to restore its great power status. My view at the time was that short of a Rose Garden moment, there would not be any effective settlement. In the absence of US involvement, the inherent flaws of the Minsk framework prevented the establishment of the conditions necessary for its effective implementation. After successive US–Russia reset attempts proved unsuccessful, enhanced support for Ukraine came to be seen by US policymakers as a cost-effective way of degrading Russian offensive capabilities – with the understanding that this approach would also weaken China’s position in the event of a future conflict with the United States.

In 2022, Ukraine defied the initial assessments of Russia’s Fifth Directorate regarding the Ukrainian population’s willingness to resist a full-scale invasion.<sup>1</sup> As for the United States, intelligence has proven accurate on the specifics of the full-scale invasion, despite significant skepticism on the part of its allies, but has fallen short of measuring Ukraine’s fighting spirit. In earnest, Ukraine’s resilience has been a key driver of the US’s increasing support over the first three years of the full-scale war.

**Valentin Yakushik:** *You often emphasise the importance of reflexive control, while much of the policy debate focuses on disinformation and cognitive warfare. Why?*

**Louis L. Voiron:**

I do so because reflexive control is, in fact, the endgame. Truth is always the first casualty of war, as the saying goes, and information operations are a necessary component of modern conflicts. They are essential for maintaining morale in the face of adversity, but their downside – when prevalent – is that they indirectly impede the prosecution of the war.<sup>2</sup> In this sense, whereas information operations alter what one believes about reality, reflexive control is of a different nature, in that it shapes how one decides, even when the information may be true.

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<sup>1</sup> Russia’s “Fifth Directorate” refers to the FSB’s Fifth Service (also known as the Service for Operational Information and International Relations), the institutional successor to the KGB’s Fifth Chief Directorate. This unit is responsible for analysing political attitudes in neighbouring states and forecasting population behaviour. Its assessments of Ukrainian public sentiment prior to the 2022 invasion proved deeply flawed (Orlova, 2024; Soldatov & Borogan, 2022).

<sup>2</sup> A century ago, Clemenceau warned with his consummate irony that “from victory to victory, we march towards catastrophe”, a potent call for an innovative approach in the prosecution of war. It echoed the spirit of his 1918 declaration before the French Chamber of Deputies: “My home policy: I wage war; my foreign policy: I wage war. All the time I wage war” (Clemenceau, 1918).

The current impasse in Ukraine has been made possible by the systematic application of Russian reflexive control – tools designed to constrain the strategic calculus of US and European policymakers from the very outset of the conflict. The nuclear shadow has served as the central instrument of this constraint. The background noise of leading propagandists such as V. Soloviev, M. Simonyan, or O. Skabeyeva; the argumentation of theorists like S. Karaganov and A. Dugin; and the unhinged statements of the current Deputy Chairman of the Security Council, D. Medvedev, recall the erratic judgements of then CPSU First Secretary N. Khrushchev – from his threat to “bury” the West after Soviet forces crushed the Budapest uprising to his 1960 shoebanging episode at the United Nations.

Today’s declarations are an obvious element of political theatre and betray unease at the turn of events. At the same time, previously announced changes in Russia’s nuclear threshold, its continued adherence to a doctrine of conditional first use, and the occasional employment of vectors such as Oreshnik – compatible with both conventional and nuclear payloads – constitute strategic signalling not lost on the United States. However, the use of dual-capacity missiles is not exclusive to Oreshnik. The same applies to air-launched ballistic-class hypersonic MIRV-equipped IRBM Kh-47M2 Kinzhal, air-launched Kh101 and Kh102 cruise missiles, 3M-54/3M14 Kalibr cruise missiles, and to Sarmat-enabled Avangard hypersonic glide vehicle. It is not a new phenomenon either: Soviet sea-launched P-500 Bazalt and INF SSC-8 are testaments to the Soviet and Russian long history of mixed-payload systems aimed at maintaining strategic ambiguity and enhancing psychological impact.

They instilled a fear of use in case the Russian leadership estimates military setback would threaten, in their own words, “the very existence of the state”. Russia’s strategic ambiguity, coupled with unusually blunt language during interactions with US and European leaders, reinforced the positions of those advocating a cautious approach both within and across Western leaderships. On several occasions over the first years of the war, the views of National Security Advisor J. Sullivan prevailed to a large extent over the more voluntarist approach of Secretary of State A. Blinken.

