Global Weekly

PERIPHERAL REGIONS INTELLIGENCE REPORT

20/06/2025

Welcome to Global Weekly's Peripheral Regions Intelligence Report.

Global Weekly is your trusted source for understanding the complexities of today's world. Our comprehensive analysis helps you stay ahead of the curve, enabling you to make informed decisions and develop effective strategies to navigate the ever-changing global environment.

Our team of dedicated analysts brings you comprehensive insights and analysis on key events and trends from around the world. This coverage offers an in-depth examination of significant events across various regions, highlighting critical developments and their potential implications. Whether it's political shifts, economic changes, or social movements, we delve deep into the factors driving these events and offer our expert perspectives.

Our Region Reports examine the most pressing regional issues of the past fortnight in a clear, concise, and easy-to-digest format. Our analysts consider key contextual, sociopolitical, and historical factors when producing the analysis that you need to remain informed in an increasingly complex world.

Index

Editors

Demetri Giannakaris and Aamnah Fatima Khan

Understanding our Risk Rubric

Global Weekly's intelligence reports make use of a risk rubric to provide a structured methodology for assessing and measuring risks associated with emerging geopolitical events. When analysing a geopolitical event, we assign a score to the following risk factors: **political and governance**, **economic and infrastructure**, **security and crime**, and **environmental and resource**. Each factor is graded on a scale of 1-10, with 1 representing the lowest risk and 10 representing the highest risk. These are some of the following factors when considered:

- **Political and Governance:** assesses the stability, clarity, and effectiveness of political and legal frameworks governing contested or shared global spaces—such as maritime zones, outer space, and polar regions—focusing on sovereignty disputes, international governance, legal clarity, treaty compliance, corporate influence, geopolitical tensions, and conflict risks.
- **Economic and Infrastructure:** evaluates the stability, resilience, and integrity of economic systems and critical infrastructure in global commons, focusing on trade security, corporate governance, corruption, supply chain robustness, and emerging technological risks such as AI.
- **Security and Crime:** evaluates the stability and safety of strategic regions by assessing military activity, cyber threats, crime regulation, exploitation risks, and the presence or breakdown of security and law enforcement.
- **Environmental and Resource**: assesses environmental health and sustainability in strategic regions, focusing on climate risk, pollution, contamination, debris, and pressures from resource competition and overexploitation.

These factors are then submitted to our database, and our analysts extract an overall, state-wide Risk Score, which is contained within this report.

Naval confrontation between China and the Philippines in the South China Sea; armed conflict risk increases

Executive Summary

- On 8 May, Chinese naval vessels blocked the Philippine Navy ship BRP Emilio Jacinto from approaching Scarborough Shoal.
- China's Nine-Dash Line claims most of the South China Sea (SCS), despite a 2016 court ruling, which has escalated tensions with the Philippines over fishing rights and trade routes.
- China's exclusion zones and Philippine resistance create a high incident probability, with potential casualties threatening to escalate territorial disputes.

Context

On 8 May, two Chinese naval frigates and a coast guard ship blocked the Philippine navy ship, the BRP Emilio Jacinto, from approaching the Scarborough Shoal. The Scarborough Shoal, or Huangyan Island in China, is approximately 100 miles from the Philippines and 500 miles from China. It is a triangular amalgamation of rocks and reefs around a sheltered lagoon claimed by the Philippines, China, and Taiwan.

Analysis

Tensions in the South China Sea (SCS) have been simmering, with Brunei, China, Malaysia, the Philippines, Taiwan, and Vietnam having overlapping territorial claims. China claims the majority through its Nine-Dash Line. In 2016, an international arbitration tribunal declared the line invalid in a case brought forth by the Philippines. China's claims are unlawful under the UNCLOS, which establishes 200-mile exclusive economic zones. Despite being a UNCLOS signatory, Beijing claims islands, waters, seabed resources, and airspace within the Nine-Dash Line. The SCS is a major artery for global trade. China's increased military presence positions Beijing to exert greater control over these trade routes, upon which its economy is dependent.

