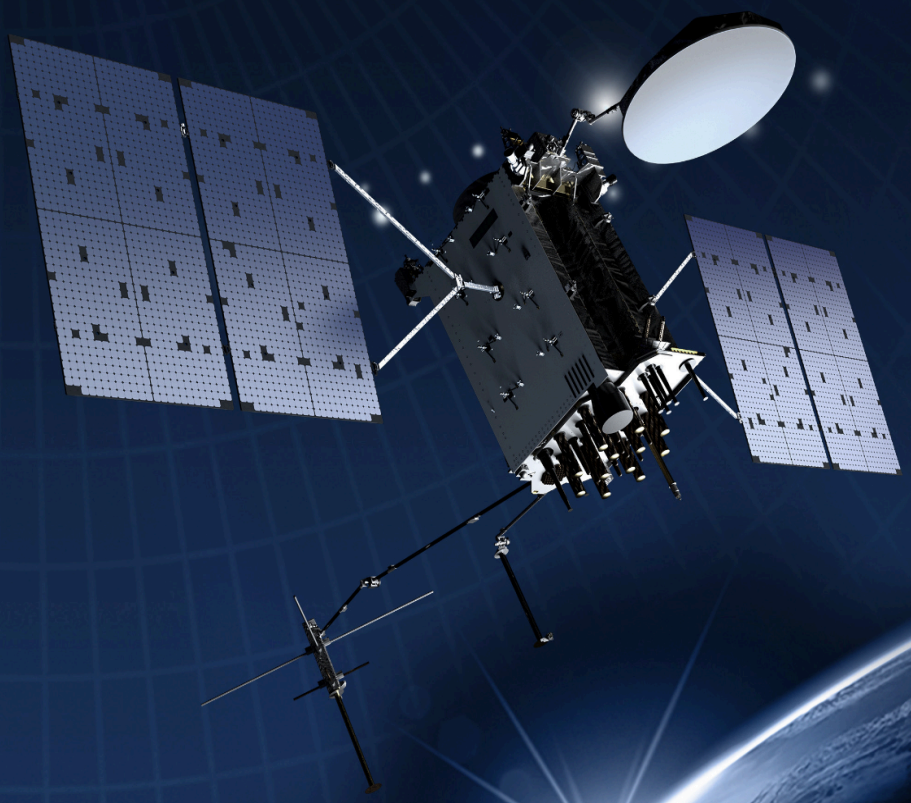
Global Weekly



PERIPHERAL REGIONS INTELLIGENCE REPORT

22/08/2025

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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Understanding our Risk Rubric

Global Weekly's intelligence reports utilise our proprietary Risk Rubric to provide a structured methodology for assessing and measuring risks associated with emerging geopolitical events. When analysing a geopolitical event, we consider 32 unique Risk Factors, categorised into our four Risk Subsections: **Political**, **Governance**, **Security**, and **Crime**. Each Factor is graded from 1 to 10, with 1 representing the lowest risk and 10 representing the highest risk.

These Factors include:

- **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.

Our analysts then use our Risk Rubric to determine the appropriate Risk Scores for each Risk Factor.

These sub-scores are then submitted to our database, and a weighted calculation is performed. From this calculation, statewide and regional risk scores are produced, which are contained within this Report.

China launches classified Shiyan 28B 01 Satellite

Executive Summary

- On 3 July 2025, China launched a new satellite in the Shiyan experimental series, the Shiyan 28B 01, into Low Earth Orbit (LEO) from the Xichang Satellite Launch Centre in the Southwestern Province of Sichuan.
- The designation suggests that this satellite will be the first of several in a new subseries of the Shiyan
- The Shiyan series is classified, but it is widely held by Western analysts that the satellites test classified, dual-use space technologies which can be used for militaristic purposes.

Context

On 3 July, China launched a new test satellite (the Shiyan 28B 01) from the Xichang Satellite Launch Centre in the South West Province of Sichuan. This is likely the first in a new subseries of the Shiyan. The Chinese government claims that the satellite will be used for agricultural monitoring and space environment exploration. This is a claim echoed by Xinhua State Media, which has reported that the satellite is for space environment exploration and related technology tests. The Shiyan satellites, however, are typically classified and are used to test undisclosed experimental space technologies. No images of the satellite series exist, and only concise, generic descriptions have been offered.

Western analysts, including officials from the United States Space Force (USSF), believe that the Shiyan series of satellites is being used to test systems, instruments and manoeuvres, and to pilot new space technologies. China has now conducted 36 orbital launches in the first half of 2025 and is on course to surpass its record of 68 in one year set in 2024. Such a concerted effort is eliciting concerns in the U.S. over China's growing capabilities in space. These fears are underlined by a recent U.S. Space Force threat fact sheet, which reports that, by the end of 2024, China had 510 satellites in orbit capable of Intelligence Surveillance and Reconnaissance (ISR).

