



DOCUMENTATION

This issue's Documentation section touches on key national security developments. It brings select excerpts from the Statements of General Anthony Cotton, Commander, United States Strategic Command, and General Stephen N. Whiting, Commander, United States Space Command, before the Senate Armed Services Committee, Subcommittee on Strategic Forces. Each general discussed concerning threat developments, particularly regarding Russia and China, and the respective commands' steps to respond to the challenge. The Documentation section also provides a full-length transcript of NATO Secretary General Mark Rutte's introductory remarks to U.S. Vice President JD Vance's much discussed remarks, which the *Journal* also reprints in full. Lastly, the Documentation section contains excerpts from the Estonian Foreign Intelligence Service's annual report on international security.

Document No. 1. Statement of General Anthony Cotton, Commander, United States Strategic Command before the Senate Armed Services Committee, Subcommittee on Strategic Forces, March 26, 2025, select excerpts.

[...] Nuclear weapons and the nuclear mission underpin all of our national defense priorities. The United States will maintain flexible nuclear capabilities and tailored deterrence strategies for potential adversaries that reflect our best understanding of their decision-making and perceptions to effectively deter across a spectrum of adversaries, threats, and conflicts. [...]

I continue to emphasize that Cold War strategies are insufficient in today's complex environment. The character of warfare continues to evolve; gray zone tactics, advanced technologies, growing adversary transactional relationships, and economic entanglement between nation-states complicates our decision calculus in ways never imagined during the Cold War. [...]

China

The CCP's nuclear modernization efforts continued throughout 2024. General Secretary Xi Jinping's directive that China be prepared to seize Taiwan by 2027 has driven CCP investment in the expansion of its land-, sea-, and air-based nuclear delivery platforms and the infrastructure necessary to support a major build-up of its nuclear forces. This expansion is complemented by an increasing capacity to create plutonium from fast breeder reactors with Russian support. Despite claiming technologies for these reactors and reprocessing facilities are intended for peaceful purposes, China likely aims to produce plutonium for its weapons program.

Beijing probably continues to load new solid-propellant intercontinental ballistic missiles (ICBMs) into the silo fields that I first reported to you in January 2023. These fields consist of 320 silos across Western China. China has surpassed 600 deliverable nuclear warheads and is forecasted to have over 1,000 nuclear warheads by 2030, many of which will deploy



in higher readiness levels. This force is expected to grow through 2035 in line with the People's Liberation Army (PLA) modernization goal of becoming a "world class" military by 2049.

The PLA Navy's six operational JIN-class ballistic missile submarines (SSBNs) represent China's first credible sea-based nuclear deterrent. Each JIN-class SSBN carries up to 12 missiles, and China's next-generation TYPE 096 SSBN will reportedly be armed with longer range sea-launched ballistic missiles (SLBMs). Based on the projected 30-plus-year service life of the platforms, China will operate its JIN and TYPE 096 SSBN fleets into the 2050s.

China's H-6N bomber is capable of carrying air-launched ballistic missiles armed with nuclear warheads; last year, Beijing used H-6Ns for the first time during its ninth combined bomber patrol with Russia. China is also developing a strategic stealth bomber, the H-20, believed to have a range of 5,000 miles and the capability to threaten the continental United States.

Russia

Russia maintains the largest and most diverse nuclear arsenal in the world—including 1,550 deployed strategic nuclear warheads and up to 2,000 non-strategic nuclear warheads. Russia's non-strategic nuclear warheads are unconstrained by any treaty obligation, and its refusal to negotiate a follow-on to the treaty between the United States of America and the Russian Federation on Measures for the Further Reduction and Limitation of Strategic Offensive Arms (New START) means its strategic warheads will be unconstrained after the treaty expires in February 2026.

Russia's ICBM force is comprised of 310 missiles capable of carrying up to 1,200 warheads. Despite recent testing challenges with the RS-28 Sarmat ICBM, Moscow continues to pursue this new ICBM, which has a range of 11,000 miles, the ability to carry multiple nuclear warheads, and a future fractional orbital bombardment capability. Russia's Skyfall nuclear powered strategic cruise missile remains in testing and has not yet been formally certified for combat.

The sea-based leg of Russia's triad is comprised of at least 10 DELTA and BOREI-class SSBNs equipped with up to 16 SLBMs each, and the fleet is capable of carrying more than 700 warheads. The Russian Strategic Navy continues to modernize by adding new BOREI-class submarines and deploying new SS-N-32 SLBMs. Russia is also developing the submarine-deployable Poseidon autonomous underwater vehicle, which may be armed with a two-megaton nuclear payload. Lastly, Russia's multi-mission Severodvinsk SSGNs are armed with long-range KALIBR cruise missiles designed to destroy enemy ships and land-based targets.

Russia's air-leg has up to 70 strategic bombers—comprised of the Tu-95MS Bear and the Tu-160 Blackjack—which are being modernized to operate beyond 2030. The Bear can carry up

to 16 AS-15 nuclear-armed cruise missiles, while the Blackjack can carry up to 12. Both aircraft are capable of carrying nuclear gravity bombs. Moscow will complete development of its new PAK-DA bomber within a decade, which will include stealth capabilities and employ both conventional and nuclear armament.

Russia's hypersonic weapons, such as the Kinzhal, Tsirkon, and Avangard, provide Moscow with a myriad of escalation options within its portfolio. These weapons present intercept challenges to current air defense systems. Finally, we remain concerned that Russia may intend to put a space-based nuclear weapon on orbit. [...]

Democratic People's Republic of Korea

In 2024, Kim Jong Un vowed to intensify efforts to make his nuclear force fully ready for combat with the United States. [...] Pyongyang also continues to increase its stockpile of plutonium and highly enriched uranium in support of its nuclear program. [...]

North Korea launched two solid-propellant ballistic missiles purportedly loaded with hypersonic payloads in 2024 and debuted a new, more powerful solid-propellant ICBM. Increasing reliance on solid-propellant systems allows Pyongyang to launch missiles with much less warning than before. [...]

In 2023, North Korea claimed to unveil a tactical nuclear warhead capable of being mounted on at least eight delivery systems, including an unmanned underwater vehicle. In 2024, Kim Jong Un inspected a project to construct the country's first SSBN, although this capability is unlikely to be realized in the next decade.

Islamic Republic of Iran

The Islamic Republic of Iran continues to expand its nuclear program by increasing its stockpile of highly enriched uranium and deploying additional advanced centrifuges. Tehran has reduced the time required to produce sufficient weapons-grade uranium for a nuclear device from 10-15 days to presumably less than one week.

Iran possesses the region's largest arsenal of conventional ballistic missiles, which it employed in attacks on Israel last year. Tehran continues to proliferate advanced conventional weapons to non-state militia groups across the Middle East, resulting in attacks against U.S. and partner personnel and interests, undermining regional stability. Iran's work on space-launch vehicles—including its two-stage, liquid-fueled Simorgh satellite carrier rocket—likely shortens the timeline to produce an ICBM due to the similarities in technology. This rocket could have a 2,400 mile range with a 2,200 pound payload.

Growing Transactional Relationships

A defining feature of today's evolving strategic environment is the increasing prevalence of transactional relationships amongst nuclear-armed competitors and nuclear aspirants. Technology exchanges, troop deployments, combined exercises, and public affirmations of each other's violations of international law are increasing. The possibility of simultaneous conflicts makes complex escalation dynamics even more challenging.

China's "comprehensive strategic partnership of coordination" with Russia entails an increasing degree of military cooperation. Sino-Russian cooperation occurs through exchanges of training, equipment, technology, high-level visits, and other coordination mechanisms. Beijing is Moscow's top supplier of machine tools, microelectronics, and nitrocellulose—all critical to making munitions and rocket propellants—and Russia is using these items to ramp up its defense industrial base and circumvent extensive sanctions.