Beyond global trade routes, the territorial claims over the SCS involve a dispute over its vast resources. It is a significant fishing ground, with the Scarborough Shoal's sheltered lagoon harbouring one of the region's richest fishing grounds. For the Philippines, the territorial dispute is not just about regional sovereignty, but also about the livelihood and food security of its

coastal communities. Beijing's seizure of the Shoal in 2012 and its establishment of an exclusion zone effectively cut off Philippine fishermen from accessing fishing grounds. From a strategic standpoint, Manila wants to reinforce its claims and assert its role as a frontline state in U.S.-led regional security. On 21 May, the U.S. and the Philippines conducted a bilateral naval exercise in the waters off Palawan and Occidental Mindoro. This exercise sends the message to Beijing that the Philippines has U.S. support.

The 8 May incident comes amidst increased confrontation between the two countries in the SCS. Beijing accused the Philippines of repeated infringements of its territory and provocation. Manila insists on its territorial rights and accuses China of recklessly endangering the lives of its people. Beijing's rejection of international arbitration has rendered legal mechanisms powerless, forcing the Philippines to rely on naval presence to assert its territorial rights. This dispute risks entanglement in the broader great power competition. U.S. Ambassador to Manila, MaryKay Carlson, condemned China's actions as aggressive, stating on X that they "recklessly endangered lives and threaten regional stability." Chinese Foreign Ministry spokesman Mao Ning advised "the U.S. side not to use the Philippines to stir up trouble in the South China Sea, and not to undermine peace and stability in the region."

Forecast

China will highly likely continue its strategy of intimidation via exclusion zones, military standoffs, and naval blockades. The Philippines is unlikely to relinquish its territorial claim over the Shoal and its exclusive economic zone. Although ASEAN is working on a framework for the SCS, it is unlikely to resolve this dispute, as countries such as Thailand and Cambodia are hesitant to anger China. Simultaneously, countries such as the Philippines and Vietnam are unlikely to abandon their territorial rights. Continued military standoffs increase the probability of incidents. Any casualty on either side would likely constitute an escalation, potentially transforming this territorial dispute into an armed conflict.

Risk Ratings:
Political and Governance: 6
Economic and Infrastructure: 5
Security and Crime: 6
Environmental and Resource: 5

Trump unveils 'Golden Dome' missile defence system; risk of further militarisation elevated

Executive Summary

- On 20 May, President Trump announced a Golden Dome missile defence system to protect North America, marking the first deployment of weapons in space.
- The program reflects U.S. efforts to counter peer and near-peer countries developing advanced delivery systems that bypass existing missile defences on the continent.
- This marks a significant step in the militarisation of space and could initiate a new arms race.

Context

On 20 May, President Trump unveiled plans for a Golden Dome missile defence system to counter next-generation aerial threats, including hypersonic, cruise and ballistic missiles. The program would deploy a constellation of satellites, some armed with lasers, which would identify, track and potentially intercept incoming missiles. The satellites will link up with existing land, sea and air infrastructure to provide a layered defence over North America.

President Trump announced that the project would cost $175bn and would be operational by the end of his Presidential term.

Analysis

Project Dome has reframed U.S. missile defence doctrine from its focus on protecting against 'rogue adversaries' like North Korea, to combating threats by peer or near-peer countries like China and Russia. Existing missile defence systems are designed to counter the limited strike capabilities of North Korea or Iran, not the advanced and large-scale ballistic and hypersonic missile arsenals of peer adversaries. By developing a space-integrated system, the U.S. aims to achieve a significantly higher level of 'deterrence by denial', making it more difficult for peer and near-peer adversaries to strike the U.S. with advanced delivery systems developed for that purpose.

Whilst Project Dome complies with the letter of the 1967 Outer Space Treaty (OST), it signals a new phase in U.S. strategic competition in space. The OST prohibits the deployment of weapons of mass destruction in orbit, but is silent on the use of satellite-mounted lasers. By framing the Golden Dome as a defensive manoeuvre, the U.S. is likely exploiting the ambiguity in the OST to expand its military footprint in space.