As a result, since 2022, the West has provided Ukraine with assistance sufficient to keep it in the fight and to degrade Russian offensive capabilities – with compelling estimates for armour, artillery, and Southern Fleet (Black Sea Fleet) assets – yet never sufficient to allow Ukraine to seize and retain the strategic initiative. The delivery of Western systems, and the gradual relaxation of conditions on their use, have followed a strikingly similar incremental pattern for armoured vehicles, aircraft, and missiles.

**Valentin Yakushik:** *How do you see the evolution of the conflict?*

**Louis L. Voiron:**

The future is always difficult to predict. That said, drawing on assessments I made before the 2014 and 2022 aggressions – both of which proved accurate – I incline towards a scenario in which, through US mediation, a settlement could eventually be reached that effectively pauses the conflict. Unless appropriate parameters are put in place, however, such an outcome would risk giving the Russian Federation the opportunity to regenerate its capabilities before resuming operations. For American mediation to succeed, the United States would need to regain leverage over Russian – rather than Ukrainian – leaders through a combination of carrots and sticks, something that has so far proved elusive.

In the long term, the situation could ossify into a Korean-style frozen conflict. Conquering territory entails its population. I am not convinced Russia would find it advantageous to

integrate the vast majority of Western-leaning populations west of the Subtelny line<sup>3</sup> into the fabric of its autocratic system. In what is shaping up to be a largely static war characterised by incremental gains, I also believe the Dnipro River will constitute a significant physical barrier to any future large-scale Russian advances. Russia might seek to overturn this by continuing to cross into the Western side of the Oskil River. Short of realising even its most restrained initial objectives, Russia is likely to revert to a range of strategies directed at eroding the viability of Ukraine as a functioning state.

In the meantime, Russia's aspiration to restore its imperial sphere of influence will remain unchanged. Under such conditions, the conflict is likely to shift westward where readiness and fighting experience fall short of Ukraine's high bar. The next flashpoint could plausibly emerge in either the Baltics or Moldova. The latter would require gains on the southern front around Odesa, which explains I place greater weight on a Baltic scenario centred on Kaliningrad and the Suwałki Corridor, as this would align closely with Russian reflexive control doctrine. It would immediately test the credibility of NATO's solidarity – particularly if cyber and kinetic operations were conducted in ways that deliberately complicate attribution or deliberations about NATO's response, whether through Belarus or the instrumentalisation of nuclear threats around Kaliningrad.

**Valentin Yakushik:** *From your perspective, what might Europe do from here?*

**Louis L. Voiron:**

A lack of European deterrence paved the way for Russian aggression. Energy dependence and oligarchs' investments fostered complacency. We need to be candid about this.

It is time Europe takes ownership of a war being fought on its own continent. Regardless of how the conflict in Ukraine ultimately evolves, restoring deterrence is a prerequisite. Turning reflexively to the United States for additional assistance and complaining about the country's pursuit of its more global strategic priorities in relation to China are no substitute for decisive European action. This requires less vindictive rhetoric and far more resolute action – within a very short timeframe.

It is supposed to rebuild the capacity to sustain a long, high-intensity war of attrition on the European continent. This effort must be threefold. Financially, European defence spending has increased, but not at a level commensurate with the risks and likely impact. Industrially, European production output – shells and drones being the most telling indicators – remains far below what the situation demands. Technologically, with the obsolescence cycle for counter-electronic warfare now measured in as little as six weeks, success will depend on tight coordination and rapid RETEX processes directly informed by battlefield feedback.

**Valentin Yakushik:** *How do you see US engagement with Ukraine going forward?*

**Louis L. Voiron:**

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<sup>3</sup> The “Subtelny line” is an analytical shorthand derived from Orest Subtelny's *Ukraine: A History*. It refers to a longstanding historical and cultural divide running roughly along the Dnipro River, separating regions shaped by Polish-Lithuanian and Austro-Hungarian rule in the west from those historically under Muscovite/Russian and later Soviet control in the east. Subtelny does not draw a literal line, but his narrative identifies a civilisational frontier that scholars later labelled the “Subtelny line”. In this context, “west of the Subtelny line” denotes the more Western-leaning, European-oriented regions of Ukraine (Subtelny, 2009).