Analysis

Whilst it is difficult to verify the specific objective(s) of the Shiyan 28B 01 satellite, it is

realistically possible that one objective is the analysis of space weather conditions (e.g. solar flares and geomagnetic storms) and developing the capability to operate within them. Technological developments in this area will enable China to conduct larger-scale operations in previously hostile environments more efficiently and safely. Moreover, China will then be better positioned to access and leverage resources beyond the range of its rivals with less vulnerability to its operations.

A second, more likely objective of the Shiyan 28B sub-series could be the testing of technologies such as lasers and robotic arms. These technologies can be used for peaceful purposes, such as removing orbital debris. But they can also be dual-use. Both, for example, can be used to neutralise probes which are essential in missile early warning systems on earth - probes which will underpin America's planned 'Golden Dome' missile defence system. The capability to neutralise either this system or equivalent systems, dependent upon probe technology, will render China's main geopolitical rival vulnerable to aerial, amphibious and even land-based attacks on earth. Robotic arms and lasers can also interfere with navigation and communication systems. Capability in this area will enhance China's ability to outmanoeuvre its rivals and inhibit their capacity to gather and disseminate intelligence on earth and in geospace. If China does obtain the ability to weaken, if not disable, America's intelligence and communications infrastructure, then it is highly likely that occupations of territories such as Taiwan will be easier to execute.

An even more likely objective of the Shiyan 28B subseries is the practice of Space Situational Awareness (SSA) exercises, which are critical to the safety and sustainability of space operations. Although these exercises may be peaceful in their intent, advanced knowledge in this area will enable China to anticipate and engage any objects within its LEO domain. These exercises, however, could also be dual-use, as they involve adjusting trajectories and positioning in relation to other spacecraft in order to facilitate interactions. Irrespective of intent, such exercises signify a strong ambition to perfect actions such as air-to-air servicing/refuelling. This will give Chinese space assets operational longevity over the counterparts of rivals, who may need to operate with greater caution and less flexibility in geospace and LEO.

Given China's broader objectives in space, another equally likely objective is the conduct of electronic intelligence, remote sensing and Rendezvous and Proximity Operations (RPOs). If China is conducting RPOs, it is extremely likely that it is not only honing the practice of

satellite-to-satellite refuelling, but also simulating space ‘dogfighting’ (something the USSF claims to have observed in March). If China is conducting space ‘dogfighting’ simulations, then it is likely that it will be positioned to strike potential threats (either in self-defence or pre-emptively) and deter its rivals from asserting themselves across various levels of space.

A final, and perhaps, most likely objective is the trialling of new systems, such as sensors, communications subsystems and environmental instruments. If this is an objective, then the aim is very likely to verify and validate payloads and designs before larger-scale deployment. This will likely move China closer towards establishing space systems and platforms (e.g. stations) which supplant those operated by the West. Once established, such systems will not only give China a greater operational range in space but will also enable it to conduct more sustained research projects.

Forecast

Should China be conducting (and planning to conduct further) manoeuvrability exercises in LEO, it is highly likely that it is positioning itself to track and intercept U.S. satellites. The U.S. does still enjoy spatial and geospatial dominance (it aims to conduct 170 orbital launches via SpaceX alone in 2025, over double the amount China is likely to make), but China is working to alter the balance of power. In response, the U.S. is also extremely likely to develop counter technologies capable of neutralising such threats. The time frame of such a response, however, is more difficult to determine, as Washington will likely face increasingly tighter budget constraints than Beijing in the short and medium term.

Advanced technologies in the fields of satellite lasers and robotics will very likely strengthen the People’s Liberation Army (PLA) in its operations on Earth. Although it is unlikely that China will actively attack U.S. space technology at present, the salient point is that China will have the potential to do so in the future. Whilst the U.S. is bound by tighter budget constraints than China in its space programme, it is extremely unlikely that any attack will go unchecked.

If, as is most likely, China is using the Shiyan 28B series to test and verify payloads ahead of larger-scale deployment, any larger-scale future systems and networks will at least begin to rival U.S. counterparts. This will not pose the same space security risks as satellite tracking and interception capabilities. It will, however, very likely induce the U.S. to recalibrate its space security policy and invest more in LEO and geospatial security, as far as government budgets and effective private-sector developments permit.

Despite China projecting and expanding its power into space, a Government Space Programs (GSP) report in January 2025 revealed that the U.S. continues to lead global government space spending. That share has declined from over 75% in 2000 to 25% in 2024, which means that, for now at least, the U.S. is very likely to remain the dominant power in space. But this is neither guaranteed nor unassailable.