The project is susceptible to supply chain challenges, which could impact the delivery schedule and cost. Dependence on limited suppliers, such as Honeywell and Teledyne, for space-based components increases the risk of production bottlenecks. Export controls on critical minerals, such as gallium and germanium, which are primarily sourced from China, may also extend lead times. A significant challenge is that Project Dome will have to develop and deploy technology that does not currently exist, which comes with its own inherent unpredictability. These factors make it unlikely that Project Dome will be completed within Trump's second term.

Forecast

The Golden Dome signals a shift toward the weaponisation of space, which will likely incentivise peer- and near-adversaries, such as China and Russia, to accelerate their own space militarisation efforts. U.S. allies will also benefit, with Canada likely to come under the umbrella of the Golden Dome as part of the North American Aerospace Defence Command.

Risk Ratings

Political and Governance: 6

Economic and Infrastructure: 5

Security and Crime: 5

Environmental and Resource: 5

Russia and China sign Moon power plant construction deal; renewed space tensions likely

Executive Summary

- On 12 May 2025, China and Russia announced a memorandum to construct a nuclear power plant on the moon.
- The memorandum establishes the moon as a new arena of geopolitical competition, raising questions about the purpose of the base beyond research.
- The proposed colonisation of the moon could provide a platform for international diplomacy and collaboration, but it is also likely to revive tensions akin to those of the Cold War-era Space Race.

Context

On 12 May, a memorandum signed by the Russian space agency, Roscosmos, and the China National Space Administration (CNSA) was announced. The memorandum outlined the states' joint goal to construct a nuclear power plant on the moon by 2036.

The reactor would serve as a power source for the International Lunar Research Station (ILRS), a planned settlement on the South Pole of the moon born out of the Sino-Russian alliance. The alliance has already welcomed 17 partner states, with the number expected to grow rapidly through China's new 555 Project, 'which seeks to involve 50 countries, 500 scientific research institutions, and 5,000 researchers worldwide.' The ILRS is emerging as a competitor of NASA's Artemis program, a U.S.-led initiative to create an orbital station around the moon, also known as Gateway. Recent budget cuts, however, including a plan to cancel the Gateway project altogether, threaten to leave the U.S. behind.

Analysis

The memorandum between Russia and China establishes the moon as a new arena of geopolitical competition. Although China or Russia's space sectors have not reached parity with the U.S., their industries are rapidly evolving. Both states possess unique capabilities that, when combined, may lead to notable achievements. Russia has a longstanding history of space-based nuclear systems, making it a forerunner in generating nuclear power on the moon.

China, on the other hand, has established itself as a frontrunner in autonomous technology systems, which it intends to use during the early phases of the project.

Although the creation of a permanent nuclear-powered moon base may be an exciting stride in space exploration, it also raises important questions regarding the exact purpose of the base. China and Russia's space ambitions are closely tied to their military capabilities. Under Xi Jinping's leadership, for example, China has established the 'Central Military Commission: the Aerospace Force (ASF), the Cyberspace Force and the Information Support Force,' new military entities focused on enhancing China's space warfare capabilities. Russia, on the other hand, has been shunned by NASA and the European Space Agency amidst the war with Ukraine, invigorating its resolve to embark on its own space missions. This status, combined with its partnership with China, may increase the level of threat felt by the U.S. and its allies should Russia choose to utilise the base for military activities.

Even more importantly, the base brings the 1967 Outer Space Treaty to mind. The treaty outlines that space may exclusively be used for peaceful purposes; it is for the benefit of all humankind, and no state can claim sovereignty over the moon or other celestial bodies. The construction of the base by Russia and China raises questions regarding access to the moon following its construction. Would either of the states lay sovereignty claims over the moon? Would the base be used as a way to hinder the space exploration of other states? Could it be used as a space military base by either of the partner states in times of conflict?

Forecast

The construction of a nuclear power plant on the moon is likely to serve as a key component of international collaboration for member states of the International Lunar Research Station (ILRS) alliance. China and Russia are likely to utilise the project to advance their strategic objectives, framing it as a symbol of technological prowess. Successful completion of the project would likely be presented as evidence of the strength of the Sino-Russian model of governance and the decline of the West.