Iran and the DPRK are also contributing to the war in Ukraine. Tehran has been providing armed drones to Russia since 2022, as well as transferring hundreds of short-range ballistic missiles to Moscow and training personnel to operate these weapons. The DPRK has delivered over 11,000 troops and 16,500 containers of weapons and ammunition to Russia, including ballistic missiles, launchers, and millions of artillery rounds. Moscow has also signed a security pact with Pyongyang, which reportedly includes a mutual defense clause.

Accomplishing the Mission: The Triad and Other Core Functions

To address the challenges posed by the complex security environment, the United States must remain committed to sustaining legacy triad systems and completing the multi-generational, decades-long modernization of the nuclear deterrent, including all three legs of the triad and critical NC3 systems. As we modernize our capabilities, we must retain credible forces to deter strategic attacks, assure Allies and partners, and achieve U.S. objectives should deterrence fail. [...]

Minuteman III

[...] Asset attrition, aging, parts obsolescence, and sustainment shortfalls present operational challenges. Sustaining this capability until its replacement is fielded requires continued national investment to address specialized equipment and replacement parts availability. MMIII must remain an operationally effective and credible deterrent until fully replaced by the Sentinel ICBM.

Sentinel

Sentinel's accuracy, range, responsiveness, safety, security, and sustainment capabilities will ensure the ICBM force remains a potent warfighting capability and a credible land-based nuclear deterrent through at least 2080. A complex mega-project replacing every facet of the MIII, Sentinel will be accompanied by a secure and robust NC3 capability, a new missile, and hundreds of infrastructure projects, including hardened facilities spread across five states. The program consists of ICBM silos, thousands of miles of modern fiber optic cabling, acquisition of permanent and temporary real estate easements, and operational site activation efforts necessary to support the construction workforce and development of the Sentinel weapon system.

Any further Sentinel delay will increase USSTRATCOM's operational risk and impact the credibility of our deterrent. [...]

OHIO-Class SSBN

The fourteen OHIO-Class submarines represent seventy-percent of our Nation's day-to-day nuclear capabilities. While a sufficient deterrent today, the fleet has been life extended to an unprecedented 42 years and will continue to face sustainment and readiness challenges until replaced by COLUMBIA-class submarines. OHIO will start decommissioning about one hull per-year beginning in 2027. [...]

COLUMBIA-Class SSBN

The COLUMBIA program of record (POR) will deliver at least 12 SSBNs, the absolute minimum required to meet strategic guidance. [...] The COLUMBIA-class SSBN remains a high USSTRATCOM priority strategic deterrent program and must achieve its first strategic deterrent patrol by 2031 to avoid an unacceptable capability gap. [...]

Sea-Launched Cruise Missile – Nuclear (SLCM-N)

The SLCM-N, established as a new POR by the fiscal year 2024 (FY2024) National Defense Authorization Act (NDAA), will provide additional at-sea nuclear deterrent capability. This program will provide much-needed low-yield, non-ballistic, survivable, and persistent nuclear capability without visible generation, offering additional range, flexibility, and survivability for extended deterrence and assurance. [...]

B-52H Modernization

The B-52H is a 65-year-old platform slated to remain in service for at least another 25 years. It is critical to providing flexible strategic deterrence options to the President and is the threshold platform to carry the Long Range Standoff (LRSO) weapon. [...]

B-2 Modernization

The B-2 fleet remains the world's only low-observable bomber able to penetrate denied environments while employing a wide variety of munitions against high-value strategic targets. With advancements and proliferation of anti-access and area denial technology, the capabilities provided by the B-2 remain critical to strategic deterrence and our ability to execute missions around the globe. [...]

B-21 Raider

The B-21 Raider will form the backbone of America's future bomber force, replacing conventional B-1 bomber and nuclear-capable B-2 bomber fleets. The B-21 will ensure USSTRATCOM's ability to penetrate advanced air defenses far into the future and will provide strategic and operational flexibility across a wide range of military objectives. The program is on track to meet USSTRATCOM operational requirements, with the first aircraft scheduled for delivery in the late 2020s. [...]

Air-Launched Cruise Missile / Long Range Standoff Weapon

The Long Range Standoff (LRSO) weapon will replace the Air Launched Cruise Missile (ALCM) as our Nation's air-delivered standoff nuclear capability. It is optimized for the future with a planned 30-year service life. The LRSO weapon will provide the President with flexible and scalable options capable of penetrating and surviving against advanced air defenses—a key attribute and critical component to all USSTRATCOM operational plans. [...]

Tanker Support

The demand for tankers across Combatant Commands continues to grow. A robust tanker fleet is essential to sustaining global reach for all USSTRATCOM missions. The KC-135 serves as the backbone of U.S. air refueling capability. Tanker modernization and expansion efforts are imperative for concurrent operations encompassing strategic, theater, and homeland defense missions across CCMDs. [...]

Regional Deterrence Capabilities

[...] The United States' forward deployed nuclear weapons in Europe are critical to NATO's nuclear deterrence. [...] Russia, China, and North Korea are developing theater nuclear weapons in an attempt to offset the United States' and its Allies' asymmetrical conventional superiority and to create deterrence challenges of their own at the regional level. [...]

The DoD and the Nation are reliant on aging NC3 systems with a no-fail mission. As with the triad, we must sustain these systems until the next generation of NC3 is fielded. Key focus areas for USSTRATCOM include: the Survivable Airborne Operations Center (SAOC), E-130J Take Charge and Move Out (TACAMO) recapitalization, satellite communications, missile warning/missile tracking systems, the ground-based components of NC3 such as the Fixed Submarine Broadcast System radio transmitter sites, and securing data and information processes in cyberspace. [...]

Key to long-term viability is cybersecurity integration and sustainment throughout program lifecycle and tailored incorporation of artificial intelligence / machine learning (AI/ML) and advanced data analytics for improved situational awareness and timely response. [...]

A robust set of nuclear and non-nuclear capabilities, effective across a range of potential conflict scenarios, is necessary to successfully conclude conflict while managing escalation. As part of our deterrence strategy, USSTRATCOM is expanding efforts towards Conventional Nuclear Integration (CNI).

CNI encompasses more than kinetic conventional support to nuclear operations and requires the integration of non-kinetic capabilities to complement and enhance nuclear operations. Operations in the information environment (OIE) capabilities—to include cyber, space, EMS operations, military information support to operations (MISO), and public affairs capabilities—should be leveraged to influence the decisions of competitor leadership. The integrated employment of these forces and capabilities, combined with conventional and nuclear operations, must be considered throughout all phases—from competition to conflict. [...]

Conventional Kinetic Operations

Two decades ago, USSTRATCOM recognized the need for a conventional prompt global strike weapon system to hold distant, defended, and/or time-critical threats at risk when other forces are unavailable, incapable, or not preferred. The need for these weapons is more important today as we witness the rapid expansion of adversary military capabilities and rising tensions around the world. USSTRATCOM will use long-range precision strike conventional munitions to enhance the traditional capabilities inherent in the nuclear triad

and implement CNI initiatives, in turn bolstering deterrence capabilities in support of strategic deterrence.

Hypersonic weapons provide a highly responsive, long-range, non-nuclear strike capability to hold critical targets at risk across all stages of conflict. Hypersonic weapons will also mitigate shortfalls in current standoff conventional weapons capacity and capability. We support the Services' continued development of hypersonic weapon systems through flight test programs, robust modeling and simulation, and ground testing.

USSTRATCOM continues to advocate for rapid development and fielding of advanced conventional capabilities, including the Army's Long Range Hypersonic Weapon and Navy's Conventional Prompt Strike. Partnerships leveraging commercial infrastructure and launch vehicle providers significantly increase the Nation's capacity for ground and flight testing of hypersonic payloads and technologies. [...]

The Asymmetric Advantage of Allies & Partners

U.S. Allies and partners are a critical component of deterrence and provide an asymmetric advantage that potential adversaries cannot outmatch. China, Russia, DPRK, and Iran do not integrate as we do through planning, exercising, and combined operations. [...]