Engagement with Ukraine has long been a hallmark of US policy. If we are wise enough to move beyond recent episodes of bad blood, we can see continuity, rather than change, dating back to the formulation of the Brzezinski doctrine (Brzezinski, 1997; Pietrzak, 2023).

Ukraine's challenge will be to balance this bilateral US–Ukraine relationship with its various European cooperation tracks. Going forward, US–Ukrainian engagement should rest not only on shared values but also on shared interests. The mineral deal,<sup>4</sup> which has been in the planning work long before this Administration, has already fostered a sense of co-development in Washington. In the future, Ukraine can play a meaningful role in US economic security, while the United States has the capacity to increase its economic involvement in Ukraine.

As future market conditions will be shaped by tightened export controls amid growing tensions in the Asia-Pacific, US investment in Ukraine's critical raw materials projects makes strategic sense. Given the operational costs, they are intended to secure defence supply chains that have been left exposed to China. This creates an opportunity for Ukraine to integrate into US supply chains and, in doing so, to generate durable political goodwill – reminiscent of Israel's trajectory or South Korea's success in building globally competitive industries. I also see scope for progress in the US–Ukraine energy trade.

The same logic applies to Ukrainian innovation. The war has revealed Ukraine's potential to develop a sustainable, entrepreneurial economy. The country now procures the majority of its armaments. For those where dependencies remain – long-range artillery, air defence systems, intelligence – there are few credible alternatives at scale to the US in terms of defence industrial capacity. During the conflict, Ukrainian founders should prioritize attracting US and European capital – venture capital, DFC funding, and DARPA-linked investment – to the defence technology sector. This would enable scaling, better satisfy domestic requirements, and facilitate international expansion. It would also help address the US government's unmet needs and enable early adoption of Ukrainian technologies by the US armed services and federal agencies. Given the sheer size of the US defence and national security budget and its likely increase in the coming years, the US market presents the Ukrainian defence industry with unmatched opportunities. If Ukrainian UAVs have captured media's attention, seaborn autonomous systems deployed in the Black Sea would carry important lessons for Anti-Access Area-Denial (A2-AD) challenges faced by the United States in the Asia-Pacific theatre. It will also earn Ukraine significant political capital in Washington across a number of key constituencies.

Post-conflict, Ukraine will face the immense task of reconstruction. US groups stand ready to participate alongside their European counterparts and possess a unique ability to deploy capital at scale. Ultimately, one can envisage a rebuilt Ukraine in which joint defence and technology projects secure strong US political and security support.

**Valentin Yakushik:** *How do you see the evolution of the US–Europe relationship in relation to Ukraine?*

**Louis L. Voiron:**

As the prospect of the conflict expanding westward becomes more credible, Western cohesion itself is at risk.

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<sup>4</sup> The US–Ukraine “mineral deal” refers to the 2025 memorandum on critical minerals cooperation, under which the United States supports investment and technological development in Ukraine's rare earth and strategic mineral sector in exchange for secure, longterm access to these resources. The agreement is intended to anchor a broader framework of economic co-development and strengthen both countries' resilience in critical supply chains. See: (Baskaran & Schwartz, 2025; Odarchenko & Kolisnyk, 2025).

On the one hand, the United States has grown increasingly wary of entanglement in conflicts it perceives as peripheral to its core priorities: securing the Western Hemisphere and responding to China's challenge to US primacy in the Indo-Pacific. Recent American overtures toward Moscow should be understood as the execution of the "Kissinger-in-reverse" move I discussed – an attempt to prevent a structural fusion of China's industrial scale and workforce with Russia's vast territory and natural resources. The Administration's attempt proved more challenging as Russia has retrenched into a war economy and built alternatives to Western markets with the help of China and, to a lesser extent, India and others. US steps against Venezuela and Iran, both Russian partners, nonetheless reveal clear red lines and a broader commitment to gradually erode China's alliances.

On the other hand, Europe – slow to acknowledge the threat in 2020 and to unwind its energy dependencies thereafter – is now attempting to compensate for US retrenchment, buying time to rebuild its own preparedness in a context of growing international isolation.

Observing the emerging dealignment between Europe and the United States is deeply troubling. For Ukraine, Western fragmentation could prove problematic: the polarisation of policy analysis, the politicisation of intelligence, and what increasingly amounts to interference in political systems across the Atlantic carry potentially lethal consequences.