Furthermore, both states will likely open the base to broader international participation, fulfilling shared goals of deep space exploration and further space colonisation. They are also likely to utilise the base as a point of collaboration for space-based nuclear power initiatives, allowing for greater innovation. However, this is likely to lead to the dissemination of sensitive technologies,

conceivably allowing hostile actors to gain access to offensive nuclear capabilities and undermining international space norms. More importantly, the Chinese and Russian-led ILRS will likely be used as a means of asserting greater dominance over the space domain. With the current budget cuts to U.S. space programs, notably Artemis, the ILRS will likely be utilised as a means for the two states to project power and influence, further alienating countries that have been involved in space activities for decades.

The United States is likely to view the project as a hostile act or even a violation of space treaties. As the ILRS alliance slowly comes to fruition, the U.S. will likely increase efforts to dissuade states from joining. This may create a state of affairs in which countries choose sides to gain a strategic advantage. Although the proposed nuclear power plant on the moon may provide a platform for international diplomacy and collaboration, it is also likely to revive tensions reminiscent of those of the Cold War-era Space Race. Notwithstanding the project's success, its proposal highlights how space is becoming a contested domain.

Risk Ratings

Political and Governance: 5

Economic and Infrastructure: 5

Security and Crime: 5

Environmental and Resource: 5

Russia modernises Arctic icebreaker fleet; continued heavy investment highly likely

Executive Summary

- Russia announced a $6 billion investment in its Arctic icebreaker fleet during a joint press conference with China on 8 May 2025, aiming to expand control over the Northern Sea Route (NSR) and secure Arctic dominance.
- The move builds on the March 2023 agreement to establish a joint Russia–China working group on NSR development, now reinforced by the procurement of military-capable ice-class ships.
- This development underscores a trend toward Arctic militarisation and will likely prompt countermeasures from NATO and Arctic Council members.

Context

On 8 May 2025, during a joint press conference with Chinese President Xi Jinping, Russia announced plans to expand and modernise its Arctic icebreaker fleet, accelerating its maritime capabilities in the High North and aiming for year-round control of the Northern Sea Route, a key Arctic trade corridor.

This initiative builds on Russia's 2022 Northern Sea Route program, which includes over 50 icebreakers, port development, rescue centres, and satellite deployment. It also supports the March 2023 Russia-China agreement to boost NSR cargo to 50 million tons annually by 2030. The new fleet will feature dual-use nuclear and diesel-electric icebreakers, reflecting increased civilian-military integration in Russia's Arctic strategy.

Analysis

Russia's Arctic strategy represents a calculated effort to transform geographic advantage into long-term strategic influence by aligning economic development with military objectives. At the core is the expansion of dual-use infrastructure, such as icebreakers and Arctic ports, which facilitates year-round transit along the Northern Sea Route (NSR) while enabling swift military deployment. This infrastructure likely supports Moscow's bid to dominate emerging Arctic trade routes and control key maritime chokepoints exposed by climate change.

The militarisation of the region is tightly integrated with these economic goals. Russia has bolstered the Northern Fleet, deployed advanced S-400 and Bastion systems, and reactivated Soviet-era bases across the High North. These actions appear designed to secure critical energy infrastructure, reinforce territorial claims, and signal strength to NATO. The integration of civilian and military assets, as outlined in the revised Maritime Doctrine, suggests an intent to normalise military presence under the guise of economic activity.

Meanwhile, China's involvement through joint Arctic ventures, including the Yamal LNG project and the Polar Silk Road, indicates a shared Russia-China interest in challenging Western influence and reshaping Arctic governance. Climate change is accelerating these dynamics, and Russia's approach is best understood as anticipatory—aimed at shaping the region's future geopolitical and economic order, rather than merely responding to it.

Forecast

Russia is highly likely to continue investing heavily in Arctic infrastructure; however, operational and financial returns remain uncertain due to sanctions restricting technology and persistent logistical challenges. The NSR is likely to remain a seasonal or specialised shipping corridor rather than a full alternative to traditional routes. Environmental concerns are expected to prompt stricter regulations on shipping and resource extraction, adding complexity to its development.

