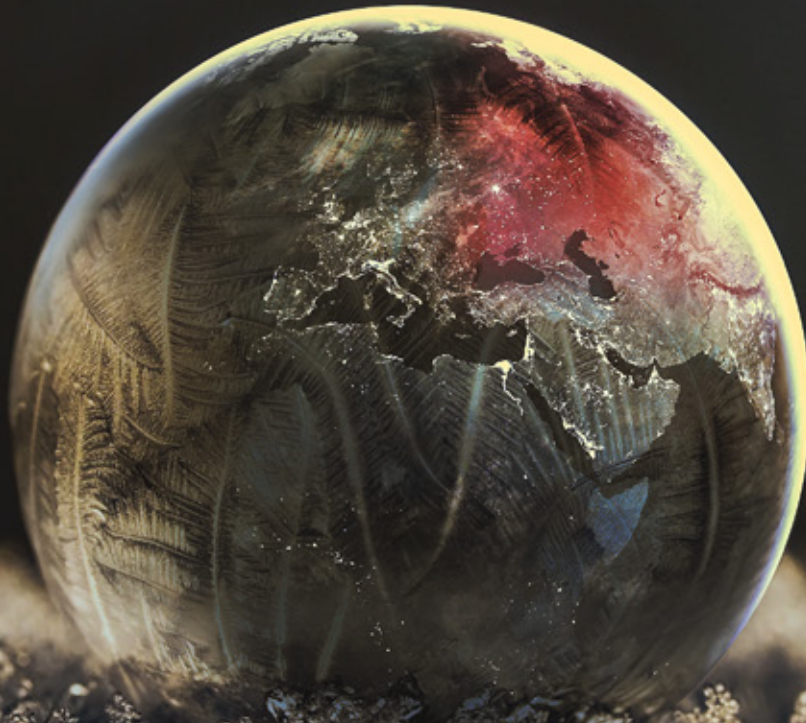




NORWEGIAN
INTELLIGENCE SERVICE



FOCUS 2023

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

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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 responsible for preventative national security. NSM advises and supervises the safeguarding of information, systems, objects and infrastructure of national significance. NSM also has a national responsibility to detect, alert and coordinate responses to serious ICT attacks. In its report *Risiko*, NSM assesses the risk environment of national security. In the report, NSM assesses in what way vulnerabilities in Norwegian businesses and functions in society influence the risk environment, with the NIS and PST assessments of the threat environment in mind. The report also recommends measures to reduce risks connected with activity that threatens security.



International terrorism

Simple attacks carried out by individuals with no direct ties to established extremist organisations continue to pose the most likely terrorist threat in Europe and Norway.

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A strategic mistake

The Russian armed forces are in a quagmire in Ukraine, but Russia sticks to the goal of gaining political control of the country. At home, Putin's regime will struggle to maintain stability.



China remains on the offensive

At the start of 2023, Xi is China's undisputed leader and expected to maintain his position of power beyond the next five-year term. Meanwhile, the Communist Party faces greater challenges.



Conflict areas

In 2022, de-escalation processes in the Middle East have enabled initiatives of trust between regional rivals such as Iran and Saudi Arabia, though there are still contentious issues that prevent a full normalisation of relations in 2023.



Last year when Focus went to print, the massing of Russian forces and attack plans against Ukraine was extremely worrying. As we finalise this year's edition, we look back on a year with war in Europe.

Russia's invasion of Ukraine on 24 February 2022 marks a watershed for Europe. What Russia thought would be an easy takeover of Ukraine has turned into a war of attrition, with terrible losses on both sides. The morale of the Ukrainian people is phenomenal. The sufferings are enormous. For Russia, the so-called 'special operation' has been disastrous, and it will mark Russia's political, military and economic development for many years to come.

Russia's invasion of Ukraine signifies a permanent rupture with the West. The invasion has clearly shown what kind of threat Russia represents to its neighbours and to NATO. Russia is conventionally weakened, but no less dangerous. Russia will rebuild its military capabilities; the Kremlin has few other instruments of power than its armed forces to pursue its great power ambitions.

The war in Ukraine also challenges the idea that closer economic interaction reduces the risk of conflict between countries. Interaction also creates vulnerabilities and exposes dependencies on supply chains, which can be used for extortion. By cutting off gas supplies to Europe, Russia seeks to sow division in the West and undermine Western support to Ukraine. The economic repercussions of the war are felt across Europe.

Much of Focus 2023 is dedicated to Russia and the war in Ukraine. However, there are other developments which also affect Norwegian security. Rivalry between China and the United States is growing, and what happens in China is increasingly important to Norway. Although the terrorist threat against the West is generally lower than it was a few years ago, the tragic attack in Oslo last summer was a reminder of how real the threat from extremists still is.

Vice Admiral Nils Andreas Stensønes
Director Norwegian Intelligence Service

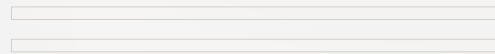
Editing concluded on 27 January 2023



A STRATEGIC MISTAKE

The Russian armed forces are in a quagmire in Ukraine. The invasion has exposed fundamental weaknesses in Russia's war machinery. Inadequate situational awareness and a poor coordination system within the armed forces are part of the reasons why Russia has failed to reach the invasion's objectives. What Russia initially described as a 'special operation' has turned into a war of attrition and a stalemate along a frontline of 2,500 kilometres.

Despite the setbacks, Russia maintains its overarching goal of toppling the government in Kyiv, destroying Ukraine's military capabilities and securing political control of Ukraine. For Ukraine, the war is a battle for the nation's survival. Unless we see significant changes in the trajectory of the war, any real negotiations seem improbable. The war will continue, with its brutality, high number of casualties and terrible suffering for Ukrainian civilians.



AT NATO'S BORDER

Because of their location, the Nordic countries will be strategically important in a conflict with NATO. The prospect of Swedish and Finnish NATO membership has created a security policy problem for Moscow.

O FRANZ JOSEF LAND



HUGE LOSSES

Approximately half of the initial Russian invasion force of 200,000 troops are dead or wounded.



A WEAKENED RUSSIA

As a result of the West's political and economic sanctions, Russia is left with few instruments of foreign policy and trade.



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A STRATEGIC MISTAKE

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Ukraine's advances in the autumn of 2022 represented a tremendous loss of prestige for Russia. The war will continue to weaken Russia's military capabilities throughout 2023. Incompetent leadership, lacking equipment and extensive losses on the battlefield demoralise the troops and reduce Russia's conventional capabilities.

Approximately half of the initial Russian invasion forces of 200,000 men are dead or wounded, and even though Russia has tried to offset the losses with a partial mobilisation, the land forces still lack offensive power. Russia has lost approximately 5,000 armoured vehicles, including more than 1,000 main battle tanks and 100 aircraft. In addition, Russia has depleted huge stocks of ammunition and other materiel; Russia is now reaching out to Iran and North Korea to secure resupplies.

Although the power of the land forces is significantly reduced, Russia's air and naval forces are largely intact, but the stock of precision-strike weapons has shrunk considerably.

The war has severe political and economic costs for Russia. The invasion has unified the West and driven Sweden and Finland to apply for NATO membership; the West is training Ukrainian soldiers and delivering

arms to Ukraine; Russia is subject to vast political and economic sanctions and has lost access to Western markets in the foreseeable future.

Nevertheless, there is no indication that Putin is altering his course in Ukraine. In the absence of military progress, Russia has changed its strategy, directing precision-strike weapons at Ukrainian critical infrastructure to weaken the Ukrainian resistance. Russia is still willing to accept huge losses and has the ability to escalate both in Ukraine and against the West.

Western military support remains crucial to Ukraine

Ukraine's will and ability to withstand the Russian attack was crucial in the first phase of the war. The West's political and military support in the form of weapons deliveries and training are now crucial to the further development of the conflict. Already in the lead-up to the war, Russia tried to deter the West from getting involved, adding pressure by cutting gas supplies to Europe. Russia has not succeeded with this strategy. →



Ukrainian soldiers walk among burned-out Russian tanks in Bucha outside Kyiv, 3 April 2022. Russia has suffered great personnel and materiel losses in Ukraine.



Image: Russia could deploy MiG-31 combat aircraft armed with hypersonic Kinzhal missiles to the Baltic Sea. Kinzhal can be armed with both conventional and nuclear warheads.

Russia's nuclear doctrine

Russia's nuclear doctrine is a partially public framework for when and how Russia could make use of nuclear weapons. The doctrine defines two central criteria for such use:

1) if an adversary uses nuclear weapons or other weapons of mass destruction against Russia or its allies, or 2) if a conventional attack threatens the existence of the Russian state.

The Kremlin is deliberately creating uncertainty about the Russian will to use nuclear weapons. If a conflict escalates into a regional war that involves NATO, then Russia could make use of nuclear weapons on grounds that the war is threatening Russia's existence, in which case so-called demonstrative use of tactical nuclear weapons could be an option.

Deployment of advanced weapons systems

Russia has long been threatening to deploy long-range precision-strike weapons and hypersonic missiles along the border areas with NATO. In August 2022, Russia announced the deployment of three MiG-31 fighter aircraft equipped with the hypersonic ballistic missile Kinzhal to Kaliningrad. The aim, according to Russia, was to ensure strategic deterrence against NATO in the region.

It is still a Russian aim to undermine the West's will to support Ukraine. The Kremlin sticks to a policy of confrontation with the West, without any will to compromise. The pressure campaign against Europe's energy supplies will continue, also by using new means.

The situation will remain unstable. As long as Russia fails to make progress in Ukraine, there is a risk of escalation. Moscow will continue to create uncertainty about its potential use of nuclear weapons. Russian strategic signalling and deterrence will persist in the form of threats and deployment of strategic and conventional forces along NATO's flanks. This will have an impact on the areas close to Norway.

NATO enlargement increases importance of areas close to Norway

The plans for Swedish and Finnish NATO membership have created a security policy problem for Moscow. The geographic location of the Nordic countries is central to Russia in the event of a conflict with NATO, since the region is close to Russia's core areas in the west and north-west. A NATO enlargement will also increase the importance of the Baltic Sea region. The enlargement implies that the length of Russia's border with NATO is doubled from 1,200 to 2,600 kilometres. This has ramifications for the Western Military District and the defence of the strategic base complexes on the Kola Peninsula.

After suffering considerable losses in Ukraine, Russia now has few available land forces to counter a NATO enlargement, but for the time being, Russia can regroup personnel from units in other regions and reinforce the border guard service. However, this does not constitute a real strengthening of Russia's overall defensive capabilities. The fact that Russia has chosen to redeploy its

land forces away from Russia's entire border with NATO shows that the Kremlin does not consider the threat from NATO to be imminent.

In the meantime, Russia could resort to demonstrations of military capability, deterrence and aggressive rhetoric to communicate its strategic interests in the Nordic countries and the Baltic Sea region.

Political development

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Russia is still controlled by a Putin regime that appears to be stable. However, it will become more of a challenge to maintain stability in 2023. Putin's fate is tied to the developments in Ukraine. The regime has minimised the possibility of organised resistance. The costs of voicing any dissent in Russia is extremely high, both for the elites and the population. All prominent opposition figures have either been jailed or forced to flee, leaving people with no political alternatives to turn to at the moment. Putin also controls the Russian media. Nevertheless, the war in Ukraine has several ramifications that affect the population and elites, which also increase the likelihood that something will challenge the Putin regime in 2023.

Russia has serious economic challenges; the effects of the sanctions are already felt across the country and will be felt even stronger by the population and the elites in 2023. Thus far, the authorities have handled the economic decline, but people's living conditions will now deteriorate faster than they have in recent years. Many people in the elites will suffer economic losses. Several members of the Russian elite have so far →



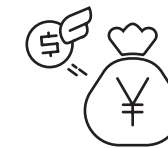
Riot police detain a protester in Moscow, 21 September 2022. The entire Russian population feel the impact of the war.



Regime faces major challenges



Maintaining regime stability in 2023 will be difficult



Cooperation with China will not cover export revenue losses



The entire population feel the impact of the sanctions

avoided speaking about the war, but the Kremlin will be pressing harder for them to express public support of the war. As a general rule, the Kremlin accepts no criticism of the war or Putin. However, some nationalists have been able to publicly criticise the way the war is being fought. This has highlighted some of the discrepancies between the official narrative and the realities in Ukraine. The regime risks losing control of how people perceive the war. The risk will increase if a growing number of people's friends and family members are enlisted as a result of new mobilisation efforts. If casualty numbers increase and the government fails to pay compensations to the bereaved, this could bring about more discontent. In 2022, Russia mainly drafted soldiers from rural areas to the war. This has been a strategy by the regime to curb resistance to the war in the more resourceful and densely populated regions. With further mobilisation, the regime will not be able to uphold this distinction.

A growing number of young Russians are emigrating, fleeing mobilisation and growing economic problems. Hundreds of thousands have already left the country, and the trend is expected to continue. The highly educated are the first ones to leave. This

could ease the pressure on the regime to some extent, since many critical voices are leaving Russia. However, emigration will undermine Russia's long-term economic and technological development and its ability to keep important functions in society running. The full impact will start to hit Russia in 2023.

The war in Ukraine also has ramifications for several other former Soviet states. Russia considers these countries to be part of its sphere of interest and influence. The economic decline in Russia affects trade and work migration from these countries, amplifying pre-existing cleavages. Political and economic unrest could challenge Russian control. In a country already stretched on resources, such a development would constitute a strategic vulnerability.