Last year, our SSBN forces integrated across five CCMDs and five Allied nations, successfully synchronizing near-simultaneous Pacific, Atlantic, and Caribbean submarine operations. Our Bomber Task Force global campaign operations included over 200 days of overseas presence, 140+ missions in partnership with all CCMDs, and integration with 35 partner nations in FY2024—effectively projecting U.S. global strike power and interoperability. [...]

In alignment with the 2023 DoD National Defense Industrial Strategy, we advocate to expand stockpiles of the critical parts, finished goods, and commodities needed to meet production requirements for conducting sustained campaigns against adversaries. [...]

Current shipyard infrastructure capacity is insufficient to accommodate the one COLUMBIA-class SSBN plus two VIRGINIA-class SSNs per-year build plan (1+2 build plan) by FY2026 (the year in which COLUMBIA-class serial production starts). [...]

Stockpile and Weapons Infrastructure

Today's stockpile is sufficient to achieve current strategic deterrence objectives. Sustaining this for the long term will require confidently assessing the performance of aged weapons until they can be replaced, on-time fielding of replacement weapons, and the infrastructure to support both. While we can currently mitigate these risks, they do potentially impact the long-term viability of weapons in all three legs of the strategic triad.

The credibility of strategic deterrence relies on the effectiveness of the stockpile and the infrastructure needed to maintain the current weapons while producing modern replacements. This requires a Nuclear Security Enterprise (NSE) with efficiencies in development and production processes, modular weapon designs to enable rapid adaptability to meet emerging needs, and an enterprise-wide science, technology, and engineering (ST&E) effort to enable the development and maturation of technologies outside of specific stockpile programs. [...]

The NNSA [National Nuclear Security Administration] completed the first production unit for a war reserve W87-1 plutonium pit, and is now working towards rate production of 30 pits per-year at Los Alamos National Laboratory and 80 pits per-year overall. Re-establishing a credible plutonium pit manufacturing capability remains the top stockpile priority, but we must not lose sight of other initiatives—including uranium manufacturing, high explosives manufacturing, lithium processing, tritium production, radiation-hardened electronics production, and non-nuclear components production. Continuous production is absolutely necessary to ensure the United States is postured to address long-term challenges.

Additional stockpile modernization progress was achieved with completion of the B61-12 life extension program and the W88 Alteration 370 program remains in full-scale production; the B61-13 was also established as a POR. As with infrastructure modernization, considerable work remains to modernize the nuclear weapons stockpile, including the air-leg's W80-4, the land-leg's W87-1/Mk21A, and the sea-leg's W93/Mk7. It is imperative these programs remain on track or the Nation will continue to rely on older weapons with increasing uncertainty in their viability into 2040 and beyond. [...]

Missile Threat Assessment

Maintaining USSTRATCOM's ability to deter and respond to strategic attack by potential adversaries requires defenses against all types of advanced missiles and other novel delivery systems. Pursuant to the January 27, 2025, Executive Order on the Golden Dome for America, and in cooperation with the Office of the Secretary of Defense, U.S. Northern Command, and other DoD stakeholders, we are actively assessing strategic missile threats and prioritizing a set of locations to defend against a counter-value attack by nuclear-armed adversaries. Defending North America and our interests around the globe—to include the Arctic—is inherently linked to the ability of the Joint Force to operate. We also support improvements in early warning, identification, tracking, discrimination, and attribution for the full range of advanced air and missile threats to the homeland and our strategic forces to support U.S. Space Command's trans-regional missile defense responsibilities. [...]

Document No. 2. Statement of General Stephen N. Whiting, Commander, United States Space Command before the Senate Armed Services Committee, Subcommittee on Strategic Forces, March 26, 2025, select excerpts.

[...] Our guiding principle is clear: to secure peace, we must be prepared for conflict extending to space, and if deterrence fails, we will fight and win. USSPACECOM will uphold this principle in the face of operational threats, which are expanding at a breathtaking pace and which are being fielded deliberately and specifically to challenge the United States, the American way of life, and hold the Joint Force at risk. [...] The increasing lethality and proliferation of space-enabled and cyber threats displayed in Ukraine and the Middle East, and the rapid advance of China's capabilities, demonstrate that winning the space fight is foundational to defending the nation, the readiness of the nation's forces, and reestablishing deterrence. [...]

Our opponents are rapidly delivering counterspace capabilities and new weapons that operate in, from, and to space.

Deterrence in space is consistent with other operational theaters: it requires a keen understanding and clear communication of what we are deterring against; credible acknowledged capabilities to impose unacceptable costs on those who would attack us; and resilient architectures to dissuade attack by denying the adversary the benefit they seek. We need to make clear that cost imposition need not be limited to the domain of the initial action. Achieving this level of deterrence demands not only strategic intent but also the timely development and fielding of new space capabilities. [...]

Today, we face concurrent and accelerating threats. These threats, extensively discussed over the years, are no longer future possibilities but operational realities. They span terrestrial, on-orbit, and cyber capabilities holding space systems in all orbital regimes at risk, capable of restricting Joint Force freedom of action in all domains and attacking the homeland with little warning. Naturally occurring threats, such as severe solar activity, also pose risks to the longevity and functionality of on-orbit assets. [...]

China

China views space technologies as critical to its goal of becoming the dominant power in East Asia and a global superpower. The People's Republic of China (PRC) seeks to rival the United States in nearly all areas of space technology by 2030 and establish itself as the world's preeminent space power by 2045. Since 2015, China's on-orbit presence has grown 1000 percent, with 1094 active satellites as of January 2025. Its sophisticated space and counterspace systems enhance its ability to secure territorial claims, project power, and challenge U.S. advantages.

China integrates space capabilities with advanced missiles, enabling the People's Liberation Army (PLA) to find, fix, track, and target U.S. and Allied terrestrial forces using long-range, over-the-horizon, precision missiles to disrupt logistics and limit operational freedom in the Indo-Pacific area of responsibility (AOR). The PLA relies on over 300 intelligence, surveillance, and reconnaissance (ISR) satellites equipped with advanced sensors to detect U.S. aircraft carriers and expeditionary forces. Additionally, China's BeiDou Positioning, Navigation, and Timing (PNT) system provides precision targeting, coordination of troop movements, and advanced C2 capabilities.

China's counterspace operations seek to undermine how the U.S. military fights by disrupting or destroying space capabilities which are foundational to Joint Force operational concepts, effectively blinding and deafening friendly forces. The PLA is also developing on-orbit, maneuverable counterspace satellites to target our satellites using dual-use technologies, such as the Shijian-21 satellite, for potential offensive purposes against satellites we rely on to defend the homeland and project power. China's experimental satellites and operational ground-based systems, like direct-ascent antisatellite missiles, lasers, and jammers, give the PLA robust lethal and non-lethal counterspace options across the spectrum of conflict. Additionally, in 2024 Chinese scientists revealed efforts to develop a novel microwave weapon that could target satellites, reflecting a comprehensive counterspace approach.

China also leverages international partnerships and cutting-edge projects to challenge U.S. leadership in space. In 2024, it hosted the China-Latin America and Caribbean Space Cooperation Forum to promote collaboration on space infrastructure and governance. China is also advancing Space Situational Awareness with tracking stations in Egypt and a space debris monitoring project in the Asia-Pacific region. China is investing in reusable launch vehicles to increase its spacelift capacity while lowering costs, and it is moving quickly in planetary exploration to potentially secure strategic advantages in key space terrain. Milestones such as the Chang'e-6 mission, which impressively returned lunar samples from the Moon's far side, further demonstrates China's growing space capabilities. These advancements, paired with international partnerships, underscore Beijing's strategy to erode U.S. leadership and establish itself as the dominant space power.