Russia's Arctic approach is likely to emphasise "area denial" and "strategic signalling," combining dual-use icebreakers with advanced missile systems, such as the S-400 and Bastion, to assert control and deter NATO presence. Rising cargo traffic, driven by Russia-China cooperation, will certainly heighten NATO and Arctic Council concerns, given the blurred lines between commercial and military activities. This dynamic is expected to lead to an increased NATO presence in the Arctic, raising geopolitical tensions and risks of miscalculation. Meanwhile, disputes over maritime boundaries and transit rights are likely to intensify, demanding nuanced diplomacy.

Risk Ratings

Political and Governance: 5

Economic and Infrastructure: 5

Security and Crime: 5

Environmental and Resource: 6

Helsing unveils new maritime drones, highlights international legislation gap; accidental tension escalation more likely

Executive Summary

- German defence AI firm Helsing unveils new Lura and SG-1 Fathom maritime drones.
- Demand for autonomous underwater systems is accelerating following high-profile attacks on cables and pipelines.
- Use of armed sea drones in Ukraine signals tactical evolution; legal frameworks lag.

Context

On 21 May 2025, defence AI company Helsing presented its Lura and SG-1 Fathom unmanned underwater systems (UUS) at the Undersea Defence Technology (UDT) conference in Oslo. The Lura is designed for wide-area subsea surveillance and cable mapping, while the SG-1 Fathom offers autonomous mine detection and neutralisation capabilities. Both systems are designed to operate in swarms and integrate AI-driven threat identification and response.

Founded in 2021, Helsing develops software-defined defence platforms, focusing on integrating artificial intelligence into conventional and autonomous weapons systems. The company partners with European governments and defence manufacturers to scale AI-enabled capabilities, including airborne and maritime surveillance.

Analysis

Autonomous underwater systems (AUS) are increasingly central to maritime security, but their strategic promise remains uneven. While platforms like Helsing's Lura and SG-1 Fathom provide persistent, covert surveillance over subsea cables and maritime approaches, their operational efficacy depends on sustained connectivity, reliable AI discrimination, and resilience to countermeasures. In contested environments, electronic warfare or spoofing could degrade their effectiveness, especially for swarm deployments that rely on shared situational awareness.

Industry adoption is accelerating largely because these systems offer cost-effective augmentation of manned operations. Compared to crewed vessels, AUS reduces personnel

deployment, allows for scalable patrol coverage, and maintains presence in grey-zone scenarios without politically escalatory signals. However, they are not yet substitutes for conventional naval deterrence.

Ukraine's recent deployment of armed naval drones to down Russian Su-30SMs with U.S.-supplied Sidewinders highlights a key shift: the line between ISR and offensive strike is increasingly blurred. While such capabilities enhance asymmetric deterrence, they also complicate command accountability and risk inadvertent escalation, especially when attribution is unclear or human oversight is minimal. The incident may embolden other mid-tier powers or non-state actors to adopt lethal AUS without robust safeguards.

A similar logic drives commercial interest. As attacks on undersea infrastructure grow, ranging from the sabotage of the Nord Stream pipeline to unexplained cable breaks in Asia, operators in the energy and telecommunications sectors are seeking autonomous patrol solutions. Yet, widespread deployment faces hurdles, including data security, legal liability for autonomous actions, and interoperability across naval command networks.

International law is trailing behind this technological curve. The United Nations Convention on the Law of the Sea (UNCLOS) lacks provisions for autonomous offensive platforms, and there is no global consensus on rules of engagement for unmanned underwater warfare. Without regulatory clarity, maritime actors operate in a legal vacuum, thereby increasing the likelihood of incidents without accountability or effective deconfliction mechanisms.

Forecast

Risk profiles in the maritime domain are evolving as the boundary between surveillance and offensive operations erodes. Naval drones, once viewed as passive monitoring tools, are now increasingly capable of carrying out strikes, disrupting adversary assets, or deterring encroachment - often with limited or no human oversight. This ambiguity complicates attribution, crisis management, and escalation control, particularly in congested or contested waters.