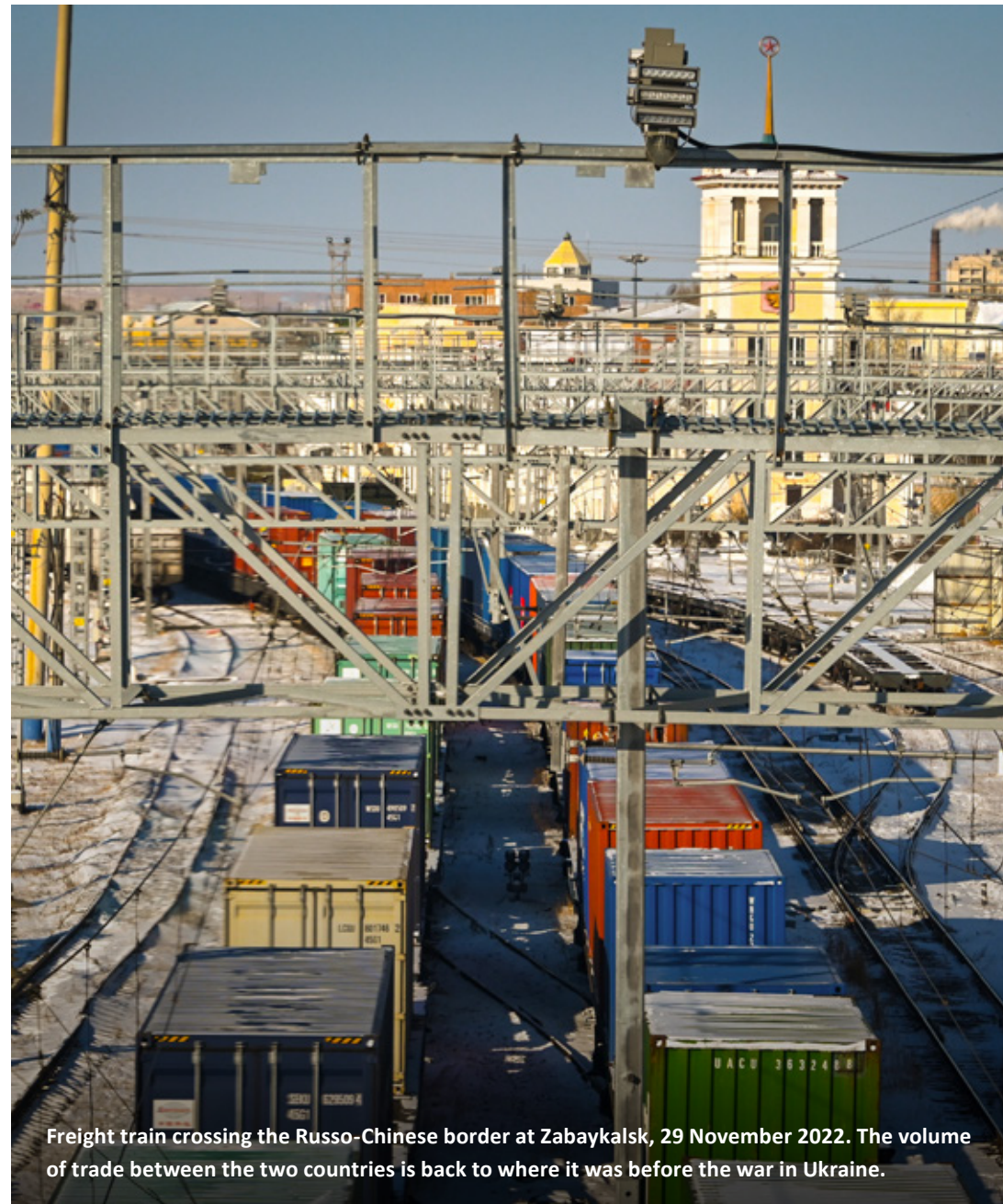
Russia tries to undermine Western unity

Due to the West's political and economic sanctions, Russia is left with few foreign policy and trade policy tools. The expulsion of Russian diplomats has consid- ➔

Image: President of Russia, Vladimir Putin, speaks at an event to celebrate the annexation of occupied territories in eastern Ukraine, 30 September 2022.

■ **A permanent rupture with the West**

Moscow is prepared for a permanent rupture with the West. Russia has been banished from several cooperation entities, and its diplomatic presence in several Western countries has been reduced. At the same time, Russia is setting its sights on non-Western countries and partnerships that exclude the West, such as BRICS and SCO. The aim is to challenge what Russia refers to as an American hegemony and build a multipolar world order which, to a greater extent, safeguards Russian interests.



Freight train crossing the Russo-Chinese border at Zabaykalsk, 29 November 2022. The volume of trade between the two countries is back to where it was before the war in Ukraine.

erably restricted Russian security and intelligence services' freedom of action in Europe. Russia is therefore expected to intensify its use of network operations for influence and intelligence purposes.

Russia is seeking to undermine Western unity and will to support Ukraine by exerting pressure on the energy sector of Europe. The Kremlin considers the European export market lost and will continue to attack Europe's economy by cutting off gas supplies. As Russia gradually runs out of options, there is a growing possibility that Russia will try to harm energy supplies from other countries.

Energy and trade cooperation with China will not compensate for export revenue losses

To the Kremlin, Russia's partnership with China is important to ease the impact of the sanctions and stabilise the Russian economy and, in turn, the regime. Russia's invasion of Ukraine has not changed Beijing's view that the partnership is necessary. The Western sanctions against the energy and transport sector, and the fact that Russian infrastructure towards Asia is limited, make it challenging for Russia to redirect its gas exports to these markets. Russia will try to speed up the construction of the gas pipeline 'Power of Siberia 2'. This pipeline is to connect the Russian production of gas in western Siberia to China via Mongolia, but it will take many years to complete.

Russia will manage to redirect a considerable share of its oil exports to China, India and other countries outside the sanctions regime, but this will be less profitable. The oil will mainly be shipped from ports in the Baltic and Black Seas, at a considerable discount.

In general, Russia's export revenues will shrink as a result of a drop in oil prices due to lower global economic growth.

China is the actor that can compensate the most for Russia's loss of energy exports to Europe. However, although the Russian authorities will describe the shift from Europe to Asia as a success, Russia's negotiating position vis-à-vis China will be weakened. Beijing will exploit the situation to its advantage.

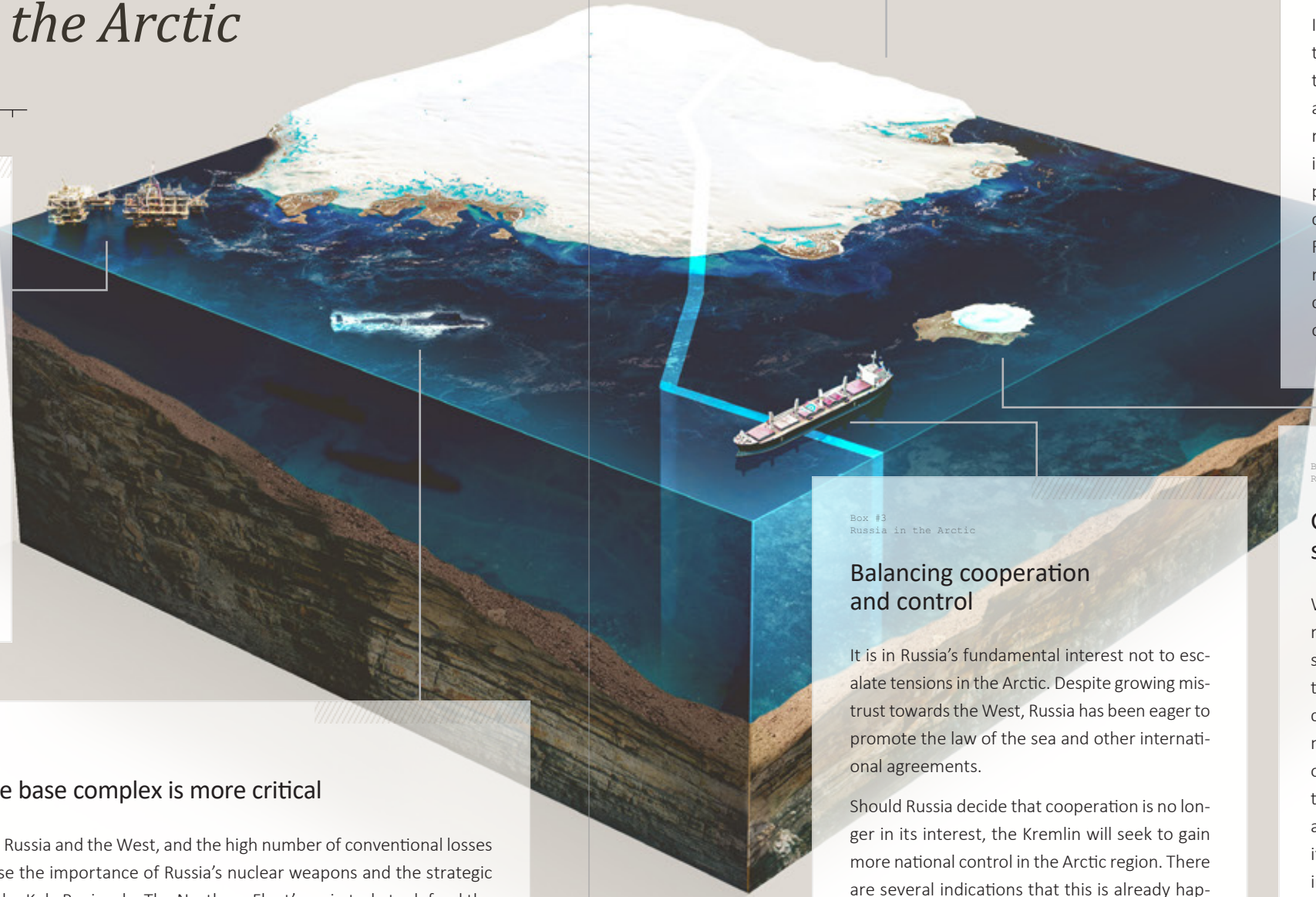
The Middle East and Asia become more important to circumvent sanctions

In addition to the great Asian economies, the Middle East will be an area where Russia can secure access to export markets and reduce the impact of Western sanctions. Considering Saudi Arabia's key role in the OPEC Plus cooperation and the United Arab Emirates' will to help Russia circumvent sanctions, the Russian authorities and businesses will try to improve their relations with the Gulf states.

Iran supports Russia with drones and missiles which strengthen Russia's capabilities in Ukraine, and Moscow will likely further strengthen its relations with Tehran in 2023. Iran also has an established network for trade with sanctioned goods, which Moscow needs. At the same time, Tehran is also subject to extensive Western sanctions. This will restrict Russia's ambitions to build infrastructure via Iran to bolster trade relations with China, India and Pakistan. In parallel, Moscow is strengthening its dialogue with North Korea, a country that can deliver considerable amounts of ammunition.

In-depth #001
Russia in the Arctic
Sources:

Russia in the Arctic



Box #4
Russia in the Arctic

Less predictable policy towards Norway

In Kremlin's view, Norway is part of the Western collective and as such an unfriendly state. In 2022, we saw more aggressive Russian actors, who normally do not handle matters relating to Norway, play a more active part in these affairs. There are few remaining diplomatic forums where Norway and Russia can meet bilaterally and multilaterally; thus, Russia's view of Norway and the prospects of regional and local cooperation will be more contingent on the overarching security policy climate than before.

Box #5
Russia in the Arctic

Greater need for state subsidies to Barentsburg

Western sanctions and Russian self-imposed restrictions have had severe economic consequences for Trust Arktikugol, the company that runs the Russian activity on Svalbard. The company is struggling to sell coal and has lost much of its income from tourism. Svalbard is of military strategic importance to Russia, and the Kremlin will prioritise a Russian presence also in 2023, despite the recession. Several initiatives indicate a stronger focus on tourism in 2023 which, in view of the economic situation, will make Trust Arktikugol more reliant on state subsidies.

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Box #1
Russia in the Arctic

Seeking investments from non-Western countries

Russia is signalling an ambition to intensify the development of the Arctic, but will likely have to cut its budgets. Moscow is particularly seeking non-Western funding of ambitious energy projects. Potential investors will be wary of Western sanctions. China will remain Russia's most important partner. Russia seeks to restrict China's footprint in the Arctic, but depends on larger Chinese involvement to fulfil its ambitions.

Box #2
Russia in the Arctic

Defending the base complex is more critical

Tensions between Russia and the West, and the high number of conventional losses in Ukraine, increase the importance of Russia's nuclear weapons and the strategic base complex on the Kola Peninsula. The Northern Fleet's main task, to defend the bases on the Kola Peninsula and exercise deterrence with strategic submarines, becomes more important. Since most of the land forces have been redeployed away from the Kola Peninsula, this task is now primarily solved with naval and air forces.

NATO operations in the High North will be met by Russian military activity to maintain the Northern Fleet's situational awareness, perform strategic deterrence and demonstrate credible naval and air defence capabilities against allied operations. So far, there are no changes in the Russian response to allied activities in the High North.