Risk Ratings

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

EU extends Greenland fishing agreement amid Arctic competition

Executive Summary

- EU Parliament approved a six-year fishing agreement with Greenland, with the rapporteur citing the partnership's importance in the current geopolitical context
- EU-Greenland fisheries deal strengthens Brussels' Arctic position against Russia's territorial assertions and China's Belt and Road infrastructure investments
- Brussels uses SFPA as an opening move in the Arctic great power competition, leveraging an environmental and economic approach against China and Russia

Context

On 8 July, the European Parliament approved an agreement that allows EU vessels to fish in Greenlandic waters for six years on top of the EU's Sustainable Fisheries Partnership Agreement (SFPA) with Greenland. EU rapporteur Emma Fourreau emphasised that "the European Parliament reiterates the importance of its fisheries partnership with Greenland in the current geopolitical context.

Analysis

The EU is likely extending its fishery agreement with Greenland to highlight its overall commitment to Greenland amidst rising tensions in the Arctic. Allowing EU fishing vessels into Greenland's coastal waters reinforces its maritime boundaries, which are currently contested by Russia's Arctic territorial claims. The increase of EU fishing vessels in Arctic waters will possibly enable EU access to the Northern Sea route, which will most likely become a shortcut for maritime trade between Asia, Europe and North America. This deal signals the EU's respect for Greenland's home rule status while potentially serving as a strategic economic partnership to draw Greenland politically closer to Brussels.

The EU is caught between the Arctic interests of China, Russia and the US, which puts pressure on the EU to act decisively in the Arctic. Securing the SFPA and strengthening its ties with Greenland will possibly improve Brussels' strategic visibility and influence in the Greenland-Iceland-United Kingdom (GIUK) Gap, in coordination with NATO operations.

The Gap is the body of water that Russian submarines from Murmansk have to cross to reach the Atlantic. Much of Russia's nuclear arsenal is stationed on Arctic submarines that provide its essential second-strike capability. It is therefore in Russia's strategic interest to control as much of the Arctic as possible for its ballistic missile submarines (SLBMs) to remain undetected by Western countries. Given that Russia's nuclear deterrence strategy relies heavily on remaining undetected, Moscow will likely monitor EU presence in Greenland's waters closely.

Closer economic ties with Greenland through sustainable partnerships are likely to serve as a counterbalance to Beijing's economic initiatives in Greenland. Beijing has courted Greenland as part of its Roads and Belt Initiative, bidding to fund airports and build a research base. This poses a considerable strategic risk regarding Chinese influence in Greenland, due to its strategic location and proximity to the US military base, Pituffik Space.

Recently, Greenland has indicated that it needs US or European mining companies to invest in it; otherwise, it would explore Chinese investments. China is already Greenland's biggest export partner, and will likely be interested in exploring mining investments to secure Greenland's minerals and its influence in the region.

Forecast

The EU's SFPA is very likely the first step in Brussels' strategy to politically align itself with Greenland and establish a strategic-economic role in the Arctic. Brussels' rapprochement to Greenland and the Arctic region balances the influence of the US, China, and Russia. The sustainability-focused approach will likely give the EU an advantage over China's Belt and Road investments. Due to Russia's strategic interests and territorial assertions in the Arctic, Moscow will likely increase naval and submarine activity in the Arctic.

Risk Ratings

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

China gets green light for Northern Sea Route, boosting Climate-Driven shipping efficiency

Executive Summary

- A series of permits were signed earlier this month, allowing Chinese container ships to transit across the Northern Sea Route during the warm summer months.
- As no icebreaker capacities are required for these ships, the permits allow for increased profit margins and stronger competitiveness for China, a trading power of manufactured goods and energy resources.
- Amidst Western and Russian concerns of a growing Chinese military, scientific and infrastructure presence in the Arctic, these permits legitimise a neutral Chinese presence in the Arctic Ocean.

Context

Certain Chinese container ships received Russian permits this month to transit the Arctic Ocean. The largest vessel accorded permission is the *NewNew Panda 1*, the largest ship to traverse the Arctic to date. The permit allows for a timeframe between August 10 and October 30, where no icebreaker assistance is needed, showcasing the accessibility of the Arctic during the warmer season. The vessel belongs to Yanpu Newnew Shipping Co., Ltd., a company that, since 2023, has begun offering Arctic connecting ports in Asia to service Northern Europe and the Baltic. This permit is part of NewNew Shipping's expansion of its Arctic container shipping line from 2024.

Other NewNew Shipping container ships received permits for a similar time frame without needing an ice classification. This falls into NewNew Shipping's Arctic Express Route No.1 development, a project expanding Arctic Ocean transit for its container ships. This also follows the June 2024 announcement at the St. Petersburg International Economic Forum that NewNew Shipping will soon acquire five ice-class container ships.

