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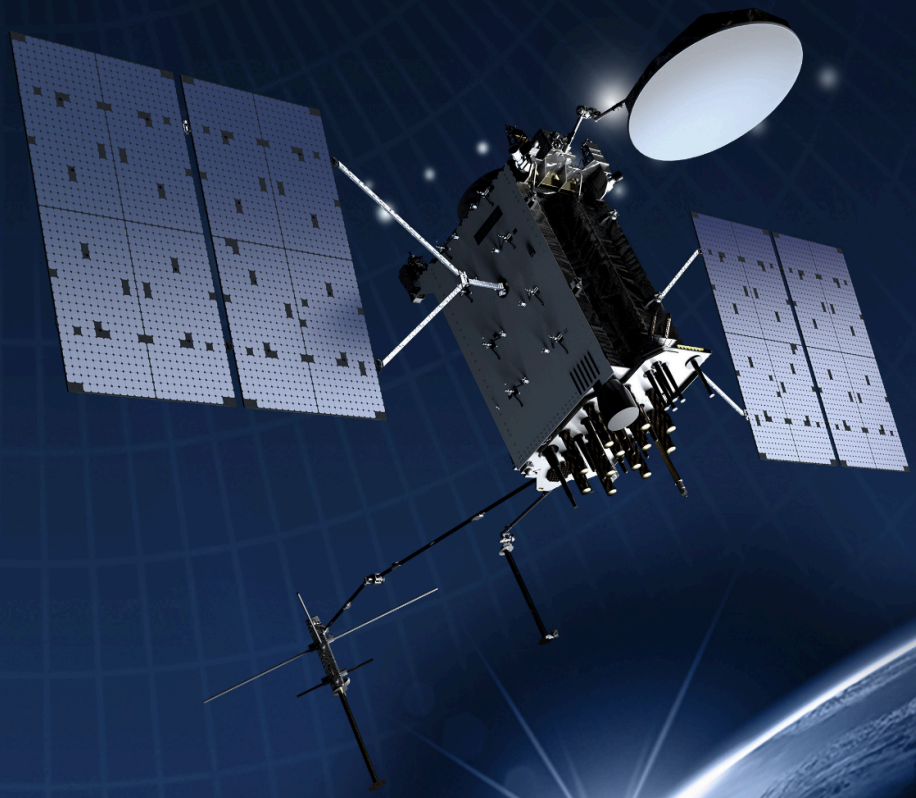

PERIPHERAL REGIONS INTELLIGENCE REPORT

24/01/2025

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, making informed decisions and developing 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 provides an in-depth look at significant occurrences 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.

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Editors

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China Launches 42nd Antarctic Expedition with Major Station Upgrades and Broadscope Research

Executive Summary

- China has launched its 42nd Antarctic expedition with over 500 personnel on the icebreakers *Xue Long* and *Xue Long 2*. The mission upgrades Qinling Station, expands renewable energy, and conducts diverse research across the Southern Ocean.
- The expedition continues China's steady effort to strengthen its scientific presence through enhanced infrastructure and broader fieldwork. Its activities remain aligned with long-standing goals under the Antarctic Treaty System.
- China is likely to expand station capacity, deepen climate and ecosystem research, and improve expedition efficiency. Governance priorities, scientific needs, and ongoing environmental change will shape these developments.

Context

China has deployed more than 500 personnel aboard the Polar icebreaking research vessel *Xue Long* and *Xue Long 2* for its 42nd Antarctic expedition, one of its largest to date. A key priority is upgrading Qinling Station with expanded solar and wind systems and improved power-storage infrastructure to reduce reliance on fuel and support more stable year-round operations. The scientific mission includes deep-ice drilling for climate records, atmospheric measurements, oceanographic surveys of Southern Ocean currents and chemistry, and biological assessments of ecosystem changes.

To support continuous observation, the expedition is deploying sensors, buoys, and autonomous platforms across land and sea. The two-icebreaker approach enables parallel operations, greater geographic reach, and more efficient transport of personnel and equipment.

Analysis

The 42nd expedition demonstrates China's increasingly coordinated, capability-driven approach to Antarctic research, marked by its ability to conduct large-scale, simultaneous operations and manage complex, multi-team logistics. The investment in renewable-energy infrastructure at

Qinling Station almost certainly indicates a shift toward longer-duration, lower-dependency research bases that can sustain more intensive scientific programs while reducing the operational risks associated with fuel transport. The structure of the scientific work integrating drilling, atmospheric monitoring, oceanography, and biology likely indicates a deliberate effort to build interconnected datasets that improve environmental and climate analysis.