Box #3
Russia in the Arctic

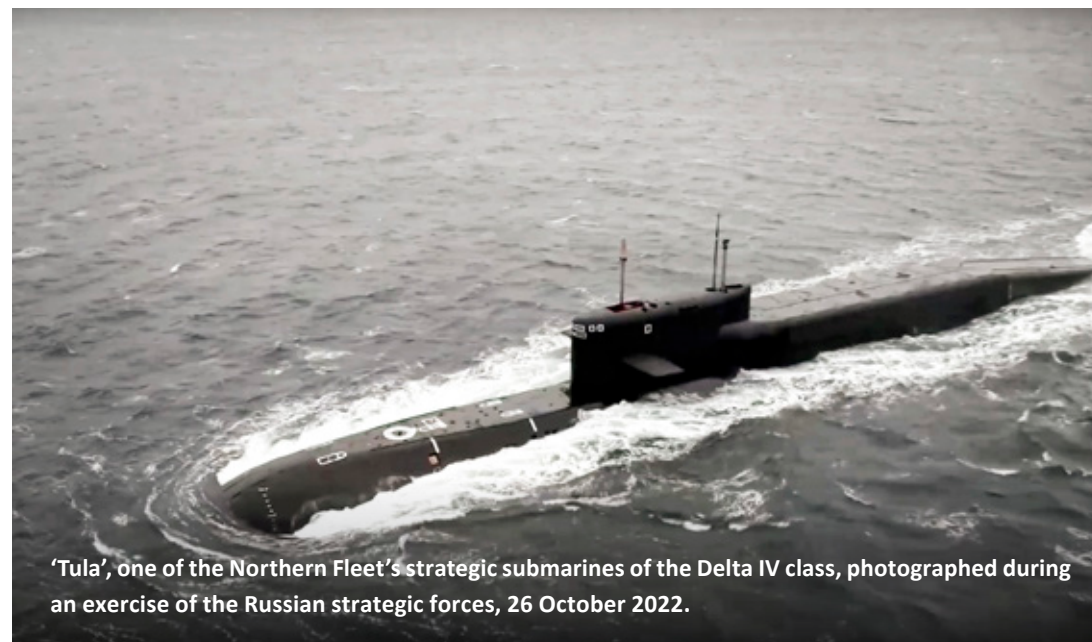
Balancing cooperation and control

It is in Russia's fundamental interest not to escalate tensions in the Arctic. Despite growing mistrust towards the West, Russia has been eager to promote the law of the sea and other international agreements.

Should Russia decide that cooperation is no longer in its interest, the Kremlin will seek to gain more national control in the Arctic region. There are several indications that this is already happening. In December, Russia passed a law that is to warrant control of foreign state vessels along the Northern Sea Route. Furthermore, the Arctic is defined as a 'vitally important' area in Russia's new maritime doctrine, which allows for use of military means to safeguard Russian interests.



The destroyer Severomorsk photographed in the summer of 2019. The Northern Fleet's mission remains the same as before the war in Ukraine, and the naval forces are essentially intact.



'Tula', one of the Northern Fleet's strategic submarines of the Delta IV class, photographed during an exercise of the Russian strategic forces, 26 October 2022.

Military developments

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Russia's standing conventional forces have been significantly weakened throughout the war in Ukraine, and most of the troops left are tied up in the war. Russia has run through three fourths of its modern surface-to-surface missiles in Ukraine. However, Russia has large reserves of military materiel, particularly of the older kind. A lot of this will now be used, but it will take several months to make the materiel ready for operational use and build up new units. Russia's nuclear capabilities, on the other hand, are the same as before the war, and air and naval forces are mainly intact.

In 2023, the defence budget will increase by 34 per cent, which will add more pressure on the Russian economy. The defence and justice sectors combined now constitute approximately one third of Russia's state budget. As Russia's conventional capabilities are weakened, nuclear weapons have become significantly more important. Thus, the Russian Strategic and Regional Deterrence Forces have become ever more important to the Russian armed forces. The Northern Fleet's strategic submarines are a crucial part of Russia's nuclear capabilities. We see no change in the armament of Russian surface combatants in the Northern Fleet.

Tactical nuclear weapons are a particularly serious threat in several operational scenarios that could involve NATO countries. In addition, Russia has subsea capabilities, anti-satellite weapons and cyber means that could threaten Norway and NATO. Since the importance of nuclear weapons and the Strategic Deterrence Forces is increasing, so does the North-

ern Fleet's defence of the military bases on the Kola Peninsula, the Northern bastion and the Barents Sea.

Russian decisions are marked by strong mistrust in Western intentions. Western responses to the invasion of Ukraine have enhanced this perception. Thus, the risk of misunderstandings between Russia and NATO and of unintentional incidents is growing, which in turn enhances the risk of escalation.

The Northern Fleet's main mission remains the same

Like many other Russian units, the land forces on the Kola Peninsula have suffered considerable personnel and materiel losses in Ukraine. Approximately three battalion groups counting more than 3,000 troops have been sent into battle; nearly half of them have been lost. In addition, the Northern Fleet may have lost up to one hundred main battle tanks and infantry fighting vehicles. The Northern Fleet has also sent surface ships to the eastern Mediterranean and landing ships to the Black Sea to support the invasion. Many of these vessels are expected to remain in these areas of operation in 2023. Land forces trained on the Kola Peninsula will still be sent to Ukraine as replacement personnel; these troops are trained as light infantry. Most of the land force materiel has been moved from Kola.

The Northern Fleet's naval forces will still conduct routine fleet exercises, long-term submarine patrols in the Barents Sea and submarine operations in the Atlantic. The addition of new quiet-running multirole submarines increases the fleet's capabilities in the Norwegian Sea and Atlantic Ocean. At the same time, the new maritime doctrine released in the summer of 2022 indicates that Russia has ambitions to increase its presence in the Arctic, Asia, the Pacific and the



Image: Russian troops on the battlefield in Ukraine, summer of 2022. Russia's military operations and destructive network operations seem poorly integrated.

Russian network operations in Ukraine

In the first months of the war, Russia carried out at least 40 successful destructive network operations. The purpose was to disturb, confuse and overwhelm the Ukrainian authorities and to weaken Ukraine's general ability for resistance. The operations targeted Ukrainian government websites, energy and communication providers, financial institutions and media outlets.

So far, Russia's destructive network operations appear to be poorly integrated with military operations and have had limited impact on the war itself. Ukraine has had a well-functioning cyber defence. In cooperation with private actors, and with support from allies, Ukraine has prevented and held off a high number of Russian destructive network operations. Russia's failures on the battlefield indicate that the internal flow of information is not working, which makes coordination difficult.



Ambitions unchanged, despite huge losses



The Kremlin's ambitions to control Ukraine remain unchanged



Older military materiel is brought out to replace weapons that have been depleted or destroyed



A weakened Russian conventional capability increases the importance of nuclear weapons

areas around the Indian Ocean. The main mission of the Northern Fleet's air forces is only marginally affected by the Ukraine war. The number of aircraft on the Kola peninsula remains mainly as before. The air forces' training year and activities are expected to be carried out more or less as normal, focusing on routine exercises and air defence operations.

Patrols with Russian strategic bombers in areas close to Norway are likely to occur, but there has been a downward trend, as most of the aircraft are caught up in the Ukraine war. However, temporary deployments of strategic bombers to the High North and the Kola Peninsula have occurred in 2022 and will continue in 2023.

Extensive use of long-range precision-strike weapons

Russian forces have used modern long-range precision-strike weapons against Ukraine in a high tempo. Particularly ground-launched missiles have been used extensively. The precision-strike weapons are a vital part of Russia's defence and deterrence strategy

towards NATO, and Russia will have to keep the majority of the remaining missiles as a strategic reserve. Therefore, the use is expected to go down. It will take years for the Russian arms industry to replace the missiles. In the meantime, Russia's military capabilities and capability for controlled escalation and deterrence will decrease.

Replacement of lost materiel hampered by Western sanctions

Russia's extensive loss of personnel and materiel will have considerable impact on its armed forces for many years. Moscow still has great ambitions for developing the Russian armed forces, in line with Russia's materiel plan and armament programme GPV 2027. However, the war complicates this. Even before the invasion of Ukraine, Russia was one of the countries in the world that spent the highest share of GDP on the military; according to the SIPRI Institute, Russia spent approximately NOK 650 billion, i.e. 2.9 per cent of GDP in 2021. In 2023, the defence and justice sector will constitute approximately one third of Russia's budget. →

■ Russia's dependence on imported technology

Russia relies on imported technology to maintain and develop its military capabilities. Western technology is preferred, and Russia needs everything from maintenance components to advanced systems ready for use.

Russian procurement networks have proven adaptable in their efforts to bypass Western sanctions and export controls, and the Russian intelligence and security organisations are involved in these processes. In Norway, manufacturers of maritime technology and sensor technology are among the businesses that are especially exposed to Russian procurement efforts.

Because of the Western sanctions, Russia will be more inclined to use third countries to carry out procurement activities. The number of concealed and covert procurement attempts by Russia is expected to increase in 2023, and Russian actors will continue to use Norway as a transit country for procurement from other Western countries.

After Russia's invasion of Ukraine, Russian companies are, for all practical purposes, banned from buying into European enterprises and taking part in other procurement processes. Large quantities of Russia's foreign exchange reserves are frozen. Restrictions on exports, financing and settlements force Russia to make transactions via third countries.

Microelectronics production at the Research Institute of Electronic Engineering (JSC NIIET) in Voronezh, Russia.





The greatest obstacles to replacing the materiel lost in the war, however, are not budgets and funding issues, but lack of access to Western technology because of the sanctions regime. Many advanced weapons systems, from missiles and combat aircraft to submarines, contain Western components. Already in 2023, the Russian military industry will struggle to cope with the sanctions. Filling the void with self-production will be very difficult. Setting up new production lines is an elaborate process, and it takes time to train a new workforce. Russia will seek to acquire alternative components through covert procurements, imports from friendly countries and via third countries. However, the Russian arms industry still has great production capacity and the ability to produce small arms, missiles, main battle tanks, combat aircraft and naval vessels built using Russian and Soviet technology.

Development and testing of highly prioritised weapons systems will continue

Development of highly prioritised Russian weapons systems and platforms will continue at reduced capacity. The Strategic Deterrent Forces still have the highest priority. Development and testing of new long-range precision-strike weapons, ballistic and hypersonic missiles and anti-satellite weapons will continue.

Completion of new strategic submarines of the Dolgorukiy class and multirole submarines of the Severodvinsk class are also highly prioritised in Russia's modernisation programme. Both types have been deployed to the Kola Peninsula and more are expected to come in the next five to ten years. Russia has started testing the hypersonic anti-ship and land-attack missile Tsirkon from Severodvinsk submarines.

The system is nearing the end of its development and test phase, and has previously been tested from surface vessels. Russia is also developing the new intercontinental missile Sarmat, which is being tested at Plesetsk, south of Arkhangelsk.

Russia will also continue to develop the autonomous torpedo system Poseidon, which could be tested in the Arctic Ocean some time in 2023. Poseidon has nuclear propulsion and intercontinental range and can also be equipped with a nuclear warhead. Testing of the cruise missile Skyfall will also continue. This missile is developed to be nuclear-powered, with a very long range and better ability to overcome missile defence systems. Additional tests from Novaya Zemlya are expected. It will take several years to make both these systems operational.

Russia is expected to give priority to developing weapons based on new technology, such as autonomous unmanned air, land and sea platforms, advanced systems for electronic warfare and cyber capabilities. Russia will have to acquire a lot of the technology from non-Western countries, primarily China and other countries that do not take part in the sanctions regime against Russia.

Russia remains the main nuclear threat to NATO

In a context of lasting tensions between Russia and the West, Russia will continue to pose the greatest nuclear threat to NATO, hence also Norway. The possibility of a local war that escalates into a wider military conflict involving Russia, the US, NATO and Norway cannot be discounted.



Image: At the opening of the propaganda exhibition 'Ukraine: At the Turns of Epochs' in Yekaterinburg, 12 January 2023. Information confrontation also means to present history in a way that concurs with Kremlin propaganda.

Information confrontation

'Information confrontation' is a comprehensive approach to network and influence operations, rooted in Russia's national security strategy (2021). It has two components:

- Information-technical effects, which involve cyber operations, but also other forms of communication collection. These could be collection operations, but also acts of sabotage.
- Information-psychological effects, which involve attempts to influence people's perceptions and attitudes. They can be conducted in both digital and physical domains.

Russia will maintain, modernise and further develop its nuclear arsenal, though we do not expect any significant changes to the Russian nuclear doctrine in the coming years.

Russia has the ability to use chemical and biological weapons

Russia still has the ability to develop chemical and biological weapons, as it had in Soviet times. Although Russia has agreed to international conventions that restrict the production and ban the use of such weapons, there are examples of non-compliance.

Russian service personnel are responsible for the poisonings of Sergei Skripal, a former officer in the military intelligence service GRU, in Salisbury in 2018, and the political dissident Alexei Navalny in Tomsk in 2020. The assassination attempts demonstrated that the Russian regime is willing to use nerve agents developed for military use to intimidate defectors and opponents. Use of chemical or biological weapons on a larger scale is less likely.

Technology, intelligence and influence

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Russia's model for complex use of means is built on Soviet strategic thinking and has later been founded on concepts such as 'information confrontation'. This

concept builds on the idea that Russia and the West are in a continuous information battle, where the West tries to destabilise Russia.

Russian intelligence and security services play a crucial role in Russia's complex use of means, and in recent years they have been through a substantial reorganisation process. Russia's ability to influence Western opinion is considerably reduced because of the war in Ukraine, and Russia's use of means now has to be covert to a larger extent – i.e. Russia tries to conceal its role. As a result of the war, Russia and the West have fewer forums for interaction and contact. The digital domain has become more important for Russia's use of means. Russia's military doctrine is based on a concept that network operations are included in both strategic information campaigns and military operations.