Analysis

This event is situated within a broader trend of Sino-Russian Arctic relations, Chinese expansion into the Arctic and the growing accessibility of Arctic trade routes.

Firstly, this development follows the June 2025 memorandum between Rosatom, the Russian nuclear agency, and NewNew Shipping, a Chinese maritime firm. The agreement established a continuous container line between the states through the Arctic Northern Sea Route (NSR). This is reflected in President Putin's pivot to eastern trade corridors through the Arctic, following Western sanctions imposed after the Ukrainian invasion. The NSR is seen as a partial solution to current supply chain issues in shipping, as well as geopolitical instability.

Secondly, climate change will serve to expand the transit window for non-ice-class ships in the Arctic, and these permits illustrate the beginning of shipping companies benefiting from it. The NSR is the quickest way to connect Western Eurasia and the Asia-Pacific region, and climate change is expediting Arctic geopolitics as prolonged seasonal thawing increases navigability and resource extraction.

Finally, with this in mind, China has gradually increased strategic planning and budget allocations in the Arctic. Chinese economic and strategic power relies on manufactured goods and energy resources, and their trade. A secure and ensured access to the NSR would lead to increased profit margins, stronger competitiveness and reduced production costs. Hence, where the Arctic poses significant economic and geopolitical meaning for China, the shipping agreement strengthens China's Arctic strategy.

Forecast

Russia and China are still divided in their intentions for the NSR. Where the Kremlin favours autarky in the region, Beijing prefers the internationalisation of the transportation corridor, without forsaking its other Arctic partners. This shipping permit would circumvent Western suspicion, allowing for a stronger Chinese presence in the region through a temporary shipping line agreement.

An NSR shipping agreement could be employed as a stepping stone to further Chinese ventures in the region. Especially as the Kremlin is cautious of Chinese military presence in the Arctic and its "first come, first served" vision. The permits are indicative of a reduced animosity between both states and create a seemingly "innocuous" Chinese presence in the Arctic that could later be leveraged. In this sense, near-Arctic European states (Denmark, Finland, Sweden, etc.) that have criticised the Sino-Russian Arctic development strategy, reversely

welcome the neutrality fostered by economic cooperation. These permits reflect progress in the latter, depicting positive Chinese economic expansion into the region.

Risk Ratings

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

Japan's deep-sea trial signals strategic maritime assertion

Executive Summary

- On 2 July 2025, the Japanese government confirmed plans to begin test extraction of rare-earth elements from seabed mud in its exclusive economic zone (EEZ) near Minamitorishima Island in early 2026.
- While domestically framed as a step toward resource security, the trial reflects Japan's intent to consolidate a first-mover advantage in deep-sea mining technologies and reinforce its influence over emerging maritime governance frameworks.
- The trial is likely to sharpen strategic competition in the Indo-Pacific, enabling Japan to leverage technological and data supremacy in international maritime forums, while prompting regional actors to reassess their seabed capabilities.

Context

On 2 July 2025, Japanese media reported that Japan plans to launch the world's first deep-sea rare-earth extraction trial in January 2026, using the Japan Agency for Marine-Earth Science and Technology (JAMSTEC) research vessel Chikyu to retrieve mineral-rich mud from a depth of approximately 5,500 meters near Minamitorishima Island, within Japan's exclusive economic zone.

This builds on over a decade of underwater surveys and technological prototyping in the region. The move comes amid intensifying pressure to reduce Japan's reliance on Chinese rare earth imports, which account for over 60% of its critical mineral supply. Policymakers have highlighted the strategic need for supply chain resilience in defence, semiconductors, and green technologies.

Analysis

Japan's 2026 deep-sea mining test almost certainly represents a calculated effort to shape the regulatory and technological frontiers of seabed extraction, ahead of potential global codification. Operating within its Exclusive Economic Zone (EEZ) provides both legal clarity and operational flexibility, reducing exposure to contested interpretations of international law and enabling Japan to act unilaterally.

The trial will likely generate valuable proprietary data on subseafloor sediment composition, mining robotics under ultra-deep pressures, and environmental baselines. Control over this data ecosystem may enable Tokyo to refine extraction methods, establish technical benchmarks, and shape international standards. Rather than exerting direct pressure, this influence could enhance Japan's appeal as a leader in deep-sea mining innovation, strengthening its position in multilateral dialogues through attraction and expertise rather than coercion.

By demonstrating operational capacity, Japan likely seeks to position itself as a standard-setter rather than a standard recipient, influencing decision-making in venues such as the International Seabed Authority (ISA) and the G7 toward frameworks favourable to technologically advanced democracies. This move, aligned with Japan's Free and Open Indo-Pacific strategy, enhances its leadership in non-traditional security domains like undersea resource governance and sends a clear signal to China, South Korea, and Australia to accelerate their own seabed exploration efforts or risk falling behind normatively and technologically.

