



**PERIPHERAL REGIONS  
INTELLIGENCE REPORT**

27/07/2025



**W**elcome to Global Weekly's Peripheral Regions 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 provides you with comprehensive insights and analysis on key global events and trends. Our coverage offers an in-depth examination of significant events across various regions, highlighting critical developments and their potential implications..

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**. We grade each Factor from 1 to 10, with 1 representing the lowest risk and 10 representing the highest risk.

These Factors include:

- **Political Risk:** Autonomist movements, levels of food and water security and the predictability of government decision-making.
- **Governance Risk:** Corruption, standards of legal and regulatory frameworks and human rights.
- **Security Risk:** Threat from domestic actors, ethno-religious tensions and the capacities of security forces
- **Crime Risk:** Organised crime, levels of sexual abuse and the capacity of law enforcement agencies.

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, we produce statewide and regional risk scores, which are contained within this Report.



## Ukrainian drones strike Arctic air base, high-value Russian bombers damaged; medium-term Russian fund diversion likely

### Executive Summary

- Ukrainian drones [targeted](#) Olenya Air Base near Murmansk, Russia, damaging long-range bombers.
- The Arctic is no longer insulated from Ukraine's drone-based war strategy, and drone warfare is reshaping global assumptions about reach, escalation, and theatre boundaries.
- Russia is likely to reinforce its Arctic bases over the next twelve months, diverting funds from other projects.

### Context

On 9 June 2025, Ukrainian drones reportedly [struck](#) Olenya Air Base in Russia's Kola Peninsula. Located near Murmansk, the base houses strategic aircraft, including Tu-22M3 bombers. These platforms are regularly used to launch cruise missile attacks on Ukrainian targets.

Satellite imagery [verified](#) damage to at least two bombers. Open-source analysts identified scorched tarmac, debris fields, and fire-damaged fuselages. Russia has not confirmed the extent of the losses. The strike marks the northernmost Ukrainian attack on Russian military infrastructure since the war began. Olenya lies approximately 1,500 miles from the Ukrainian border.

### Analysis

The strike compelled Russia to [reassess](#) its Arctic basing model. Long-range bombers must now disperse to secondary fields, such as Engels-2 (Saratov) and Mozdok (North Ossetia); older Arctic strips, like Tiksi North, may be reactivated despite limited infrastructure. Each relocation increases transit time, fuel demand, and maintenance burdens, [reducing sortie rates](#) and delaying cruise-missile salvos against Ukraine.

Enhanced force protection will follow. We can likely expect mobile Pantsir-S1 batteries, radar aerostats, and electronic-warfare detachments at Olenya and Belaya Air Base. Russia will likely revive the revetment of its airbases, projects that were [paused](#) after the 2014 budget cuts. These moves absorb scarce air-defence resources already stretched between Moscow and the southern front.

Strategically, the attack [undermined](#) the Northern Fleet's "bastion" concept, which relies on air cover to shield ballistic-missile submarines in the Barents Sea. With Arctic runways now vulnerable, Russia must either [invest](#) in drone-proof hangars or forward-deploy frigates equipped with Redut surface-to-air missiles, further draining Russian war coffers.

The raid also exposed gaps in Russian early-warning doctrine. Existing Over-the-Horizon radars and A-50 AEW aircraft track high-altitude threats; they struggle with low-observable drones launched from within Russia. Russia may accelerate the procurement of counter-UAS swarms and AI-enabled acoustic sensors to fill these gaps.

For NATO, Ukraine's success signals that low-cost drones can penetrate far-north airspace. NORAD and Allied Command Transformation will likely [trial](#) Arctic counter-drone exercises, integrating new technologies such as passive RF arrays and laser interceptors.

Doctrinally, Ukraine has demonstrated a scalable method for conducting a strategic strike without relying on traditional airpower. States with limited bomber fleets, such as Iran or North Korea, could replicate this model, complicating global air-defence planning.

## Forecast

Russia will almost certainly [disperse](#) bombers further and harden Arctic bases within 12 months, with the consequence of diverting funds from new aircraft procurement. Ukrainian forces will likely conduct deep-rear raids, aiming to accumulate attrition against the scarce Tu-95MS airframes. One can expect NATO Arctic members to upgrade their counter-UAS networks, while global militaries are likely to accelerate their development of inexpensive long-range drones,

eroding the relevance of geographic sanctuaries and reshaping strategic-bomber doctrine worldwide.