Building on this, the mission also reflects China's growing emphasis on technological integration to enhance scientific productivity. The deployment of autonomous platforms and distributed sensors likely signals a move toward more continuous, less seasonally constrained monitoring, allowing China to collect higher-resolution environmental data with reduced on-site staffing requirements. The dual-icebreaker strategy further reinforces this trajectory by enabling flexible, multi-point operations that minimise downtime and expand observational coverage. Collectively, these elements illustrate China shaping its Antarctic program around efficiency, scientific depth, and the strengthening of long-term research capacity.

Forecast

Building on the 42nd expedition's coordinated approach, China is likely to expand its Antarctic infrastructure to support longer and more autonomous research missions. Renewable-energy-powered stations like Qinling will probably become more common, reducing reliance on fuel transport and enabling sustained scientific operations. Integration across drilling, atmospheric monitoring, oceanography, and biological studies suggests future missions will produce highly interconnected datasets. The dual-icebreaker strategy emphasises flexible, multi-point operations that maximise coverage and minimise downtime.

China's Antarctic program is likely to deepen its scientific output and enhance climate and environmental analyses over time. Expanded infrastructure and technological integration will enable simultaneous field operations across multiple sites. Continuous data collection and autonomous systems will allow more precise year-round tracking of environmental changes. Improved station resilience and logistical coordination will support more ambitious, multi-disciplinary research campaigns. These developments will likely strengthen China's influence in Antarctic governance and international scientific collaboration. Over time, this integrated, technology-driven model is likely to define China's long-term strategy in the region.

Risk Ratings

Political and Governance: 5
Economic and Infrastructure: 5
Security and Crime: 5
Environmental and Resource: 5

Denmark bolsters Arctic cable infrastructure amid rising Russian hybrid threats

Executive Summary

- Denmark is investing $8.7 billion in Arctic security, including new undersea cables to Greenland and the Faroes, following a surge in Russian hybrid attacks since 2021
- Danish cable investments respond to Russian hybrid threats while setting a NATO precedent for territorial self-reliance, simultaneously addressing Washington's Arctic ambitions
- Moscow will likely exploit delays in Denmark's cable infrastructure, while Copenhagen leverages its investments to strengthen NATO engagement rules and its diplomatic position with Washington

Context

Denmark, Greenland, and the Faroe Islands are negotiating to expand undersea internet cable infrastructure following warnings from regional leaders about threats of Russian sabotage. Denmark has committed $8.7 billion to F-35 jets and Arctic security, including a new data cable to Greenland potentially routed through the Faroes. Russian hybrid attacks targeting critical undersea infrastructure, particularly fibre-optic cables, have surged in the Baltic and Arctic regions since 2021. Moscow has spent considerable money, time, and effort developing platforms and capabilities. They could target undersea infrastructure, including deep-diving nuclear submarines and submersibles capable of operating at 6,000 metres.

Analysis

Russia's intensifying focus on undersea infrastructure likely reflects a deliberate strategic calculation: hybrid tactics enable it to destabilise a region without entering open conflict, as direct attribution is difficult and such actions fall beneath the threshold of armed conflict. For remote islands like the Faroes and Greenland, this creates an asymmetric threat as severing one of these links could potentially paralyse governance and emergency services in those regions. Banking and online transactions, as well as government communications, would likely come to a halt. It would also create political pressure for Copenhagen if 55,000 people were cut off from banking and other services, potentially causing a grey zone dilemma for Denmark.

Denmark's investment will likely prompt a broader NATO reassessment of how the alliance protects remote territories. Copenhagen's financial commitment and enhanced surveillance capabilities will likely set a precedent, pressuring smaller nations to secure their territories more independently and prompting a wider reevaluation of burden-sharing within NATO. NATO's strategy in dealing with cable-cuts in the Arctic is likely to remain reactive rather than proactive and focus on monitoring threats instead of prevention, as international law dictates that states cannot intercept ships in international waters.

Denmark's cable investments will likely strengthen its transatlantic relations. New subsea cables not only strengthen the Faroe Islands' and NATO's resilience against hybrid attacks without additional US financial aid. By demonstrating that Copenhagen can secure its Arctic territories independently, it addresses Washington's security concerns. This could create tensions as it reduces Washington's leverage to argue that the US needs greater control over Greenland to guarantee Arctic security. More resilient North Atlantic infrastructure will likely prompt Russia to shift its hybrid tactics towards less protected states such as the Baltic states.