Russian Federation

Russia's space program remains a strategic priority for the Kremlin despite significant challenges from sanctions, international isolation, and funding constraints. Key efforts include developing a new Russian space station, advancing nuclear power in space, and enhancing Arctic monitoring for military operations. [...] Russia has also expanded its space-based support for operations in Ukraine with the launch of multiple satellites providing enhanced ISR since February 2022.

Russia has declared commercial satellites used for military operations as valid and legitimate targets. Russia continues to advance electromagnetic warfare (EW), directed energy, cyber, and both ground-based and co-orbital ASAT capabilities. In 2024 and already in 2025, Russian EW systems disrupted PNT services in the Baltic, Black Sea, and Mediterranean regions, causing flight diversions and Global Positioning System inaccuracies. These activities underscore Moscow's ability and willingness to degrade military and civilian space systems and highlight the challenge with maintaining credible deterrence.

Most concerning, Russia is pursuing the possible placement of a nuclear weapon on-orbit. Detonating a nuclear weapon on-orbit would have indiscriminate effects, potentially disrupting the global use of space for security, economic, and scientific purposes. [...]

Russia is also expanding space partnerships with its allies and U.S. strategic opponents. In June 2024, Russia and the DPRK signed a comprehensive strategic partnership treaty that includes provisions for mutual defense and space collaboration. In October, demonstrating their growing collaboration, Iran sent two satellites to Russia for space launch services. Russia also continues to work with China on development of the International Lunar Research Station, BeiDou-GLONASS integration, and space debris monitoring. [...]

Evolving Missile Threats

The U.S. homeland and national interests face growing threats from the expanding and evolving offensive missile capabilities of peer, near-peer, and rogue adversaries. These advanced systems—including hypersonic glide vehicles (HGVs) and fractional orbital bombardment platforms (FOBS)—can launch into, transit through, or even originate from space, crossing multiple Combatant Commanders' AORs before striking their targets. The increasing diversity and proliferation of these technologies complicate tracking, targeting, engagement, and determination of intended target location.

China continues to develop its wide-ranging missile program and is now the global leader in hypersonic payload capability. In 2021, a Chinese FOBS launch saw an HGV travel 25,000 miles within the defined space AOR before re-entering the atmosphere, aggressively maneuvering to strike a target in the Chinese mainland, which could just as easily have been a target within our homeland, like Washington, D.C., New York, or Los Angeles.

Russia's continued missile advancements strain U.S. sensors and defenses. Moscow has fielded three hypersonic systems with air, land, and sea launch options, featuring ranges over 6,000 miles carrying both conventional and nuclear capabilities, including two types of nuclear-armed HGVs. These advanced and long-range threats highlight the urgency to build the Golden Dome for America to protect our borders and skies against foreign coercion and aggression. [...]

Operate Through a First Strike

Our most stressing scenario is operating through a first strike from an undeterred adversary while ensuring the space capabilities essential for victory continue to operate. We must anticipate, defend against, recover from, and immediately respond to a wide range of scenarios, conditions, and threats. Doing so will require robust defensive capabilities and resilient architectures across our integrated space enterprise.

The most consequential threat to our resilience is an attack on the United States from ballistic, hypersonic, and advanced cruise missiles, as well as emerging space-based weapons. Our legacy systems—Space Domain Awareness (SDA), space-based and terrestrial Missile Warning and Missile Defense, and satellite-enabled Nuclear Command, Control, and Communications—remain as vital today as ever in protecting the homeland. Recognizing this, our adversaries have developed terrestrial and on-orbit weapons designed to threaten these critical space capabilities, underscoring the urgent need to strengthen our defenses. [...]

Quickly and Seamlessly Transition from Crisis to Conflict

Our ability to quickly and seamlessly transition from crisis to conflict is essential to providing national leadership broad options and greater flexibility. Clear understanding of authorities, international agreements, access/basing/overflight requirements, and force posture are key tools we continue to develop. Robust and persistent campaigning simultaneously enhances deterrence and postures for conflict. [...]

Deploy, Regenerate, and Reconstitute Space Forces

[...] On orbit, sustained space operations require the right mix of responsive launch, sustained maneuverability, and logistics to allow for the operational availability, movement, and maneuver required to achieve a position of advantage over an adversary. These sustainment activities need to occur simultaneously across all domains, ensuring resilience and survivability throughout all phases of conflict.

Achieving sustained space maneuver requires investment in purpose-built systems—on-orbit refueling, in-space assembly, modular hardware upgrades, and urgent orbital resupply—to revolutionize how USSPACECOM achieves and maintains space superiority. Legacy space systems were constrained by the technological limitations of their era, launched with finite fuel and fixed payloads that offered minimal operational maneuverability, flexibility, or defensive capability. Future systems must overcome these limitations by enabling greater flexibility through dynamic maneuver, upgradability, and resupply. Platforms designed to support space maneuver should provide the capability and

capacity needed to deter adversaries, maintain initiative, and conduct operations across all phases of competition and conflict. [...]

To enhance flexibility, operational effectiveness, and resilience, USSPACECOM also requires sustained investment in terrestrial mobile and transportable capabilities. These include EW capabilities like the USSF's Counter Communications System and the U.S. Army's Mobile and Theater Integrated Ground Suites; the U.S. Marine Corps' Electromagnetic Reconnaissance System; missile warning nodes such as the Space-Based Infrared System Survivable/Endurable Evolution; and agile SDA capabilities provided by the U.S. Navy's Aegis Combat System. These mobile elements are critical for augmenting fixed networks, closing coverage gaps, and expanding the battlefield geometry of our space enterprise to counter evolving and dynamic threats.

Achieve Space Superiority

Our ability to achieve space superiority is foundational to Joint Force success. To deter strategic competitors, defend U.S., Allied, Partner, commercial interests, and protect the Nation and Joint Force, the Services require funding for three essential space superiority capabilities: Integrated Space Fires, Enhanced Battlespace Awareness for Space Operations, and Resilient, Timely Operational Space C2.

Integrated Space Fires are our most pressing need and are reflected as such in our Integrated Priority List. [...]

USSPACECOM requires the requisite near-real-time domain awareness to close our kill chains, interdict adversary kill chains, and to outpace adversaries in today's increasingly congested and contested space environment. Legacy SDA systems lack agility, making investment in interoperable sensors and dynamic architectures critical for timely detection, tracking, and characterization of space objects. [...] However, more advanced space-based and terrestrial systems are needed to dynamically track spacecraft in nonstandard orbits and, eventually, in farther regions beyond geostationary earth orbit out to Cislunar orbit. [...]

Resilient and timely space C2 is essential to closing friendly kill chains, deterring hostile actions, and defending U.S., Allied, and Partner interests. A modernized C2 capability is critical for managing space domain operations and supporting terrestrial operations in which space effects are vital. [...]

We are at a critical juncture. Our most pressing threat, China, is marching towards General Secretary Xi Jinping's directed timeline for his armed forces to be ready to militarily reunite with Taiwan, a date that is now less than two years away. Though this is not a prediction of conflict, it is a reality that must be taken seriously. Furthermore, we are being threatened

terrestrially and on-orbit with capabilities that seek to not only dull our ability to support the Joint Force, but also our ability to defend the homeland.

[...] Should deterrence fail, however, the integrated space power of our Joint, Interagency, Combined, and commercial team will provide a decisive advantage in any conflict. By realizing the full potential of our integrated space enterprise and elements of victory, we will prevail. [...]

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Document No. 3. Remarks by NATO Secretary General Mark Rutte with U.S. Vice President JD Vance in the margins of the Munich Security Conference, February 14, 2025.¹

(As delivered)

Thank you so much Mr Vice President. And it's a pleasure to see you again.

And I want to thank you for the American people, for everything you are doing to keep the whole world safe, basically.

And I know there are many theatres in the world you really have to take your attention to.

So I do understand the issue of burden sharing. It is crucial.