Intelligence

The civilian and military Russian intelligence and security services both work on matters concerning Norway. These services are adaptable and have considerable resources. They conduct intelligence collection in the digital domain as well as from space, ground, air and sea – where they also use civilian ships for intelligence operations. Civilian ships have unique access to areas close to Norway, and any intelligence activity they may perform, in addition to legitimate activities, can be difficult to detect. After Russia's invasion of Ukraine, several illegals ('deep-cover' spies) have been exposed in several European countries.

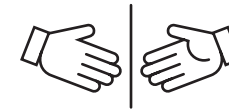
Russian actors seek information on Norwegian policy formulations, especially on defence, foreign affairs, security, the Arctic, Svalbard and the energy →



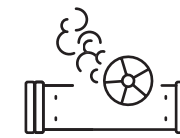
Children use flashlights during a literature club meeting at a library in Irpin, north of Kyiv, 23 December 2022. Russian strikes against civilian infrastructure disrupt the power supply many places in Ukraine.



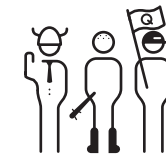
Complex use of means



As a result of the war, Russia and the West have fewer forums for interaction and contact



Russia cuts gas exports to Europe and spreads disinformation



Anti-government and politically extreme communities are more exposed to influence attempts

sector. The Norwegian Armed Forces, military readiness plans, military infrastructure and allied activity are also targets of interest.

In terms of technology, Russia is showing a keen interest in companies with unique expertise and technology, for instance in the arms industry and maritime sector.

Influence activities

Influence operations are an integral part of Russian doctrines for information warfare. The decision to cut off gas exports to Europe is underpinned by public messages and disinformation in Russian state media and seemingly independent news sources which are in fact controlled by the Russian government. In this way, Russian narratives are spread through Western information networks, often by messengers unfamiliar with the information's origin.

A well-known Russian tactic is to spread tailored messages and disinformation to selected target groups

with the aim of altering another country's policies. Questions related to defence and security policies are especially vulnerable to Russian influence activities in Norway. Another tactic is to heighten the level of conflict in society by focusing on controversial issues. This happened during the 2016 presidential elections in the United States. A third tactic is to bombard the media with different theories and untruths about an incident or a case. The aim then is not to convince, but to sow doubt about the truth and undermine people's trust in the authorities and national media.

Increased vigilance in the Western population makes it harder for Russian influence actors to succeed. They have to adjust both their methods and target sets to have an effect. Anti-government groups, radicals and groups that engage in what could become highly contentious issues will be more exposed to influence attempts. In general, expert communities that work with matters of importance to Russia, such as Norway's security and defence policies and weapons support to Ukraine, will remain targets of interest to Russian influence activities. □

Russian military power and areas close to Norway

A TEN-YEAR PERSPECTIVE



The Arctic becomes a stage for great power rivalry

The war in Ukraine has reinforced Russia's need to consolidate its security interests in the Arctic. This is due to a heightened threat perception in Russia now that its conventional capabilities are weakened and also a belief that the Arctic cannot be separated from the confrontation with the US and NATO. This could lead Russia to mark its red lines and react more vehemently in the face of perceived threats. If push comes to shove, Russia could abandon its low-tension policy. In the areas close to Norway, the potential for conflict is persistent.



Norway's geopolitical value is increasing

Developments over the past year have clarified the image of Norway in Russia's threat perception. This has to do with the increased importance of the nuclear arsenal on the Kola Peninsula, but most of all because of Sweden and Finland's accession to NATO. While Russia has seen Norway as a stepping stone for allied projection of power in the north, the NATO enlargement will tie Norway directly to the Baltic Sea region – one of Russia's most important operation theatres. With Swedish and Finnish NATO membership, Russia will attach greater importance to Norwegian ocean areas, territory and infrastructure. In the longer term, Russia will counter the NATO enlargement by changing its force deployment along Russia's northern and north-western border.

The geopolitical value of Norway is not just about geography; in the foreseeable future, Europe will depend on Norwegian energy supplies. Such a view of Norwegian targets will underlie Russia's use of means in peace, crisis and war.

In-depth #002.1
Russian military power and areas close to Norway
- a ten-year perspective

Sources: ██████████ ██████████

Russia's invasion of Ukraine has sparked a lengthy conflict between Russia and NATO, which impacts all sectors and geographical areas where Russian and allied interests meet, not least in the Arctic and the Baltic Sea region. The Norwegian Intelligence Service's assessment of potential future developments can be summarised in eight points.



Russia becomes a more unpredictable neighbour

A Russia that is unstable could also mean that Russian decision-making processes concerning Norway and areas close to Norway become less predictable. In Moscow, Norway is seen more as part of a Western and aggressive collective and less as a neighbouring country with whom Russia has common interests.

In addition, Russia's diplomatic efforts in the West are scaled down. A long-term consequence of this development could be that expert communities and civil service branches that have dealt with Norway until now will have less influence. This could affect Russia's understanding of Norwegian politicians' viewpoints and increase the likelihood of misunderstandings.

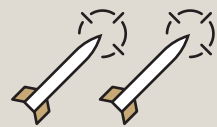


Russia will prioritise the rebuilding of Strategic Deterrence Forces

Long-range precision-strike weapons are a key element in Russia's strategy of deterrence and warfare against NATO, and has been a priority for a long time. The extensive use of such weapons in Ukraine is therefore an unfavourable development for Russia. Despite economic decline and sanctions, such systems will be prioritised and funded in the time ahead, underpinned by espionage and covert technology procurements. The stocks of precision-strike weapons are expected to return to pre-war levels in five to ten years.



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 Norwegian Intelligence Service
 In-depth: Russia
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Russian doctrine still based on surprise and initiative

A central aspect of the Russian military doctrine is a rapid pre-emptive strike to knock out critical targets far into enemy territory. For Ukraine, as the weaker party in nominal terms, mobility and the dispersion of critical defence installations such as anti-aircraft have proven decisive. Nevertheless, despite failed attempts in the north and around Kyiv, Russia is more successful in southern and eastern Ukraine. Hence, it is more likely that Russia will try to further develop the strategy of assault rather than discard it.

Russia had planned an occupation of Ukraine, and initially the ambition was to take over as much unharmed infrastructure as possible after the invasion. Attacks on critical civilian infrastructure to demoralise the adversary was only introduced at a later stage in the war. In the event of an attack on Norway and NATO, however, destroying such targets will be a priority early on, and warning times will be very short.

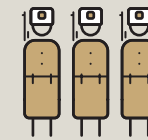
In-depth #002.2
 Russian military power and areas close to Norway - a ten-year perspective
 Sources: ██████████ ██████████



The regional warfare and deterrence of the Russian Armed Forces will rely on nuclear weapons and asymmetrical capabilities

While Russia rebuilds its arsenal of conventional long-range precision-strike weapons, non-strategic nuclear weapons will have a more prominent role in Russia's regional defence. This role becomes all the more important if Russia faces overwhelming economic challenges in rebuilding its conventional military power. This means that the threshold for nuclear escalation becomes lower, also in areas close to Norway. Either way, a conflict with NATO will always have a nuclear dimension.

At the same time, Russia's asymmetrical capabilities, such as reconnaissance and sabotage capabilities under water, electronic warfare, anti-satellite weapons and naval mines, become more important. Hence, Russia has not become a less dangerous threat to NATO.



Russia becomes a less modern, yet powerful military force

While it is true that Russia's conventional military power is considerably reduced at the moment, it may not be true in a more long-term perspective. Certain elements of the armed forces' potential have not been fully utilised or challenged in Ukraine. Furthermore, we should expect the failed operation against Ukraine to bring about changes to the materiel and force structure, procurement plans, organisation and leadership. Provided that Russia is able to learn from and correct its mistakes, Russia's conventional fighting power will improve in the future.

Rebuilding the conventional forces will take five to ten years. In the meantime, economic limitations and lack of technology will induce production, repairs and modernisation of older, often Soviet materiel – which is both less modern and less reliable – but still powerful.



A Russia marked by unrest and instability

Over the next decade, the Russian elites will see an inevitable change of power and a generational change. This could play out in several ways. Whichever way it goes, we will see the elites jostling for power, most likely while public support of and trust in central and regional authorities declines. This, in combination with a demographic crisis and economic recession, could cause social unrest, fragmentation of the state apparatus and more regionalisation. In the end, it could lead to a collapse of the regime, or even civil war.

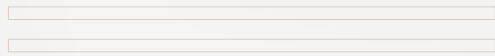
On the other hand, a more controlled transfer of power will nevertheless be marked by the war and involve a continuation of most of the current domestic and foreign policies of Russia. The Russian Armed Forces are expected to dominate future budgets. The Russian state will become even more authoritarian and militarised, with an effective propaganda machinery that seeks to mobilise the population to rally around the narrative of the regime. This will also be reflected in Russian foreign policy, where the bridge to authoritarian regimes is consolidated. Presently, there is no reason to believe that a fundamentally more democratic Russia will emerge over the next decade, or that the country's interests will become more compatible with the West's.



CHINA REMAINS ON THE OFFENSIVE

At the start of 2023, Xi is China's uncontested leader and expected to maintain his position of power beyond the next five-year period. After the party congress in October 2022, all the top leaders of the Communist Party of China (CPC) are Xi loyalists, and there are no contenders to the CPC's rule. The party's main objective is to maintain internal stability in China and the party's status as the only political alternative.

The covid-19 pandemic, extreme weather and the crisis in the property sector will still create economic challenges and China's growth rate will be lower than in previous years. Yet, economic strength will remain the country's most important instrument of power. The goal of playing a lead role, regionally and globally, and having a more China-oriented international system persists.



AN EYE ON NORWAY

Chinese actors have shown a keen interest in advanced technology, and over the past years they have managed to compromise Norwegian targets.



NATIONAL INTERESTS BEFORE GROWTH

The 'zero-covid' policy illustrates a recent trend where the Communist Party lets other interests go before economic growth.

XINJIANG

BEIJING

CHINA

TIBET

HONG KONG

TAIWAN

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Norwegian Intelligence Service
CHINA REMAINS ON THE OFFENSIVE
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INCREASED PRESSURE

With Hong Kong, Tibet and Xinjiang under political control, China can focus more on Taiwan and disputed ocean areas.



In order to avoid losing access to Western capital and technology, Beijing is expected to tone down both its confrontational rhetoric and economic coercion tactics. Cooperation with Russia will remain close; the volume of trade between the two countries is already back to the levels of before the Ukraine war.

Political developments

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China's national revival strategy rests on the concept of 'national security'. Regime security is overarching, but the term is broadly defined and includes for instance economic, technological and cultural security. China expects relations with the US to deteriorate and takes steps to reduce its own vulnerability.

The security focus is clear in the economic policy, which focuses on self-sufficiency and development of national technology. In the education policy, ideolog-

ical training is central. Xi is described as the 'core' of the CPC, a role established also by amendments to the party's constitution. Moreover, the party propaganda stresses Xi's ideological convictions, loyalty to the party and allegiance to Xi. Security of supply remains a priority, especially when it comes to energy, food and other crucial elements of the Chinese economy. The CPC also emphasises the need to bolster mechanisms that can offset foreign sanctions and trade restrictions; China has already passed legislation to this end. The regulations allow various penal sanctions, including lawsuits, against foreign actors who support what Beijing considers to be unlawful measures against Chinese actors.

The party will further tighten its grip on the civil sector, including trade and industry, in the years to come. Control over the party's disciplinary committee and the justice and security sector, especially the People's Liberation Army (PLA), will be a priority. After the party congress, Xi ties the intelligence service MSS and the internal police and intelligence service MPS closer to himself. In addition, more and more companies refer to the CPC and Xi in their bylaws. →



Delegates vote at the Communist Party of China's 20th Congress in Beijing, 22 October 2022.



Image: Crown Prince Mohammed bin Salman of Saudi Arabia receives China's President Xi Jinping in Riyadh, 8 December 2022. Saudi Arabia has been granted dialogue partner status at the SCO.

SCO

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

BRICS

BRICS is a collective term for *Brazil, Russia, India, China* and *South Africa* and these countries' increasing economic and political influence. BRICS is also the name of the countries' cooperation forum.

RCEP

Regional Comprehensive Economic Partnership is a free trade agreement between several countries in Asia and the Pacific region, including China, Australia, Japan, South Korea, Indonesia, Malaysia and Vietnam.

Securing Beijing's territorial claims will remain a high priority for Xi. As political control over Hong Kong, Tibet and Xinjiang is practically secured, Taiwan and disputed ocean territory will receive much attention.

There is little chance that dissatisfaction with social and economic conditions will erupt into collective resistance against the central government. The state's capability for surveillance and censorship combined with a legal system that criminalises any criticism of the regime makes any organised form of resistance difficult.

The Communist Party of China faces greater challenges

The consequences and handling of the covid-19 pandemic, extreme weather and the crisis in the property sector will continue to create economic challenges, and China's growth rate will be lower than in previous years. The CPC will be under pressure to handle growing youth unemployment. The property sector will no longer be an engine of economic growth, and climate change will affect food and energy security.