### Risk Ratings

**Political and Governance: 5**

**Economic and Infrastructure: 5**

**Security and Crime: 5**

**Environmental and Resource: 5**

### **New India Starlink contract adjusts information exchange balance; further shift towards private digital infrastructure likely**

#### Executive Summary

- India grants Starlink a licence to provide satellite internet services, targeting the country's significant connectivity gap amongst its unconnected population.
- Starlink's global reach grants Musk unprecedented control over information exchange, enabling geopolitical decisions independent of government oversight in conflict zones worldwide.
- Starlink's Indian approval signals a shift toward private control of digital infrastructure, likely leading to similar decisions across Africa and Asia.

#### Context

On 6 June, India's Department of Telecommunications [issued](#) Elon Musk's Starlink a key licence, enabling Starlink to launch internet services in India. Starlink operates 6750 active satellites in Low-Earth Orbit, making it the world's largest satellite constellation. Starlink and Musk can now target India's connectivity gap, where 40% of the population lacks internet access.

#### Analysis

Musk's entry into the Indian market highlights the increasing role of private satellite operators as de facto instruments of geopolitical competition, operating beyond traditional state control. Satellite constellations are essential for secure military communications and surveillance. Starlink operates the largest satellite constellation in LEO, which [enables](#) Musk to make strategic decisions that bypass official diplomatic channels. This is exemplified by the activation

of Starlink in Iran and Musk's decision to [restrict](#) Ukrainian military drone access. More broadly, it highlights the strategic vulnerabilities that can arise from the privatisation of critical infrastructure. India's approval creates dependency on Musk for internet access for a large part of its population, thus challenging Indian digital sovereignty.

The timing of India's license coincides with an estrangement of the Trump-Musk relationship. It suggests that Musk is diversifying his geopolitical relationships as Trump [seeks](#) to curb his domestic political influence. Musk's partnership with India enables him to operate part of his satellite fleet independently of US oversight and expand Starlink rapidly. Starlink's reach now extends to over 100 countries, and it is actively pursuing African and South Asian markets. Particularly, Nigeria and Kenya's [uptake](#) of Starlink indicates a growing demand for Starlink services, positioning it to replace broadband as the backbone of fibre internet.

With centralised control over Starlink, Musk holds considerable leverage over lower-income countries that rely on the service, particularly given the lack of viable competitors. The EU is attempting to build its own satellite constellation to counter Starlink's monopoly, but due to Italy's Prime Minister Giorgia Meloni [preferring](#) a partnership with Starlink, the project has been halted. Regarding the US, it has [pursued](#) a tech neutrality stance, which enables Musk to expand his services within the country. Starlink's rapid growth since 2015 has given Musk unprecedented control over global information exchange.

## Forecast

India's regulatory approval of Starlink as an Internet provider will likely accelerate the company's global expansion by enabling further satellite deployment and market access. This development almost certainly signals a shift towards private control of critical digital infrastructure, with governments increasingly depending on Starlink services for remote areas. The precedent set by India's approval will likely accelerate similar licensing decisions across emerging markets, particularly in Africa and Southeast Asia, where connectivity gaps remain substantial. The EU's response will likely be fragmented, as is evident from Italy's pursuit of a national partnership with Starlink. As a result, it is unlikely Starlink will face meaningful competition.

## Risk Ratings

**Political and Governance: 6**

**Economic and Infrastructure: 5**

**Security and Crime: 5**

**Environmental and Resource: 5**

## EU launches €1 billion ocean pact; maritime security, governance improvements likely

### Executive Summary

- On 11 June 2025, the European Commission formally activated [the €1 billion European Mission Ocean and Waters Pact](#), marking a unified effort to restore marine ecosystems, boost the blue economy, and enhance maritime governance across the EU.
- The pact enhances maritime security by reinforcing seabed infrastructure protection, expanding regional surveillance networks, and integrating civilian and defence ocean-monitoring systems amid intensified geopolitical contestation in EU-adjacent waters.
- EU ocean diplomacy is likely to gain global traction as the initiative advances the bloc's normative leadership in high seas governance, while supporting strategic resilience in zones vulnerable to grey-zone maritime threats.

