



NORWEGIAN
INTELLIGENCE SERVICE

FOCUS 2024

*The Norwegian Intelligence Service's
assessment of current security challenges*



DIGITAL VERSION:
ETJ.NO/FOCUS

Design, layout and illustrations: The Norwegian Intelligence Service

The Norwegian Intelligence Service's annual report Focus is one of three Norwegian threat and risk assessments published during the first quarter of each year. The other two are published by the Norwegian Police Security Service (PST) and the Norwegian National Security Service (NSM).

■ **THE NORWEGIAN INTELLIGENCE SERVICE (NIS)** is Norway's foreign intelligence service. Although subordinate to the Norwegian Chief of Defence, NIS does not concern itself exclusively with military matters. The main tasks of NIS are to warn of external threats to Norway and high-priority Norwegian interests, to support the Norwegian Armed Forces and the defence alliances Norway is part of, and to assist in political decision-making processes by providing information of significance to Norwegian foreign, security and defence policy. In the annual threat assessment Focus, NIS presents its analysis of the current situation and expected developments in geographic and thematic areas considered particularly relevant to Norwegian security and national interests.

■ **THE NORWEGIAN POLICE SECURITY SERVICE (PST)** is Norway's domestic security service, subordinate to the Norwegian Minister of Justice and Public Security. PST is responsible for preventing and investigating crimes that threaten national security. It is the task of the service to identify and assess threats relating to intelligence, sabotage, the spreading of weapons of mass destruction, terrorism and extremism. The assessments are meant to assist policy formulation and support political decision-making processes. PST's annual threat assessment is a part of the service's public outreach, explaining the expected development in the threat environment.

■ **THE NORWEGIAN NATIONAL SECURITY AUTHORITY (NSM)** is the Norwegian directorate responsible for national preventive security. The service's main mission is to improve Norway's ability to protect itself against espionage, sabotage, terrorism and complex threats. Through advice, oversight, inspections, testing and research, NSM helps businesses secure civilian and military information, systems, objects and infrastructure of importance to national security. NSM is responsible for a national warning system (VDI) that detects and warns of cyber operations against digital infrastructure. NSM also has a national responsibility to coordinate the handling of serious malicious cyber operations. NSM publishes an annual assessment of the national security risk environment. The report recommends measures and considers how vulnerabilities in Norwegian businesses and societal functions affect the risk environment in light of the threat environment outlined by the Norwegian Intelligence Service and the Norwegian Police Security Service.

05

Introduction

06

A changed security situation

A less predictable neighbour	08
Military positioning in the High North and Baltic Sea region	08
Arctic powerplay	10
The intelligence threat to Norway	13
Vulnerable value chains and infrastructure	13
The jostle for knowledge, ownership and technology	17
Norway as a target of political influencing	21
Insight: The war in Ukraine	24

28

Russia's permanent break with the West

Putin retains control	30
Investment in defence industry keeps economy afloat for now	30
Loss of influence in Russia's near abroad	33
Break with the West forces new Arctic policy	33
Russia seeks to preserve 'no enemies' strategy in the Middle East	33
Russia continues to challenge Western interests in Africa	34
War in Ukraine central to military development	34
Insight: Exercise Ocean Shield 2023	36
Whole of society a legitimate target	39
Combat power retained near Norwegian borders	39
Plans for a larger force structure	41

42

China's global ambitions

Security more important than economic growth	44
Economic strength the main foreign policy instrument	44
Distrust in the outside world	44
The Taiwan issue intensifies	47
PLA's strength and capabilities increase	49
New technology for the war of the future	49
Insight: Ambitions and asymmetry	50

54

Arms race picks up pace

Russia: nuclear weapons remain top priority	56
China: rapidly growing nuclear arsenal	56
Iran: nuclear weapons skills retained	59
North Korea: evolving its nuclear capability	59

60

Middle Eastern reconciliation processes on hold

Conflict lines persist	62
Fragile dialogue on nuclear deal with Iran	62
World powers battling for influence	65

66

The terrorist threat to Europe

The threat from militant Islamist terrorism against Europe is increasing	68
Trigger incidents could increase the terrorist threat to Norway	68
Absence of established far-right terrorist organisations	71



Today, we face a more dangerous security situation than we did a year ago, and the development ahead is uncertain. The conflicts of interest between authoritarian states and the West are becoming more apparent. Russian and Chinese authorities share an ambition to undercut the influence of the West and to establish an international order in which liberal values such as democracy and freedom of speech do not set the course. Cooperation between authoritarian states is increasing. International rule of law is weakened, and the world is re-arming.

Russia considers the war in Ukraine a proxy war with the West, and Moscow is not abandoning its goal of crushing the Ukrainian armed forces and securing control of the country. With increased production of arms, improved access to personnel and considerable support from other authoritarian states, Russia is gaining ground on Ukraine. Ukraine continues to show tremendous fighting spirit, but the country relies on Western support to defend itself and retake the initiative.

The war between Israel and Hamas has considerable radicalisation potential and raises the terrorist threat in Europe. Both IS and al-Qaeda have called for attacks against Israeli targets, and IS has made several attempts to carry out attacks in Europe. Trigger incidents could raise the terrorist threat to Norway as well.

How these and other security-related concerns develop depends not only on the threat environment that we describe, but also on how the West chooses to react. Many countries are to hold elections this year. Security policy tensions and economic uncertainty are deepening political divides in Western countries as well.

The main mission of the Norwegian Intelligence Service is to warn against threats to Norway and Norwegian interests. Focus is the Norwegian Intelligence Service's annual unclassified threat assessment and must be read in conjunction with other perspectives. Our priority is to describe adversarial actors and developments that we consider important to Norway's security in the coming year. Focus 2024 is the Norwegian Intelligence Service's 14th annual unclassified assessment, and we hope it will inspire public debate.

Vice Admiral Nils Andreas Stensønes
Director Norwegian Intelligence Service

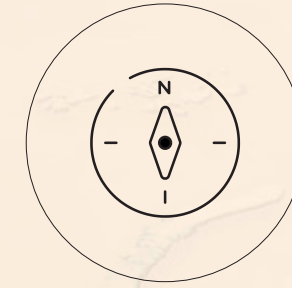
Editing concluded on 26 January 2024

I.

A CHANGED SECURITY SITUATION

Norway is facing a more serious threat environment now than it has in decades. As the war in Ukraine enters its third year, Russia is about to gain the military upper hand.

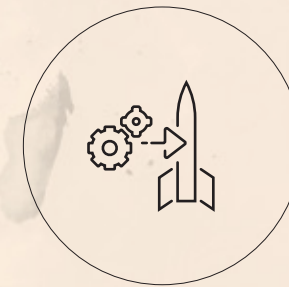
The Russian military industry is running at full steam, and China, Belarus, Iran and North Korea are providing considerable materiel support. Russia is better positioned in the war than it was a year ago, and the Russian armed forces remain the main military threat to Norway's sovereignty, its people, territory, key societal functions and infrastructure.



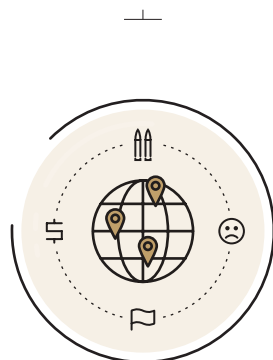
The Arctic is more clearly becoming a stage for great power rivalry



Russia and China are seeking a world order that serves their interests



There is a persistent risk that Western technology could be used for military purposes in authoritarian states



The relationship between Russia and the West is at a historic low point and can best be described as a clash of opposing values and security interests. The prospect of any genuine dialogue seems distant, and Russia’s policies towards the West and Norway are expected to become more unpredictable in the years to come. Thus far, Russia’s military conduct in the north has been restrained, but distrust of the West and of allied military activities in the Arctic could alter Russian military behaviour in areas close to Norway. This could increase the risk of misunderstandings, accidents and escalation.

Russia and China have a revisionist agenda in which they seek to reshape the international order to safeguard their own interests. These two countries share a belief that the United States is containing Chinese and Russian ambitions.

A less predictable neighbour

Russia refers to Norway as an ‘unfriendly country’ dictated by the anti-Russian policies of the great powers in the West. The Russian authorities will seek to maintain those few remaining points of contact it has with Norway, such as Svalbard and the annual

negotiations on fisheries. Nevertheless, Russia’s policies towards its neighbouring countries have become even more centralised. There are fewer bilateral points of contact between the countries, giving Russia less insight into Norway’s perspectives and policies. This, in turn, makes Russian policies towards Norway less predictable.

Russia has a continued interest in maintaining its presence and activity on Svalbard and a stated ambition to set up an international research and education centre at the former Soviet coal mining settlement Pyramiden. Russia could therefore choose to cooperate more with non-Arctic states on Svalbard.

Military positioning in the High North and Baltic Sea region

According to Russian military thinking, the High North and the Baltic Sea constitute a continuous area. With the NATO enlargement, one of Russia’s most important goals in the Baltic Sea has been lost, namely to preserve the region as a geographic and political buffer against the alliance. The enlargement reduces Russia’s military freedom of action in the region. For NATO, southern and central Norway have become →



The ballistic missile submarine Imperator Aleksandr III was declared operational on 11 December 2023. It belongs to the Dolgorukiy II class, which comprises Russia’s newest and most powerful strategic submarines. Image: Kirill Iodas / POOL / AFP / NTB



« China does not constitute a military threat to Norway, but it has an interest in establishing a political, economic and, in time, military foothold in the Arctic. »

more important for the ability to carry out operations in the Baltic Sea, which also means these areas have become more important to Russia. At the same time, new Russian force dispositions could further alter the dynamics. The Kremlin has stated that it will respond to the NATO enlargement and plans to re-establish the Moscow and Leningrad military districts.

Russia's behaviour in the Baltic Sea is somewhat confrontational, as it is in the Black Sea, and clearly aimed at allied activity. In the High North, Russia's response to allied operations has mostly been reserved, though Russia is increasingly distrustful of allied activity in the north. This could lead to more belligerent Russian military behaviour and more persistent Russian intelligence operations.

Arctic powerplay

The Arctic is strategically important to both Russia and China. This region is especially important to Russia because of natural resources and the way Russia has shaped its nuclear deterrence capabilities. Defending the northern bastion and having access to the Atlantic will remain vital to Russia's concept of security. Russia wants to be the dominant actor in the Arctic. At the same time, Moscow considers its position in the region to be more vulnerable than a few years ago.

Allied military activity in the Arctic and the High North has increased, while Russian authorities seek to counter political isolation by inviting in new actors on the civilian side, especially the BRICS countries. On top of Russia's distrust of allied military activity, there is now a more complex set of actors entering the scene. This increases the risk of misunderstandings, accidents and escalation of conflicts.