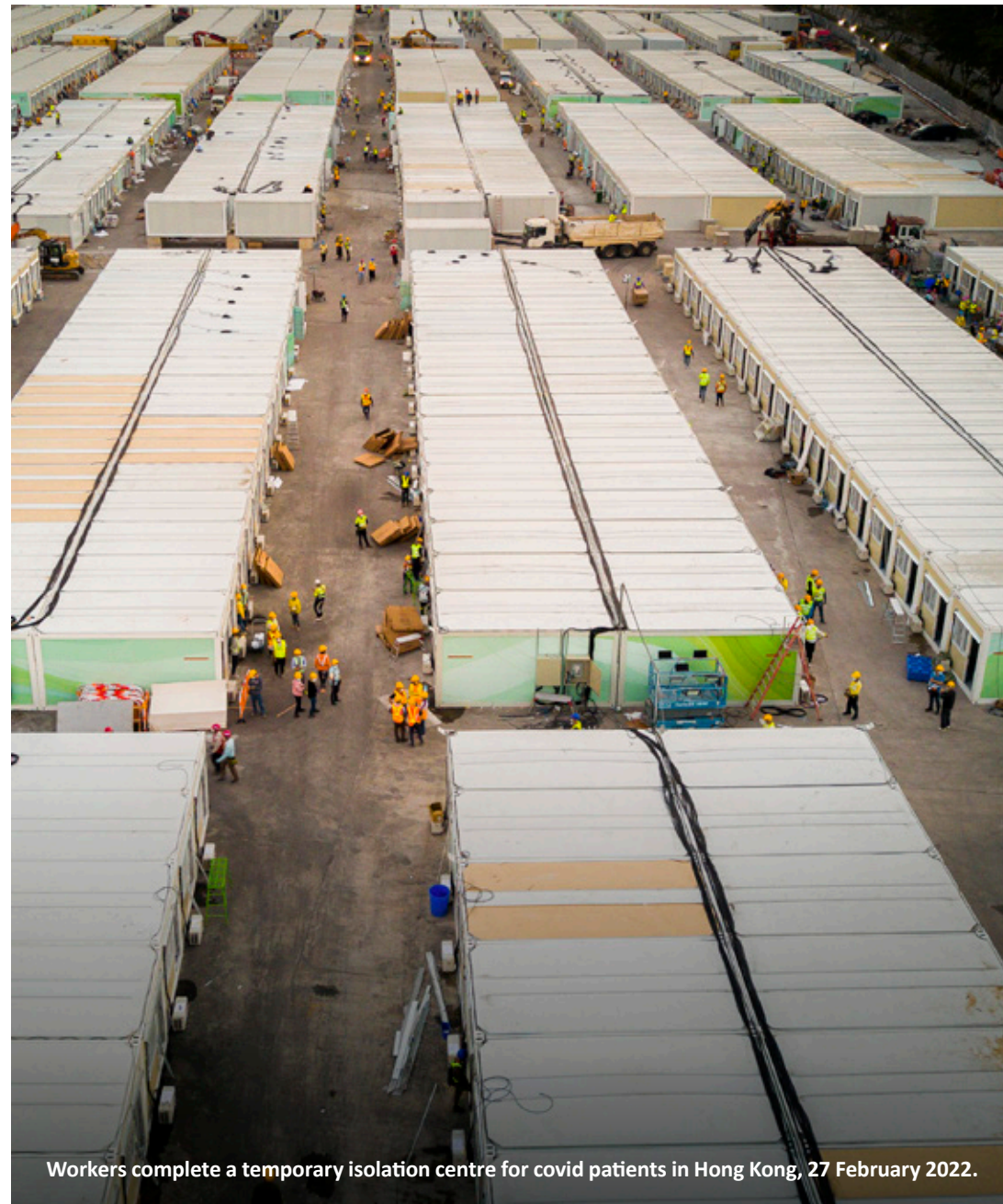
After decades of nearly double-figured economic growth, China's growth rate since 2015 has fallen to 5–6 per cent. To revive growth, the government has to increase private consumption, an undertaking that has proven difficult with all the covid lockdowns. With restrictions now largely lifted, infection rates have risen, limiting the production capacity and private spending, as many people stay at home to avoid getting infected. The economic activity will only stabilise when a greater share of the population has been vaccinated or exposed to the coronavirus.

The zero-covid policy China stuck to for a long time illustrates a more recent trend of the Communist Party of China to put other interests above economic growth. To a larger extent, the party has to use nationalism, ideological campaigns, information control and digital surveillance to secure popular support. Beijing will likely launch economic redistribution initiatives to renew the people's support to the party.

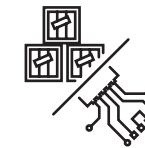
China's confrontational foreign policy will continue

China's goal remains to have a regional and global leading position and a more China-oriented international system. Economic strength remains Beijing's most important instrument of power, and it will continue to act on the rationale that the US follows a containment policy and forms alliances to counter Beijing. The Chinese authorities will seek to prevent American allies from aligning with the US's China policy. At the same time, Beijing seeks to increase its influence on international institutions. Beijing will strive to gather support in the UN and strengthen the international organisations where China is in power, such as BRICS and SCO. Beijing is expected to place more importance on cooperation with countries in the south. Some economic interaction has already shifted towards Asia and the Pacific region, partly to make China less economically dependent on the US. China currently imports more than twice as much from trade partners in RCEP than from the US and EU combined. Exports to Western countries remain high, but this is also changing gradually.

The Global Development Initiative (GDI) and the Global Security Initiative (GSI) are Chinese foreign policy initiatives developed to promote Beijing's foreign policy objectives. Both could increase China's



The path to global leadership



Self-sufficiency and national technology development are matters of security policy



Economic strength remains China's most important instrument of power



Beijing sticks to its ambition of a more China-oriented international system

global influence in the years to come. These initiatives tone down direct references to China, instead promoting economic cooperation and the policy of non-interference. Human rights issues are absent. The initiatives paint a picture of China's vision of global governance, and Beijing will use them to strengthen its role as a responsible great power and guarantor of global security and development. The Belt and Road Initiative will be oriented further towards investments in digital infrastructure and renewable energy. The initiative remains an important instrument for Beijing in its efforts to gain more global influence. China's market position in the south is bolstered by the fact that Chinese businesses use and promote Chinese technological standards. Despite the reduced speed of Chinese investments, especially since the covid-19 outbreak, China's loans and investments in countries in the south will be significant in 2023.

China wants to prevent a deterioration of its relations with Europe and reduced access to Western capital and technology. Therefore, it is likely that China will pull back on the obvious economic coercion tactics and 'wolf warrior' diplomacy and instead use a more congenial rhetoric. Due to increasing European awareness of the

security risks linked to Chinese investments, there are indications that new Chinese investments now tend to go through funds or Chinese-owned European companies. Some investments are likely motivated by a need for profitable investments of foreign exchange surplus, while others want to acquire technology. Especially start-ups and high-tech companies that can support China's industrial policy ambitions will attract Chinese investments. In Europe, renewable energy, maritime industry, electric vehicles, ICT, biotechnology, artificial intelligence and microelectronics are among the sectors that Chinese actors will continue to be interested in.

Beijing strengthens ties with Moscow

Russia is China's most important strategic partner. This is reflected in the joint statement regarding 'borderless cooperation' from 4 February 2022, and Russia's invasion of Ukraine has not changed this. In Beijing's view, the extensive sanctions regime against Russia confirms the need for close cooperation with Russia →



China's icebreaker Xue Long (Snow Dragon) in the Antarctic Ocean, autumn 2018.

and other friendly actors, security-wise, politically and economically. The strategic partnership is crucial to Beijing's ambitions to challenge the US's global leadership and its alliance policy in Asia in particular. China's energy security is also strengthened through access to Russian oil and gas, and stable neighbourly relations reduce the need to tie up Chinese deterrence forces along the border with Russia.

China will maintain close political, diplomatic, economic and military relations with Russia in the coming year. China's land, air and naval forces will continue to develop their cooperation with Russian counterparts through joint patrolling, coordination of operations and exercise activity. The most important effect is bilateral relationship building and strategic signalling to the outside world. Both parties keep the most sensitive capabilities hidden from each other. The trade volume between Russia and China is already back to the levels of before the Ukraine war and could increase further in 2023. The SWIFT sanctions against Russian banks have caused major challenges, but they find temporary solutions. China is a willing buyer of Russian raw materials. Russia, which has become isolated from the West, wants to import Chinese goods – advanced technology in particular. Due to the risk of secondary sanctions, internationally exposed Chinese companies will be reluctant to invest in Russia, which the Chinese authorities are likely to accept.

China will explore cooperation opportunities with Russia in the Arctic

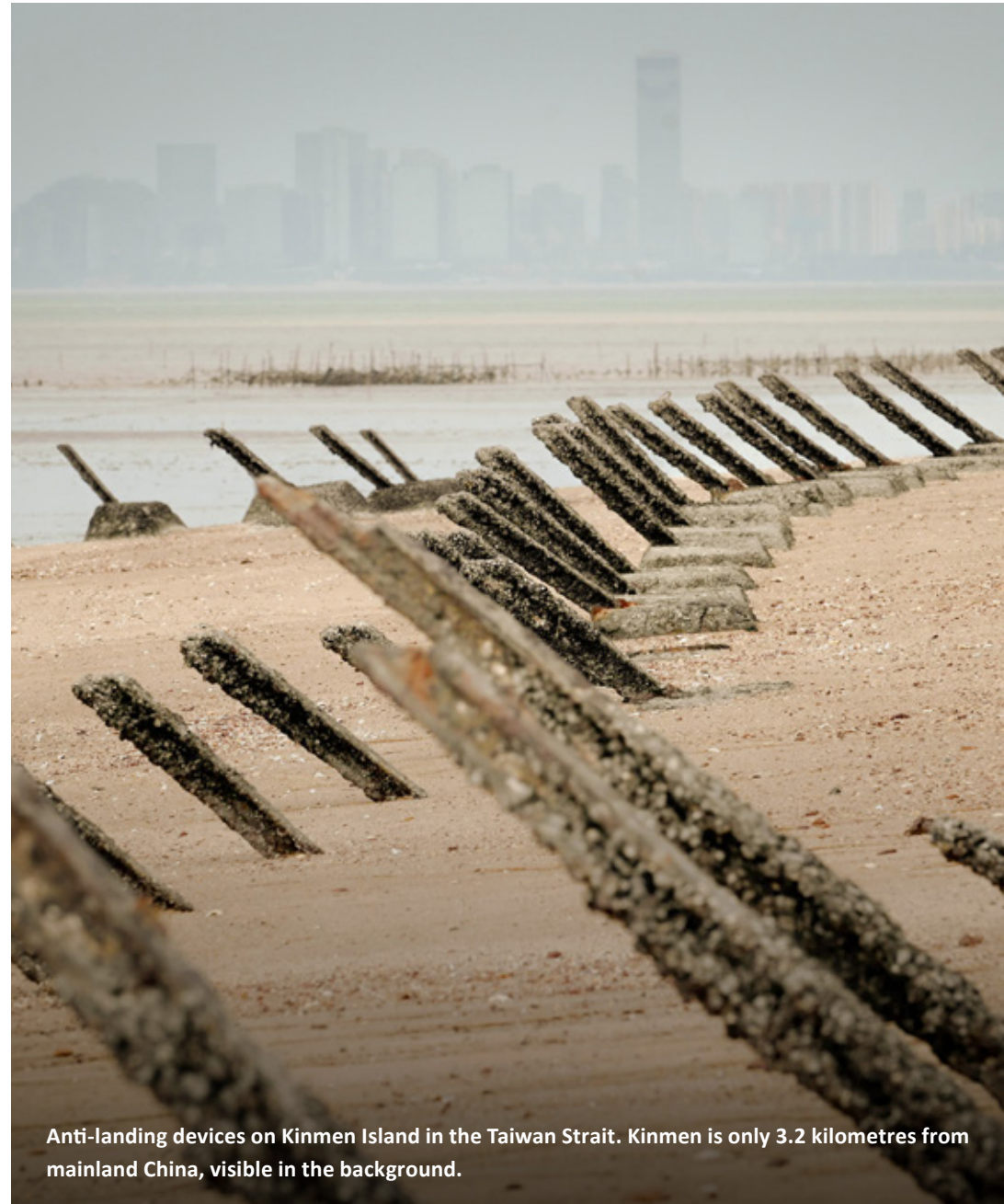
During the covid-19 pandemic, China's level of activity in the Arctic was lower than before; this activity is likely to increase in 2023.

We expect China to become an increasingly important cooperation partner for Russia in the Arctic, and that the Chinese authorities will explore the opportunities for more cooperation with Russia, which is isolated from the West because of the war in Ukraine. It is expected that Beijing will seek to take advantage of the increasingly lopsided balance of power when negotiating the conditions of the cooperation. At the same time, China will likely show some restraint because of the sanctions regime against Russia, uncertainty about the profitability of the projects in the region and changes to the Belt and Road Initiative. Russia, still hesitant to let China gain too much of a foothold in the region, will look to gain a wider portfolio with several cooperation partners. Beijing thinks long-term and is positioning itself for opportunities that may arise later, when Russia's need for investments are likely to increase.

Tensions around Taiwan will rise

The PLA will maintain the same high level of activity it has had around Taiwan since Nancy Pelosi visited the island in August 2022. The purpose is to deter Taiwan from taking steps towards independence, and at the same time stem American and allied actions that undermine Beijing's one-China policy. A further strengthening of the PLA's military capabilities will boost China's confidence and freedom of action when faced with what the country perceives as provocations from US and Taiwan authorities.

China would prefer a peaceful reunification with Taiwan, but fears this option is fading. Beijing revised its central policy document on Taiwan in 2022. The new version demonstrates continuity in China's →



Anti-landing devices on Kinmen Island in the Taiwan Strait. Kinmen is only 3.2 kilometres from mainland China, visible in the background.

approach, though important provisions about autonomy for Taiwan, and self-imposed restrictions on stationing PLA on the island, have been omitted.