### Context

On 11 June 2025, the European Union (EU) officially launched the operational phase of the [European Mission Ocean and Waters Pact](#), a [€1 billion initiative](#) under the EU Green Deal designed to restore marine ecosystems, advance maritime science, and reinforce governance across European waters. Built upon the EU Green Deal and endorsed by over 40 national, regional, and stakeholder signatories, the pact was unveiled at the UN conference in Nice on [9 June 2025](#), where President von der Leyen reaffirmed its goals to halve ocean pollution and restore [20% of Europe's marine ecosystems by 2030](#).

As highlighted in a [June 2025 IHEDN report](#), the EU's increased focus on maritime domains reflects a broader trend toward securitising ocean spaces, particularly in the North, Baltic, and central Mediterranean.

## Analysis

The Ocean Pact is likely to signal a shift in EU maritime policy, integrating [security](#) and environmental governance within a unified resilience framework. Instead, the Pact reflects a hybrid model of resilience that responds to grey-zone threats, such as infrastructure sabotage and untracked naval movements, through non-military means. This framework enhances early warning capabilities and promotes operational integration across Member States.

For countries like Greece and Italy, Pact funding enhances their surveillance and border management capacity while advancing national maritime agendas. In doing so, it allows them to assert regional leadership within the EU's southern maritime theatre. The implication is a decentralised but integrated approach, where frontline states gain strategic relevance while reinforcing EU cohesion. This supports a more adaptable deterrence framework, rooted in both civilian tools and cross-border cooperation.

Digital tools such as the Digital Twin of the Ocean further consolidate this strategic posture by integrating scientific data with legal frameworks to shape regulatory norms in contested maritime zones. Regionally, this reinforces intra-EU cohesion by aligning the interests of Western maritime powers with those of Eastern member states facing heightened maritime threats, thereby strengthening the Union's collective maritime resilience.

The Pact also marks a diplomatic shift, with the EU moving from endorsing global maritime norms to actively shaping them. By supporting the UN High Seas Treaty and expanding marine protected areas, the EU seeks to extend its regulatory reach beyond its territorial waters. Coordinated implementation through MED9 and the Nordic Council strengthens the EU's credibility as a regional governance model. However, its broader normative influence will depend on sustained external uptake and internal policy coherence.

This approach is likely to enhance the EU's bargaining power in multilateral forums and reinforce its push for a rules-based maritime order amid intensifying geopolitical competition. Strategically, it consolidates the EU's identity as a civilian power with growing operational

relevance, while advancing a maritime diplomacy framework that integrates legal authority, scientific credibility, and regional coordination.

### Forecast

Between 2025 and 2026, seabed surveillance, cable protection, and drone operations are highly likely to expand significantly in the Baltic and North Seas. Pact-aligned infrastructure upgrades and CISE-enabled information sharing are likely to become standard operating procedure across frontline EU coastal states. Cooperation with NATO will likely deepen, particularly in joint maritime exercises and infrastructure resilience planning.

Diplomatic initiatives are likely to intensify, with the EU pushing for ratification of the BBNJ Treaty and launching a permanent Ocean Board to coordinate cross-border maritime policy. As geopolitical competition over strategic sea routes and seabed resources intensifies, the Pact will serve as a foundational tool for internal EU preparedness and external engagement in ocean diplomacy.

### Risk Ratings

**Political and Governance: 5**

**Economic and Infrastructure: 5**

**Security and Crime: 5**

**Environmental and Resource: 5**



## Trump officials seek Biden-era Alaska environment protections rescission, oil and gas development expansion; risk of Arctic resource exploitation normalisation increases

### Executive Summary

- Senior Trump administration officials, including the secretaries of Energy and the Interior, as well as the EPA administrator, visited Alaska in June 2025 to promote expanded oil and gas development.
- Their push coincides with a new Interior Department proposal to rescind 2024 Biden-era protections on 13 million acres within the National Petroleum Reserve in Alaska (NPR-A).
- The move signals a broader strategic shift toward increasing domestic fossil fuel extraction, despite Indigenous opposition and environmental risks. The decision could heighten political, environmental, and legal tensions in [the Arctic region](#).