I also want to thank you personally for everything you have done over the years in engaging with Europe. It has been noted. You have been here before and it's really important.

And I look forward also, from that perspective, to our talks. And on Europe stepping up, European part of NATO stepping up, you are absolutely right. It has to be done. We have to grow up in that sense, and spend much more. We have also had to discuss the defence industrial base.

This is a problem we have both in the US and in the rest of NATO. We are simply not producing enough. We are not keeping up with the Russians and the Chinese.

And then, of course, Ukraine: how to bring Ukraine to a lasting peace. No Minsk again. So it has to be lasting. Putin should never try it again.

¹ See, "Remarks," *NATO.int*, February 14, 2025, available at https://www.nato.int/cps/en/natohq/opinions_233217.htm?selectedLocale=en.

And how to get them into a place of maximum strength when the talks starts.

So a lot to discuss and really looking forward also to build the relationship.

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Document No. 4. Remarks by Vice President JD Vance, Munich Security Conference, February 14, 2025.²

Well, thank you and thanks to all the gathered delegates and luminaries and media professionals, and thanks especially to the host of the Munich Security Conference for being able to put on such an incredible event.

We're, of course, thrilled to be here. We're happy to be here. And one of the things that I wanted to talk about today is, of course, our shared values.

And it's great to be back in Germany. As you heard earlier, I was here last year as United States Senator. I saw a foreign minister, excuse me, foreign secretary David Lammy and joked that both of us last year had different jobs than we have now.

But now it's time for all of our countries, for all of us who have been fortunate enough to be given political power by our respective peoples to use it wisely to improve their lives.

And I want to say that I was fortunate in my time here to spend some time outside the halls of this conference over the last 24 hours. And I've been so impressed by the hospitality of the people, even of course, as they're reeling from yesterday's horrendous attack. And the first time I was ever in Munich was with my wife actually who's here with me today on a personal trip.

And I've always loved the city of Munich and I've always loved its people. And I just want to say that we're very moved and our thoughts and prayers are with Munich and everybody affected by the evil inflicted on this beautiful community. We're thinking about you. We're praying for you and we will certainly be rooting for you in the days and weeks to come.

Now, I hope that's not the last bit of applause that I get, but we gather at this conference, of course, to discuss security. And normally we mean threats to our external security. I see many great military leaders gathered here today.

² See, "Remarks at the Munich Security Conference," *YouTube*, February 14, 2025, available at <https://www.youtube.com/watch?v=pCOsgfINdKg>.

But while the Trump administration is very concerned with European security and believes that we can come to a reasonable settlement between Russia and Ukraine, and we also believe that it's important in the coming years for Europe to step up in a big way to provide for its own defense, the threat that I worry the most about vis-a-vis Europe is not Russia, it's not China, it's not any other external actor.

And what I worry about is the threat from within. The retreat of Europe from some of its most fundamental values, values shared with the United States of America. Now, I was struck that a former European commissioner went on television recently and sounded delighted that the Romanian government had just annulled an entire election. He warned that if things don't go to plan, the very same thing could happen in Germany too. Now, these cavalier statements are shocking to American ears. For years we've been told that everything we fund and support is in the name of our shared democratic values.

Everything from our Ukraine policy to digital censorship is billed as a defense of democracy. But when we see European courts canceling elections and senior officials threatening to cancel others, we ought to ask whether we're holding ourselves to an appropriately high standard. And I say ourselves because I fundamentally believe that we are on the same team. We must do more than talk about democratic values. We must live them.

Now within living memory of many of you in this room, the Cold War positioned defenders of democracy against much more tyrannical forces on this continent. And consider the side in that fight that censored dissidents, that closed churches, that canceled elections. Were they the good guys? Certainly not. And thank God they lost the Cold War.

They lost because they neither valued nor respected all of the extraordinary blessings of liberty, the freedom to surprise, to make mistakes, to invent, to build. As it turns out, you can't mandate innovation or creativity just as you can't force people what to think, what to feel or what to believe. And we believe those things are certainly connected.

And unfortunately, when I look at Europe today, it's sometimes not so clear what happened to some of the Cold War's winners. I look to Brussels, where EU commissars warn citizens that they intend to shut down social media during times of civil unrest, the moment they spot what they've judged to be "hateful content," or to this very country where police have carried out raids against citizens suspected of posting anti-feminist comments online as part of "combating misogyny on the internet, a day of action."

I look to Sweden where two weeks ago the government convicted a Christian activist for participating in Quran burnings that resulted in his friend's murder. And as the judge in his case, chillingly noted, "Sweden's laws to supposedly protect free expression do not in fact grant," and I'm quoting, "a free pass to do or say anything without risking offending the group that holds that belief."

And perhaps most concerning, I look to our very dear friends, the United Kingdom, where the back slide away from conscience rights has placed the basic liberties of religious Britons in particular in the crosshairs. A little over two years ago, the British government charged Adam Smith Connor, a 51-year-old physiotherapist, and an army veteran, with the heinous crime of standing 50 meters from an abortion clinic and silently praying for three minutes. Not obstructing anyone, not interacting with anyone, just silently praying on his own.

And after British law enforcement spotted him and demanded to know what he was praying for, Adam replied simply it was on behalf of the unborn son he and his former girlfriend had aborted years before. Now the officers were not moved. Adam was found guilty of breaking the government's new buffer zones law, which criminalizes silent prayer and other actions that could influence a person's decision within 200 meters of an abortion facility. He was sentenced to pay thousands of pounds in legal costs to the prosecution.

Now, I wish I could say that this was a fluke, a one-off crazy example of a badly written law being enacted against a single person. But no, this last October, just a few months ago, the Scottish government began distributing letters to citizens whose houses lay within so-called safe access zones, warning them that even private prayer within their own homes may amount to breaking the law. Naturally, the government urged readers to report any fellow citizen suspected guilty of thought crime.

In Britain and across Europe, free speech I fear is in retreat. And in the interest of comedy, my friends, but also in the interest of truth, I will admit that sometimes the loudest voices for censorship have come not from within Europe, but from within my own country, where the prior administration threatened and bullied social media companies to censor so-called misinformation.

Misinformation, like for example, the idea that Coronavirus had likely leaked from a laboratory in China, our own government encouraged private companies to silence people who dared to utter what turned out to be an obvious truth.

So, I come here today, not just with an observation, but with an offer. And just as the Biden administration seemed desperate to silence people for speaking their minds, so the Trump administration will do precisely the opposite, and I hope that we can work together on that.

And in Washington, there is a new sheriff in town. And under Donald Trump's leadership, we may disagree with your views, but we will fight to defend your right to offer it in the public square. Agree or disagree.

Now, we're at the point of course that the situation has gotten so bad that this December, Romania straight up canceled the results of a presidential election based on the flimsy

suspicious of an intelligence agency and enormous pressure from its continental neighbors. Now, as I understand it, the argument was that Russian disinformation had infected the Romanian elections, but I'd ask my European friends to have some perspective.

You can believe it's wrong for Russia to buy social media advertisements to influence your elections. We certainly do. You can condemn it on the world stage even. But if your democracy can be destroyed with a few hundred thousand dollars of digital advertising from a foreign country, then it wasn't very strong to begin with.

Now, the good news is that I happen to think your democracies are substantially less brittle than many people apparently fear. And I really do believe that allowing our citizens to speak their mind will make them stronger still, which of course brings us back to Munich, where the organizers of this very conference have banned lawmakers representing populist parties on both the left and the right from participating in these conversations.

Now, again, we don't have to agree with everything or anything that people say, but when people represent, when political leaders represent an important constituency, it is incumbent upon us to at least participate in dialogue with them.

Now to many of us on the other side of the Atlantic, it looks more and more like old entrenched interests hiding behind ugly Soviet era words like misinformation and disinformation who simply don't like the idea that somebody with an alternative viewpoint might express a different opinion, or God forbid, vote a different way or even worse win an election.