Forecast

Denmark's new cable infrastructure is unlikely to be operational soon, leaving a window of vulnerability that Moscow is likely to exploit with increased hybrid activity. If cable sabotage incidents continue to rise, NATO is likely to face pressure to establish rules of engagement to protect its undersea infrastructure. Copenhagen is likely to leverage its investments to strengthen its diplomatic position in Washington.

Risk Ratings

Political and Governance: 5
Economic and Infrastructure: 5
Security and Crime: 5
Environmental and Resource: 5

Lux Aeterna Secures U.S. Government Partnership for Reusable Satellite Technology

Executive Summary

- Lux Aeterna, a commercial aerospace manufacturer in the United States, has secured government financial support for the development of reusable satellite technology.
- The agreement regarding reusable technology has occurred at a time when the aerospace sector is concerned about supply chain vulnerabilities.
- With research, development, and testing likely to run until the end of 2026, the reusable technology is unlikely to mitigate supply chain vulnerabilities significantly.

Context

Lux Aeterna and the U.S. Government have reached an agreement over the development of heat-shield technology designed to make satellites fully reusable. The agreement will grant government research and operational organisations access to Lux Aeterna's rapid development capability, advanced thermal protection and re-entry technologies. This will enable quicker and more cost-effective evaluation of new materials, flight systems and space concepts than traditional government programmes. Lux Aeterna has also signed a Space Act Agreement with NASA's Ames Research Centre, which will facilitate collaboration with the United States Space Force (USSF) and the United States Air Force's Scientific Development Unit (USAF).

The heat shield prototype has validated key structural characteristics, and various tests will be conducted throughout 2026. The first launch is scheduled for the beginning of 2027. Lux Aeterna's development of this technology is part of a wider series of similar developments across the U.S. commercial sector. SpaceX, for example, have successfully reused individual Falcon 9 rockets up to 30 times. Additionally, Blue Origin became the second company to achieve orbital booster re-use during the second mission of its New Glenn rocket (following a decade of development).

The focused government interest in re-usable aerospace technology is occurring at the same time that the U.S. defence sector is becoming increasingly vulnerable to rare-earth and

critical-mineral supply chain issues. Lockheed Martin, for example, has experienced setbacks to its F-35 programme due to export controls on rare-earth magnets (used in navigation and control systems). China dominates the rare-earth production and processing industry, accounting for up to 90% of global refinement capacity. To address this vulnerability, the Pentagon has reached agreements on rare-earth and critical mineral resources in Greenland and with Pakistan. Developing mining and processing capabilities can, however, take decades, and developing the capacity to produce technologies which use refined forms of each metal can take as long. As things stand, China currently dominates this latter level of supply chains as well.

Analysis

Re-entry and vibration tests in 2026 are likely to succeed, owing to the precedent set by SpaceX and Blue Origin. Pentagon support for the Lux Aeterna project, as well as NASA collaboration, increases this likelihood. It is likely, therefore, that Lux Aeterna will successfully conduct a re-entry test in 2027. It is less likely, however, that the technology will be fully operational and applied by the USSF or USAF by 2027, especially given the timeframe over which Blue Origin developed its New Glenn Rocket.

Despite this, the extended collaboration with NASA, USSF, and USAF will likely ensure a concerted, focused effort to bring the technology to operational status. Moreover, with renewed government focus on national security and supply chain vulnerabilities more broadly, greater reciprocity between the actors involved will likely be encouraged. This will likely expedite progress due to shared expertise, technology, and objectives. The involvement of the USAF, in particular, is likely to accelerate both development and testing owing to its pivotal role in U.S. national security.

Regarding supply-chain vulnerabilities, the heat-shield technology will almost certainly help mitigate dependence on China in specific areas. This, however, remains highly unlikely in the short term and unlikely to translate into other areas of aerospace production over the same timeframe. Once operational, the shield will likely protect other components and increase the likelihood of their reuse, but successful testing of the shield is not a complete and consistent guarantee of this.

Furthermore, production and processing of rare earths are only two parts of the supply chains. Production of many specific technologies (e.g., magnets) that contribute to the construction of

entire satellites is still largely controlled by China and unlikely to be mitigated within the next decade. Whilst the shield technology will contribute to the protection of other satellite components and increase the likelihood of their reusability, there is no guarantee that this will occur consistently or comprehensively.