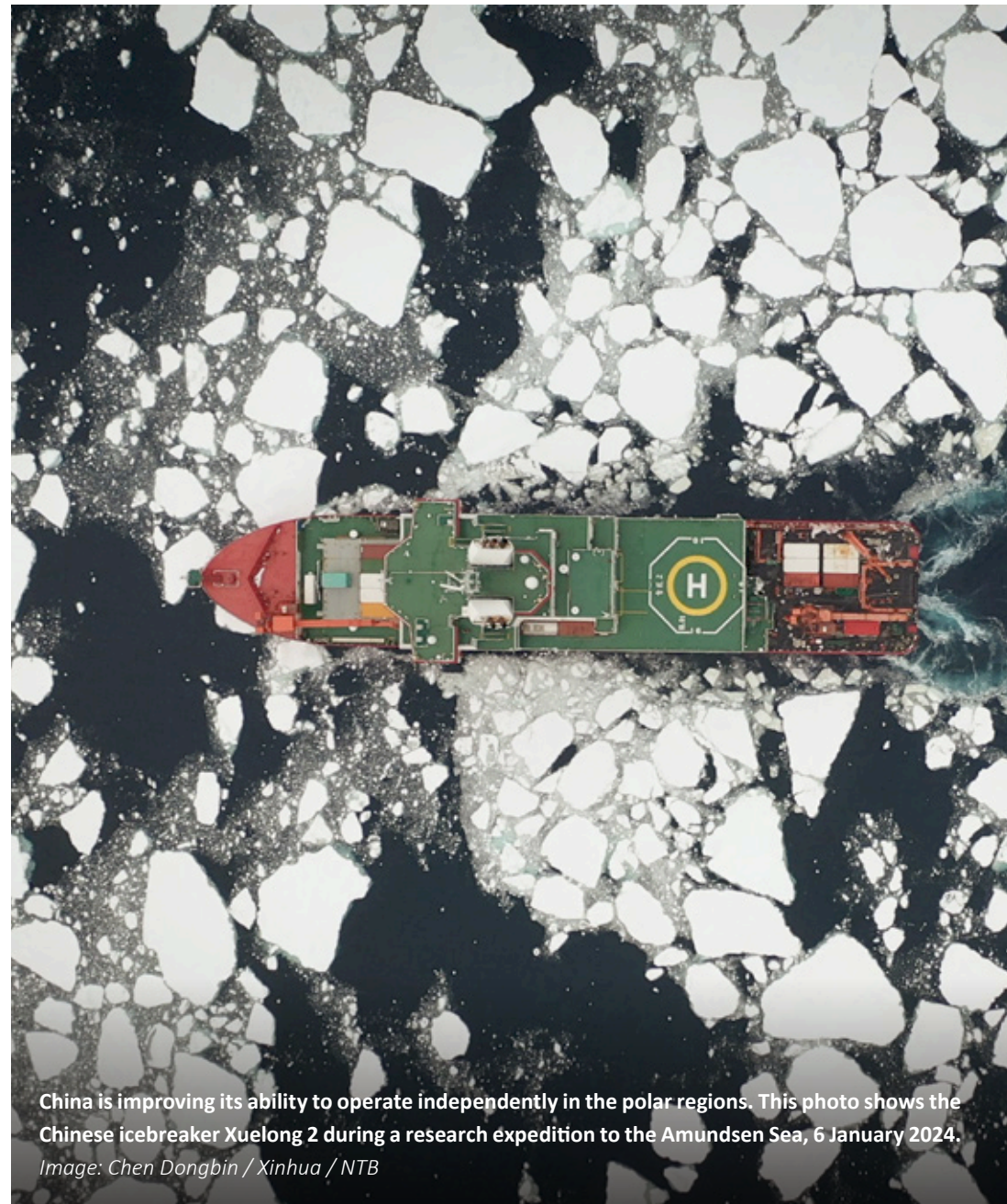
Land forces from the Kola Peninsula have been redeployed to fight in Ukraine, significantly diminishing Russia's land power on the Kola Peninsula. Following the attack on Ukraine, the Northern and Baltic Fleets have become more important to demonstrate Russia's naval power in the north, as well as in the Atlantic and the Baltic Sea region. This means that the naval forces will have a more prominent role in Russia's strategic and conventional deterrence and strategic communication towards NATO. As Russia's conventional land power is weakened, its strategic forces become more important. With its proximity to NATO's core areas, the Northern Fleet has many of these in its possession.

China does not constitute a military threat to Norway, but it has an interest in establishing a political, economic and, in time, military foothold in the Arctic. Recent investments in polar capabilities, including icebreakers, have given China the opportunity to operate more independently in the region. Developing the Northeast Passage for commercial traffic will save shipment time to European markets, →



Trust Arktikugol signage in the abandoned mining community Pyramiden. Moscow has a stated ambition of setting up an international research and education centre here.

Image: imageBROKER / NTB



China is improving its ability to operate independently in the polar regions. This photo shows the Chinese icebreaker Xuelong 2 during a research expedition to the Amundsen Sea, 6 January 2024.
Image: Chen Dongbin / Xinhua / NTB

reduce dependence on other traffic arteries and facilitate transport of raw materials. Chinese actors have shown an interest in developing infrastructure related to this shipping route in Norway as well.

The Arctic already plays an important role in China's space programmes, both civilian and military. Beijing will continue to seek access to Arctic infrastructure in order to support its activities in space. Thus far, China has not conducted any military operations in the region, but developing the ability to carry out military operations is a long-term goal.

The intelligence threat to Norway

The sanctions and limited diplomatic presence in Europe have left Russia with fewer platforms for interaction and contact with the West. Access to information about Western and Norwegian affairs rely more on Russian intelligence and security services than before. These services have been mapping out Norwegian targets for years, directing their activities at many sectors in the digital and physical space. Russian actors seek information about Norwegian politics, energy, the High North, allied activities and defence. Russia is also interested in Norwegian technology in areas they themselves want to develop. Russia also employs a high number of civilian ships for intelligence operations. These ships have lawful access close to Norwegian infrastructure and the coast of Norway. Uncovering whether civilian ships are carrying out intelligence activity in addition to their lawful undertakings can be a challenging task.

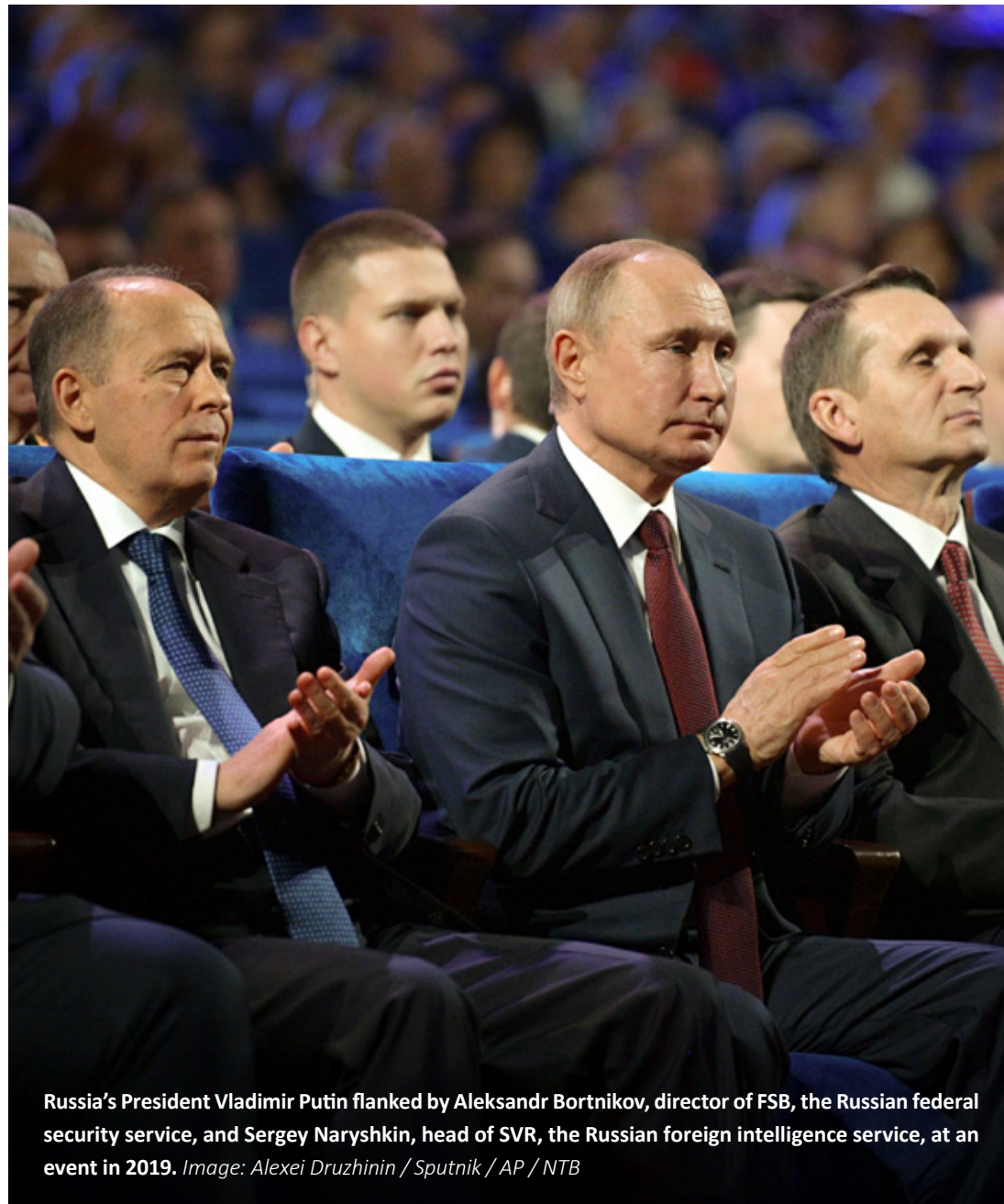
Chinese intelligence services operate all over Europe. Their activities include political intelligence and industrial espionage, and cyberspace is the main

gateway. Chinese intelligence services use a combination of actions to keep their activities and objectives concealed, such as commonly available tools and digital infrastructure that conceal the actor. Chinese services also have source handlers in Europe. Chinese diplomats, travel delegations, private individuals, businesses and special interest groups regularly carry out assignments on behalf of Chinese services. There are close links between Chinese intelligence services and Chinese corporate entities. Beijing has the institutional resources and legal framework to use Chinese businesses and individuals for government purposes. All Chinese companies and individuals are required by law to assist China's intelligence and security services.

Iran has an unremitting intention of targeting people opposed to the regime around the world. Tehran could also seek to attack Israel-affiliated targets across the world, especially in times of heightened tension between Israel and Iran. This means there is a constant risk of Iranian intelligence and security services orchestrating attacks against opposition figures, especially in countries that are vocal in their criticism of Iran or give residence permits to dissidents. Norway is not a country of special interest to Iranian security services. However, this could change if individuals targeted by Iranian services travel to Norway, or if Norwegian policies are perceived as more hostile towards Iran.

Vulnerable value chains and infrastructure

Gaining access to critical infrastructure and value chains may be extremely valuable to foreign powers as it could expose sensitive information about individuals, →



Russia's President Vladimir Putin flanked by Aleksandr Bortnikov, director of FSB, the Russian federal security service, and Sergey Naryshkin, head of SVR, the Russian foreign intelligence service, at an event in 2019. Image: Alexei Druzhinin / Sputnik / AP / NTB



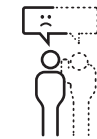
Russia's toolbox



Russia has been mapping the Norwegian petroleum industry for years



The Northern Fleet remains the greatest military threat to Norway



The regime strives to erode Western support to Ukraine

political processes and technology. It could also be used to disrupt supply chains, identify vulnerabilities and ultimately carry out physical or digital sabotage. When the production and distribution of essential goods are controlled by a handful of actors, supply disruptions and exploitation of market power become more likely. Usually, it takes a long time to establish alternative value chains, and existing dependencies will continue for several years. Dependencies can be exploited to exert political pressure, as can access to infrastructure.