Now this is a security conference, and I'm sure you all came here prepared to talk about how exactly you intend to increase defense spending over the next few years in line with some new target. And that's great because as President Trump has made abundantly clear, he believes that our European friends must play a bigger role in the future of this continent. We don't think, you hear this term burden sharing, but we think it's an important part of being in a shared alliance together that the Europeans step up while America focuses on areas of the world that are in great danger.

But let me also ask you, how will you even begin to think through the kinds of budgeting questions if we don't know what it is that we are defending in the first place?

I've heard a lot already in my conversations, and I've had many, many great conversations with many people gathered here in this room. I've heard a lot about what you need to defend yourselves from, and of course that's important, but what has seemed a little bit less clear to me and certainly I think to many of the citizens of Europe is what exactly it is that you're defending yourselves for.

What is the positive vision that animates this shared security compact that we all believe is so important? And I believe deeply that there is no security if you are afraid of the voices, the opinions, and the conscience that guide your very own people.

Europe faces many challenges, but the crisis this continent faces right now, the crisis I believe we all face together is one of our own making. If you're running in fear of your own voters, there is nothing America can do for you nor for that matter is there anything that you can do for the American people who elected me and elected President Trump.

You need democratic mandates to accomplish anything of value in the coming years. Have we learned nothing that thin mandates produce unstable results, but there is so much of value that can be accomplished with the kind of democratic mandate that I think will come from being more responsive to the voices of your citizens.

If you're going to enjoy competitive economies, if you're going to enjoy affordable energy and secure supply chains, then you need mandates to govern, because you have to make difficult choices to enjoy all of these things.

And of course, we know that very well in America. You cannot win a democratic mandate by censoring your opponents or putting them in jail, whether that's the leader of the opposition, a humble Christian praying in her own home, or a journalist trying to report the news. Nor can you win one by disregarding your basic electorate on questions like who gets to be a part of our shared society?

And of all the pressing challenges that the nations represented here face, I believe there is nothing more urgent than mass migration. Today almost one in five people living in this country moved here from abroad. That is, of course, an all time high. It's a similar number by the way, in the United States, also an all time high.

The number of immigrants who entered the EU from non-EU countries doubled between 2021 and 2022 alone. And of course, it's gotten much higher since. And we know the situation, it didn't materialize in a vacuum.

It's a result of a series of conscious decisions made by politicians all over the continent and others across the world over the span of a decade. We saw the horrors wrought by these decisions yesterday in this very city.

And of course, I can't bring it up again without thinking about the terrible victims who had a beautiful winter day in Munich ruined. Our thoughts and prayers are with them and will remain with them. But why did this happen in the first place? It's a terrible story, but it's one we've heard way too many times in Europe, and unfortunately too many times in the United

States as well, an asylum seeker, often a young man in his mid-twenties, already known to police, rams a car into a crowd and shatters a community.

How many times must we suffer these appalling setbacks before we change course and take our shared civilization in a new direction? No voter on this continent went to the ballot box to open the floodgates to millions of unvetted immigrants. But you know what they did vote for?

In England they voted for Brexit. And agree or disagree, they voted for it. And more and more all over Europe, they're voting for political leaders who promised to put an end to out-of-control migration.

Now, I happen to agree with a lot of these concerns, but you don't have to agree with me. I just think that people care about their homes, they care about their dreams, they care about their safety and their capacity to provide for themselves and their children, and they're smart.

I think this is one of the most important things I've learned in my brief time in politics, contrary to what you might hear a couple mountains over in Davos, the citizens of all of our nations don't generally think of themselves as educated animals or as interchangeable cogs of a global economy.

And it's hardly surprising that they don't want to be shuffled about or relentlessly ignored by their leaders. And it is the business of democracy to adjudicate these big questions at the ballot box.

I believe that dismissing people, dismissing their concerns or worse yet, shutting down media, shutting down elections or shutting people out of the political process protects nothing.

In fact, it is the most surefire way to destroy democracy. And speaking up and expressing opinions isn't election interference. Even when people express views outside your own country, and even when those people are very influential. And trust me, I say this with all humor, if American democracy can survive 10 years of Greta Thunberg scolding, you guys can survive a few months of Elon Musk.

But what German democracy, what no democracy, American, German, or European will survive, is telling millions of voters that their thoughts and concerns, their aspirations, their pleas for relief are invalid or unworthy of even being considered.

Democracy rests on the sacred principle that the voice of the people matters. There's no room for firewalls. You either uphold the principle or you don't.

Europeans, the people have a voice. European leaders have a choice. And my strong belief is that we do not need to be afraid of the future. You can embrace what your people tell you, even when it's surprising, even when you don't agree.

And if you do so, you can face the future with certainty and with confidence knowing that the nation stands behind each of you. And that to me is the great magic of democracy. It's not in these stone buildings or beautiful hotels. It's not even in the great institutions that we have built together as a shared society.

To believe in democracy is to understand that each of our citizens has wisdom and has a voice. And if we refuse to listen to that voice, even our most successful fights will secure very little.

As Pope John Paul II, in my view, one of the most extraordinary champions of democracy on this continent or any other once said, "Do not be afraid."

We shouldn't be afraid of our people even when they express views that disagree with their leadership.

Thank you all. Good luck to all of you.

God bless you.

Document No. 5. Estonian Foreign Intelligence Service, *International Security and Estonia 2025*, select excerpts.³

[...] Despite suffering the largest post-World War II human losses on the battlefield, Russia's armed forces are growing. New units and formations are being established, primarily with recruited contract soldiers. Russia is not merely restoring its pre-war personnel numbers of 600,000-700,000 soldiers; this target was already reached during the partial mobilisation in autumn 2022. Since then, Russia has simultaneously worked to restore the combat readiness of its operational forces and implement force generation by creating new units staffed with contracted personnel. By 2026, the Kremlin aims to expand its military to 1.5 million soldiers. [...]

The Kremlin has chosen a path of long-term confrontation, committing to the mobilisation of additional societal resources to rebuild the military and achieve its reform goals. If Russia succeeds in continuing its military reform and forming the planned units, Estonia and NATO

³ The document can be found at <https://www.valisluureamet.ee/doc/raport/2025-en.pdf>.

will face a Russian force posture in the coming years that poses a sustained military threat. [...]

Drawing on lessons and experiences from the war in Ukraine, the Russian government is determined to ensure technological and industrial readiness for the large-scale adoption of drone technology⁴ in both military and civilian sectors. [...]

As of December 2024, Russia has used over 8,000 Shahed, Geran and Garpiya drones in Ukraine, targeting critical infrastructure in massive waves combined with other precision weapons, such as ballistic and cruise missiles. This terror tactic aims to undermine Ukrainian morale. From Russia's perspective, targeting civilian infrastructure also increases the likelihood that Ukraine will expend its limited stock of air defence resources to intercept drones. Thus, one-way attack drones can also serve as saturation decoys for Ukraine's air defences so that Russia's more expensive and capable ballistic and cruise missiles can reach their intended military targets. [...]

Sanctions have had a limited impact on Russian drone production. [...] Estimates indicate that up to 80 per cent of sanctioned Western components reach Russia through China, suggesting that representatives of manufacturers, wholesalers and intermediaries within China are almost certainly a weak link in the supply chain. China has made some efforts to restrict its state-owned and state-associated entities from supplying sanctioned goods to Russia. It has also tightened existing restrictions and introduced new ones, such as the Chinese Ministry of Commerce's export controls on certain drones and drone components imposed on 1 September 2023. Despite this, covert supplies from Chinese private companies persist, with Beijing remaining Russia's primary hub for importing high-tech and dual-use goods.

Dependency on imported components, including drone motors and engines, has been one of the most significant challenges to developing Russia's domestic drone production. [...] Although the Chinese government likely seeks to avoid the direct involvement of its state institutions in supplying sanctioned goods to Russia, it facilitates bilateral cooperation and covert transfers of dual-use components through private companies. This approach will likely decrease Russia's dependency on Western components and, in the long term, could undermine the West's ability to leverage influence in this domain. [...]