For commercial operators—especially in the energy and data sectors—this shift presents a dual challenge. On one hand, they face a growing threat from state or proxy actors targeting subsea cables, platforms, and pipelines. On the other hand, they must navigate a grey zone where defensive ISR platforms might be misinterpreted as offensive assets. This blurring of intent makes infrastructure protection more urgent but also more politically sensitive.

Both private firms and national navies are ramping up investment in autonomous maritime ISR and strike capabilities. Helsing's Lura and SG-1 Fathom are likely to appeal to NATO members and infrastructure operators for their hybrid surveillance–response functionality. This will enable persistent underwater coverage without escalating to visible military deployments.

However, until international legal frameworks catch up, these systems will operate in a legal vacuum, particularly in international waters or disputed exclusive economic zones. This gap increases the likelihood of accidental escalation and complicates efforts to establish rules of engagement. New norms or bilateral agreements are likely to emerge only after a high-profile incident forces the issue into multilateral forums.

Risk Ratings

Political and Governance: 5

Economic and Infrastructure: 5

Security and Crime: 5

Environmental and Resource: 5

HMCS Margaret Brooke completes historic Antarctic mission; further Canadian polar engagement likely

Executive Summary

- HMCS Margaret Brooke has completed a 119-day mission across South America and Antarctica, supporting scientific research and diplomatic engagement under Operation PROJECTION 25-01.
- The deployment advances Canada's Antarctic strategy by showcasing naval capability, strengthening international partnerships, and enhancing credibility within the Antarctic Treaty System.
- Canada is likely to expand its dual-polar naval operations and enhance its strategic role in Antarctic governance and science diplomacy.

Context

On 9 May 2025, the HMCS Margaret Brooke returned to Halifax, Nova Scotia, for a 119-day deployment under Operation PROJECTION 25-01. The mission marked several firsts for the Royal Canadian Navy, including the first recorded visit to Antarctica and a Canadian vessel's first circumnavigation of South America in decades. The ship travelled over 20,500 nautical miles, visiting nine countries and three Antarctic Research Stations, conducting operations in the Southern Ocean. HMCS also supported three Antarctic Research Stations.

The mission supported an all-Canadian scientific expedition focused on climate and environmental research, while also facilitating defence diplomacy through joint exercises with South American navies. The deployment concluded with *Margaret Brooke*'s return to Halifax on 9 May 2025.

Analysis

HMCS Margaret Brooke's deployment significantly advances Canada's Antarctic strategy by demonstrating operational capability in extreme southern latitudes. As the first Royal Canadian Navy vessel to cross the Antarctic Circle, Margaret Brooke establishes a precedent for naval support to Canadian scientific missions in Antarctica. This capability aligns with the principles of the Antarctic Treaty System (ATS), where a peaceful scientific presence directly contributes to national influence. Canada's demonstrated ability to provide logistical and operational support

for environmental research strengthens its claim to an active consultative role in shaping the future governance of the continent.

Canada's deployment has strengthened international partnerships that align with its broader regional objectives. Joint activities with the Peruvian and Chilean navies and logistical support at Chilean Antarctic bases signal an intent to counter growing strategic competition in the South Atlantic and Antarctic. China and Russia are expanding their presence through increased naval operations, dual-use infrastructure, and scientific stations with potential military applications. Canada's defence diplomacy promotes transparent cooperation, scientific exchange, and adherence to international law. These efforts aim to constrain rival influence and support a coalition of like-minded states committed to rule-based governance in geopolitically sensitive polar regions.

Additionally, the integration of polar science, naval mobility, and defence diplomacy reflects a more assertive approach to climate leadership, enabling Canada to shape environmental governance norms, monitor climate impacts in real-time, and support sustainable access to the polar regions. The mission promotes research on ocean currents, microplastics and glacial melt, contributing to global climate science while reinforcing Canada's image as a constructive and environmentally responsible actor. Canada has demonstrated its capability for dual-polar operations, underscoring its ability to maintain a presence in both the Arctic and Antarctic regions. This enhances its stature within the ATS and international discussions around polar security, environmental protection and maritime cooperation.