China will prioritise reinforcing its military capabilities rather than launching any military assault on Taiwan in 2023, but this could change if Taiwan declares independence or takes significant steps to forge closer ties with the US. China could increase its use of both military and non-military measures to force a reunification. Measures to isolate Taiwan diplomatically and exclude it from international organisations will continue. Various Chinese actors will at the same time continue covert and overt influence activities against Taiwanese targets, aiming to gain acceptance for Beijing's Taiwan policy. The PLA conducts frequent aircraft sorties in the airspace above the Taiwan Strait and almost daily crossings of the median line in the Taiwan Strait with aircraft and vessels. A high level of military activity increases the risk of unintentional incidents, escalation and exacerbation of the regional security situation.

together the PLA's services and units, and to compensate for the US's conventional superiority. The PLA assumes that emerging and disruptive technologies, such as artificial intelligence and autonomous systems, will be part of all future warfare. The development of amphibious capabilities such as landing craft will be a priority in 2023. This capability plays an important role in the PLA's regional and global force projection. Focus on increased interoperability between defence components and the theatre commands is also a central part of the ongoing defence modernisation. China is to a larger extent focusing on the PLA's military-technological needs when it comes to economic priorities. Beijing emphasises the need for increased military-technological self-sufficiency and continues the strategy of military-civil fusion (MCF). Talent programmes, academic exchange, research and investments in foreign companies already support the PLA's objectives.

The nuclear arsenal is expanding quickly

Towards 2040, China will establish a nuclear triad, similar to the US and Russia. The nuclear arsenal will grow significantly; China is for instance building one hundred new silos for intercontinental ballistic missiles (ICBM). Should all the silos be filled with ICMBs, it could mean that China is leaving the minimum nuclear deterrence doctrine. In addition, air and sea-based nuclear deterrence capabilities are strengthened as air-launched ballistic missiles and new strategic submarines equipped with ballistic missiles are developed.

The development programme for ballistic missiles is extremely extensive. China has developed a new precision-strike weapon, with both conventional and nuclear variants. It can be used accurately against

Military developments

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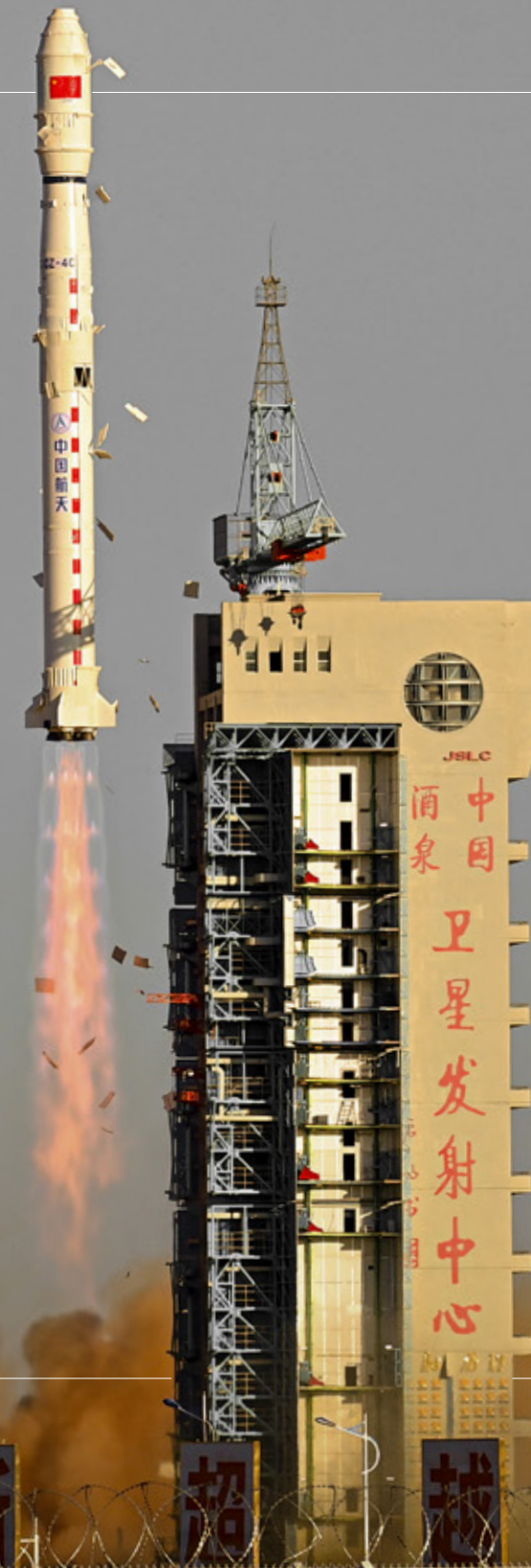
China accelerates the modernisation of its armed forces, aiming to reach important milestones already in 2027, when the PLA celebrates its 100th anniversary. Beijing perceives the threat from the US as increasingly imminent, which impacts Beijing's military-strategic calculations. The PLA will continue to prioritise the development of network and space-based military capabilities. The goal is to increase the efficiency of collection, processing and use of information by joining

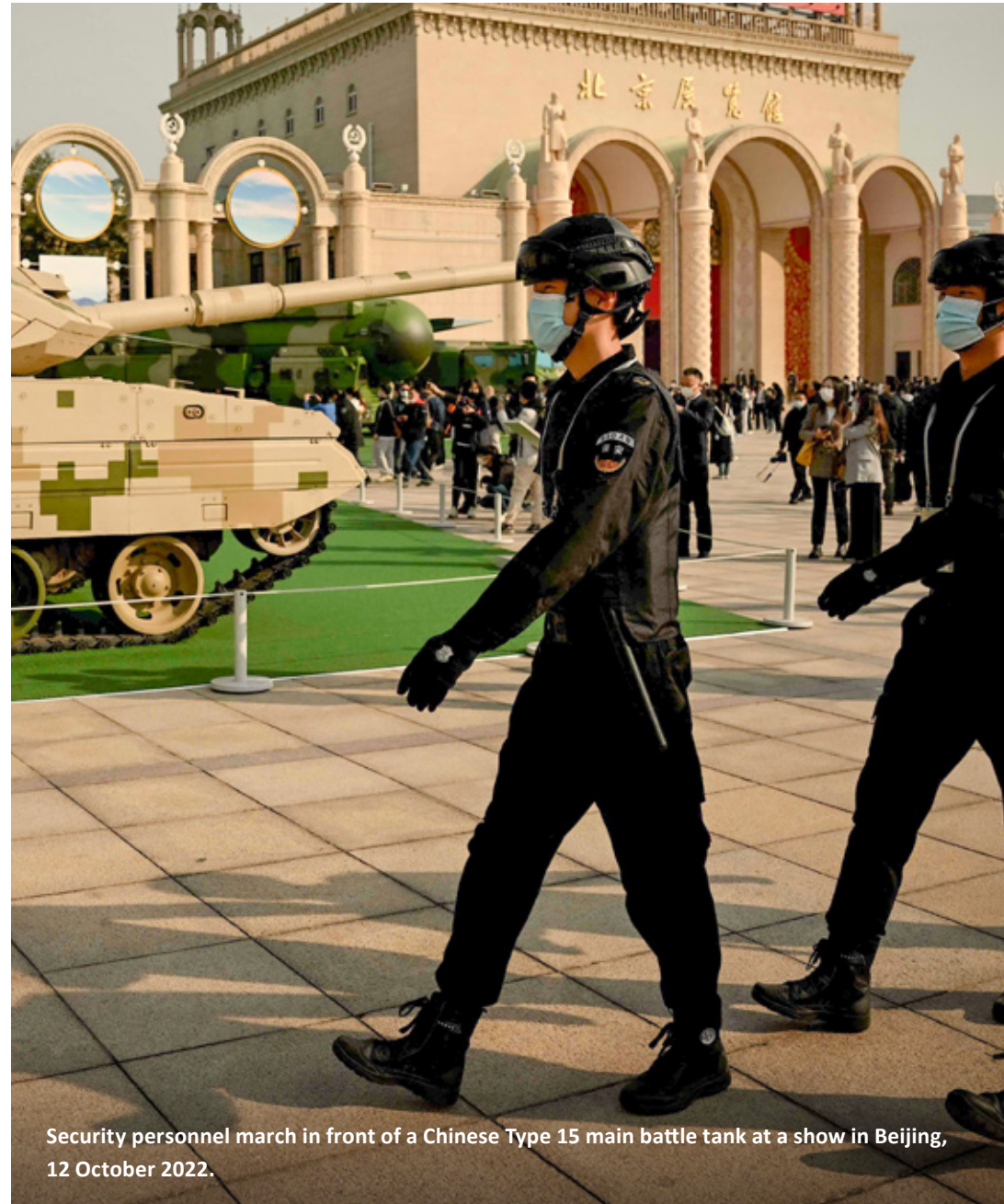
■ The Strategic Support Force

One of the most important structural changes that come from the ambition of information dominance is the establishment of the *Strategic Support Force* (SSF). This force is directly subordinate to the *Central Military Commission* and gathers all of the PLA's capabilities for information warfare. The SSF is responsible for offensive and defensive cyber operations, electronic warfare, psychological warfare and space capabilities.

The support force's mission is to develop a network-based defence to link kinetic and non-kinetic operations. One example is *Integrated Network Electronic Warfare*, a concept of operations where cyber operations are to be used together with electronic warfare; the goal is to blind, disturb or trick the adversary's systems for command and control, communications, intelligence, surveillance and reconnaissance (C4ISR systems) while at the same time launching missiles, precision-strike weapons or conventional military forces.

Image: A Chang Zheng (Long March) 4C orbital launch vehicle carrying two satellites lifts off from Jiuquan Satellite Launch Center, 12 December 2022.





Security personnel march in front of a Chinese Type 15 main battle tank at a show in Beijing, 12 October 2022.

military targets, and it could mean that China discards the no first use doctrine wherein nuclear weapons are only to be used as a second strike in retaliation to an attack by an adversary using weapons of mass destruction. The Chinese authorities deny any doctrine change. The mixture of conventional and nuclear capabilities will lead to distinction challenges and risks of misunderstandings in a potential crisis.

In order to penetrate increasingly advanced missile defences, China is developing hypersonic glide vehicles (HGV) capable of high speeds and manoeuvrability. The systems are meant to support the country's deterrence capabilities but also regional warfare. These vehicles can be equipped with nuclear or conventional warheads. In 2019, China exhibited what is likely to be the world's first operational regional HGV. Chinese ambitions are shaped by, among other things, the US's weapons programmes, presence in Asia and security guarantees to East Asian countries. In China's stated ambitions of having 'a world class military' by 2049, there could be a goal to reach nuclear parity with the US.

that manage information of importance to the war in Ukraine and Western responses. Chinese actors show a particular interest in advanced technology for both civil and military use, and they have in recent years been successful in compromising Norwegian targets.

The importance of R&D institutions for knowledge transfer

China has emphasised the importance of research institutions for military development purposes and are working tenaciously to gain expertise from foreign expert communities. Knowledge transfer is instrumental to areas of development that are hard to cover through imports, and academic cooperation provides many opportunities. There are foreign attempts to exploit research and development communities in Norway for military purposes. A lot of knowledge from technical and scientific research can be used for military development. Getting access to and training on how to use instruments and equipment for testing and production is in many cases as useful as theoretical knowledge.

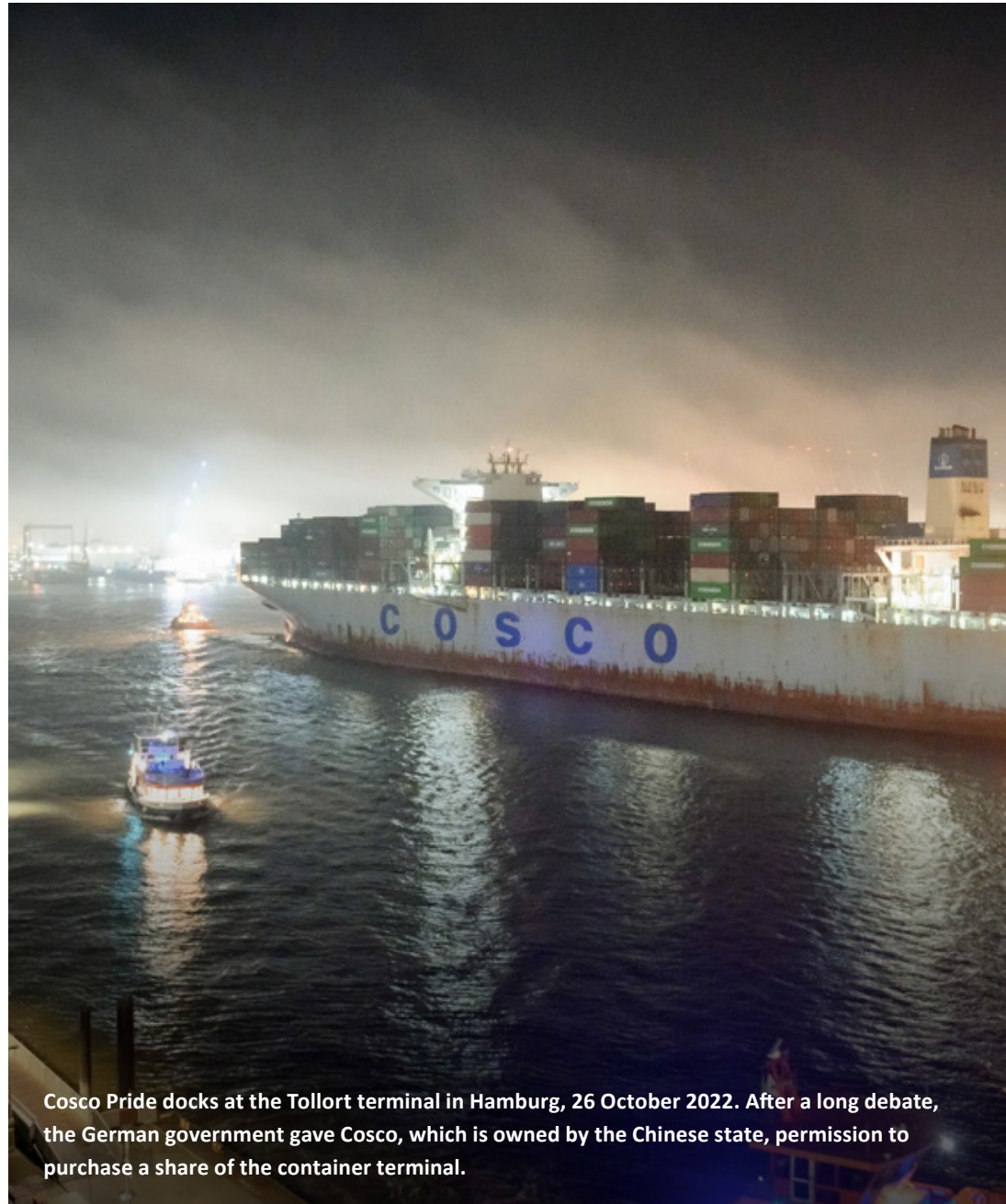
Technology, intelligence and influence

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Cyber operations and space will remain the preferred collection methods. Especially vulnerable targets are intergovernmental networks, defence, defence industry, space research, health services, telecommunications and mass media, in addition to targets