The sanctions against Russia have made it harder for Russian actors to gain access to Western value chains and critical infrastructure. Currently, it is primarily Beijing that has the ability and will to pursue such a strategy. It is part of China's strategy to secure control of critical value chains and be a key player in both logistics and infrastructure. China dominates the extraction and refining of minerals for use in energy production, advanced technology and the defence industry. Norway has deposits of up to 20 types of minerals, both on land and on the ocean floor,

which the EU has defined as critical raw materials because their supply depends on imports from China.

Within several areas of technology, Chinese manufacturers have acquired dominant market shares, often supported by direct or indirect government subsidies. In some cases, there are virtually no alternatives to the Chinese providers of technology components. Beijing will adjust its reactions to Western restrictions in order to avoid that the West accelerates the establishment of alternative value chains. At the same time, Chinese authorities seek to influence European countries in order to provide access for Chinese actors and maintain economic cooperation with China.

Vulnerable petroleum and internet infrastructure

Currently, Norway is a key supplier of gas to Europe. Norwegian gas fields and terminals are directly connected to receiving countries in Europe through →



Image: Dry gas is exported to Europe from Kårstø processing plant in northern Rogaland, Norway. Russian knowledge of Norwegian oil and gas infrastructure could become important in a conflict situation.

(Cornelius Poppe / NTB)

■ Sabotage as a covert instrument

Covert state-sanctioned actions, physical or digital, aiming to destroy or seriously disrupt targets of critical importance to society, carried out with no anterior declaration of war.



« Companies tied to the Chinese government have majority ownership of at least one container terminal in more than half of the world's international ports. »

a vast pipeline network. A significant share of the gas consumed in Germany, UK, Belgium and France comes from Norway. The gas infrastructure could be subject to accidents, physical sabotage and destructive cyberattacks. Damage to Norwegian petroleum infrastructure would harm both Norway and the receiving countries in Europe.

Russia has been mapping Norwegian critical oil and gas infrastructure for years. This mapping is still ongoing, both physically and in the digital domain. The acquired knowledge could become important in a conflict situation. The same applies to European underwater infrastructure, which for instance Europe's internet traffic depends on. Russia has previously demonstrated its will and ability to harm critical infrastructure in situations of conflict. Even before the full-scale invasion of Ukraine, Russia attacked Ukrainian telecom and industrial control systems through cyber operations.

Chinese interest in Norwegian infrastructure projects

In larger projects, Chinese state and private companies often act in consortiums. With overlapping ownership interests, the Chinese state is represented throughout the entire value chain. Chinese compa-

nies frequently use subcontractors which also have ties to the Chinese government.

Chinese companies have long showed an interest in Norwegian tenders, for instance for building infrastructure. The development seen in large ports is one example of how physical and digital infrastructure are merging, blurring the lines between logistics and telecom. This could make supply chains more vulnerable. Chinese investments in European ports have increased over the past years, and government-controlled companies play an important part in this development. Companies tied to the Chinese government have majority ownership of at least one container terminal in more than half of the world's international ports.

The jostle for knowledge, ownership and technology

There is a continuous risk that Western technology ends up being used for military purposes in Russia, China, Iran and North Korea. Intricate ownership structures and complex supply chains are used to circumvent Western export regulations. Knowledge derived from international research cooperation is also used for military purposes.





In both Russia and China, there is growing government control of business interests. Moscow has forged closer ties with private businesses. Beijing has been exercising active government ownership for years, steadily increasing its shares in Chinese companies and implementing stricter legislation requiring companies and individuals to support the objectives of the party-state. The authorities in both countries exert pressure on business leaders.

Russia, Iran and North Korea all have strong expertise in certain technology areas of military application. Nevertheless, China is on a different level in terms of having broad expertise.

Norwegian research and development communities are targets of industrial espionage

Norwegian research, development and production of technology are of continuous interest to foreign actors. Companies that produce communication systems, maritime systems and navigation technology are of particular interest. Chinese actors developing military technology have shown an interest in Norwegian enterprises that develop and manufacture advanced navigation systems and how these systems are made.

Knowledge derived from technical-scientific research can often be used for military development purposes. Gaining access to and training on how to use instruments and equipment for testing and production is in many cases of as much interest as theoretical knowledge. International research and development cooperation remains an arena that provides access to sensitive information. There are several examples of Chinese and Iranian researchers with ties to Norwegian universities also working for actors in their

home countries who are involved in development and production of military technology. At-risk research areas include semiconductor and sensor technology, materials technology, cryptology, cyber security, biotechnology and artificial intelligence.

Russia circumvents sanctions and acquires military technology

The Russian arms industry is now tailored to support and continue the war in Ukraine at full pace. Russia still relies on Western technology to maintain and develop some of its military capabilities, including components and spare parts for maintenance of systems that Russia bought from the West before the invasion. Western components are also used in Russian-made systems.

Despite Western sanctions and tightened export restrictions, Russia still manages to get its hands on critical technological components. Russian procurement networks operate more covertly than before. They have also removed some restrictions on which types of components may be used in military systems. This means that a wider range of Norwegian enterprises could be subject to Russian acquisition attempts than before the invasion. Russian actors are particularly interested in obtaining Norwegian-made maritime technology and sensor technology.

In an effort to acquire technology, Russian actors have established a large number of new companies in Europe and Central Asia. New ownership structures and more complex supply chains make it difficult to determine whether Russia is the end user. Using European intermediaries is appealing because of the EU single market. Russia is trying to broaden the influx of technology and therefore uses Chinese suppliers →



An Iranian-made attack drone encounters Ukrainian air defences over Kyiv, 25 November 2023. Russia receives considerable military support from other authoritarian states.

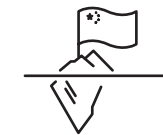
Image: Gleb Garanich / REUTERS / NTB



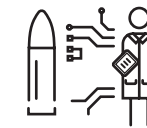
A satellite launch involving a Long March 5 launch vehicle from Wengchang, 15 December 2023. China is competing with the United States to become the world's greatest space power. Military-civil fusion is reducing the impact of Western export controls. Image: IMAGO / NTB



China's ambitions



China has an ambition to gain a foothold in the Arctic



Military-civil fusion makes civilian technology available to the Chinese armed forces



Economic power remains China's key foreign policy instrument

to acquire technology which they previously bought from the West. China is already exporting a wide range of technologies to Russia.

China circumvents restrictions through military-civil fusion

The military-civil fusion strategy is a means to strengthen China's military power. This strategy blurs the distinction between the two sectors and reduces the effect of Western barriers on technology exports to China. Chinese investments in European tech companies have diminished in recent years, partly as a result of global economic uncertainty and restrictions on Chinese economic activity. Meanwhile, because of the technological rivalry with the United States, interest in the European market is increasing. Restrictions affecting China's microchip industry could in turn diminish China's ability to compete with the West on advanced computing power, which is crucial to further develop artificial intelligence. Acquisitions and investments in Western microchip technology

and computer centres may offset the challenges. Chinese actors seek access to Norwegian technology and knowledge in order to exploit opportunities under water, in polar areas and in space. They are also interested in cryptology, nuclear technology and biotechnology, fields that have both military and civilian areas of application.

Norway as a target of political influencing

Norwegian politics and public debate are subject to Russian influence activity

Influence operations are part of Russia's information warfare. The public debate on defence and security policies, Arctic and Svalbard policies, energy and environmental policies and not least Western and Norwegian attitudes to the war in Ukraine are particularly vulnerable to Russian influence activity. Singling out specific target groups on social media for pro-Russian →



Image: Economic power remains China's key foreign policy instrument. This photo was taken at the Liuzizui Financial Hub in Shanghai.

(Alex Plavevski / EPA / NTB)

■ Influence activity

As a tool, influence activity can be overt or covert campaigns, operations and activities, often without the use of military force, in order to change attitudes, decisions or outcomes in another country.

Overt tools have a known originator, for instance public statements or political decisions. Covert tools have a hidden originator. They may include fake accounts on social media, use of media outlets with concealed government affiliation, or cyber operations.

« New denial-of-service attacks against Norway by pro-Russian actors operating on behalf or in support of Russia are likely to occur in the year to come. »

messages and disinformation is a typical method. Another course of action is to plant different theories and lies about a specific matter in order to erase the truth and undermine people's trust in the authorities and national media. Increased vigilance in the Western population combined with greater distrust of Russian intent have made it harder for Russian influence actors to succeed. Extremist and anti-government groups that use informal media are currently more exposed to Russian influence activity than society at large.

Pro-Russian 'hacktivists' have carried out denial-of-service attacks against Norwegian targets. This could sow doubts about the ability of Norwegian institutions to provide services. This activity has so far had limited effect beyond attracting public attention. New denial-of-service attacks against Norway by pro-Russian actors operating on behalf or in support of Russia are likely to occur in the year to come.

A challenge to European cohesion

The Putin regime strives to erode Western support to Ukraine. Tools previously used by the Kremlin include cyber operations, influencing elections, provoking waves of refugees and halting oil and gas supplies. In addition, Russia nurtures its relations with certain countries and political movements in Europe to undermine European cohesion.

Russia promotes a narrative that the West has compromised the security situation in the Nordic region. The situation that occurred at the border with Finland in autumn 2023, when hundreds of migrants were transported to Finnish border posts, is an example of how Moscow may try to influence the situation in the Nordic and Baltic regions.

China: economic power and co-opting

China's most important influencing tool is to use its economic power and informal sanctions on trade. These tools are used to pressure people, organisations, companies and governments into acting and expressing themselves in accordance with Chinese interests. Furthermore, Chinese influence actors are stepping up their activity in cyberspace, especially with covert activity on social media and websites. The activity on Western social media is becoming more sophisticated.

Having influential people promote China's agenda, so-called 'elite co-opting', is another much used influencing strategy in Europe. Local proxies have more credibility than the Communist Party of China's own representatives. □

Russia makes gains at Ukraine's expense

The Ukrainian offensive in 2023 put significant pressure on Russian forces. Ukraine has honed its ability to attack Russian military rear-area targets and has restricted the Russian Black Sea Fleet's freedom of action.

However, the Russian forces have well-prepared and reinforced lines of defence. Despite Ukraine's formidable struggle, the Ukrainian armed forces have failed to reclaim significant territory. Although Western military support to Ukraine has ensured that Russia has failed to make substantial military progress in the past year, a large proportion of the materiel given has been lost or expended on the battlefield. Heading into 2024, Ukraine has failed to retain the initiative in the war.

Russia, for its part, has taken a number of successful steps. Although casualty rates are very high on both sides, Russia has mobilised large numbers fresh troops and will be able to field approximately three times as many recruits fit for active service as Ukraine. Moscow is handling Western sanctions better than expected, and the production rate of ammunition, combat vehicles, drones and missiles is higher now than it was a year ago. Moreover, Russia is receiving considerable military support from China, North Korea, Iran and Belarus, including large amounts of ammunition and drones from North Korea and Iran.