These rising tensions between Europe and the United States align neatly with the Russian playbook, inherited from the Soviet tradition of separating Europe from America. These are the perfect enablers of Mátyás Rákosi-style salami tactics applied once again.

If these tensions keep growing, the danger is that the alliance will fracture and become ineffective. If Europeans fail to find a way to navigate the realities of a "Peace Through Strength" and "America First" agenda, however unpalatable they might be, they will confront a serious capacity gap within the timeframe they may be given to address threats to their own integrity. It is important to understand that the British deterrent remains technically dependent on the United States, and the French one is of a strategic nature and aimed at preserving the country's strategic interests. Despite recent overtures, I doubt it can be credibly extended to provide continent-wide protection. The Scandinavian/German plan, if viable, will require years for completion. Absent US and European coordination, there are risks that Europe will find difficult to counter a renewed Russian Suez-type scenario backed with nuclear blackmail to derail EU accession. Under such circumstances, the trajectory of Ukraine's EU membership would become uncertain. Without renewed strategic engagement, the possibility of a reversion to an association agreement-style outcome could not be excluded. Ukrainian and Western policymakers alike should carefully consider the best ways to mitigate this threat scenario.

**Valentin Yakushik:** *How do you perceive paths to settlement?*

**Louis L. Voiron:**

Ahead of a settlement, Ukraine will have to navigate two challenges:

On the one hand, it will have to maintain close ties with the US in parallel to its increasing European integration. If in the short term the Europeans may appear more inclined to assist, Ukraine will need the United States for its capacity and as a backstop to ensure its long-term security.

On the other hand, it will have to alter China's calculation that it "cannot afford to let Russia fail", in Wang Yi's reported words (Birmingham, 2025). This will require, this time, a careful balancing act in its relationship with the US, but one can still discern a credible path to success.

When it comes to the present negotiations, I am not going to elaborate here on ongoing conversations, but I would like to emphasise one particular thought: short of an outright victory, a settlement will require a number of innovative approaches.

In the Russian world, military defeat – as in 1917 – a crisis off-ramp – such as after the Cuban crisis – or an unpalatable political settlement has historically led to a loss of political power, bringing threats to the integrity or even the lives of those leaders, and a redistribution of assets. Irrespective of whether war aims are achieved or not, this represents a strong disincentive to settlement.

In the peace formulas being discussed, I feel more importance should be given to innovative approaches and the development of pilot projects. Today I will discuss only one that has particular relevance for Switzerland, where the Ukraine Foundation is also based – the political and security framework for maintaining or rebuilding a series of critical infrastructure assets such as nuclear power plants and water adduction systems. Track 2 diplomacy, private-sector engagement, and bilateral aid have the potential to unite countries around a shared purpose, much as we finally managed to do to save Aswan during the first Cold War. Conflict resolution will by no means be easy, but no effort should be spared to secure the future of a free, prosperous, and thriving Ukraine.

**Valentin Yakushik:** *What are the Foundation's present activities and plans for the future?*

**Louis L. Voiron:**

Ukraine Foundation's overarching objective is to foster enhanced cooperation between Ukraine, the United States, Europe, and a select group of partner and allied nations. It focuses on three interconnected priorities. First, we continue to support Ukraine's resilience and international engagement through targeted policy programmes, including capacity-building initiatives, structured bilateral dialogue tracks, and partnerships with key national institutions. Our highly experienced Congressional and Administration taskforces play a central role in advancing this work, particularly across sectors where our network of partners can deliver tangible added value. Second, we are developing a series of co-development projects aimed at strengthening Ukraine's long-term economic and technological potential. These include major initiatives that will be unveiled shortly with some of the largest institutional investors as well as leading pioneers in defence tech innovation, education, and international investment facilitation. Third, we are leveraging our extended team's unique experience in international negotiations and Track 2 diplomacy to advance practical humanitarian relief and policy solutions that could contribute to a fair and durable settlement. Looking ahead, our objective is to help anchor Ukraine within a stable, prosperous, and secure European and transatlantic future. This requires sustained engagement, close strategic coordination with international partners, and a commitment to building the institutional foundations of a modern, resilient state. The Foundation will continue to serve as a platform — a bridge — for such enhanced cooperation, mobilising expertise, resources, and political goodwill in support of Ukraine's reconstruction and long-term development (see also Ukraine Foundation, n.d.).

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