



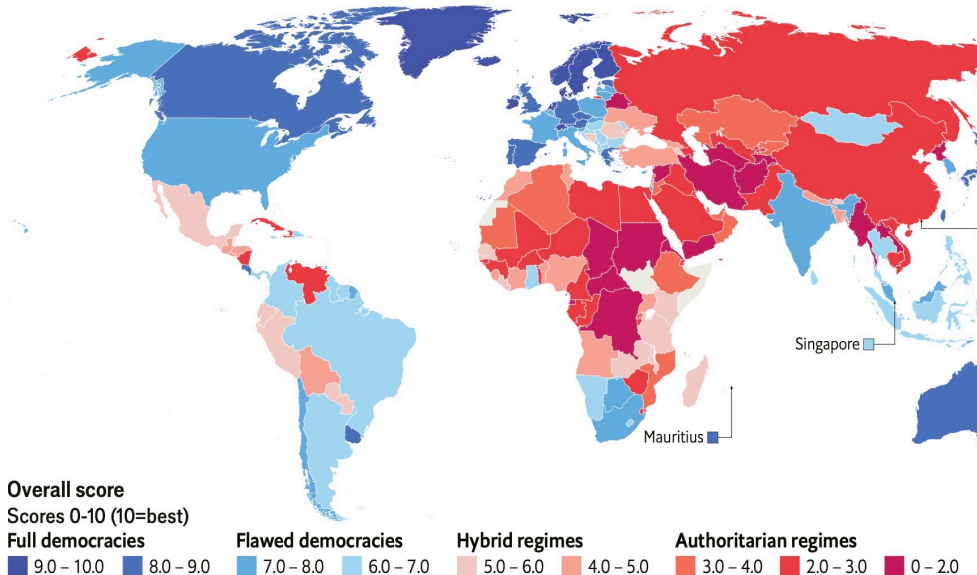
Geopolitics and exposure to the Nordics

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THE NORDICS on top of the world

Democracy Index 2024, global map by regime type



Overall score
Scores 0-10 (10=best)

Full democracies

9.0 – 10.0 8.0 – 9.0

Flawed democracies

7.0 – 8.0 6.0 – 7.0

Hybrid regimes

5.0 – 6.0 4.0 – 5.0

Authoritarian regimes

3.0 – 4.0 2.0 – 3.0 0 – 2.0

Source: EIU.

Democracy Index 2024

	Overall score	Rank	Change from previous year
Full democracy			
Norway	9.81	1	
New Zealand	9.61	2	
Sweden	9.39	3	
Iceland	9.38	4	
Switzerland	9.32	5	
Finland	9.30	6	
Denmark	9.28	7	
Ireland	9.19	8	
Netherlands	9.06	9	
Luxembourg	8.88	10	

UK-EU
SUMMIT
2025

UK-EU
SUMMIT
2025

*«Europe is caught
between
an assertive China,
a revisionist Russia,
an erratic USA
and its own political breakdown»
William (Bill) Burns, 2020*





History is back
US-China rivalry
Multi-polar trends
Hybrid threats
Exposure to the Nordics



EUROPE:



POST-WAR EUROPE IS GONE

HISTORY IS BACK

Economic incentives & institutional integration
to prevent war is collapsing or eroded



DIRECT FRONTLINE *THROUGH* EUROPE

Europe must stand against Russia

Defence
Sanctions
Reserve currency



War in Ukraine:

”old, dirty trench-war **on land**”

Global armsrace:

MARITIME, SPACE, CYBER, INFO

➔ **not** territorially limited



GEOPOLITICAL PRESSURE

INCREASING

ON THE NORDICS

IN ALL DOMAINS

BIPOLAR WORLD

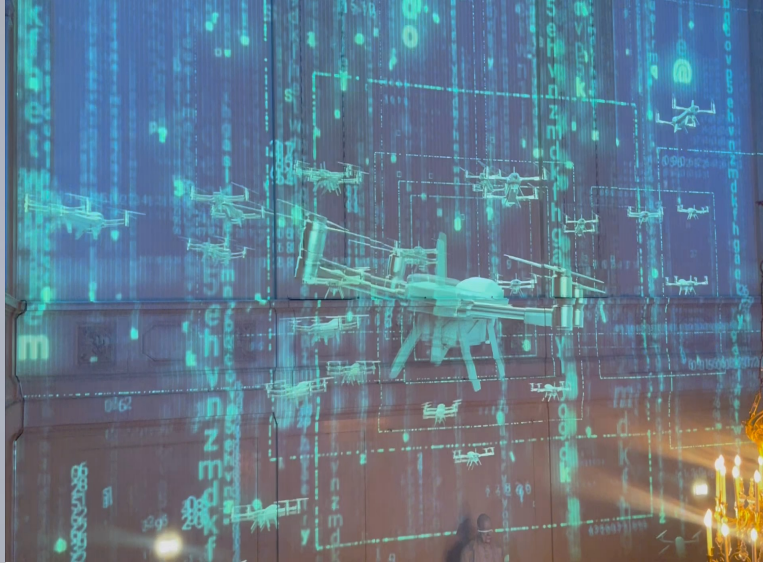


US – CHINA RIVALRY

The race for frontier technologies

“We may experience more technological progress in the next ten years than in the last century, with a disruptive impact equal to the industrial revolution”

Richard More, MI6, 2021



The state which first domesticates frontier technologies “will rule the world”

DRAMATIC START 2025



“The next few years will determine whether artificial intelligence leads to catastrophe – and whether China or America prevails in the AI arms race”



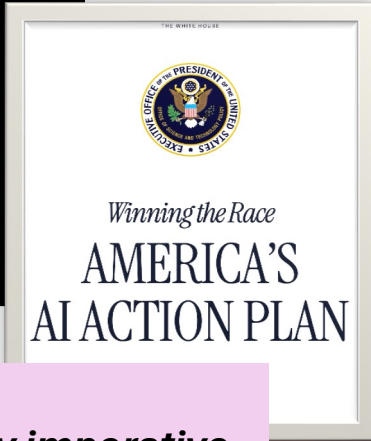
“This is beyond uncharted waters, this is an unexplored galaxy – a new frontier”



CHINA 2017: global AI dominance by 2030

CHINESE CYBERWEAPONS IN OR AGAINST CRITICAL INFRASTRUCTURE IN THE US

Volt Typhoon
Salt Typhoon
Flax Typhoon



JULY 2025

*“It is a **national security imperative** for the United States to **achieve and maintain unquestioned and unchallenged** global technological dominance.”*





TECH - RACE

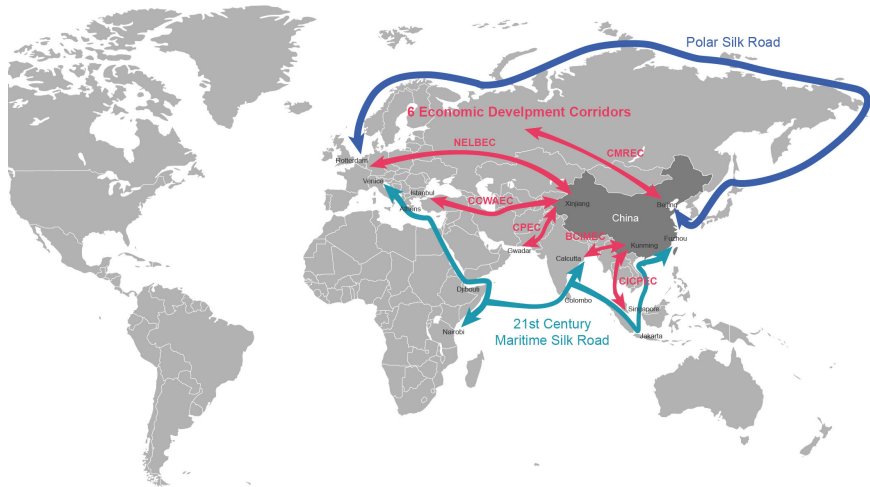
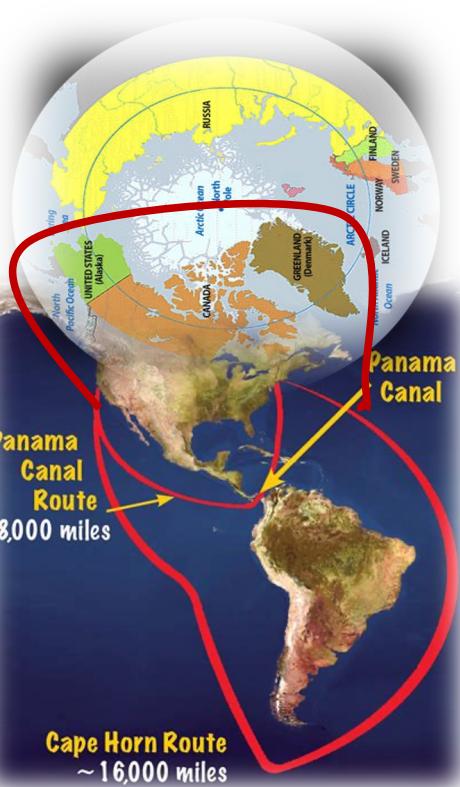
Military: maritime, cyber, information, space BUILD-UP