Russia's position in the war is stronger than it was a year ago, and the country is in the process of seizing the initiative and gaining the upper hand militarily. The Kremlin is expected to step up its war effort in the months ahead. The prospect of real negotiations is dim, and all signs point to the war continuing throughout 2024.

The war in Ukraine

China supports Russia's war effort

Although China has thus far refrained from supplying fully assembled weapons and ammunition to Russia, Chinese deliveries of military equipment and components are crucial to Russia's warfare. China is supplying machines, vehicles, electronics and parts, and is helping to develop the Russian arms industry. There is close diplomatic coordination between the two countries both bilaterally and in the UN.

External support crucial for Ukraine

Despite Ukraine's heroic efforts, reclaiming the initiative in the war would require large-scale Western arms support, including new capabilities. Ukraine is in dire need of ammunition, long-range weapons systems, air defence, combat vehicles and combat aircraft.

Tactical nuclear weapons: ambiguity as strategy

Russia conducted a large-scale strategic nuclear weapons exercise just days before the outbreak of war in 2022, and this has been the strongest signal yet to the West to refrain from getting involved militarily in the conflict. Since then, Russian leaders have repeatedly threatened the use of nuclear weapons. As things stand at the start of 2024, Russia is highly unlikely to use tactical nuclear weapons in Ukraine; that said, creating uncertainty regarding the nuclear weapons threshold is part of Russia's strategy.

The deployment of Russian tactical nuclear weapons to Belarus can be seen as both posturing towards NATO and a measure to tighten control of Belarus. In and of itself, however, the deployment does not heighten the threat to the West, as Russia is already capable of attacking Europe with tactical nuclear weapons from Russian territory.

Russia's challenges

Russia is also facing a number of challenges. Its offensives have not yet yielded territorial progress. Low training standards and a poor ability to conduct joint operations will continue to limit combat power.

The transition to a war economy is also risky. After the war, defence spending will no longer be an equally powerful driver of growth, and the return to a sustainable economy will be fraught with difficulty.

Nevertheless, the Russian regime believes that time is on its side and it is ready for a drawn-out war.

A Ukrainian cannon crew fires artillery against Russian forces in Kreminna, Ukraine, 31 December 2022. Extensive Western weapons support is needed for the Ukrainian forces to reclaim the initiative in the war.

Image: Nicole Tung / New York Times / NTB

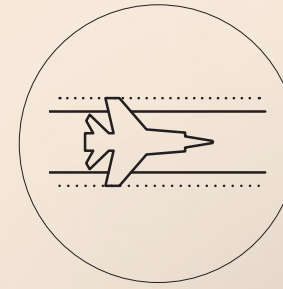


II.

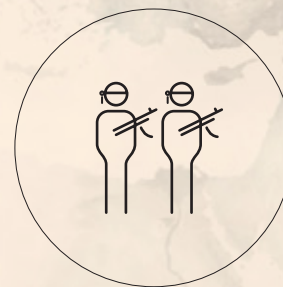
RUSSIA'S PERMANENT BREAK WITH THE WEST

From Moscow's perspective, Russia is in direct confrontation with the West and fighting a proxy war with NATO in Ukraine. As a result, Moscow is looking to strengthen its cooperation with other countries.

After the United States and Europe introduced sanctions, Russia was quick to ramp up its diplomacy, trading links and strategic communication with China and other non-Western countries. Russia needs to soften the economic blow of Western sanctions while simultaneously securing political influence and support for Russian views.



Military infrastructure, including airbases and military bases, radar sites and coastal defence installations, are still being built in the Arctic



Challenges facing African states that have a problematic relationship with the West create a window of opportunity for Russia



Around one third of the government budget is being spent on defence and security



Putin retains control

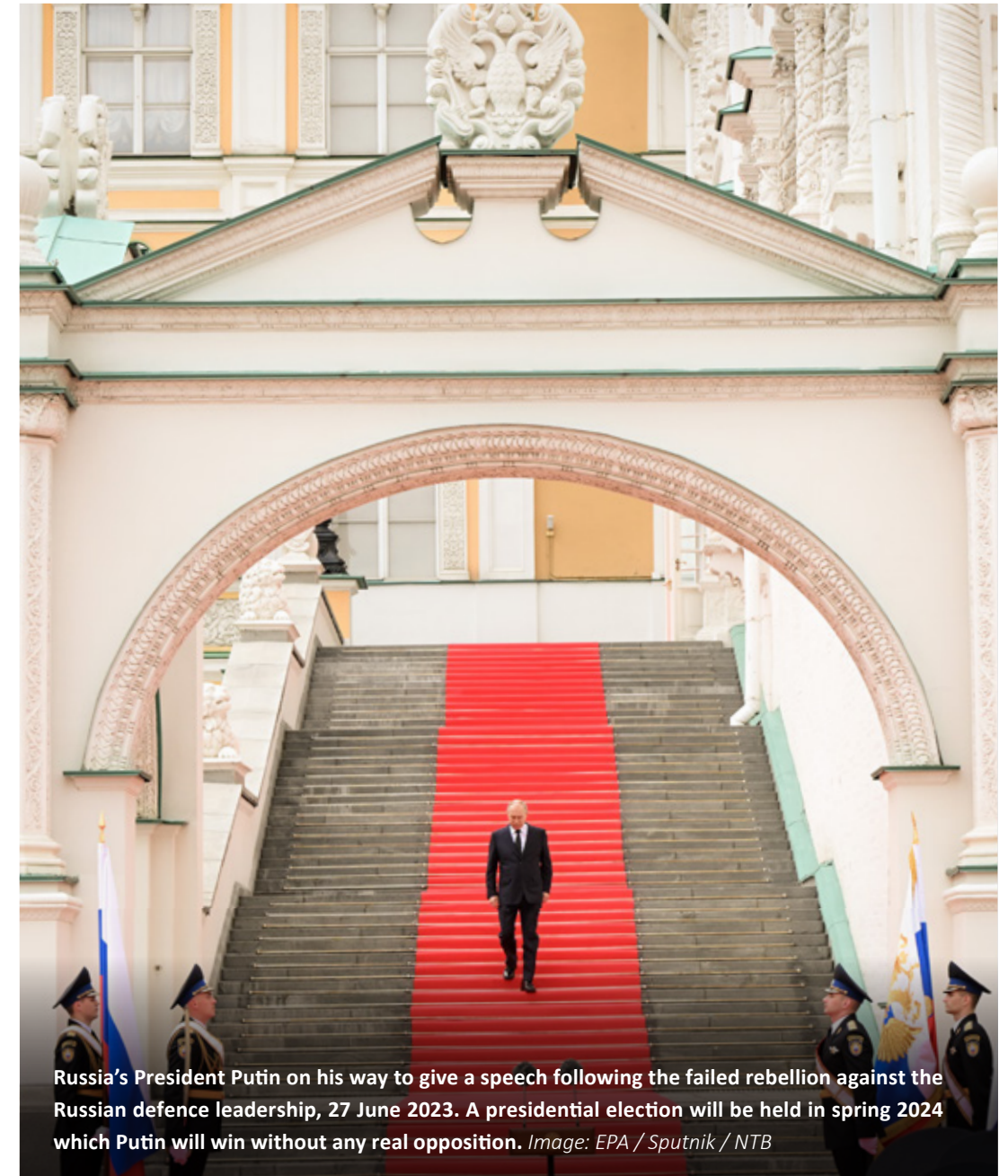
The political system in Russia is increasingly characterised by totalitarian features. The state retains control through political suppression, surveillance and propaganda. The regime clings to the narrative that Russia is under attack by the West. The Russian presidential election will be held in spring 2024, which Putin will win without any real opposition. The election is controlled and intended to demonstrate that the public supports Putin and Russia's current political course. Any costly and unpopular measures will be put on hold until after the election.

In response to poorer living conditions, the Kremlin is stepping up its political indoctrination of the public, with conservative values and the idea of Russia as a unique civilisation as central tenets. The Kremlin has a long-term perspective and is especially eager to convince young Russians that the current regime is the one that best serves Russia's interests. This narrative is at the heart of the so-called patriotic curricula being introduced in schools and universities.

Investment in defence industry keeps economy afloat for now

Although Western sanctions are limiting public revenue, Russia is still seeing economic growth. This can largely be explained by extremely high spending on the defence industry. The regime is now spending around one third of the government budget on defence and security. Three shifts have been introduced across much of the Russian defence industry.

The need to finance the war has led to cuts in investment in infrastructure, healthcare and education. Meanwhile, Western sanctions are driving inflation and leading to raised production costs. High public spending adds inflationary pressure. This development is reinforced by a critical labour shortage, particularly in knowledge-intensive sectors. The Russian economy also remains dependent on oil exports and is therefore vulnerable to oil price falls. As a result, Russia will continue to prioritise cooperation within the OPEC+ framework. In addition, the authorities will be levying higher taxes and rates on major commodity and energy companies. →



Russia's President Putin on his way to give a speech following the failed rebellion against the Russian defence leadership, 27 June 2023. A presidential election will be held in spring 2024 which Putin will win without any real opposition. Image: EPA / Sputnik / NTB



A Russian icebreaker near the North Pole, 18 August 2021. Following the break with the West, Russia is seeking increased Arctic cooperation with non-Western countries.
Image: Ekaterina Anisimova / AFP / NTB

Power and dependency



Suppression, surveillance and propaganda secure Putin's power



Cooperation with China is important to secure investments in the Arctic



Russia seeks to be a neutral power in the Middle East

The longer the war in Ukraine drags on, the longer and more complicated the return to a sustainable Russian economy will become.

Loss of influence in Russia's near abroad

Russia's ability to influence political developments in neighbouring countries has become weaker due to the war in Ukraine. This is caused by both an erosion of trust in Russia as a dependable actor and a lack of resources with which to exert power. This trend is expected to continue in 2024.

Break with the West forces new Arctic policy

For Russia, the break with the West unsettles its long-standing Arctic policy, a central tenet of which has been cooperation with other Arctic states in order

to maintain low tensions and facilitate foreign investment. The preconditions for successful development of the region as a future resource base have come under heavy pressure. The Russian authorities regularly express their concern for current developments and reiterate their distrust in the West.

Russia's ability to influence developments in the Arctic has become diminished. This forces it to look for Arctic cooperation with non-Western countries, including other members of BRICS. The need for Chinese investment and technology in particular means that Sino-Russian cooperation will grow closer in the years ahead. This will continue to increase Russia's dependence on China.

Russia seeks to preserve 'no enemies' strategy in the Middle East

Iran will remain a key partner for Russia in 2024, both to secure access to military materiel and as a transit country for Russian goods heading east. →

« The war in Ukraine will be decisive for the development of the Russian armed forces in 2024 onwards. »

Saudi Arabia's key role within the OPEC+ scheme and the Gulf States' willingness to help Russia circumvent sanctions suggest that the Russian authorities and Russian businesses will continue their efforts to bolster relations with the resource rich Gulf States.