Through this approach, Japan not only advances its strategic interests but also helps shape emerging norms and cooperative mechanisms that could define the governance of deep-sea resources.

Forecast

Given strong state support, mature R&D, and a permissive maritime environment, Japan is highly likely to complete the 2026 trial successfully. The resulting data and technological proof-of-concept will significantly enhance Japan's negotiating position in international forums and contribute to the formulation of extraction and environmental standards that reflect its national interests.

The test will very likely intensify strategic hedging across the Indo-Pacific. China will likely respond through dual-track pressure, expanding its seabed footprint while pushing for stricter international oversight to limit unilateral gains. Meanwhile, regional actors will likely initiate or accelerate seabed exploration projects, leading to an uneven patchwork of national regulatory regimes in the absence of comprehensive global rules.

Medium-term, there is a moderate risk of increased friction around EEZ boundaries and overlapping maritime claims as interest in deep-sea mineral zones grows. In the long term,

Japan’s initiative is expected to shape the evolving norms of seabed governance, with its technological model and data architecture serving as templates for both cooperation and contestation.

Risk Ratings

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

U.S. Navy nuclear submarine has docked in Iceland for the first time ever

Executive Summary

- USS Newport News (SSN 750) made its first publicised port call by a U.S. Navy nuclear-powered submarine in Reykjavík, Iceland, marking a turning point in regional security strategy amid increasing Russian activity.
- Iceland's updated 2023 defence policy, which permits the deployment of nuclear submarines, advances integration with NATO, bolsters undersea infrastructure security and demonstrates new levels of U.S.-Iceland cooperation.
- The historic visit signals preparations for regular U.S. and NATO submarine deployments, expanded focus on undersea cable protection and heightened military signalling aimed at deterring Russian and Chinese actions in the Arctic.

Context

USS Newport News's entry into Reykjavík on 9 July 2025 marks the first occasion of a nuclear-powered submarine docking within Icelandic territory following Reykjavík's revised policy in 2023. This development occurs amid increasing military activity in the Arctic, primarily driven by Russia's military expansion around Murmansk and the Northern Fleet, as submarine transit through the North Atlantic grows.

Iceland's importance lies in its position within the GIUK gap, a crucial chokepoint for monitoring Russian naval movements from the Arctic to the Atlantic. The U.S. presence in Iceland was prominent during the Cold War, with Keflavik Air Base diminished after post–Cold War force reductions. Renewed NATO air rotation, P-8A Poseidon deployments and regular submarine visits indicate a renewed strategic significance.

Both U.S. and Icelandic officials emphasised that the port call reinforces collective defence, amid rising Allied concerns over undersea cable security, especially following suspected Russian sabotage in the region. Iceland's geography and policy adjustments now facilitate Allied undersea surveillance and logistics, thereby enhancing broader Atlantic security.

Analysis

USS Newport News' visit marks a fundamental shift in Iceland's security policy as it adapts to

evolving military threats in the region. The port call underscores deeper NATO integration, supporting advanced US anti-submarine, intelligence and rapid deployment capabilities. From a technological synergy point of view, US submarines like the Newport News bring advanced sonar, signal intelligence (SIGINT) and electronic warfare tools. Iceland's cooperation here facilitates these systems' deployment near key chokepoints, enhancing real-time threat assessment across the GIUK gap. Iceland's strategic position within the GIUK gap remains vital for tracking Russian submarine activity and safeguarding transatlantic cables that underpin Western defence and economic infrastructure.

This development also enhances NATO's operational flexibility. Although Iceland lacks its own armed forces, it supports Allied efforts through regulatory and logistical cooperation, allowing sustained surveillance and deterrence missions. New operational protocols for submarine visits are aligned with established practices among Arctic partners, ensuring smooth Allied engagement around Icelandic waters.

Forecast

United States and NATO submarine visits to Reykjavík are expected to increase in the next twelve months, with Iceland increasingly acting as a logistics and monitoring hub for operations in the North Atlantic and Arctic. Iceland will further formalise support for Allied maritime deployments, improving intelligence-sharing, infrastructure security and deterrence posture across the GIUK gap.

As Russian submarine patrols intensify in the North Atlantic, NATO's strategic signaling is set to grow, with Iceland playing an increasingly important role in Alliance readiness and the protection of critical undersea infrastructure. Iceland's central location within the GIUK Gap and its demonstrated leadership in multinational maritime resilience initiatives position it as a key coordinator within emerging NATO efforts to safeguard seabed assets. Although Iceland lacks a standing military, its proactive defence collaboration and experience in hosting major anti-submarine exercises make it well-suited to assume a coordination role in potential NATO seabed security task forces, further enhancing its value to Alliance partners as security challenges evolve.