Economic: *secure* resources, components, know-how, **EXCLUDE** rival

Politics/Diplomatic: BIPOLAR DYNAMIC

Prediction: **ESCALATION**







THE NORDICS

CONNECT

EURASIA

AND THE AMERICAN CONTINENT

and

MAKE UP

THE ARCTIC SEAGATE TO EUROPE



MULTIPOLAR WORLD



EMERGING REGIONAL POWERS



GEOPOLITICAL RESTRUCTURING

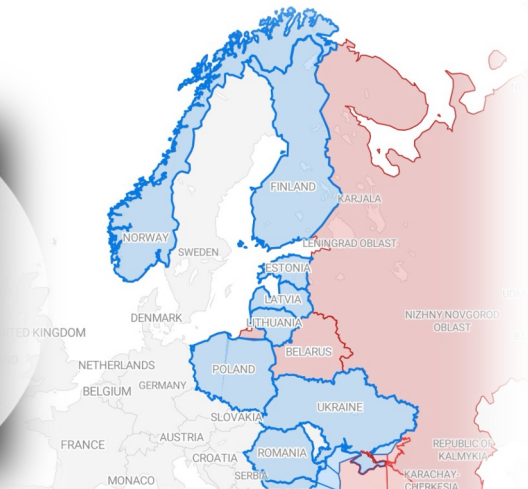


SHIFTING ALLIANCES

INTERNATIONAL INSTITUTIONS AT AN IMPASSE



➔ REGIONAL POWERS ROOM FOR MANEUVER



NEW GEOGRAPHIC AREAS UNDER PRESSURE

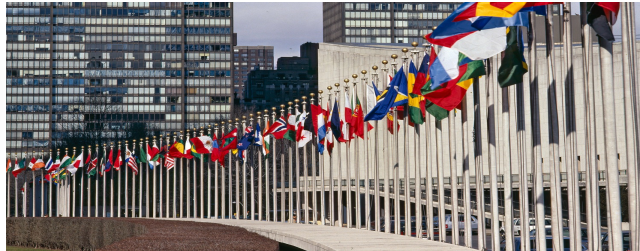


Military: land, sea, air for regional control (collaboration or rivalry)

Economic: supplychains, prizing of food, energy, rare materials

Politics/Diplomatic: MULTIPOLAR DYNAMICS

Prediction: depends on region





→ Emerging non-democratic powers have **offensive capacities** in **cyber** & **information** domain

**THE NORDICS EXPOSED
AS
ACCESSIBLE, OPEN AND
DIGITALISED SOCIETIES**

THREAT FORECASTS

Microsoft's taxonomy of threat actors

Blizzard  Russia	Typhoon  China	Sandstorm  Iran	Sleet  North Korea	Dust  Türkiye	
Cyclone  Vietnam	Rain  Lebanon	Hail  South Korea	Whirlwind  Pakistan	Squall  Singapore	Haze  Syria
Monsoon  India	Gale  Germany	Derecho  Spain	Frost  Ukraine	Lightning  Palestine	Tornado  United States
Gust  United Arab Emirates	Waterspout  Australia	Freeze  Canada	Heatwave  Israel	Swell  New Zealand	Fog  United Kingdom
Flood  Influence operations	Tempest  Financially motivated	Tsunami  Private sector offensive actor	Storm  Groups in development		

Hybrid threats

”Tools of war in peace”



Increased prevalence and risk of war



- May 2025: 130 armed conflicts in 56 countries
- Potential for escalation
- Regional or global confrontation?