Although Moscow is strengthening relations with Tehran, the Russian authorities are expected to preserve their strategy of being a neutral power in the Middle East, open to dialogue with all parties. However, this approach could be challenged if the war between Israel and Hamas escalates into a regional conflict. In reality, Moscow has little opportunity to influence developments, and Russian interests may come under particular pressure should the conflict spread to Syria.

Russia continues to challenge Western interests in Africa

Even while waging war in Ukraine, Russia has managed to garner political support from and increase its influence in Africa. Moscow has entered into several new partnerships with African countries and is using them to demonstrate that Russia is not politically isolated on the world stage. Several African states and state leaders have problematic relationships with the West and a growing need for security and counterterrorism support. This creates opportunities for Russia, as is especially evident in the Sahel. Military security support, channelled through private military

companies, has been an important and efficient tool for increasing Russian influence. Although Russia is expected to preserve this strategy, the Kremlin will be tightening its control of the Russian military presence in Africa in order to prevent companies from gaining too much influence and independence, as was the case with Wagner under Yevgeniy Prigozhin's leadership.

War in Ukraine central to military development

The war in Ukraine will be decisive for the development of the Russian armed forces in 2024 onwards. Russia has switched to a war economy, and the Russian defence industry has been given significant extra allocations. The industry is now capable of manufacturing sufficient ammunition and other materiel to ensure the continuation of the war in Ukraine throughout 2024. Due to a considerable increase in arms and equipment production, Russia has cut the time needed to restore combat power to pre-war levels to three to five years when the war is over. In the face of Western sanctions, Belarus, China, Iran and North Korea are the most relevant cooperation partners for technology and skills transfer.

Strategic deterrence remains the other key priority. As Russia's conventional military capability has been reduced, the strategic deterrence forces, including the Northern Fleet's long-range weapons systems, have taken on a more important role. →



Image: Russia's Minister for Defence Sergey Shoigu inspects Russian materiel before it is dispatched to the front in Ukraine. (Russian Defence Ministry / AP / NTB)

■ Russian defence spending: historic increase in 2024

The war in Ukraine continues to drive Russian defence spending. In 2022, the Russian defence budget saw a year-on-year increase of 16.5 per cent in real terms, and from 2022 to 2023 a further 27 per cent. Russia was planning to spend USD 70.5 billion on defence in 2023, with continuous adjustments of the budget in line with growing needs. In 2023, the defence budget constituted 20 per cent of total federal spending and 4 per cent of the gross domestic product (GDP).

Planned defence spending for 2024 is unparalleled in recent Russian history, with an increase of USD 48 billion in nominal terms, i.e. a 61 per cent increase in real terms from 2023. Russia's official defence budget consequently totals USD 118.5 billion, or almost 30 per cent of government budget expenditure in 2024. In the GDP forecast for 2024, the defence budget makes up 6.1 per cent. Other major items of expenditure that fall under other budget items come in addition to this and include the medical service, education, pensions and defence industry subsidies.



Insight #2
 Exercise Ocean Shield 2023
 Sources: [redacted]

■ Exercise Ocean Shield 2023

The Russian naval exercise Ocean Shield took place in autumn 2023 in the Barents Sea, the North Sea and the Baltic Sea. The exercise demonstrated how Russia intends to position forward-deployed capabilities such as submarines, surface vessels and aircraft. The forces' disposition confirmed that Russia views the High North and the Baltic Sea region as one continuous area.

During the exercise, Russia deployed vessels to strategic positions in the so-called Bear Gap between Svalbard and the Norwegian mainland, as well as to the Norwegian Sea and the Barents Sea. In addition, the Russian authorities announced two NOTAMS (Notice to Airmen) for military activity north and south of Bear Island. A NOTAM is a warning to aircraft pilots to keep their distance.

The Bear Gap is important as a border area in the Russian bastion defence, as it marks the transition between the shallow Barents Sea, which is the Northern Fleet's main area of operations, and the deep Norwegian Sea. The fact that the naval exercise took place here indicates that the Northern Fleet wanted to demonstrate its ability to prevent allied access to the Barents Sea.

Graphics:
 Schematic presentation of Russian dispositions during Exercise Ocean Shield 2023



A Russian MiG-31K combat aircraft carrying the Kinzhal hypersonic missile. Russia has increased the rate of missile production. Image: Russian Defence Ministry / AP / NTB



A Russian Tu-160 strategic bomber takes off from a Russian airbase in early 2023. This aircraft type has been used to carry cruise missiles in the war against Ukraine.

Image: Russian Defence Ministry / AP / NTB

Russia is in the process of restoring core capabilities to continue the war against Ukraine, including weapons and materiel for the land forces. The rate of production of missiles and attack drones is also being accelerated in order to retain the ability to attack areas behind the frontline, Ukrainian population centres and critical infrastructure. Increased production of weapons and materiel, re-organisation of the forces and a steady supply of new personnel could pave the way for a major Russian offensive in 2024. Hard-earned experience and testing of new technology and weapons systems on the battlefield in Ukraine will also affect the development of the Russian armed forces in the years to come.

Whole of society a legitimate target

Russia's military strategy involves targeting the opponent's will to fight as well as their military capability. Russia will use all available means, both military and non-military, to undermine their adversary's will to defend and then defeat them. The purpose is to pre-empt the other party.

In accordance with Russian military doctrine, Russia may also attack civilian targets, including a country's political leadership, critical infrastructure and targets of high economic value. In the event of a military conflict involving Norway, most of these targets are located in southern Norway. Such targets can be influenced or attacked using a wide variety of means even before the outbreak of military conflict, including through political influence, information warfare, cyber operations, sabotage, infiltration, disruption of energy supply and border infringements.

Combat power retained near Norwegian borders

As Russia's conventional military capability has been reduced, the significance of its strategic deterrence forces has increased. The Northern Fleet's capabilities and proximity to NATO's core areas make it central to Russian deterrence. As a result, NATO's northern maritime flank has become more significant. Whereas Northern Fleet land forces have been reduced by around 80 per cent, its naval forces have been little affected by the war in Ukraine and continue to receive new submarines and surface vessels. The Northern Fleet remains the greatest military threat to Norway. The Fleet's vessels can threaten NATO supply lines and strategic targets, and the submarines are capable of attacking targets across Europe and the United States. The air forces on the Kola Peninsula have been affected to some extent by the war, resulting in a reduced presence of tactical bombers and strategic air defences. After Russian bases further south were attacked by Ukrainian forces, Russia has temporarily relocated many strategic bombers to the Kola Peninsula. The aircraft are used in the war in Ukraine, and their deployment north is expected to continue.

The Northern Fleet's deep-water capabilities continue to pose a serious threat to Western underwater infrastructure. The Russian underwater reconnaissance programme (RURP) has sophisticated surface vessels, submarines and other capabilities for mapping, reconnaissance and sabotage of civilian communication cables and underwater installations. RURP has a considerable capacity to threaten Norwegian and Western critical underwater infrastructure and energy sectors. In addition, Russian intelligence and security services are taking advantage of a significant number of civilian vessels.

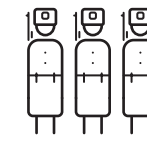


A Russian T-90 main battle tank and crew near Lyman, Ukraine in July 2023. Russian land forces have been prioritised for the fight in Ukraine. Image: Evgeny Biyatov / Sputnik / IMAGO / NTB

The Russian war economy



Economic growth is maintained through vast spending on the defence industry



The number of troops are to increase from one million to one and a half million by 2026



Military support from other authoritarian states helps Russia keep the war in Ukraine going

Russia will continue to develop military infrastructure in the Arctic, including airbases and military bases, radar sites and coastal defence installations. Nevertheless, the war in Ukraine and a struggling economy leaves limited resources, and the work will take longer than originally planned.

Testing of new Russian weapons systems will also continue in the High North. Further testing of inter-continental ballistic missiles, long-range precision-guided weapons, hypersonic missiles and anti-satellite weapons is expected. Weapons designed for nuclear propulsion, both missiles and torpedoes, were tested at Novaya Zemlya in 2023, and this activity is expected to continue. The testing carries a risk of accidents and local radioactive emissions.

Plans for a larger force structure

Moscow expects a lengthy confrontation with the West and has identified a need for expanding the Russian armed forces. According to official plans,

the armed forces will increase from 1 to 1.5 million soldiers by 2026. The Moscow and Leningrad military districts will be revived, and new units will be formed in Karelia. Russia is also set to establish several new infantry and airborne divisions. An expansion of the military structure on this scale will be a time-consuming and challenging process, particularly due to the war. Although Moscow's plans are first and foremost political posturing, some changes may take place near Norwegian borders already this year.

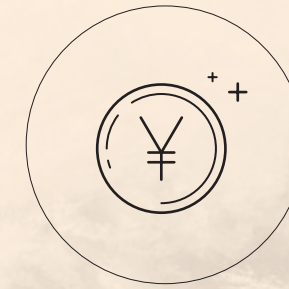
The land forces took receipt of many new weapons systems during Russia's modernisation of the armed forces in the period 2010 to 2022. Much of this materiel has already been spent or lost in Ukraine, and it has been replaced by older materiel from storage. Moreover, Russia has lost a large proportion of its most experienced personnel. The land forces are therefore already undergoing major organisational changes. Even before the war, Russia was in the process of reducing the number of brigades and reintroducing the division level, as according to Russian thinking, divisions are seen as better suited to fighting a regional war with NATO. □

III.

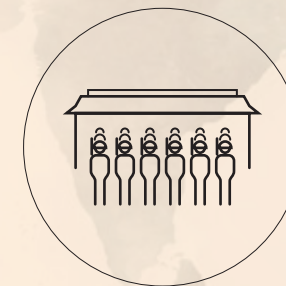
CHINA'S GLOBAL AMBITIONS

China has become a global power, with major influence on international collaboration, economy and security. The Communist Party of China (CPC) wants a new international order in which the West no longer dominates, liberal values such as democracy and freedom of speech do not set the course, and China's position as a great power gives the country power of definition in international matters.

The strategic partnership with Russia is based on a view of the United States as the defining threat to both Chinese and Russian ambitions. The partnership enables Beijing to focus more on facing the US and its allies in the Pacific.