Russia's aggressive rhetoric, paired with its lack of response to Western actions, has undermined the credibility of its 2020 nuclear doctrine. Russia has issued warnings of nuclear escalation in situations that fall short of the thresholds outlined in the doctrine.

⁴ The term "drone" is used here as a general designation for unmanned vehicles, including unmanned aerial, ground and water vehicles, as well as one-way unmanned attack systems, loitering munitions, FPV [first person view] drones and similar devices.

Following this discreditation and Russia's inability to deter the West, discussions within Russia's security circles intensified after the initial setbacks of the invasion. Both public and private debates focused on finding more effective ways to leverage nuclear weapons as a deterrent.

These discussions culminated in the adoption of a new doctrine on 19 November 2024. [...] However, such doctrines carry little weight in an autocratic system like Russia's, where their primary function is to create an alarming notion in the West that the choice lies between submission and nuclear war. This doctrinal change is highly unlikely to lead to the use of nuclear weapons against Ukraine under current conditions. The use of nuclear weapons is almost certainly not automatically tied to the conditions outlined in doctrine but depends on the decisions of the Russian regime's leader.

By lowering the threshold for nuclear weapon use and continuing its intimidation tactics, Russia aims to influence Western policymakers. This includes deterring support for Ukraine and discouraging NATO from strengthening its defence capabilities near Russian borders. Intimidation has yielded some results; while Ukraine continues to receive support despite Russian threats, many countries have adopted measured approaches, creating self-imposed "red lines" that Russia can exploit.

The success of these intimidation tactics primarily hinges on the reactions of Western nations and the global community. If nuclear threats or limited use were successful in deterring Western aid to Ukraine and securing concessions for Russia, this would likely spark a wave of nuclear proliferation, with non-nuclear states increasingly viewing non-strategic nuclear weapons as a primary security guarantee.

Alongside intimidation, Russia is likely revising the role of non-strategic nuclear weapons (operational-tactical and tactical nuclear weapons) in practice. Russia's new and expanded force structure along its western flank [...] includes a non-strategic nuclear component. Exercises in the summer of 2024 covered practical aspects such as the transportation, protection and potential use of nuclear weapons, including in Kaliningrad. [...]

The Kaliningrad depot, previously in disrepair, has been renovated and expanded, becoming a focal point for Russia's 12th Main Directorate (12th GUMO), which oversees nuclear weapons. In 2024, it was upgraded to a national depot, which positions nuclear warheads and delivery systems closer to the Baltic states and reduces the early warning time for potential use. This likely indicates a shift in Russia's threat perception, intended both to further intimidate the West and to allow for faster deployment if required.

However, the military benefits of using nuclear weapons on the battlefield are limited in modern warfare. Using nuclear weapons against Ukraine would almost certainly fail to achieve strategic objectives and would instead expose the limitations of non-strategic

nuclear weapons. It would highlight the superiority of modern conventional weaponry and significantly erode Russia's nuclear deterrence credibility. Nuclear weapons and the taboo surrounding their use remain central to Russia's reputation and self-perception as a great power. Any use of these weapons would shatter this illusory status on the international stage, including among the Global South. [...]

Putin's regime appears unshakable, but beneath the polished surface, internal tensions and contradictions are building. The regime primarily responds with harsher directives, restrictions and repression, offering no substantive solutions. With resources concentrated on sustaining the war and maintaining the military-industrial complex, development in other areas has nearly ceased, leading to rapidly declining living standards. At the same time, corruption, abuse of power and financial waste continue to plague all levels of government. [...]

In addition to the increasing difficulty of securing funding for the war, these changes also underscore how critical it is for Vladimir Putin to end the war on terms favourable to him. It is almost certain that this objective is driven by his awareness that losers are not respected in Russia, and for reputational reasons alone, he must conclude the war with a result that can be portrayed as a victory. Thus, the Kremlin's leader remains motivated to secure the resources necessary to continue the war, despite its costs far exceeding the original plans and the ever-growing price Russia is paying. [...]

Military spending in the federal budget has reached record levels year after year, with nearly 18 trillion roubles allocated for defence and internal security in 2025, amounting to 40% of the federal budget.

However, there are clear signs that the surge in military-industrial output, driven by federal funding, has reached its limit. Even Russia's official statistics indicate that industrial production volumes in monetary terms have plateaued since September 2023, fluctuating by a few per cent in either direction month-to-month. Considering inflation of around 10%, actual output has either stagnated or even slightly declined. [...]

Russia's budget revenues have been robust in 2024. While the high domestic tax revenues were expected due to the infusion of wartime spending into the economy, the more than 1.5-fold increase in oil and gas revenues compared with the previous year came as a surprise – even to the Russian government. Global oil prices remained high due to OPEC+ agreements, and Russia managed to bypass Western-imposed price caps with the help of a shadow fleet and intermediaries. [...]

Inflation is running at more than twice, and sometimes even three times, the bank's target rate. To combat this, the central bank has continued to hike its base interest rate, which has reached 21% with no end to the cycle in sight. This rate hike has significantly worsened

prospects for sectors not tied to military procurement but has had little impact on the defence industry, which benefits from preferential loans. Consequently, the central bank faces an impossible task: to control inflation without being able to address its primary source. [...]

While Russia managed to mitigate the impact of oil price caps, other sanctions have significantly affected its economy. Third-party countries, including China, have begun restricting transactions with Russia out of fear of secondary US sanctions, complicating Russia's foreign trade and raising transaction costs.

The Moscow Stock Exchange can no longer trade in Western currencies due to sanctions, making it impossible to determine their actual market value. This allows Russian banks to manipulate currency rates at the expense of clients, which substantially increases the costs of export and import transactions in Western currencies for Russian companies.

Russia's "wartime economy boom" is likely to end in 2025, increasing the risk of negative surprises, such as budget revenue shortfalls. However, the economy retains significant inertia, making a sudden downturn unlikely without external shocks, although the overall trend is clearly downward. A potential negative shock could stem from a worse-than-expected performance of China's economy or the collapse of OPEC+ oil production limits, which would sharply reduce global oil prices and, by the same token, Russia's oil and gas revenues. [...]

In 2025, Russia's opposition to the West is expected to intensify. Amid the war in Ukraine, Russia is gearing up for a prolonged confrontation with NATO, which implies bolstering its western border with additional military units over the medium to long term. Putin likely views a resolution to this conflict as achievable only through a Yalta-style agreement – that is, dividing Europe into spheres of influence, undermining Ukraine's sovereignty and dismantling Europe's broader security framework. In any potential negotiations, Putin is likely to reintroduce the broader security demands presented to the US and NATO in December 2021, alongside his ultimatums on Ukraine. This package represents an effort to mitigate Russia's geopolitical setbacks, particularly Finland and Sweden's accession to NATO. A central demand from the December 2021 proposal was the withdrawal of NATO's military presence to its 1997 boundaries. [...]

Although Russia's approach to the Baltic states has not fundamentally shifted, its perception of threats in the region has grown. Following the onset of war and Finland and Sweden's accession to NATO, Russia's strategic position in the Baltic Sea has weakened and long-term risks have heightened. For Moscow, potential risks such as the blocking of Kaliningrad's access routes and the closure of the Gulf of inland to maritime traffic require preventive actions and the development of possible countermeasures. Avoiding any restrictions on

maritime traffic in the Baltic Sea is economically vital for Russia, as approximately 60% of its oil exports rely on Baltic ports. [...]