THE ERA OF HYBRID WARFARE

WHEN WAR IS TOO DANGEROUS

- Great powers resort to hybrid measures ***to avoid war***
- Emerging powers resort to hybrid tools ***as force-multiplier***
- Collapsing powers resort to hybrid tools ***as spoilers***



THE HYBRID BATTLEFIELD: WHAT

Reliance on means ***other than military warfare*** to obtain similar objectives

“U.S. sanctions in furtherance of foreign policy or national security objectives are coercive economic or diplomatic measures taken against a target **to bring about a change in behavior**”

Council of foreign relations



THE HYBRID BATTLEFIELD : **WHY**

Avoid war

Control escalation

Provoke war

Prepare war

Expand the battlefield of war

Threats

Pressure

Negotiations

Deterrence (show capability)

Strength multiplier

Spoiler-activity

Plausible deniability & ambiguity about motive

HYBRID BATTLEFIELD: **WHERE**



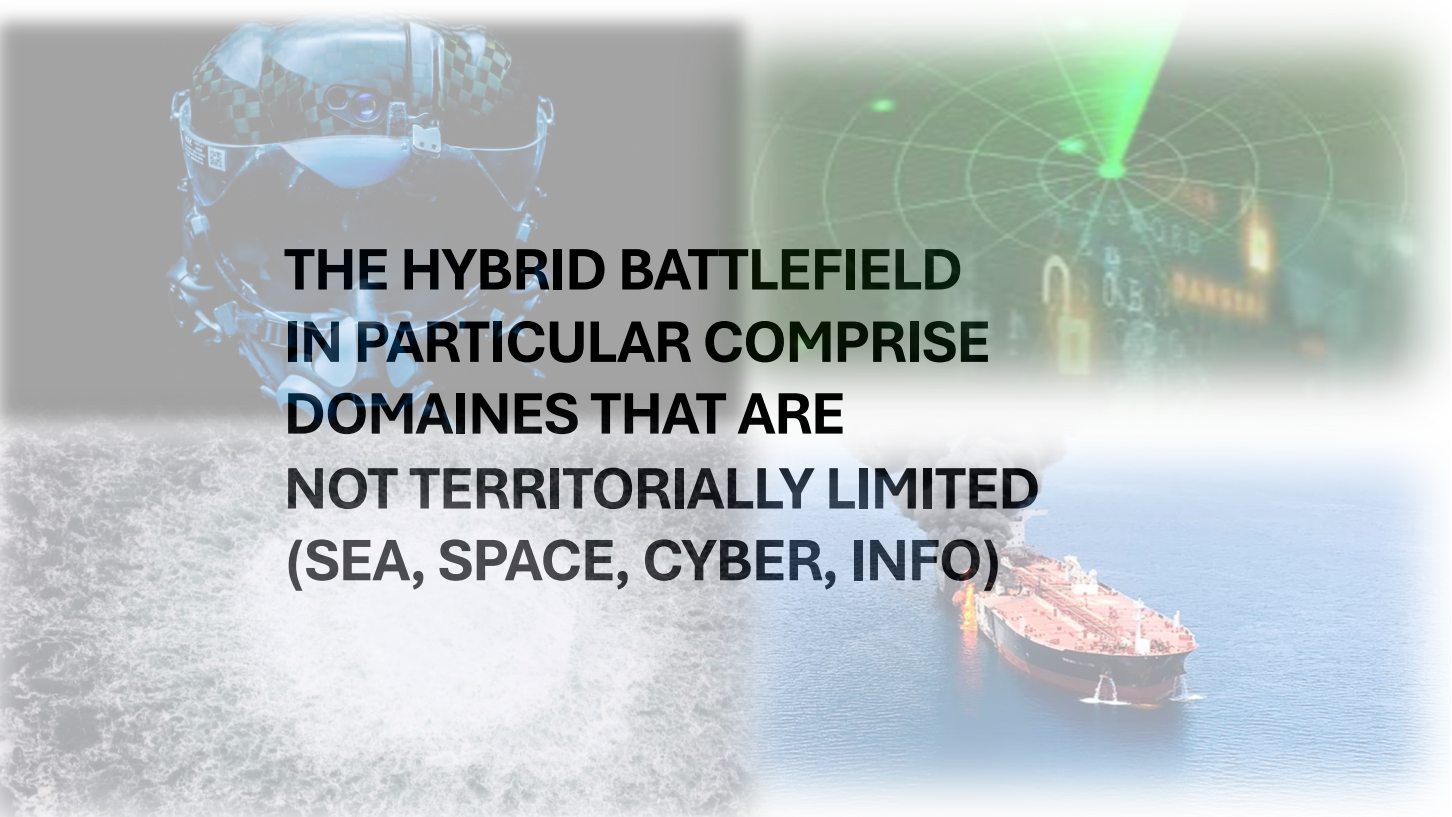
WAR: OUTSIDE OF BATTLEFIELD

- Land
- Sea
- Air
- Space
- Cyber
- Information domain



PEACE: ANY MEANS

- **Sabotage**
- **Political**
- **Economic**
- **Financial**
- **Cyber-attacks**
- **Information campaigns**
- **Social pressure**
- **Lawfare**



**THE HYBRID BATTLEFIELD
IN PARTICULAR COMPRISE
DOMAINES THAT ARE
NOT TERRITORIALLY LIMITED
(SEA, SPACE, CYBER, INFO)**

THE HYBRID BATTLEFIELD : **HOW**



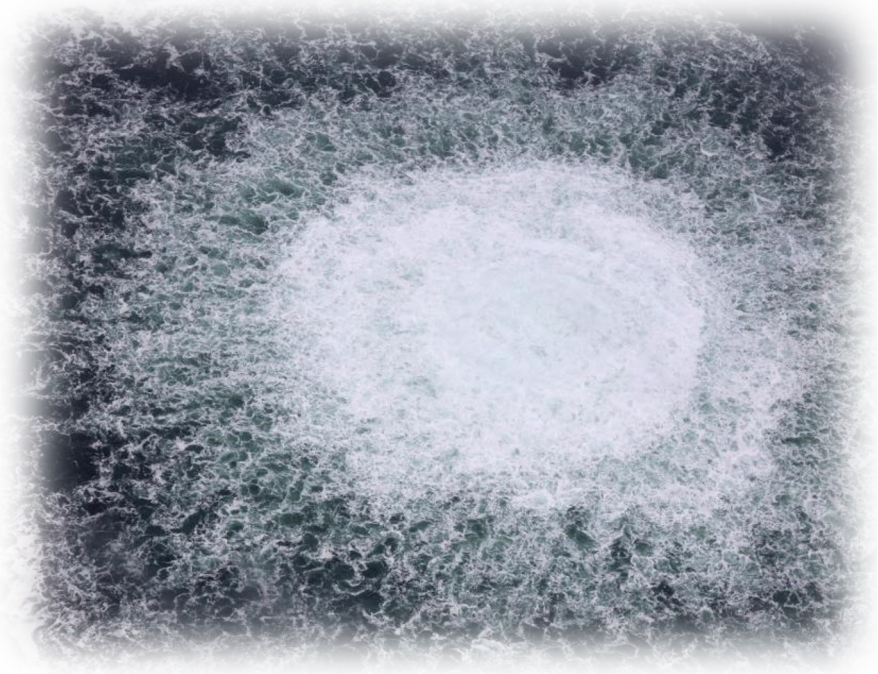
HARD POWER → threats (**coersive**)
SOFT POWER → inticement (**corruption**)
SMART POWER → targeted (**pressure**)
SHARP POWER → penetrating society,
conceaed destruction of
the fabric of society
(**polarization**)