New channels for ownership in strategically important industries

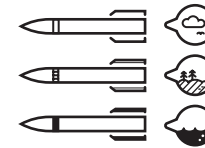
Chinese businesses are met with increasingly tight regulation and scrutiny. As the technology rivalry between the US and China tightens, the US is implementing stricter and stricter controls on the exports of technologies and technical expertise to China. The same is increasingly happening in European countries. →



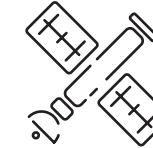
Cosco Pride docks at the Tollort terminal in Hamburg, 26 October 2022. After a long debate, the German government gave Cosco, which is owned by the Chinese state, permission to purchase a share of the container terminal.



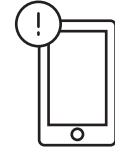
'A world-class defence' by 2049



China is developing a full-scale nuclear triad towards 2040



PLA prioritises the development of network-based and space-based military capabilities



Information dominance is a key concept to win the conflicts of the future

Chinese acquisition of technology companies is also subject to stricter regulation in Europe. This has consequences for companies with links to the PLA and other companies that produce semiconductor technology. In 2022, Germany and Britain stopped Chinese acquisition attempts of factories and companies producing semiconductors. Beijing coordinates its activities with businesses, which often receive state support for winning tenders in the West. This ensures that foreign investments still remain an instrument of power for Beijing's strategic goals. Technology with multipurpose potential is of particular interest; companies with expert knowledge on areas such as artificial intelligence, robotics and biotechnology attract the interest of Chinese investors.

mation dominance across traditional mass media, the digital domain and outer space. Cyber espionage and cyber warfare are key factors. Chinese cyber warfare should be able to attack the adversary's communications and logistics networks while at the same time protecting the PLA's own networks. China emphasises this type of network dominance as a premise to achieve and retain victory in a war. In peace time, China maps critical infrastructure globally.

The PLA also places importance on 'intelligent defence'. The concept entails exploiting and operationalising emerging technologies, especially artificial intelligence, in order to enhance its military capability. Chinese actors seek to improve the ability to collect, transfer, decrypt and process data and develop more advanced methods of psychological warfare and influence operations. □

Information dominance ambitions

Information dominance is a key concept of China's military modernisation. The PLA is to be armed to win future information wars. This means achieving infor-

■ A technology-driven arms race

Russia and the United States control the majority of the world's nuclear weapons. There is only one treaty left regulating the nuclear arsenal of the US and Russia: New START. The treaty regulates their strategic nuclear weapons and was extended for five years in 2021. Russia could be willing to sign a new treaty when New START expires, but tensions between the US and Russia after the invasion of Ukraine will make it difficult to reach an agreement. The INF Treaty, which regulated ground-launched intermediate-range nuclear weapons, effectively ended in 2019.

The great powers will continue to develop and emphasise different types of capabilities and systems. China and Russia will maintain that US conventional capabilities affect their nuclear retaliatory capability and will tie future nuclear arms discussions to Western conventional, long-range precision-strike weapons, missile defence and weapons in outer space.

The US wants non-strategic nuclear weapons to be included in a future framework for arms control. Russia has become more dependent on tactical nuclear weapons for deterrence after suffering extensive conventional losses in Ukraine. Hence, the Russians will not be interested in regulating these weapons. Despite its growing importance as a nuclear power, China does not take part in arms control talks. It is unlikely that China will agree to regulate its own nuclear weapons as long as the Chinese arsenal is much smaller than that of the West and Russia. The collaborative environment has never been worse than now. The world is in the middle of a technological arms race – not numerically but in the form of new weapons systems.



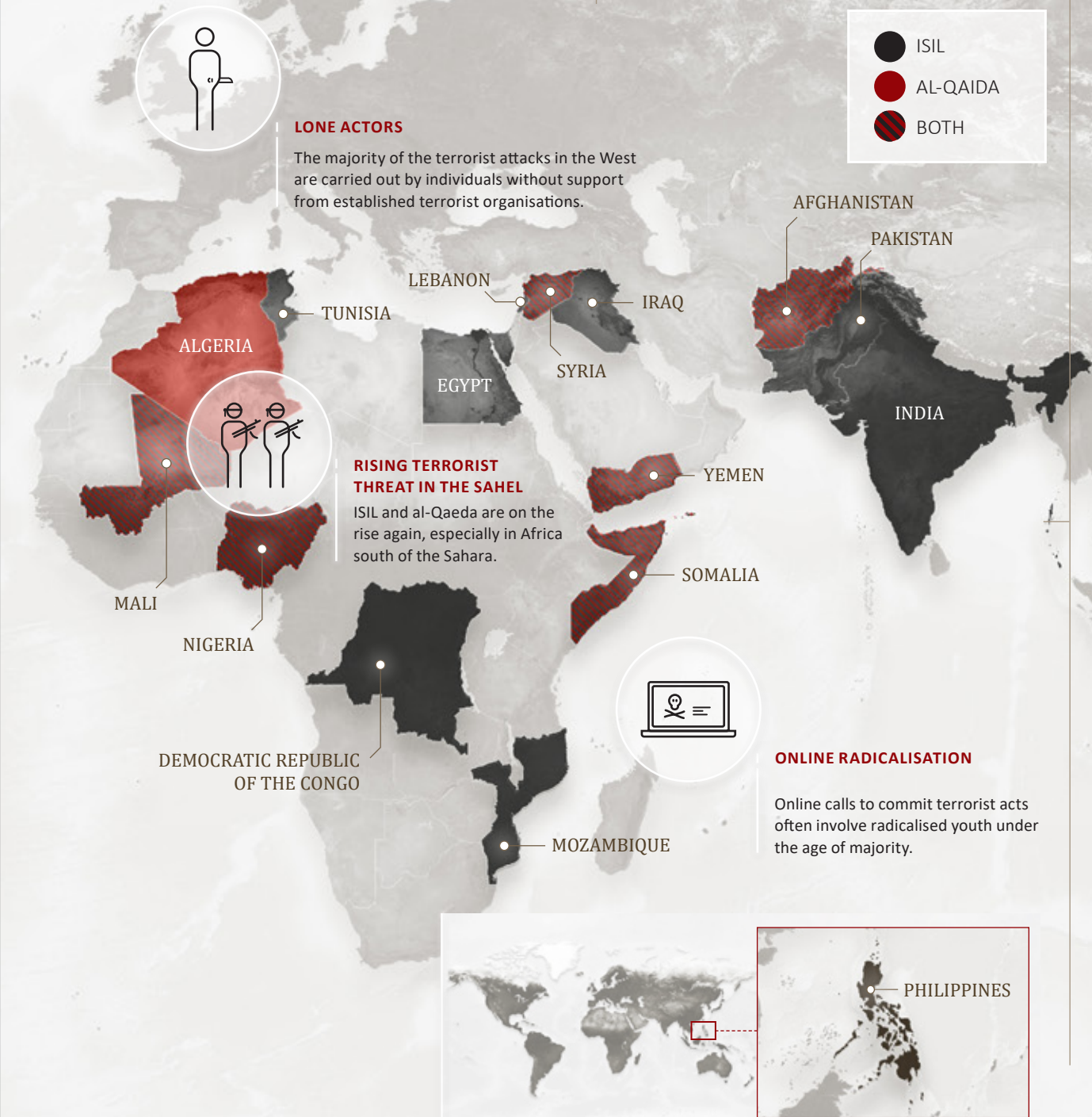
Image: A Yars Intercontinental Ballistic Missile (ICBM) is launched from the cosmodrome in Plesetsk, as part of Russia's exercise of the strategic forces, 26 October 2022.

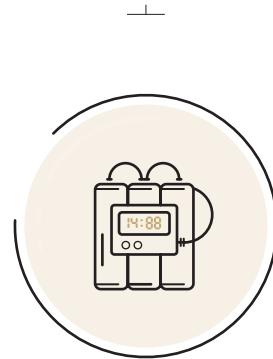


INTERNATIONAL TERRORISM

Simple attacks carried out by individuals with no direct ties to established extremist organisations continue to pose the greatest terrorist threat in Europe and Norway. Attacks from centrally managed networks are no longer the main threat against the West. The threat is mainly influenced by local conditions in European countries. Radicalisation happens mostly online, often with young people.

The Islamist terrorist organisations prioritise local growth and attacks in their heartland, and continue to gain strength in areas where there is poor government control and local conflicts, especially in Africa, the Middle East and Afghanistan.





The majority of the terrorist attacks in the West are carried out by individuals without support from established terrorist organisations. Individuals and loosely knit networks that sympathise with militant Islamism or right-wing extremism constitute the main terrorist threat to Norway and Europe. Fewer extremists in Europe have direct ties to the established extremist organisations, and both far-right extremists and militant Islamists are poorly organised.

Terrorist organisations' possibilities to operate in Europe have narrowed considerably over the past decade as a result of coordinated efforts against terrorism from Western intelligence and security services. ISIL and al-Qaeda no longer have a real presence as an organisation in Europe. These groups continue to call on supporters to carry out attacks, but their appeal has diminished. European militant Islamists focus on a general jihadist ideology and on local affairs such as the treatment of Muslims.

Although the number of terrorist attacks from both extremist Islamists and far-right extremists in Europe

have declined in recent years, serious cases involving calls for terrorist attacks, training and concrete attack planning are constantly uncovered. These cases often involve minors who have been radicalised online.

Far-right extremism Lone actors pose the greatest threat

The absence of established organisations limits the ability of far-right extremists for systematic recruitment and planning of more complex attacks. Attempts to set up organisations and centralise far-right extremist communities online have failed due to internal strife and poor organisation skills. At the same time, far-right extremists continue to inspire each other through manifestos and livestreams from terrorist attacks. The attack in Bratislava, Slovakia in October 2022 was directly inspired by the attack in Buffalo, US in May of the same year. This was in turn inspired by →

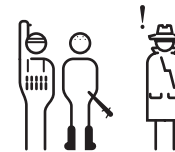


A person lays down flowers outside the supermarket in Buffalo, New York, where a far-right extremist shot 13 people, killing 10, on 15 May 2022.

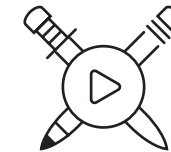


Malian forces fighting Islamist rebels in Gao, 21 February 2013.

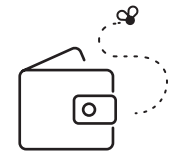
Loose networks



Opportunities to commit terrorist acts in Europe have shrunk due to counterterrorism efforts



Far-right extremists continue to inspire each other through manifestos and livestreams



Economic decline and rise in unemployment could lead to more radicalisation and recruitment

the wave of extreme-right attacks in 2019. All these attacks were carried out by lone actors loosely tied to digital networks.

The influence of Russian far-right extremist groups on Western like-minded people is diminished as a result of the war in Ukraine. More far-right extremists now see Russia as responsible for a destructive conflict. In addition, the sanctions regime against Russia makes any physical contact between Russian and Western far-right extremists difficult.

Economic decline and a potential increase in unemployment may pave the way for more radicalisation and recruitment to far-right movements. With rising unemployment, xenophobia could once again become an important driver of far-right extremism.

The war in Ukraine Few foreign fighters

Serving as a foreign fighter in Ukraine is unlikely to foster radicalisation, considering that the war lacks a

clear ideological dimension both for far-right extremists and militant Islamists. The groups fighting in the war have little interest in ideological indoctrination, nor do any of them have a strategy that involves terrorist attacks outside of Ukraine. The few far-right foreign fighters who have left Western Europe could however pose a threat once they return; the network, experience and expertise they have acquired could be used in future attack planning. Experiencing violence and psychological trauma can also lower the threshold for violence.