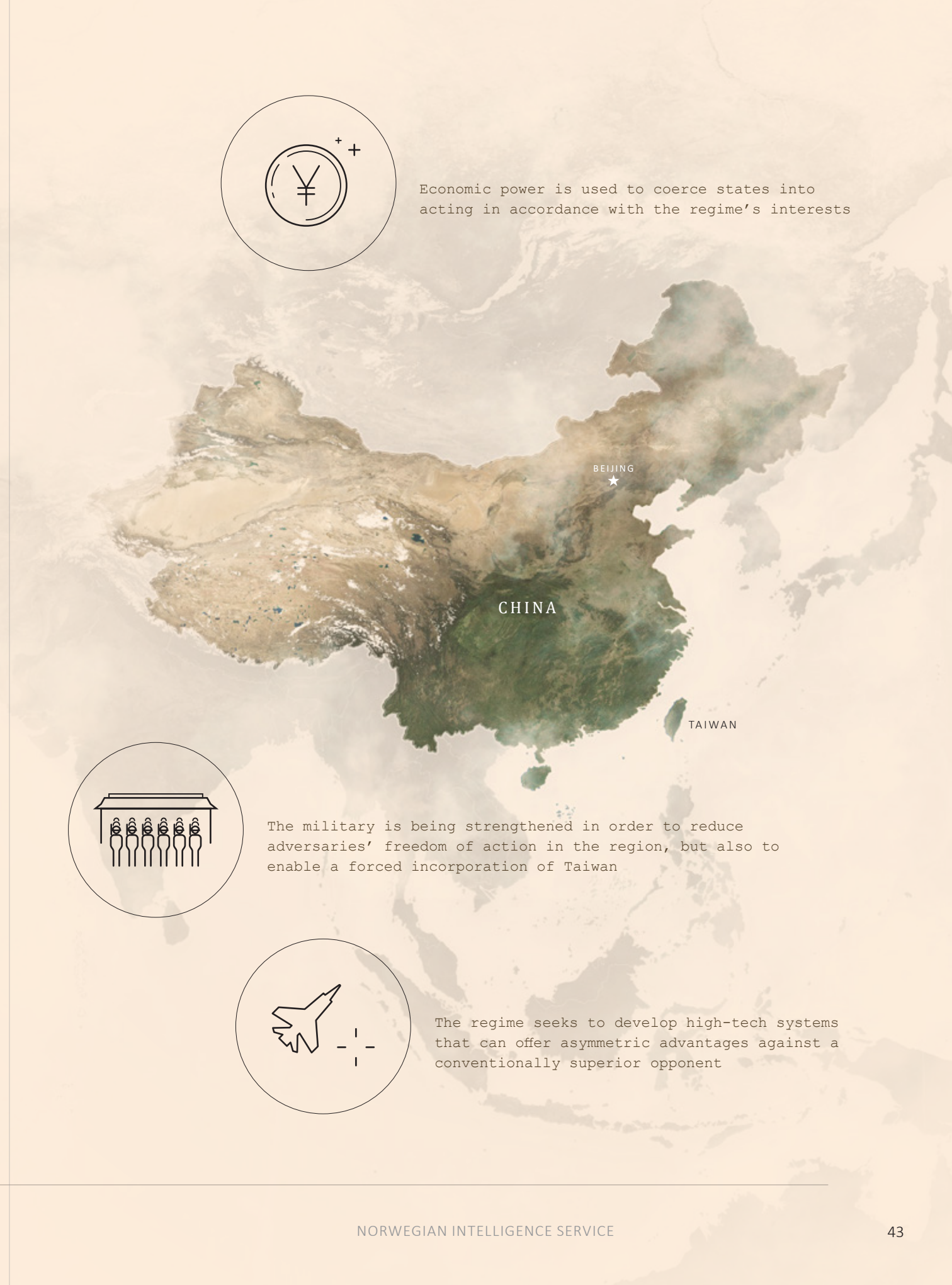
Economic power is used to coerce states into acting in accordance with the regime's interests



The military is being strengthened in order to reduce adversaries' freedom of action in the region, but also to enable a forced incorporation of Taiwan



The regime seeks to develop high-tech systems that can offer asymmetric advantages against a conventionally superior opponent





Security more important than economic growth

Domestically, it is considered important to establish the Communist Party of China as a guarantor of political and economic development. Beijing is preparing for a tougher period with a poorer-performing economy and growing external pressure. This entails prioritising national self-sufficiency and technology development at the expense of economic growth. There is a focus on strengthening supply security for energy, food, technology and other crucial factors of production.

At the same time, China is implementing measures that make it more predictable for Western actors to operate in China, and easier for the Chinese authorities to exert pressure on other states, companies and individuals. China's revised counter-espionage law of 1 July 2023 rests on a very broad definition of 'intelligence activity' and may also include collection of information significant to investing or manufacturing in China.

Economic strength the main foreign policy instrument

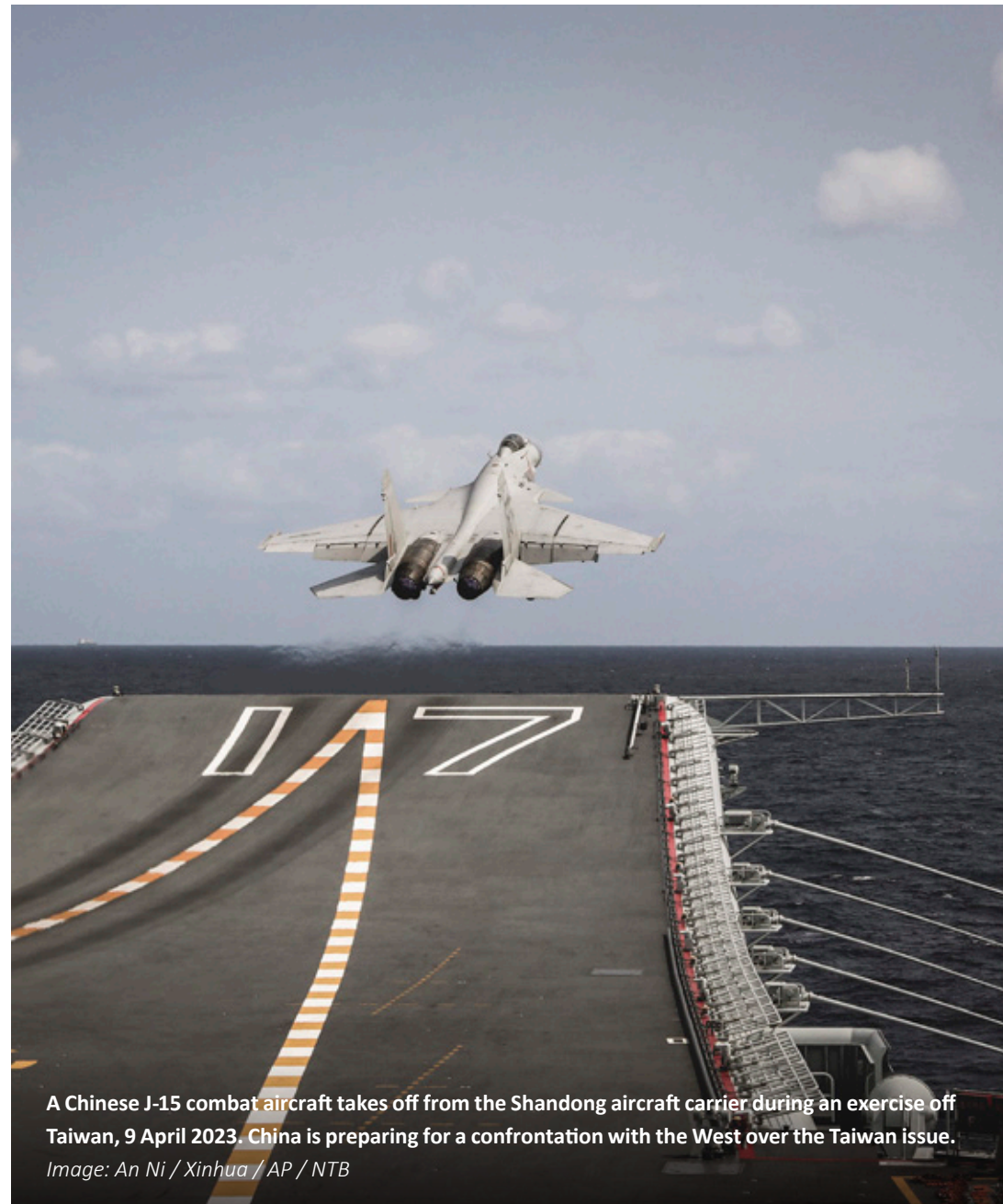
Economic strength remains Beijing's most important instrument of power when it comes to foreign policy. China will continue to seek increased influence in international forums and diminish the dominance of Western countries, particularly the United States. Strengthening the ties to countries in the global south is central, both in order to build political and economic alliances and to secure access to critical minerals. China will continue to invest in both physical and digital infrastructure.

Distrust in the outside world

China considers itself surrounded by adversaries and the object of US containment policy. Beijing particularly believes that security developments in the Pacific Ocean are becoming increasingly difficult to navigate. →



A recruitment fair in Chongqing, April 2023. Beijing is preparing for lower economic growth and prioritising security over other economic considerations. Image: AFP / NTB



A Chinese J-15 combat aircraft takes off from the Shandong aircraft carrier during an exercise off Taiwan, 9 April 2023. China is preparing for a confrontation with the West over the Taiwan issue.
Image: An Ni / Xinhua / AP / NTB



Security over growth

National self-sufficiency is prioritised over economic growth

The regime is forging closer links with other authoritarian states

The Taiwan issue is decisive for military modernisation

This is due to an increased US presence, neighbouring countries' military rearmament and the strengthening of defence cooperation to curb Chinese influence. The People's Liberation Army (PLA) is supposed to reach important modernisation milestones by 2027, when it celebrates its centenary. The purpose is not only to reduce the US' and its allies' freedom of action in areas close to China and the western Pacific, but also to have the capabilities to carry out a potential invasion of Taiwan.

The Taiwan issue intensifies

Beijing thinks Taiwan needs to be coerced with threats of military force in order to agree to be incorporated into the People's Republic of China. The Taiwan election result from January 2024 reinforces China's perception. China continues to prefer peaceful unification, but nevertheless seeks to be ready to force the incorporation of Taiwan and to prevent or delay any military support to the island.

China's military activity in areas close to Taiwan has mushroomed throughout 2023. The situation means short warning times for Taiwan and considerable attrition of the Taiwanese armed forces during peacetime. In addition, China has built bases and increased its activity in the South China Sea, while new Chinese weapons systems enable China to face potential troops from other countries farther out; with that, China's deterrence capability increases.

Despite influence activity and coercion, Beijing has not managed to change Taiwan's stand on unification, and China is expected to increase its use of both military and non-military means in an attempt to deter Taiwan from taking steps towards independence. At the same time, China will work to force a unification. Measures to isolate Taiwan diplomatically will persist, as will overt and covert influence activity and a high level of military activity in the region. The latter increases the risk of unintended incidents and escalation, and makes the regional security situation even more delicate.

The rivalry with the US means that it is important for Beijing to maintain good relations with European →



A statue of a Chinese general outside Heihe, near the border with Russia. In 2023, China's trade with Russia exceeded USD 200 billion. Image: Gilles Sabrié / New York Times / NTB

countries. Beijing will work to ensure that the agreed EU China policy does not become too critical of the country, and that the potential restrictions that will be implemented will have as little impact as possible. China will continue to place importance on European strategic autonomy and seek to stress matters where European and US interests differ.

PLA's strength and capabilities increase

China is preparing for a confrontation with the West over the Taiwan issue. Against this backdrop, China's Communist party has initiated an extensive modernisation process within the PLA. The process involves changes to the services' personnel structure, doctrine and training methods. In addition, advanced technological equipment is being implemented on all levels as part of building a high-tech, network-based force. According to China's defence strategy, China is to avoid initiating any offensive action unless an adversary has harmed or intends to harm China's strategic interests. The strategy provides the Chinese armed forces with great flexibility in responding to actions and incidents.