NATO is increasingly deploying unmanned maritime vehicles (UMVs) and mobile undersea sensor arrays to bolster surveillance and security in key maritime areas, including the North

Atlantic. Iceland's strategic location makes it an ideal base for these emerging technologies, supported by local facilities such as Teledyne Gavia, which produces autonomous underwater vehicles. NATO's Task Force X initiative, tested successfully in the Baltic Sea, is expanding to include persistent unmanned monitoring in new northern maritime zones like Iceland. These efforts align with NATO's broader innovation goals to enhance situational awareness and protect critical undersea infrastructure, with unmanned systems serving as force multipliers in collective defence.

Risk Ratings

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

France's new Arctic defence strategy

Executive Summary

- In July 2025, France published its first-ever Arctic defence strategy, signalling its intention to contribute to security and cooperation in the High North.
- This move reflects growing NATO coordination in the Arctic following the accession of Finland and Sweden.
- France's defence and industrial engagement supports broader European interests in cold-weather capabilities and resource security.

Context

The Arctic's geopolitical environment is changing rapidly. Climate change has reduced transit times via the Northeast Passage by nearly 40 per cent, increasing the region's economic value. Meanwhile, Russia's 2022 invasion of Ukraine ended the decades-long "Arctic exception," where regional actors had prioritised cooperation over confrontation.

Finland and Sweden's accession to NATO in 2023 and 2024, respectively, brought seven of eight Arctic coastal states into the Western alliance. This consolidation is reshaping the strategic landscape. In this context, France's Ministry of Armed Forces released its inaugural Arctic defence strategy. The document outlines three priorities: enhancing presence, deepening cooperation with allies, and developing Arctic-specific capabilities. Though France is not an Arctic nation, it seeks to contribute meaningfully to allied stability operations and industrial resilience in the region.

Analysis

France's strategy reflects a deliberate alignment with the evolving Arctic posture of NATO. While France lacks territorial claims in the region, it has global naval reach and is positioning itself as a supporting player in Arctic deterrence. The strategy complements alliance efforts to respond to growing Russian activity in the Kola Peninsula and increased Chinese economic presence through the Polar Silk Road.

Rather than asserting leadership, France appears to be reinforcing Arctic burden-sharing. This serves both a strategic and political function: demonstrating solidarity with Northern allies and

sustaining its influence within NATO's strategic planning. The focus on interoperability and joint exercises, rather than permanent deployment, reflects France's pragmatic assessment of its role. Nonetheless, the move introduces trade-offs. France's expeditionary forces are already active in the Mediterranean, North Africa, and Indo-Pacific. Arctic operations demand specialised training, logistics, and cold-weather systems. The Ministry of Armed Forces will likely be challenged to balance these competing regional commitments.

The strategy also opens doors for enhanced industrial cooperation in cold-weather defence technologies. France is likely to engage more deeply with Sweden and Finland, whose defence industries have long developed Arctic-adapted systems. While France is unlikely to lead in this area, it is well-placed to contribute through joint procurement and R&D frameworks, potentially within PESCO or EU initiatives.

This industrial dimension also intersects with resource security. France's strategic interest in Arctic critical minerals aligns with broader EU efforts to reduce dependency on China and Russia. Greenland, in particular, offers opportunities for future partnerships in rare earth extraction. Any engagement will likely be conducted in coordination with Copenhagen and framed as contributing to EU resilience rather than pursuing national strategic advantage.

Forecast

France's strategy is likely to accelerate NATO-wide coordination in the Arctic. Germany and the Netherlands may release similar strategies in the coming year, reinforcing the alliance's Arctic footprint and standardising joint operational frameworks. While France's role is limited, the broader NATO Arctic consolidation may prompt Russia to expand Northern Fleet infrastructure and deploy more ISR assets in the High North. China is expected to double down on its Polar Silk Road strategy and continue investing in dual-use infrastructure, such as ports and icebreakers. One can expect joint development of Arctic-capable platforms between France and Nordic partners, particularly in mobility, surveillance, and communications. France may co-lead an EU working group on cold-weather capability harmonisation by 2026.

Risk Ratings

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

Russia launches 'July Storm' maritime drills in the Pacific and Arctic Oceans and the Baltic Sea

Executive Summary

- The Russian navy conducted large-scale maritime exercises in the Pacific, Arctic, and Baltic Sea.
- Operation ‘July Storm’ signals Russia’s ability to mobilise naval assets across multiple theatres, despite losses to its Black Sea Fleet.
- Increased Russian activity in the High North is likely to sharpen NATO’s focus on its own Arctic readiness.

Context

Between July 23 and July 27, the Russian navy conducted large-scale maritime exercises in the Pacific Ocean, Arctic Ocean, and Baltic Sea. Operation ‘July Storm’ was led by Admiral Aleksandr Moiseyev and reportedly included 150 vessels, 15,000 personnel, over 120 aircraft, and 10 coastal missile systems. The use of long-range weapons and unmanned aerial drones was on display.