Forecast

Whilst there is a strong likelihood that testing will be successful, and a realistic possibility that a 2027 re-entry test will be successful, scalability issues will likely remain. Even with the concerted support of NASA and the Pentagon, it is still unlikely that the technology can be scaled and operationalised across multiple platforms and wings of the U.S. Defence sector.

In the long term, the competitiveness of the commercial sector, in conjunction with increased government intervention and collaboration, will likely help address scalability issues. However, given China's dominance across all points of the supply chain and the time it will take the U.S. to develop the necessary domestic capacity, it is still unlikely that such technology will substantially address issues within the next decade. Indeed, even matters related to the procurement of essential raw materials, aside from processing capabilities, are unlikely to be addressed within the next decade.

Risk Ratings

Political and Governance: 5
Economic and Infrastructure: 5
Security and Crime: 5
Environmental and Resource: 5

Emerging Arctic Power: Ukraine's Strategic Sanctions Against Russia

Executive Summary

- In early November 2025, Ukraine issued a decree imposing sanctions on Russian entities that collectively cover the entire Arctic resource-extraction value chain.
- This framework enables other nations, acting through Ukraine, to restrict Russian Arctic development, significantly constraining Moscow's ability to project power.
- This is likely to position Ukraine as an emerging Arctic security leader within both NATO and the broader European community.

Context

In early November 2025, Ukrainian President Volodymyr Zelensky issued a decree imposing sanctions on Russian entities involved in Arctic resource extraction. The measures target 18 individuals and 36 legal entities that collectively span the entire Arctic resource extraction value chain, from exploration to extraction and export. These sanctions are unique, marking the first measures to holistically target Russian Arctic development. They form part of Ukraine's broader effort to synchronise sanctions with key partners, including the European Union, Canada, and the United States.

Regarding the significance of the Arctic sanctions, they meaningfully constrain Russia's overall power projection. The Arctic's vast resources are central to Russia's economic strength and long-term strategic ambitions. Moreover, the region provides Russia with a vital corridor for expanded access to Asian markets, particularly China.

Analysis

Building on Ukraine's earlier coordination with other nations on synchronised sanctions, the Arctic-specific measures create a comprehensive and coordinated sanctions apparatus. This mechanism offers several strategic advantages. For instance, the effectiveness of all Ukrainian allies' sanctions on Russia is increased through a more united front. Additionally, by channelling enforcement through Ukraine, states, notably European, can implement Arctic-related sanctions more assertively without further escalating tensions with Moscow.

Additionally, this arrangement allows for strengthening various Arctic international forums and institutions, such as the Arctic Council. With Russia heavily sanctioned, there are few nonmilitary means to keep Russia in line with liberal international norms. However, nations through Ukraine can militarily stop Russian violations in the Arctic while avoiding direct retaliation. This arrangement is particularly attractive for European nations, as they lack the defence capabilities to fend off a massive direct Russian assault at this time. Through these strengthened international forums, nations can strategically shape Arctic Development.

For the United States, this structure creates an opportunity to maximise strategic leverage by providing Washington with an additional tool to pressure Russia into engaging meaningfully in peace negotiations with Ukraine. For example, the United States could signal that a failure to pursue negotiations would trigger a strengthening of this sanctions apparatus, significantly constraining Russia's ability to develop its Arctic resources. In doing so, Washington would seek to demonstrate to Moscow that prolonging the conflict in Ukraine would impose prohibitive long-term economic and strategic costs.

At the same time, this structure enables the United States to deepen Europe's dependence on American energy supplies. By restricting Russia's Arctic development, Washington removes a key alternative source of oil and gas for European markets. With Russian supply options curtailed, the United States is well-positioned to fill the resulting gap, shifting Europe's energy dependence away from Russia and consolidating American influence over Europe's external energy security.

Forecast

It is unlikely that this Ukrainian Arctic sanctions apparatus will, by itself, force Russia to withdraw from Ukraine. This is particularly evident given Russia's planned expansion of its Arctic presence. Regarding Ukraine, even if it never joins the EU or NATO, it is still likely to become a key component of its Arctic security architectures.

Risk Ratings

Political and Governance: 5
Economic and Infrastructure: 5
Security and Crime: 5
Environmental and Resource: 5

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