Forecast

Canada is likely to continue integrating naval deployments into its polar science and diplomatic agenda. Margaret Brooke's success in Antarctic operations provides a model for future missions that combine research, engagement and presence. This integration supports Canada's aspiration to strengthen its status as a leading Antarctic stakeholder.

Given the global spotlight on climate resilience and strategic access to the poles, Canada is expected to formalise its dual-polar engagement through recurring naval deployments, interagency coordination, and long-term support for multinational research missions. Institutionalising these activities would reinforce Canada's credibility under the Antarctic Treaty System (ATS), while regular operations in both polar regions would help protect sovereignty,

advance scientific collaboration, and influence the development of international norms governing polar governance and environmental stewardship.

Risk Ratings:

Political and Governance: 5

Economic and Infrastructure: 5

Security and Crime: 5

Environmental and Resource: 5

Poland investigates suspected seabed cable sabotage; risk of further sabotage high

Executive Summary

- On 22 May 2025, Polish authorities launched an investigation near a power cable to Sweden following suspected sabotage, underscoring growing concerns over Baltic seabed security.
- Repeated cable disruptions and Russian-linked grey-zone maritime activity have prompted enhanced coordination between NATO and the EU.
- The risk of further sabotage remains high. While NATO and regional partners are expected to expand surveillance and infrastructure hardening, persistent threats will require a sustained multinational commitment.

Context

On 22 May 2025, Polish Prime Minister Donald Tusk announced that authorities were inspecting the seabed near a key power cable to Sweden for the possible presence of explosive devices. The investigation follows a series of suspicious incidents in the Baltic Sea. In February, Finland detained a Russian-flagged vessel suspected of tampering with undersea cables, prompting NATO to launch "Baltic Sentry," a mission using drones, patrol aircraft, and naval forces to secure vital infrastructure.

Earlier, on 14 January, eight NATO countries, including Poland, Finland, and Sweden, issued a joint statement in Helsinki condemning sabotage and pledging stronger cooperation to protect critical seabed systems.

Analysis

The Baltic region's cables are a critical digital and energy lifeline - more than 95% of global internet traffic and trillions of dollars in financial transactions rely on submarine networks. Repeated disruptions have raised concerns about grey-zone operations linked to Russian maritime activity, especially involving state-affiliated vessels manoeuvring near critical nodes.

The eight-nation pact and NATO's deployment underscore increasing regional cooperation. The EU's involvement adds strategic depth by aiming to harmonise protection protocols and

enhance maritime domain awareness. Military and civilian agencies are sharing data more effectively to detect and attribute threats in real time.

However, key vulnerabilities remain. Legal ambiguity in international waters, limited redundancy in cable routing, and delays in incident attribution leave vital infrastructure exposed. Russia's past behaviour suggests a continued intent and capability to exploit these gaps. The integration of non-military tools into conflict dynamics—hallmarks of hybrid warfare—intensifies the need for robust, coordinated deterrence and response mechanisms.

Forecast

The risk to subsea infrastructure in the Baltic Sea is likely to remain high through 2025. Regional military cooperation is very likely to deepen, with Poland, Sweden, and Finland expected to enhance seabed mapping, deploy autonomous underwater vehicles (AUVs), and increase patrols. NATO and the EU are likely to expand joint protocols for detection and response. However, deterrence will remain limited due to ongoing operational constraints and political divisions, especially around monitoring, attribution, and legal authority.

As sabotage incidents escalate, the risk of retaliatory cyber operations or naval signalling will likely grow, reflecting broader uncertainty over the resilience of Europe's digital and energy infrastructure under persistent hybrid threats.

Institutionalising seabed protection as a permanent NATO mission would mark a strategic shift, tilting focus toward maritime domain awareness and undersea infrastructure defence. This evolution may affect NATO's operational priorities by reallocating intelligence, surveillance, and logistics assets from land to naval missions. It could also test alliance cohesion, as members debate roles, resources, and legal frameworks. Addressing these challenges will likely require sustained investment, capability development, political alignment, and stronger legal interoperability to adapt deterrence strategies for a contested seabed domain.