### Context

In early June 2025, officials from the Trump administration joined Alaska Governor Mike Dunleavy at the Alaska Sustainable Energy Conference in Anchorage. Interior Secretary Doug Burgum, Energy Secretary Chris Wright, and EPA Administrator Lee Zeldin toured Alaska, including the resource-rich North Slope. The trip coincided with the Interior Department's announcement of a proposal to roll back the 2024 Bureau of Land Management (BLM) rule that had designated 13 million acres of the NPR-A as "special areas," restricting oil and gas development to protect [subsistence resources and wildlife](#).

In response, several [environmental concerns](#) were raised, including threats to water quality and human health. However, cabinet members defended the proposal as a necessary step to bolster

energy independence and economic growth, citing polling that suggests a majority of Alaskans support expanded [natural gas infrastructure](#).

## Analysis

The Interior Department's proposed reversal of Arctic protections functions as a calculated legal repositioning, utilising the Naval Petroleum Reserves Production Act not merely as statutory authority but as a strategic lever to reassert centralised executive control over federal Arctic lands. This indicates a deliberate broadening of administrative discretion, emphasising extraction as a sovereign imperative and framing environmental protections as regulatory [overreach incompatible with national interests](#).

The reappearance of Trump-era officials during the Alaska visit acts as political signalling: reaffirming ideological continuity between administrations on resource exploitation despite differing rhetorical framings. Their presence reinforces an extractive consensus within key federal institutions, suggesting that energy dominance remains a core strategic aim. This alignment is not incidental; it reflects a conscious blurring of administrative boundaries to normalise fossil-centric governance under both [conservative and nominally progressive regimes](#).

This recalibration reveals systemic fractures: between federal authority and Indigenous sovereignty, between climate ambition and hydrocarbon dependence, and between legal justification and political motive. The staging of support for expanded development amid visible local dissent reveals a deeper governance paradox, where legitimacy is pursued through legal instruments while substantive democratic and environmental considerations are subordinated to a strategic calculus.

## Forecast

The Interior Department's rollback proposal, combined with high-level political theatre by Trump-aligned officials, is likely to accelerate the normalisation of fossil fuel extraction as a national security prerogative, cementing a precedent for bypassing conservation mandates through reinterpretation of statutory authority. If formalised, the legal strategy employed could embolden future administrations to treat environmental protections as provisional and easily reversible, especially in resource-intensive zones [framed as geostrategic assets](#).

Domestically, the move will almost certainly deepen tensions between federal agencies and Indigenous communities, triggering litigation over treaty rights, environmental justice, and procedural legitimacy. Legal challenges are expected to target the Interior's statutory interpretation, as well as [potential NEPA violations](#). Simultaneously, visible Indigenous-led opposition may gain national traction, especially if framed through the lens of climate justice and democratic exclusion, fueling a broader narrative of extractive authoritarianism.

At the geopolitical level, the U.S. is likely to intensify its Arctic infrastructure investment, aligning resource extraction with the logic of great-power competition. This could escalate regional militarisation and entrench a petropolitical model of governance, undermining multilateral climate commitments and eroding U.S. credibility in global climate diplomacy. The convergence of domestic dissent, legal volatility, and geopolitical signalling suggests that Arctic governance will become an increasingly contested terrain legally, politically, and morally.

### **Risk Ratings**

**Political and Governance: 5**

**Economic and Infrastructure: 5**

**Security and Crime: 5**

**Environmental and Resource: 5**

## Third UN Ocean Conference concludes; biodiversity agreement takes shape, likely enacted in medium term

### Executive Summary

- The BBNJ Treaty is on track to enter into force within six to twelve months, marking significant progress in extending marine protection to international waters.
- This is likely to intensify compliance pressures for state and non-state actors, as regulatory demands increase the need for alignment with these standards.
- Ratification of the High Seas Treaty likely will reshape maritime governance, pressuring non-parties and enhancing China's soft power if it joins before the first COP.

### Context

The Third [UN Ocean Conference](#), held in Nice and concluding on 13 June 2025, was driven by efforts to advance the ratification of the High Seas Treaty. It gained sizable momentum, with 50 countries [ratifying](#) by the end of that week, ten short of the 60 required for it to enter international law. An [additional 30 states](#) either confirmed ratification by 2026 or committed to joining on other dates.