New technology for the war of the future

China seeks to develop advanced technological systems that offer an asymmetrical advantage against an otherwise superior adversary. Beijing has extremely ambitious plans of completing the modernisation of the armed forces by 2027, equalling the West's military technological dominance by 2035

and surpassing the US in certain areas by 2049. The PLA has also singled out and defined new domains of warfare: space, cyber, the polar regions, the underwater domain, the biological domain and the cognitive domain. Development of network-based systems intended for these fields requires comprehensive integration of advanced technology in addition to the recruitment and training of expertise.

According to Chinese thinking, big data and artificial intelligence should be exploited in order to achieve information superiority and gain the upper hand militarily. The development shows the close connection required between military and civilian actors in order to achieve the PLA's strategic objectives. Military-civil fusion is supposed to remedy Western restrictions on technology exports. A large proportion of the emerging and disruptive technologies that the Chinese armed forces and security services seek to acquire is multi-purpose technology developed by commercial actors in the civilian sector.

Beijing views space as decisive in future conflicts. China is launching a great number of satellites and is competing with the US to become the greatest space power. The space programme has both a civilian and military part, but all of China's space resources can be exploited for military purposes.

Biotechnology is already a strategic investment area, and Beijing also seeks to exploit this technology militarily. Several important state laboratories specialise in biological research. These mainly supply the civilian sector, but the research also has military potential. To different extents, other state research institutes, civilian and military hospitals and civilian companies contribute research and development that also builds military capability. The PLA has access to data and knowledge from the entire range of Chinese research and development communities. □

Insight #3
Ambitions and asymmetry
Sources: ██████████ ██████████

Ambitions and asymmetry

An imbalanced strategic partnership

China is Russia's most important partner, and China has on several occasions stressed the significance of the strategic partnership with Russia. The countries have gradually strengthened political, military and economic cooperation. In order to safeguard Russian and Chinese interests to a larger degree, both parties seek to be alternatives to the West and reorganise the international order. A cornerstone of the bilateral relations is the shared perception of the US as the primary threat to Chinese and Russian ambitions.

The increasing trust between the two countries frees up resources. Previously, strained relations tied up considerable military capabilities on both sides of the border. For Beijing, the partnership means that it has its back covered and can direct its defence modernisation towards facing the US and its allies in the Pacific. For Russia, the low tensions along the border with China are important for its ability to challenge the US and NATO westwards and to be able to concentrate its land forces in Ukraine.

The high number of meetings between Russian and Chinese officials will carry on and the parties will continue to develop their relations through formal agreements. This makes the bilateral relations less dependent on the personal relationship between Xi and Putin. China persistently supports Russia diplomatically in international forums, and the parties cooperate closely on the UN Security Council, in particular on matters where criticism of Western countries is involved. In addition, both countries seek to

strengthen multilateral organisations such as BRICS and SCO, aiming to create real alternatives to organisations where the West has influence. While China is the driving force behind adding new countries to BRICS, the expansion gives Moscow the opportunity to show that Russia is not internationally isolated.

The imbalance in the partnership continues to increase in China's favour. Russia's full-scale invasion of Ukraine and the subsequent Western sanctions have made Russia significantly more dependent on China than vice versa. This imbalance is apparent in almost all areas of Sino-Russian cooperation.

China is indispensable to Russia's ability to cushion the effects of Western sanctions, stabilise the Russian economy and consequently contribute to stabilising the Putin regime. In 2023, bilateral trade exceeded USD 200 billion for the first time. The growth seems to continue in the period to 2030, in part because of increased industrial cooperation, simplified bureaucratic processes and the improvement of transport infrastructure. Russia is becoming increasingly dependent on Chinese consumer goods and high technology, while Chinese investments in Russia have dropped as a result of reduced profit potential and Western sanctions. Russia's adjustment to the use of the Chinese currency renminbi (RMB) in trade settlements and foreign exchange reserves exacerbates the imbalance, reducing Russia's vulnerability to US sanctions but increasing its dependence on Beijing's fiscal policy.

Limited military cooperation

Russia and China frequently conduct joint naval exercises, usually in the western Pacific and adjacent waters off Japan and South Korea, and their strategic bombers have in recent years carried out joint patrols in the same area. The joint operational return is limited for the time being; so far, the increased joint military activity must first and foremost be seen as mutual support in the rivalry with the US.

China strives to appear impartial and well-suited as a mediator in the war in Ukraine, while actually supporting Russia with components, vehicles and other goods which enable Russia to maintain and continue the war effort in Ukraine. Beijing is unlikely to exert any pressure on Russia to stop the war. So far, China has refrained from supplying Russia with weapons and ammunition that are ready for use. Any potential Chinese diplomatic advances will have a Russian bias and be cleared with Moscow first. There is close coordination with Russia regarding the war in Ukraine, both in bilateral and multilateral forums.

Russia and China have conducted joint deployments in the southern part of the Bering Sea (the northern Pacific). Patrols have so far only taken place south of the Bering Strait, and it is still unlikely that Chinese naval vessels will participate together with Russian forces north of the Bering Strait, i.e. the Arctic Ocean or the Barents Sea.

In 2023, China and Russia signed a memorandum of understanding regarding increased coastguard cooperation, and for the first time, the Chinese coastguard participated as an observer during a Russian coastguard exercise. While China's coastguard is subordinate to China's Central Military Commission, Russia's coastguard is subordinate to the security service FSB.

BRICS is a cooperation forum for Brazil, Russia, India, China, South Africa, Egypt, Ethiopia, Iran, Saudi Arabia and the United Arab Emirates. Prior to 1 January 2024, it was also a collective term for Brazil, Russia, India, China and South Africa, which until then comprised the members of BRICS.

SCO (Shanghai Cooperation Organization) is a security policy cooperation organisation in Asia, dominated by China and Russia.

China's President Xi Jinping poses with Central Asian leaders during a summit in Xi'an, 19 May 2023. The Communist Party of China is seeking to establish real alternatives to organisations where the West has influence.

Image: Shen Hong / Xinhua / NTB



IV.

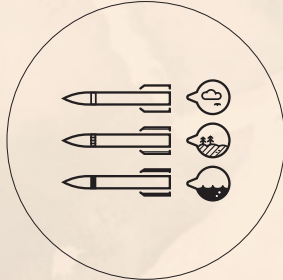
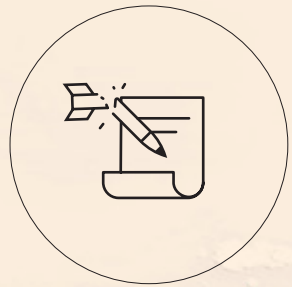
ARMS RACE PICKS UP PACE

War and great power rivalry have had a detrimental effect on the nuclear arms control regime. There are no remaining treaties that regulate the arsenals of the two largest nuclear-weapon states, Russia and the United States.

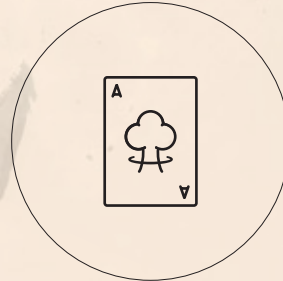
The Chinese authorities have stated that regulations are irrelevant as long as China's arsenal remains smaller than those of the United States and Russia. Without international arms control, the technological arms race will increasingly come to challenge strategic stability.



There are no remaining treaties regulating the world's largest nuclear weapons arsenals



China's ambition is to establish a robust and credible nuclear triad by 2040



North Korea continues to develop intercontinental missiles in order to deter the United States



Russia: nuclear weapons remain top priority

Russia will continue to pose the greatest nuclear threat to NATO and consequently to Norway. The conventional Russian armed forces and their deterrent capability are significantly degraded following two years of waging war, with high losses within the land forces, extensive use of advanced weapons systems and considerable attrition. As a result, both strategic and tactical nuclear weapons have become more important to Russian deterrence. Russian doctrine allows for the use of nuclear weapons in the event of an existential threat against the country. What constitutes an existential threat will always be a political decision, and creating uncertainty regarding the threshold for nuclear weapons use is part of Russia's strategy. Modernisation and development of the nuclear forces remain the top priorities in Russian arms development.

Russia's nuclear triad consists of road-mobile and silo-based intercontinental ballistic missiles, strategic submarines with intercontinental ballistic missiles and strategic bombers. The new intercontinental missile Sarmat will replace Soviet-era systems and provide a significant modernisation of the land-based component of the nuclear triad. The system was originally planned to be operational by 2018, but the

development programme has become significantly delayed. In addition to the triad, Russia has tactical nuclear warheads. These help to compensate for a growing conventional inferiority vis-à-vis the West. Consequently, Russia will continue to modernise and develop new tactical nuclear weapons for all fighting services. Although Western sanctions will delay the Russian development programmes, particularly for means of delivery for strategic and tactical nuclear weapons, they will not prevent Russia from maintaining a powerful nuclear arsenal.

Russia has withdrawn its ratification of the Comprehensive Nuclear-Test-Ban Treaty (CTBT), yet the Russian authorities have stated that Russia will not be the first country to conduct a test. Despite having signed the Chemical Weapons Convention (CWC), Russia continues to conduct research and therefore retains the ability to develop biological and chemical weapons. Russia has used these types of weapons to assassinate regime opponents.

China: rapidly growing nuclear arsenal

China's ambition is to establish a robust and credible nuclear triad by 2040, equal in volume and capability →



Sarmat, Russia's new intercontinental missile, is tested at Plesetsk outside Arkhangelsk in spring 2022. Sarmat will replace Soviet-era systems. Image: Shutterstock editorial / NTB



A Chinese Dong Feng-41 intercontinental missile on display at a fair in Beijing in autumn 2022. China's nuclear arsenal is growing rapidly. Image: Kyodo / NTB



Centrifuges at the Natanz enrichment plant in Iran. The country has retained the technology and skills needed to produce nuclear weapons. Image: Atomic Energy Organization of Iran / AP / NTB



The North Korean leader Kim Jong-un walks past what the regime claims to be a Hwasong-17 intercontinental missile. North Korea is expected to conduct several missile tests in 2024.

Image: Korea News Service / AP / NTB

to the US and Russian triads. The Chinese nuclear arsenal is growing quickly, and the largest increase is occurring in land-based intercontinental missiles, with the construction of several hundred new silos. The silo-based systems are suitable as first-strike weapons and for retaliation, but they are vulnerable to first strikes themselves. At present, China's sea- and air-based nuclear arsenal is limited. However, new submarines and strategic bombers are in development. Distributing the nuclear forces across multiple delivery platforms mitigates vulnerability and offers improved flexibility and retaliatory capability.

Chinese uranium and plutonium plants are being expanded and can be used both to meet civilian power requirements and for arms production. To all intents and purposes, the developments seen in the Chinese nuclear weapons programme mean that China has abandoned its minimal deterrence doctrine. They also raise questions regarding Beijing's no-first-use doctrine for nuclear weapons, which has prevailed thus far. In addition, China is seeking other instruments of power for deterrence. In the PLA doctrine, space-based capabilities are highlighted as key deterrent mechanisms, as they can be used covertly and below the threshold of war.

Iran: nuclear weapons skills retained

Iran has retained the technology and skills needed to produce nuclear weapons. With its current enrichment capability, Iran could produce sufficient weapons-grade uranium in a matter of weeks. Manufacturing nuclear warheads and integrating them into ballistic missiles would take longer.