HYBRID WARFARE: **WHO**

WHO IS TARGETED

- Direct
- Indirect
- Third parties



Hej. Strömavbrott

VISBY på grund a
mellan Gotland oc
kopplat från. Vi jo
felsökning och åte
mer information s
identifierats. Vänl
Gotlands Elnät AB



Gotland mörklagt august 2025



Tarmpå bilferjer i Sør-Korea

Tiltak mot bilferjeproduksjon i Sør-Korea

2019 Norwegian tankers





**HYBRID TOOLS ARE OFTEN
DIRECTED AGAINST THIRD PARTIES**

THIRDPARTIES ON THE HYBRID BATTELFIELD

OWN ASSOCIATES

- **PRESSURE:**

- Enforce discipline
- Ensure loyalty

- **BUFFER:**

- Can be sacrificed to stop escalation
- Can be sacrificed to save own interests
- Useful for increasing/decreasing tensions

ENEMY'S ASSOCIATES

- **ENTICE:**

- Outbid in order to weaken discipline and loyalty to the enemy

- **ATTACK:**

- **Lower risk (buffer to the enemy)**
- ARENA FOR
 - Rehearsal
 - Demonstration of capacity
 - Threats
 - Escalation

A large number of black quadcopter drones are flying in a formation over a snowy landscape. The drones are arranged in a grid-like pattern, with some flying higher than others. The background is a bright, overexposed snowy field. The text "HYBRID TOOLS TARGET OR AFFECT INFRASTRUCTURE" is overlaid in the center of the image.

HYBRID TOOLS TARGET OR AFFECT INFRASTRUCTURE

THE NORDICS

- Open and ***exposed*** economy
- Highly digitalized and **vulnerable**
- High trust ***limits*** imagination in planning
- Lack of “natural enemy” ***reduces*** strategic thinking

Strategically important ***PERIPHERY***

- NATO in the North, **northern flank**
- Arctic nations and **gateway** to the Atlantic
- Integrated **part** of the Chinese Silk Roads
- Natural resources ***provider*** to Europe/UK



Exposure of the Nordics

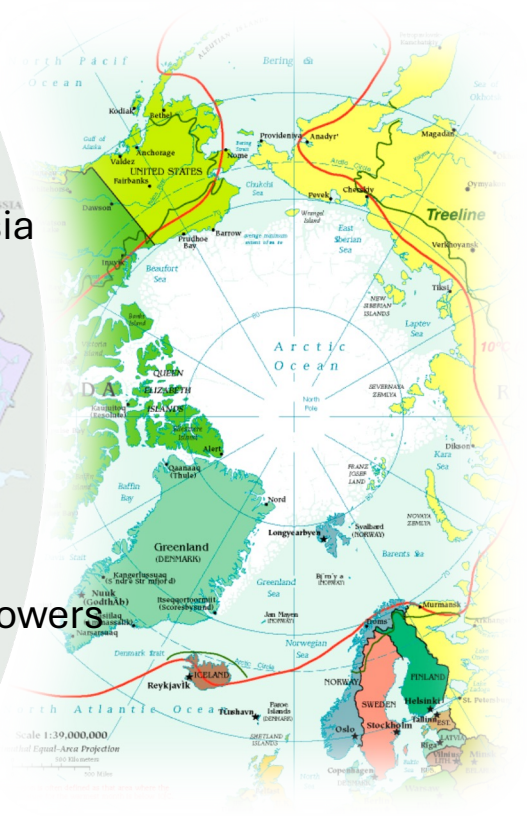
EUROPE: North of Europe with exposure to Russia

LAND, SEA, AIR, SPACE, CYBER, INFORMATION

US /CHINA: strategically important **PERIPHERY**
CYBER, INFORMATION-DOMAIN
(DIGITAL INFRASTRUCTURE)

EMERGING POWERS: postbox to the Western powers

SABOTAGE, CYBER, INFORMATION-DOMAIN
(DIGITAL INFRASTRUCTURE)



A serene landscape featuring a calm body of water reflecting the surrounding environment. In the background, dark, forested mountains rise against a sky with soft, pastel hues of pink, purple, and blue, suggesting a sunset or sunrise. The water is still, creating a clear mirror image of the mountains and the sky. The overall mood is peaceful and hopeful.

Good luck!