The High Seas Treaty, also known as the Biodiversity Beyond National Jurisdiction (BBNJ) Treaty, extends the UN Biodiversity Framework to protect 30% of the land and sea in international waters. This arises amidst growing contestation in the governance of international waters. In April 2025, President Donald Trump issued the executive order [Unleashing America's Offshore Critical Minerals and Resources](#), which empowers the US to unilaterally grant exploration rights to mining interests beyond its Exclusive Economic Zone (EEZ). The US dismissed the Nice Conference as '[not compatible](#)' with American interests.

### Analysis

With a high degree of certainty, the crystallisation of international support for the High Seas Treaty will have immediate regulatory consequences. Based on the commitments of states to ratify, it is likely that the High Seas Treaty will enter into force within the next six to twelve

months. Thereafter, pressure will intensify on undecided nations to follow before the first Conference of the Parties (COP), to acquire voting rights on the Treaty and its implementation.

While non-ratifying nations will still be unbound by the BBNJ Treaty, the norm-building it signifies will exert soft pressure to conform. Among the ratifying countries, for instance, Greece alone accounts for 21% of the global shipping fleet by deadweight tonnage. Standards imposed there will incentivise private sector actors to align their practices, or else bear the risks of non-compliance. On the surface, this appears to be a success for the multilateral governance of the High Seas.

This development will also reconfigure the structural conditions of geopolitical rivalries. Compared to the US, China has adopted a [nuanced approach](#) to the BBNJ Treaty, engaging in discussions on marine genetic resources while lobbying against its implementation in the South China Sea. If its leadership prioritises this, there is a high chance that China could ratify the High Seas Treaty before the first COP, thereby advancing its leverage on this issue and isolating the US. Ironically, China's push to include sovereignty protections in the BBNJ Treaty echoes the Trump administration's reasons for rejecting it. Yet, ratification would hand China a significant soft power advantage by appearing compliant with international law and reducing its stringency.

### Forecast

There is a high likelihood that the High Seas Treaty will enter into force within six to twelve months, given the current momentum of ratification. This will likely trigger regulatory ripple effects, particularly in shipping and deep-sea mining, as norm-setting accelerates among ratifiers. There is a moderate-to-high probability that China will ratify ahead of the first COP to shape implementation and capitalise on U.S. isolation.

### Risk Ratings

**Political and Governance: 5**

**Economic and Infrastructure: 5**

**Security and Crime: 5**

**Environmental and Resource: 5**

## Arctic-viable Solar-to-hydrogen breakthrough; green tech competition, hydrogen production likely to accelerate

### Executive Summary

- On 13 June 2025, German scientists announced a successful solar-to-hydrogen breakthrough in Antarctica, utilising thermally coupled technology, which validated hydrogen generation in extreme cold conditions.
- Geopolitical competition is likely to intensify, as nations exploit environmental credibility to expand scientific and strategic presence on the continent.
- Solar hydrogen systems are likely to become integrated into broader national strategies, encompassing environmental diplomacy, space readiness, and pre-resource positioning.

### Context

On 13 June 2025, a German research consortium led by Helmholtz-Zentrum Berlin, Ulm University, and Heidelberg University reported a significant experimental milestone: hydrogen was successfully produced in simulated Antarctic temperatures using solar energy. The group demonstrated that [coupling photovoltaic \(PV\)](#) panels to the electrolysis unit allowed waste heat to warm the electrolyte from  $-20^{\circ}\text{C}$  to  $+13.5^{\circ}\text{C}$ , significantly improving hydrogen yield.

The project, partially funded by Germany's Ministry for Economic Affairs and Climate Action, highlights the scientific and strategic feasibility of climate-resilient green energy infrastructure in Antarctica. The announcement follows similar developments at China's [Qinling Station](#) and echoes growing interest in autonomous power systems for scientific and strategic applications in Antarctica.

### Analysis

While Germany positions its Antarctic research as climate-driven, deploying advanced hydrogen technology in a geopolitically sensitive region carries implicit strategic significance. Infrastructure that enables sustained [year-round presence](#), particularly in the continent's interior, is increasingly interpreted as a form of territorial signalling, despite the constraints of the Antarctic treaty. Although currently limited in scale, Germany's new hydrogen demonstrates a viable model for self-sustaining operations with minimal logistical dependence. This capability likely serves as a foundation for a durable, long-term strategic presence.