This comes from increased Russian naval activity on NATO’s northern flank. A study of Russian Notice to Airmen (NOTAM) messages since February 24, 2022, shows an increase in Russian military exercises in the Barents Sea, which were likely designed to bolster naval bastion defences rather than be an act of strategic signalling.

Analysis

Operation ‘July Storm’ likely marked a shift in Russia’s maritime policy - from bolstering defences, to projecting broad naval capabilities as a form of strategic signalling. These operations are likely intended to present Russia as a great naval power, despite losses in the Black Sea. This has likely been achieved partly by focusing on unmanned systems to offset conventional naval losses, which fits within a broader pivot towards asymmetric capabilities within the Russian military.

It is also likely that Operation ‘July Storm’ is partly designed to provide legitimacy to Russia's claim to the continental shelf, which the UN Commission is adjudicating on the Limits of the

Continental Shelf (UNCLOS). Although the United Nations Convention on the Law of the Sea (UNCLOS) does not prohibit military activities in Exclusive Economic Zones (EEZs), this type of force dispersal - typical of 'grey zone' tactics - likely aims to shape perceptions of Russia's claim, whilst avoiding conflict escalation. This is likely designed to cement Russia's position in the High North without relying solely on adjudication from the UNCLCS.

Forecast

Growing Russian naval activity in the High North will likely sharpen NATO's focus on its Arctic readiness. This is likely to come in the form of closer integration of the Nordic Defence Cooperation (NORDEFCO) group into NATO's framework. These countries are strategically placed to monitor Russian activity in the High North.

Upgrading existing systems for Arctic operations is also a key focus. This will likely mean increasing NATO's ice patrol capabilities, and ensuring that future naval assets, such as the Royal Navy's Type 83 destroyers, are equipped to operate in polar conditions. Deployment of asymmetric capabilities, such as unmanned surface vessels, drone interceptors, and electronic warfare, will likely be increasingly important in naval tactics. In Arctic 'grey zone' operations, these assets excel in enabling covert surveillance, harassment, and denial operations without escalating into open conflict.

Risk Ratings

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

U.S. Space Force awards new contract for nuclear command and control satellites

Executive Summary

- On 3rd July, the U.S. Space Force announced a contract with Boeing for space-based Nuclear Command and Control Satellites (NC3), valued at USD$2.8 billion.
- The contract highlights the desire of the United States to get ahead of its adversaries' technological advancements and reassert itself as a global hegemon in the nuclear sphere.
- The decision of the United States to modernise its space-based nuclear command, control and communications capabilities (NC3) is likely to create a security dilemma.

Context

On 3 July, the US Space Force announced that it had chosen Boeing to build up to four satellites meant to modernise space-based nuclear command, control and communications capabilities (NC3). The contract, valued at over USD$2.8 billion, includes the delivery of two satellites for the Evolved Strategic Satellite Communications (ESS) program, with the possibility of two additional satellites in the coming years.

The new satellites are set to replace the Advanced Extremely High Frequency (AEHF) constellation, comprising six satellites in geostationary orbit, providing encrypted communications for strategic and tactical communication. The ESS is part of a comprehensive effort by the Defence Department to modernise every aspect of its NC3 enterprise, with the first satellites expected to be delivered in 2031.

Analysis

The move to invest 3.6% of the entire Space Force budget on the ESS program demonstrates the desire of the United States to get ahead of its adversaries' technological advancements and reassert its strategic advantage in nuclear deterrence amid growing technological competition. China, for example, has been developing counterspace and cyber weapons, while

simultaneously making rapid strides in its nuclear force structure and Command, Control, Communications and Battle Management (C3BM) systems.

It also launched its own ballistic missile early warning systems, with a nuclear launch-on-command system reportedly in the works. Advancements such as these will be particularly destabilising to the current systems within the NC3 structure, and will warrant constant modernisation to keep up with new threats.

The NC3 system is arguably the most important communication system in the US and creates the foundation for nuclear deterrence. As adversaries become more advanced, 'the physical architecture, data through capacity links, and even geographic and temporal constraints of the NC3 system [will] require upgrading and expansion to address today's more complex and challenging geopolitical environment.'

Prior to the Evolved Strategic Satellite Communications (ESS) program, there was the AEFH program, which replaced Milstar and created 'survivable, global, secure, protected, and jam-resistant communications for high-priority military ground, sea and air assets.' The ESS program is another stride in America's response to getting ahead of emerging threats, this time utilising greater bandwidth, AI-enabled data routing, enhanced anti-jamming resilience and more adaptable satellite constellations to operate in contested environments.