Independent think tanks, as understood in the West, with intellectual autonomy or significant influence over public opinion and political decisions on foreign policy do not exist in Russia. All similar Russian entities – whether state-funded research institutions or private think tanks reliant on corporate donations – operate under strict control. Researchers are expected to align with and promote the Kremlin's foreign policy line in their publications, speeches and direct interactions with Western colleagues. Those few dissenters who have dared to criticise official policy, even mildly, have been publicly denounced and removed from their positions. The rest have either left Russia, adapted to the constraints (i.e. accepted censorship) or adopted a more rigidly pro-Kremlin stance than before. [...]

Over the past three years, the role of shadow diplomacy has grown significantly. With official contacts between Russia and representatives of “unfriendly” nations effectively frozen, the Kremlin and its intelligence services have increasingly relied on select Russian experts for discreet communication with Western diplomats and influential think tank members. Through these intermediaries, the Kremlin has deliberately sent misleading signals to Western decision-makers, suggesting either that Putin might be open to concessions in Ukraine or, conversely, issuing veiled threats of imminent nuclear escalation should the West provide Ukraine with excessive support. This nuclear rhetoric is likely intended to stoke fears of escalation among Western policymakers, aided by Russian-aligned experts in the West. [...]

Consideration should also be given to limiting the operational freedom of Russian research institutes in the West. How are Russian think tank representatives, who recite Kremlin or intelligence talking points to their Western contacts as ostensibly independent experts, different from spokespersons for Russian state media? Both exploit Western freedom of speech and spread disinformation. Western nations largely recognise the security risks posed by Russian state media and have significantly curtailed their influence through sanctions. A similar approach should be applied to Russian think tanks operating in the West. [...]

As Russia's oil sector is the primary source of revenue for its war-strained state budget, it is crucial for Moscow to influence global energy prices. To this end, Russia collaborates with Gulf countries, particularly Saudi Arabia, the world's largest oil exporter, within the OPEC+ framework. For Saudi Arabia, shaping the energy market to align with its interests is equally important, as it seeks to implement resource-intensive reforms and projects under the Saudi Vision 2030 initiative, which is aimed at reducing the country's reliance on oil revenues in the long term. As a result, Russia and Saudi Arabia have repeatedly agreed to cut oil production within the OPEC+ framework, though Russia has often violated these agreements

to serve its own interests. Russia's duplicity in this regard has caused significant friction in its relations with Saudi Arabia. [...]

Compared with Saudi Arabia, the UAE is significantly more open to cooperation with Russia. Most of Russia's economic activities in the Gulf region are centred on the UAE, which offers greater business freedom and more opportunities to circumvent sanctions than other Gulf states because, unlike Saudi Arabia, the UAE is less susceptible to US pressure. As a result, thousands of Russian companies, including numerous shell entities involved in the export and re-export of sanctioned goods to Russia, are now registered in the UAE. The UAE also hosts the majority of Russia's shadow fleet, which is used for crude oil exports. Moreover, many wealthy Russians, business figures and oligarchs, such as Roman Abramovich, have relocated to the UAE. The country remains a popular tourist destination for Russian citizens, and its importance as a hub for Russia is underscored by Moscow's reported consideration of acquiring a local airport. [...]

Russia-UAE relations are diverse and close; further expansion is likely and will include various forms of cooperation, both overt and covert, in third countries. [...]

Despite Russia's efforts and more than two years of full-scale war in Ukraine, Moscow has been unable to shift the Western public perception of Russia as an aggressor state or erode Western resolve to continue supporting Ukraine with aid and military assistance. Since cutting off Western support is a key precondition for Russia to subdue Ukraine, the Kremlin has decided to raise the stakes by launching a deliberate campaign of sabotage against Western nations, including Estonia.

This campaign, led by Russian special services, is intended to spread fear and confusion, driving Western nations away from supporting Ukraine. Another objective is to disrupt and dismantle the supply chains delivering military and civilian aid to Ukraine. However, the Kremlin fails to recognise that acts of vandalism, arson and other physical hostility, which pose potential risks to human life, only reinforce Russia's reputation as an aggressor and strengthen further Western unity against Moscow. [...]

Forty years on, Kremlin propagandists are now seeking to revive the nuclear winter theory. Their overarching goal remains the same: to instil[l] fear in Western, particularly American, public opinion and to discourage the provision of (military) aid to Ukraine. [...]

The Kremlin plans to launch a broader campaign that combines television with modern methods and platforms, such as YouTube, podcasts and carefully selected spokespersons with authoritative and "palatable" viewpoints. Their ideal strategy would be to recruit influential American science communicators to champion the nuclear winter theory. Similarly, in the 1980s, prominent Western scientists were enlisted to disseminate the idea,

likely unaware of its KGB origins. According to our information, the Kremlin intended to wait for the outcome of the US presidential elections before fully (re) launching this campaign. [...]

Since Russia launched its full-scale invasion of Ukraine, ideological and media cooperation between China and Russia has become closer and more focused. This cooperation is coordinated at the highest political levels, with particular emphasis on news dissemination. A key goal is to present the war in Ukraine in a pro-Russian light within China's tightly controlled public information space. However, despite the growing alignment and shared worldview between the two countries, China selectively adopts Kremlin propaganda narratives that serve its strategic objectives and disregards those that do not. As a result, the carefully curated narratives about the war circulating in China's tightly controlled information sphere often reveal more about Beijing's true stance than the typically vague and ambiguously worded official statements issued by its leadership. [...]

Occasionally, since the full-scale invasion of Ukraine, Chinese scholars and think-tank experts have published critical analyses of Russia in both Chinese and English. These pieces often aim to distance China from Russia's brutal methods, stressing Beijing's desire to avoid jeopardising the prospect of improved relations with Europe or warning against the risks of deepening dependency on Russian resources. However, such views have no impact on decision-making within the Chinese Communist Party and are primarily designed to mislead external observers about the true nature of China-Russia relations.

To maintain its image as a peace-loving nation, China deliberately obscures its association with Russia's aggression in Ukraine. However, this does not indicate a neutral stance, despite official claims to the contrary. The fact that China frames the war exclusively as a consequence of actions by the US and its allies underscores its lack of impartiality. China will likely continue to take various measures to prevent Russia's defeat, as such an outcome would represent a victory for its primary rival, the US, and a setback to China's efforts to reshape the rules-based international order to favour authoritarian regimes.

China's narratives on the war in Ukraine consistently dismiss Ukraine as a genuinely sovereign nation capable of independent political decision-making, portraying it instead as a pawn in a game of global powers. China's perspective would likely be the same if Estonia were in Ukraine's position. [...]

China's technological capabilities remain heavily dependent on the West, prompting President Xi Jinping to prioritise technological self-sufficiency as a strategic goal. However, growing Western resistance to scientific collaboration with China has made international educational and research partnerships especially significant for the CCP, as it works to strengthen Chinese universities' ties with foreign institutions to advance China's innovation and technological development in particular. [...]

Party officials in the Chinese education sector understand that the European Union and other Western research institutions are unlikely to transfer sensitive or valuable information to China willingly. As an alternative, Chinese researchers or doctoral candidates are sent to Western research institutions, or collaborative research labs are established in the target country. Efforts are made to obscure the CCP's involvement in these projects. Chinese students and doctoral candidates' party memberships may be temporarily suspended during their time overseas. [...]

Chinese institutions are generally more reserved than their Western counterparts when sharing data, infrastructure, and research results. This creates an imbalance in collaborative projects.

Researchers participating in Chinese-funded programmes may face loyalty conflicts or pressure to prioritise Chinese interests, raising ethical and security concerns about their affiliations. Furthermore, foreign researchers may feel pressured to avoid sensitive topics – such as China's aggressive foreign policy, human rights, press freedom or its influence campaigns in the West – to preserve their relationships with Chinese institutions or secure funding. This leads to self-censorship and undermines academic integrity. [...]

According to CCP regulations, party members stationed abroad must establish a party cell (*dang zhibu*) with other members. These cells may consist of employees from a single company, but if numbers are insufficient, members from different organisations, such as embassies, research institutions or media outlets, may also be included. [...]