Antarctica provides [unmatched advantages](#) for space research, including ultra-clean skies and abundant preserved meteorites. The ability to generate local hydrogen using solar energy allows continuous power to observatories and simulation labs, particularly during the polar summer. With hydrogen systems maturing, Germany will likely seek to leverage this advantage by collaborating with the [European Space Agency \(ESA\)](#) and integrating polar tech as a testbed for off-world infrastructure (e.g., lunar or Martian habitats).

Germany has long utilised green innovation as a means of exerting international soft power. This Antarctic hydrogen breakthrough strengthens its position as a global leader [in renewable innovation](#), especially as climate diplomacy becomes a key component of global influence. Germany's efforts contrast with China's model, which blends a technological showcase with [overt](#) geopolitical positioning. By comparison, Berlin's emphasis on sustainability reinforces its image of rules-based leadership, particularly in international [environmental negotiations](#).

Although the Protocol on Environmental Protection to the Antarctic Treaty [forbids](#) commercial resource extraction, hydrogen platforms and energy infrastructure almost certainly have dual-use capabilities for resource prospecting or permanent installation support. If scaled, Germany's new system will likely serve scientific missions and future geological surveys, especially given recent international interest in subglacial mineral deposits and [microbial bioresources](#) beneath the Antarctic ice sheet.

### Forecast

Germany and other science-oriented nations are likely to expand their investment in Antarctic hydrogen technology over the next three to five years. These systems enable strategic resilience, support remote science missions, and offer high-visibility returns in international climate diplomacy. However, as both China and Germany refine solar-hydrogen integration in Antarctica, competition is likely to extend beyond science into adjacent domains, such as [space research](#), treaty rule-making, and early-stage resource mapping. Future treaty deliberations are likely to face growing pressure as green technologies are leveraged for pre-resource positioning and embedded semi-permanent operations.

### Risk Ratings

**Political and Governance: 5**

**Economic and Infrastructure: 5**

**Security and Crime: 5**

**Environmental and Resource: 5**

## EU renews Huawei subsea cable ban; increased subsea cable weaponisation likely

### Executive Summary

- European Commission [presses](#) member states to exclude Huawei from subsea cable infrastructure projects.
- Chinese vendors are increasingly framed as systemic security threats in digital and maritime networks.
- Private–public tensions grow as Big Tech expands its undersea footprint.

### Context

On 17 June 2025, the European Commission [called](#) on EU member states to exclude Huawei and other high-risk vendors from their subsea cable networks. The move follows intelligence concerns over Huawei Marine, which has laid over 100,000 kilometres of cable globally. The Commission's advisory echoes past restrictions on Huawei's 5G market access. Although legal enforcement lies with national governments, Brussels urges member states to treat subsea cables as critical infrastructure. This push coincides with increased European investment in domestic cable projects such as Medusa and EllaLink. Both are framed as secure, sovereignty-enhancing alternatives to Chinese-backed systems.

### Analysis

The move to isolate Huawei reflects a deeper strategic transformation: subsea cables are no longer neutral infrastructure. They are now assets of geopolitical leverage and tools of deterrence. Control over data pathways increasingly defines the balance of power. In a crisis, the ability to reroute, monitor, or [disable cables](#) could influence battlefield dynamics and diplomatic pressure.

By pushing Huawei out, the EU aims to [de-risk](#) future conflicts by removing foreign control over the physical layers of its internet architecture. However, exclusion does not occur in a vacuum; it reshapes alliances, market access, and global infrastructure norms.

The Commission's stance is also a recognition of an uncomfortable truth: Europe does not control most of its digital backbone. Tech companies like Google, Meta, and Amazon own or

co-finance over 60% of new cables. The geopolitical imperative now collides with this commercial reality. More broadly, there is a growing trend of collaboration between the private sector and governments in the development of undersea cable infrastructure. This is demonstrated by recent agreements such as the [deal](#) between Chile and Google.

Tech firms gain legitimacy and market access in politically sensitive regions. Governments gain visibility, redundancy, and a seat at the table. This hybridisation also introduces tension. Private operators prioritise speed, scale, and interoperability. States prioritise resilience, secrecy, and strategic control. These priorities are not easily reconciled.