Since its creation, NC3 has been based on the concept of nuclear bipolarity, but with China's and other adversaries' programs improving at a rapid pace and the lack of Chinese engagement in nuclear or space weapons treaties, modernised space-based technology will be essential to meeting the dangers that may emerge head-on. Furthermore, with no formal agreements restricting the development of space-based nuclear-enabling technologies, China's pursuit of kinetic and non-kinetic counterspace weapons raises concerns over the vulnerability of U.S. space-based communications assets, which are critical to maintaining reliable NC3 during a crisis.

Forecast

The decision of the United States to modernise its space-based nuclear command, control and communications capabilities (NC3) is likely to create a security dilemma, that is, a situation whereby other states begin to feel less secure as a result of the U.S. improvements and begin

making similar or greater advancements to their own structures. While more advanced space-based NC3 capabilities will ensure the integrity of transmitted information and be more likely to withstand the effects of a nuclear attack, they may also be viewed by adversaries as hostile.

Within the context of various geopolitical conflicts, as well as rapid technological advancement, the improvements to the NC3 structure of the US are likely to trigger new tensions and potentially lead to a conflict or an arms race to see which state can develop the most advanced systems.

The advancements to the U.S. nuclear security apparatus, however, are also likely to promote cooperation, both among smaller states lacking their own space-based deterrent systems and between current allies who may want to bolster their safety. The new ESS program is likely to be advantageous to the United States NC3 structure; however, it is unlikely to revolutionise the entirety of the structure itself. Part of this is due to the rapid pace at which new threats and technological developments emerge. The ESS will boost U.S. NC3 in the near term but will likely be replaced as new actors and technologies emerge.

Furthermore, as threats become more unpredictable, future NC3 architectures may require quantum encryption, AI-enabled adaptive communication routing and distributed low-Earth orbit constellations to ensure survivability and agility in contested environments.

Risk Ratings

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

Strategic alliances in orbit: U.S. Space Force and the new arena of great power competition

Executive Summary

- On 8 July 2025, the U.S. Space Force publicly released its first International Partnership Strategy, outlining the formation of alliances to enhance U.S. space security efforts.
- This strategy signals that space is now firmly recognised as a warfighting domain, where achieving and maintaining supremacy is essential for securing geopolitical advantage.
- Strategies like the U.S. International Partnership Strategy are likely to contribute to the formation of competing space blocs.

Context

On 8 July 2025, the U.S. Space Force released its first International Partnership Strategy. The document outlines a framework for building and strengthening partnerships with allied nations to serve as force multipliers in countering space-based threats. The strategy establishes key objectives focused on advancing U.S. national interests while integrating the capabilities of partner nations. It also provides guidance on how to implement these goals, including the creation of favourable conditions for collaboration and mechanisms for operational integration. Finally, the strategy acknowledges several risks, such as resource limitations and the potential for overclassification of information, that could hinder effective cooperation with allies.

Analysis

Strategically, the release of the International Partnership Strategy reflects a more explicit U.S. recognition of space as a warfighting domain. This perspective is reinforced by other strategic documents, such as the *Space Warfighting Framework*, which emphasises the need for space supremacy. Together, these documents indicate a shift in U.S. doctrine, framing space alongside traditional domains like land and sea, where dominance is essential to maintaining national power.

More broadly, the International Partnership Strategy reflects a broader shift in U.S. foreign policy toward a more transactional approach to international relations. While the U.S., like many

Western nations, has traditionally emphasised democratic norms and shared values, recent trends have showcased an increased focus on strategic interests and pragmatic alliances. Meaning the second Trump administration prioritises hard power and economic leverage over soft power and the defence of like-minded but vulnerable nations. This strategy reinforces that shift by emphasising the use of allied nations as force multipliers to advance U.S. national objectives, rather than pursuing broader international collective goals.

Moreover, the international partnership strategy underscores the growing recognition of space as a critical arena in the emerging great power competition. U.S. competitors like China and Russia are similarly forging space partnerships to strengthen their strategic positions. The mechanisms for these partnerships include China's BeiDou satellite system and Russia's offer to build spaceports. Just as the U.S. seeks to leverage allied capabilities, Beijing and Moscow aim to expand their influence through cooperative space initiatives.

Forecast

The U.S. Space Force is likely to face significant challenges in implementing this strategy, stemming from both bureaucratic inertia and system integration limitations. Furthermore, some nations likely will be reluctant to deepen partnerships with the United States, particularly given the Trump administration's tendency to utilise alliances as leverage.

Over the longer term, middle powers will likely seek to capitalise on the evolving great power competition to maximise their own strategic and economic benefits. This dynamic will probably lead to the formation of distinct space power blocs, with the United States and China emerging as the principal poles of influence. These space power blocs will likely emerge as fluid hybrids combining political and economic alignments.

Risk Ratings

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

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