Risk Ratings

Political and Governance: 5

Economic and Infrastructure: 5

Security and Crime: 5

Environmental and Resource: 5

US Department of Energy purchases Helium-3, first non-terrestrial resource purchase; space resource market viability highlighted

Executive Summary

- On 7 May 2025, the U.S. Department of Energy's Isotope Program (DOE IP) made a historic purchase of Helium-3 from the space resource company Interlune.
- This purchase carries implications for international space law and reflects the Trump administration's strategic emphasis on mineral security.
- This purchase likely signals to the private sector that a viable market for space resources is emerging.

Context

On 7 May 2025, the DOE IP announced its first-ever purchase of non-terrestrial resources with an agreement to acquire helium-3 extracted from the Moon. Space resource company Interlune will harvest the helium-3 and deliver it by April 2029. Under the terms of the agreement, the DOE IP will purchase three litres of lunar helium-3 at the prevailing commercial market price, marking a historic milestone in space-based resource procurement.

Analysis

The DOE IP's decision to purchase helium-3 highlights the strategic value of this rare isotope. Helium-3 is a non-radioactive isotope of helium with a range of applications, including nuclear fusion, quantum computing, defence technologies, and medical imaging. While helium-3 is extremely rare on Earth, scientists believe it is more abundant on the Moon due to solar wind deposits.

More broadly, the DOE IP's acquisition underscores the wider U.S. strategy to leverage space resources. Legal ambiguity has emerged with the Outer Space Treaty of 1967, which is vague on extraterrestrial mining, and the largely ignored 1979 Moon Agreement. As a result, several nations, such as the U.S., have enacted unilateral space mining legislation. This move underscores a growing perception of space resources as instruments of national power and strategic competition, rather than as shared assets for the global community.

Beyond legal ambiguity, the purchase highlights a broader trend of states prioritising unilateral action over international norms. Emerging powers, such as Russia and China, actively challenge the U.S.-led global order by proposing alternative frameworks. At the same time, some Western countries that once upheld these norms are increasingly retreating from them amid a rise in populism. The United States, for instance, has withdrawn from the Paris Climate Accord and the World Health Organisation. Additionally, it has signalled intentions to mine in international waters, defying established international laws and norms.

Regarding the United States, this purchase aligns with broader strategic objectives to secure critical minerals. The current administration views the nation's supply chains as overly dependent on foreign sources. Consequently, this dependence is seen as a significant threat not only to U.S. defence capabilities but also to the country's economic growth. Increasingly, nations are framing resource dominance as a tool of economic statecraft, used to bolster their geopolitical influence. Though already a leading Helium-3 producer, the U.S. purchase likely signals a strategic move to sustain market dominance and leverage space resources for geopolitical gain.

Forecast

This purchase likely signals to the private sector that space resources are a viable and strategically supported market, underwritten by U.S. government backing. Russia and China will likely condemn the move, viewing it as a U.S. geopolitical manoeuvre. Over the long term, this action is likely to increase the chances that terrestrial rivalries will extend into the space domain. These tensions will very likely manifest in the growing divide between the U.S.-led Artemis Accords and the China-Russia-backed International Lunar Research Station.

Risk Ratings

Political and Governance: 5

Economic and Infrastructure: 5

Security and Crime: 5

Environmental and Resource: 5

About Us

Global Weekly offers comprehensive coverage and expert analysis to keep you informed about the world's most pressing issues. Our team of experienced analysts and journalists ensures that our content is accurate, reliable, and relevant.

Who We Are

Global Weekly is a leading provider of insightful news and analysis on global events. We specialise in delivering up-to-date information on geopolitical trends, international security, and global economic developments.

Contact Us

For business inquiries and more information, reach out to us via:

- Email: info@global-weekly.com

- Phone: +44 7802 751 990

Follow us on social media:

- LinkedIn: Global Weekly (https://www.linkedin.com/company/global-weekly)

Rights & Content