For the EU, the risk is ending up with [fragmented regulation](#) and diminished influence over private actors. National security goals may be compromised if coordination fails or incentives misalign. Moreover, Huawei's exclusion could accelerate the bifurcation of the global internet. Emerging economies may see Chinese cables as faster and cheaper, while Western-aligned networks impose compliance-heavy barriers.

Over time, this split will likely reduce universal interoperability and increase surveillance incentives on both sides. The digital commons is becoming a contested battlespace.

### **Forecast**

More states are likely to seek equity stakes or oversight roles in future cable projects. We may see an [emergence](#) of more Chile–Google–style deals in Africa, Latin America, and Southeast Asia. EU member states will face [growing pressure](#) to nationalise cable governance. This will strain relationships with Big Tech and necessitate the development of new legal frameworks. As digital infrastructure becomes a core domain of strategic competition, subsea cables will increasingly be treated not as enablers of commerce, but as instruments of statecraft.

### **Risk Ratings**

**Political and Governance: 5**

**Economic and Infrastructure: 5**

**Security and Crime: 5**

**Environmental and Resource: 5**

## ESA extends MAGPIE project funding; further funding, projects likely through long term

### Executive Summary

- On 3 June 2025, the European Space Agency (ESA) extended its contract with Ispace-Europe to fund the Mission for Advanced Geophysics and Polar Ice Exploration (MAGPIE).
- This contract extension aligns with the broader strategic objectives of ESA's space strategy.
- ESA will likely continue to support missions like MAGPIE to assert strategic autonomy.

### Context

On 3 June 2025, the European Space Agency (ESA) [extended](#) its initial pre-Phase A contract with [Ispace-Europe](#), the Luxembourg-based subsidiary of the Japanese space resources and lunar exploration company [Ispace](#). The extended contract provides funding for the development of the Mission for Advanced Geophysics and Polar Ice Exploration ([MAGPIE](#)), led by Ispace-Europe. MAGPIE forms a key component of ESA's broader [Small Missions for Exploration](#) program, designed to foster a dynamic and innovative space exploration ecosystem.

This mission [aims](#) to deploy a rover to the Moon's polar regions to search for water ice and analyse volatile deposits. The Moon's South Pole is believed to harbour substantial water ice deposits accumulated over billions of years in [permanently shadowed craters](#). This resource is critically valuable, providing [water](#) for future lunar habitats and serving as a potential source of [rocket fuel](#) for missions deeper into space.

### Analysis

The MAGPIE mission reflects the persistent challenges and long-term ambitions shaping Europe's space sector. Europe is currently [dependent](#) on foreign suppliers in key areas of space technology, such as manufacturing and launch. However, missions like MAGPIE indicate a [strategic effort](#) to reduce these dependencies and strengthen the foundation for a more resilient and competitive European space ecosystem.

This effort is unfolding amid shifting geopolitical dynamics, as global powers like the United States and China increasingly [leverage space](#) for strategic advantage. In [contrast](#), Europe seeks to define its [space identity](#) through multilateral cooperation, sustainability, and civilian benefit. It faces the challenge of balancing these altruistic ambitions with the strategic imperative to remain competitive against more militarised powers.

When it comes to space resources, missions like MAGPIE are laying the groundwork for Europe to become competitive in this emerging domain. Beyond technological capability, Europe is also positioning itself to shape [international forums](#) in ways that support both its strategic and commercial ambitions. This approach reflects a [broader pattern](#) in other frontier domains, such as maritime governance, where Europe strategically blends sustainability with the protection of its strategic interests.

### Forecast

ESA will likely continue to fund missions like MAGPIE to close technological gaps and advance its strategic goals. Europe-Japan ties will likely [strengthen](#) as the U.S. withdraws from its traditional leadership role. China and Russia will likely attempt to sway or divide Europe to limit its strategic cohesion. While ESA is unlikely to abandon its ties to the U.S. or the Artemis Accords, it will likely assert greater independence in setting its priorities. Europe will likely struggle to reconcile the need for more assertive action in space with its commitment to socioeconomic goals.

### Risk Ratings

**Political and Governance: 5**

**Economic and Infrastructure: 5**

**Security and Crime: 5**

**Environmental and Resource: 5**

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