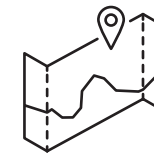
Islamist extremism Local growth provides global capability

Both ISIL and al-Qaeda give priority to strengthening and establishing affiliates in areas with conflicts and poor government control. The organisations make use of their global networks to transfer capabilities between the affiliates. The conditions for growth are especially good in Africa south of the Sahara, where

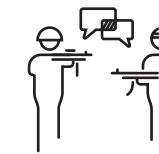


The Taliban celebrate the one-year anniversary of NATO's withdrawal from Afghanistan, 31 august 2022.

Local reinforcement



Islamist extremists focus on local matters; threat to local Western targets is increasing



Both ISIL and al-Qaeda look to gain strength in conflict-ridden areas with poor government control



The situation in Afghanistan provides a breeding ground for recruitment to terrorism, especially to ISKP

both ISIL and al-Qaeda are expected to gain strength and expand further. The affiliates ally with local groups in order to expand and become ideological rallying points and providers of security. ISIL is also gaining strength in Afghanistan, where the organisation has considerably more freedom of action after the Taliban seized power. For the first time since ISIL lost its caliphate in 2019, the organisation has called on Muslims all over the world to move to ISIL-controlled territory, especially in Afghanistan and Nigeria. Initially, these affiliates are likely to attract regional foreign fighters from neighbouring countries, while the call will have limited appeal in Western countries.

ISIL and al-Qaeda are a growing threat to local Western targets in the group's core areas, but attacks in the West are not a priority. The exception is ISIL in Afghanistan, which seeks to strike against targets in the West to undermine the Taliban's ruling power and isolate them on the international scene. However, local growth is boosting the capabilities of both ISIL and al-Qaeda, which will make them better equipped to succeed with terrorist attacks in the West, should this become a priority. Hence, the threat could escalate rapidly.

Afghanistan
ISKP remains a threat

The Taliban has established an authoritarian regime in Afghanistan, and the conservative wing has the strongest impact. The government is not covering the basic humanitarian needs of the population.

The situation in the country provides a breeding ground for recruitment to terrorism, especially to ISKP, ISIL's affiliate in Afghanistan. The Taliban is trying to defeat ISKP, but the group is still a threat both in Afghanistan, in the region and to the West. On the other hand, AQIS, al-Qaeda's affiliate in Afghanistan, is inactive, probably because the al-Qaeda senior leadership is prioritising the stability of the Taliban regime over its own activity in the country. □



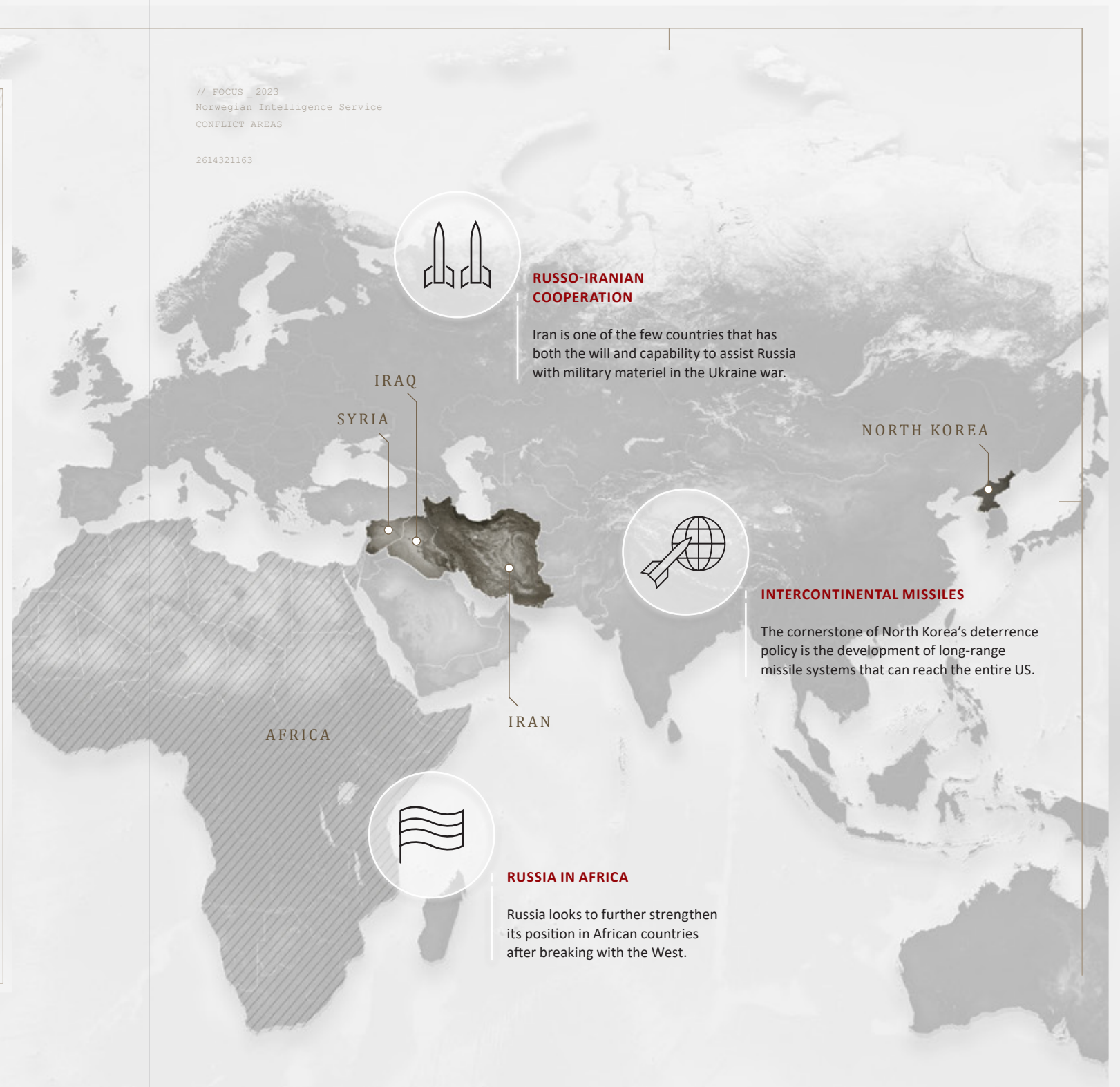
CONFLICT AREAS

In 2022, de-escalation processes in the Middle East have enabled initiatives of trust between regional rivals such as Iran and Saudi Arabia, though there are still contentious issues that prevent a full normalisation of relations in 2023.

Should negotiations to return to the nuclear deal with Iran fail, the region risks falling back to rivalry and arms race. An escalation of the conflict in Yemen, where Iran and the Gulf states are on opposite sides, could also affect the de-escalation process. In addition, the war in Ukraine is driving up food and energy prices across the region. All of this has the potential to spark waves of protests in 2023, which could impede a de-escalation, since rivals tend to get the blame for internal problems.

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Norwegian Intelligence Service
CONFLICT AREAS

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RUSO-IRANIAN COOPERATION

Iran is one of the few countries that has both the will and capability to assist Russia with military materiel in the Ukraine war.

IRAQ
SYRIA

NORTH KOREA



INTERCONTINENTAL MISSILES

The cornerstone of North Korea's deterrence policy is the development of long-range missile systems that can reach the entire US.

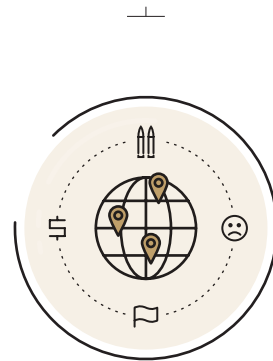


RUSSIA IN AFRICA

Russia looks to further strengthen its position in African countries after breaking with the West.

AFRICA

IRAN



Syria
Conflict still deadlocked

The war in Ukraine has overshadowed the conflicts in Syria. Decline in great power diplomacy has spoiled chances of any major changes. The relationship between Russia, Turkey, Iran and the US still determines the developments in Syria. Russia is still prioritising its engagement in Syria and has kept a military presence after the invasion of Ukraine.

A Russian downscaling in Syria would have a destabilising effect, leaving the costs of supporting president Assad to Iran. The autonomy of the Kurdish-dominated areas in north-eastern Syria hinges on the military presence of the US. If US troops were pulled out, both Damascus and Ankara would seek to expand their control of the area. Continuous instability gives ISIL freedom of action in central, eastern and southern Syria. The group continues to carry out minor attacks to undermine government control, and in brief periods they conduct larger operations to strike against strategic targets such as prisons with ISIL inmates.

Iraq
New government, but underlying problems remain

Iraq depends on both the US and Iran, economically and in terms of security policy, and the security situation in Iraq is directly affected by the relationship between the two countries. Should the nuclear talks fail, Iran will once again use Iraq as a stage for exerting military pressure on Western targets. Iraq's symbiotic relationship with Iran is reinforced by the fact that Iran-aligned militias have a strong position in the Iraqi government administration and much influence on the new government. The militias will maintain their pressure against the Western military presence.

The greatest threat to Iraq's state stability is the internal conflict of the Shia elite. A prolonged and bitter political struggle to form a government after the last parliamentary elections has partially broken the traditional division of power. Political rivalry and popular dissatisfaction with poor public services will lead to more unrest. A destabilisation of Iraq will give ISIL more freedom of action. The group is still a →



Protests in support of the Shia Coordination Framework in Baghdad, 13 August 2022.



Image: Centrifuges at the Iranian enrichment plant in Natanz.

Iran's nuclear weapons and missile programmes

Iran has the technology and expertise to produce nuclear weapons if the regime decides to do so. Two factors will be crucial for Iran to succeed: the capability to produce fissile material and to make a nuclear warhead. With the current enrichment capacity, Iran can produce sufficient weapon-grade uranium in a matter of weeks. In the absence of a nuclear deal, Iran's capability and stock of enriched material will continue to grow. In the event of a return to the commitments of the nuclear deal, Iran would have to reduce its enrichment capacity by around 80 per cent by dismantling new and advanced centrifuges which have been set up since 2019. The time Iran needs to enrich sufficient amounts of uranium to make a nuclear weapon will either way be shorter than under the original nuclear deal, which was approximately one year.

Producing a nuclear warhead and integrating it with a ballistic missile will take much longer than to enrich sufficient amounts of fissile material. This step is therefore crucial to when Iran could produce a nuclear weapon. The missile programme will continue regardless of the nuclear negotiations. Iran has numerous missiles suited to delivering nuclear warheads which can reach the entire Middle East and vast areas of Europe. Improved precision and shorter preparation time are priorities, but Iran is also making progress on launch vehicles built with the same technology as long-range ballistic missiles. Developing an intercontinental ballistic missile requires several test launches, but a lot of the test activity can happen under cover of Iran's civilian space programme.

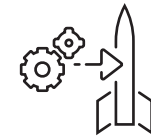
Military technology through external knowledge



Academic cooperation gives ample opportunity for transfer of knowledge



There are exploitation attempts against research communities in Norway



Training on the use of instruments and production equipment also has great transfer value

security threat in some parts of the country, especially in Ninewah, Salah ad-Din and Diyala.

Iran Strengthens its relationship with Russia, must handle social unrest

The war in Ukraine has given Tehran a unique opportunity to strengthen its relationship with Moscow. Iran is one of the few countries that has both the will and ability to provide Russia with military material. Iran provides attack drones and missiles, much needed by Russia. Iran has the capacity to produce large quantities of these weapons, and exports to Russia will continue in 2023.

The protests that started in the autumn of 2022 are the most extensive in years. So far, the protests have been unorganised without a clear leadership. The Iranian authorities have a vast security apparatus

which brutally clamps down on social unrest. The economic situation is dire, and the risk of new waves of protest is considerable. Nevertheless, there are few if any indications that the state stability is threatened or that the Iranian government will be forced to implement systemic changes.

North Korea Missile development continues, and fissile material stocks are growing

North Korea has launched many missiles in 2022. The majority of these have been short-range ballistic missiles, but for the first time since 2017, long-range systems have also been tested, including a new intercontinental missile. This system could reach the entire US with more or heavier warheads and will constitute the cornerstone of North Korea's deterrence against the US. For the short-range ballistic missiles, North



North Korean leader Kim Jong-un and his daughter in front of an Intercontinental Ballistic Missile in Pyongyang, 19 November 2022.



Korea is prioritising manoeuvrability and precision. The purpose is to reduce the vulnerabilities of its missile defence systems and boost its capability to strike against military pinpoint targets in South Korea. Testing of, and operational training with ballistic missiles, will likely continue in 2023.

North Korea likely has a few nuclear warheads in its possession, tailored to short- and intermediate-range missiles. In addition, the stock of uranium and plutonium for nuclear arms production is increasing. North Korea could develop warheads for systems that may reach the US mainland and smaller nuclear warheads for tactical weapons systems to ensure regional retaliatory capability and deterrence. There is an even chance that North Korea will have to carry out new nuclear testing before being able to phase in new types of warheads. The timing of a potential test would be adapted to the security situation and used as strategic communication.

Alliance politics Russia strengthens its cooperation in Africa

After the breakdown of relations with the West, Africa has become more important to Russia. For several years, Moscow has been strengthening ties with numerous African countries, including Mali and Sudan, aiming to challenge Western influence, alleviate the effects of Western sanctions and facilitate Russian trade.

Russia uses a combination of official and private initiatives to strengthen its position in African countries. Sometimes these measures are of a covert nature, such as influence operations and the deployment of troops from the Wagner Group. This gives Russia a certain deniability and reduces the political risks. □

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