Iran has a number of missiles suited to delivering nuclear warheads with sufficient range to cover the entire Middle East and much of Europe. Manoeuvrability, improved precision and shorter readiness times are the top priorities, but Iran is also making progress with booster rockets built using the same technology as long-range ballistic missiles. Although the development of an intercontinental ballistic missile would require a battery of tests, much of this testing activity could take place under cover of the country's civilian space programme.

North Korea: evolving its nuclear capability

The North Korean regime has showcased models of both tactical and thermonuclear warhead designs, and the country is likely to possess a few nuclear warheads adapted to short- and intermediate-range missiles. In addition, stores of uranium and plutonium for future nuclear weapons production are growing. North Korea considers a credible nuclear retaliatory capability against the United States and South Korea to be a guarantee of regime survival. In addition, the country legalised the right to first strike in 2022. The regime is also developing tactical nuclear weapons intended for regional deterrence and warfare. It is possible that North Korea will conduct new nuclear tests before phasing in additional warheads.

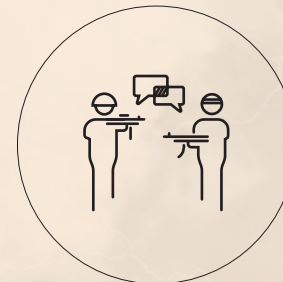
The regime conducted several missile tests in 2023, and these tests are expected to continue in 2024. Programmes for intercontinental ballistic missiles, which can carry heavier or multiple warheads, are highly prioritised and constitutes the linchpin of North Korea's deterrent against the United States. □

V.

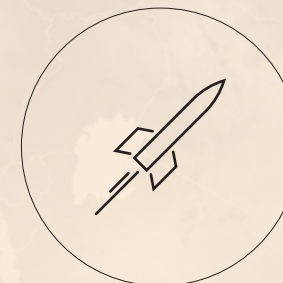
MIDDLE EASTERN RECONCILIATION PROCESSES ON HOLD

The level of conflict in the Middle East will remain high in 2024. This represents a threat to Norwegian military personnel and Norwegian interests in the region. The war between Israel and Hamas has put reconciliation processes on hold and heightened the risk of terrorism in the region.

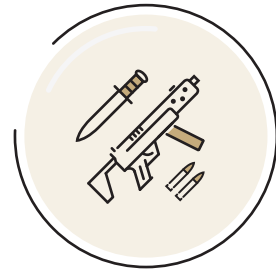
Meanwhile, the Middle East is becoming an increasingly important arena for Russia and China in their attempts to challenge Western influence and secure their own interests. The tools used in the competition between the great powers are mainly diplomatic and economic. The US remains the most influential power, especially in terms of military force, but the countries in the region exploit the rivalry to pursue national ambitions.



Actors in the region agree on the need to reduce tensions, yet the level of conflict will remain high



The nuclear deal with Iran has been deadlocked since 2022. Ongoing conflicts prevent progress in 2024



Conflict lines persist

The war between Israel and Hamas shows that the underlying conflict lines in the Middle East persist. However, regional actors want to prevent the war from spilling over into other areas, and so far, it looks like the intensive fighting will be confined to Gaza. Nevertheless, Iran-affiliated militias continue to attack Western and Israeli targets in the Middle East. This affects the border areas between Israel and Lebanon, coalition targets in Syria and Iraq, and shipping in the Red Sea.

In 2023, after Chinese mediation, Saudi Arabia and Iran resumed bilateral relations after a seven-year freeze. The rapprochement has a damping effect on regional conflicts, potentially paving the way for a normalisation of Iran's relations with other countries in the Middle East as well.

There is a broad consensus in the region that further reconciliation is needed, but the war between Israel and Hamas has made these normalisation processes difficult. For instance, the budding rapprochement between Israel and Saudi Arabia is now on hold. However, the strategic goals of stabil-

ity and economic growth remain unchanged, and the parties will seek to resume the process at a later stage.

Parallel and somewhat competing initiatives for dialogue are expected to continue in 2024. For example, the Gulf States' ongoing attempts to normalise relations with the Assad regime are largely driven by a desire to offset Türkiye and Iran's deep-rooted influence in Syria.

Fragile dialogue on nuclear deal with Iran

Negotiations for a return to Iran's nuclear agreement with the West, Russia and China have been deadlocked since September 2022. Social unrest in Iran and Iranian weapons deliveries to Russia have made it difficult to keep the dialogue open.

Iran and the US resumed indirect talks in June 2023, focusing on trust-building steps such as the exchange of prisoners and transfer of frozen Iranian funds. Yet, the dialogue is fragile and the war between Israel and Hamas makes matters worse.

To what extent will key Western security interests, →



A Chinese-built gas processing plant at the Halfaya field in Iraq, September 2023. China's interests in the Middle East primarily concern access to energy and other natural resources.

Image: Khalil Dawood / Xinhua / NTB

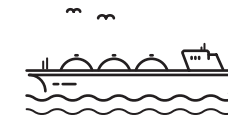


Funeral procession for Wissam al-Tawil, a top Hezbollah commander who was killed in an Israeli air strike in January 2024. Image: EPA / STR / NTB

High level of conflict



The war in Gaza has an enduring potential to escalate



Ongoing conflicts threaten shipping in the Persian Gulf



The great powers are competing for influence in the region

such as restrictions on Iran’s nuclear programme, be included in the dialogue in the coming year? This remains uncertain. One important factor will be Iran’s view on the prospect of the US easing sanctions. Lack of progress on this track could push Tehran towards a more confrontational approach, which in turn could involve an intensification of the nuclear programme and military attacks in the Middle East, including against Western presence and international shipping in and around the Persian Gulf.

Russia is showing greater interest in the Middle East after the invasion of Ukraine, since the region is important for Moscow’s ability to reduce the effect of Western sanctions, establish alternative security cooperation agreements and secure political support. However, Russia’s weakened position also gives the regional actors more leverage vis-à-vis Moscow. China’s interests in the Middle East are about establishing secure access to energy and other natural resources. For the Gulf States, having security cooperation with the US and economic cooperation with China is not contradictory.

World powers battling for influence

As US security guarantees are perceived as less certain, regional actors in the Middle East want more diversified cooperation on security policy and increased flexibility. Many of the countries seek foreign investments, and growing Russian and Chinese interest in the region presents new opportunities. These countries seek to use the rivalry between the great powers to negotiate beneficial agreements.

Thus far, neither Russia nor China wants to challenge the US’s military role in the Middle East. On the contrary, all three powers want a Middle East without major military conflicts. Stability means that military resources can be directed elsewhere and makes it easier to pursue economic goals in the region. Syria is an exception, where Russia is more willing to confront the US militarily as long as it does not have any ripple effects. □

VI.

THE TERRORIST THREAT TO EUROPE

Over the past year, the terrorist threat from militant Islamists against Europe has increased. IS has tried to carry out several attacks, and trigger incidents such as offences against Islam have led to an aggravated threat environment. Trigger incidents can lead to an increase in the terrorist threat against Norway as well.

For far-right extremists, there have been no such trigger incidents. The war between Israel and Hamas has less impact on the threat from far-right extremists.





The threat from militant Islamist terrorism against Europe is increasing

Some militant Islamist networks in Europe have ties to IS affiliates that have a persistent intention of attacking European targets. In the past year, IS has made several attempts to attack European targets, both inside and outside Europe. However, attacks in Europe are not a main priority for either IS' or al-Qaeda's leadership.

Meanwhile, IS in particular is encouraging terrorist attacks in the West. Attempts to commit terrorist acts will likely come from IS and al-Qaeda sympathisers based in Europe. These attacks generally have less damage potential, but since few people are involved and the means they use are quite basic, they can be harder to detect and avert than attacks directed by the organisations themselves.

Trigger incidents could increase the terrorist threat to Norway

Quran desecrations have given Sweden a prominent place in the enemy perception of militant Islamist terrorist organisations. Both IS and al-Qaeda have called for attacks against Swedish targets, and in the past year, IS has planned such attacks. Norway is not singled out as a priority target in the organisations' propaganda, but this could change if trigger incidents, e.g., offences against Islam carried out in Norway, receive international attention.

The war between Israel and Hamas has significant radicalisation potential and raises the terrorist threat in Europe. Both IS and al-Qaeda have called for attacks against Israeli and US targets and will seek to attack such targets in their own core areas. The war could also make them change their priorities and →



A refugee camp in Djibo, Burkina Faso, 2022. Violent incidents brought on by al-Qaeda and IS's growth in the country have resulted in more than two million internally displaced people since 2019.

(Sam Mednick / AP / NTB)

■ IS and al-Qaeda on the rise in Africa

Both IS and al-Qaeda are capable of adapting to political turmoil and counter-terrorist campaigns and still represent the greatest terrorist threat around the world.

Both organisations prioritise the empowering of local affiliates. They have significant growth potential in areas marked by conflict, poor living conditions and weak government control. The two groups have been particularly successful in Mali, Burkina Faso, Nigeria, the Democratic Republic of the Congo and Somalia. The advances in Africa help these organisations maintain their global foothold. In their core areas, they are also a considerable threat against Western interests.

Al-Qaeda and IS share the strategic goal of establishing an Islamic caliphate, and over time, their methods have become more alike. It is likely that some of the affiliates will seek pragmatic partnerships, or at least ceasefires, in areas where they have a common set of interests.

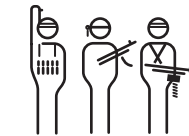


Flowers laid down in memory of two Swedish citizens who were killed in Brussels on 16 October 2023 by a terrorist who pledged allegiance to IS. Image: Nicolas Landemard / Le Pictorium /IMAGO / NTB

Increased threat from militant Islamists



IS has a persistent intention to attack European targets



The Gaza conflict has significant radicalisation potential



Trigger incidents could heighten the terrorist threat to Norway

direct more resources to planning attacks against the West, and IS could try to use existing networks in Europe to carry out attacks.

The war could incite individuals to carry out acts of violence on their own. In such cases, the distinction between hate crime and terrorism may be blurry. With this war, there has also been a sharp increase in anti-Semitic propaganda from far-right extremists, and the focus on Jewish targets may increase further.

The war in Ukraine has no clear ideological dimension, neither for far-right extremists nor militant Islamists. The groups operating in the war are not involved in ideological indoctrination to any great extent, and carrying out terrorist attacks outside Ukraine is not a strategy for any of them. The few far-right extremist foreign fighters who have travelled to Ukraine from Norway could nevertheless represent a threat when they return.

Absence of established far-right terrorist organisations

Most people involved in far-right online communities are not a terrorist threat, but because of the anonymity these communities provide, it can be hard to distinguish between statements inciting violence and real intent to attack. Hence, terrorists can be difficult to detect. In the event of far-right extremist attacks in Europe, they will probably be carried out by solo actors using simple means. With the absence of established far-right extremist terrorist organisations, far-right extremists' ability to plan and orchestrate more sophisticated attacks is limited.

Economic decline, high costs of living and increasing polarisation in Western societies could provide a breeding ground for far-right extremist organisations and increase the threat in the longer term. □





DIGITAL VERSION:
ETJ.NO/FOCUS