



NORWEGIAN
INTELLIGENCE SERVICE



FOCUS 2025

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

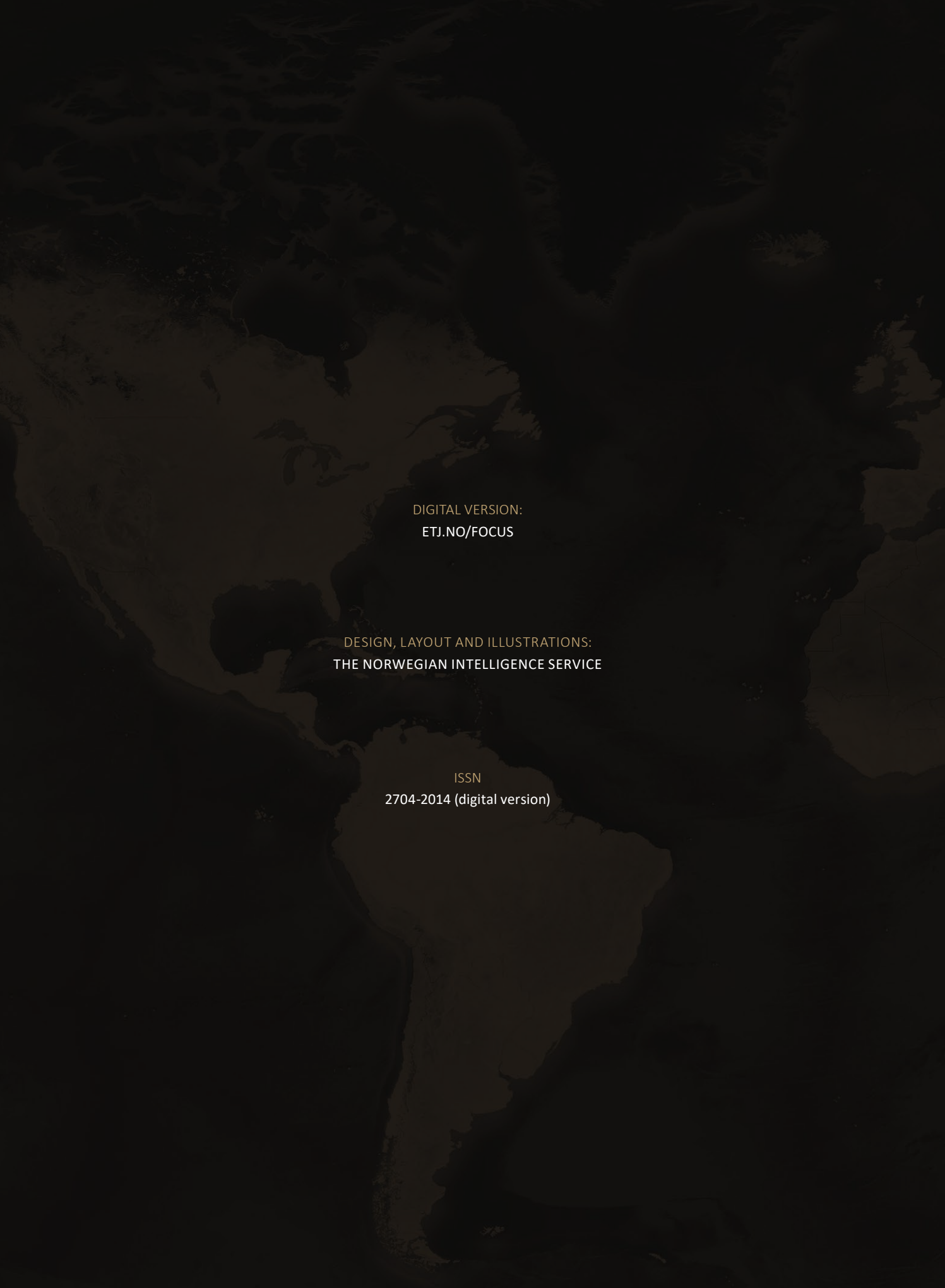


The Norwegian Intelligence Service's annual report *Focus* is one of three Norwegian threat and risk assessments published during the first quarter of each year. The other two are published by the Norwegian Police Security Service (PST) and the Norwegian National Security Authority (NSM).

■ **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 Norway's agency for national preventive security. The agency's mission is to strengthen Norway's ability to counter espionage, sabotage, terrorism and hybrid threats. NSM helps organisations protect civilian and military information, systems, objects and infrastructure that are relevant to national security by giving advice and performing control activities, supervision, security testing and security research. In order to protect digital infrastructure, NSM operates a national warning system for critical infrastructure (VDI) and coordinates national efforts to handle serious cyberoperations. Risiko, NSM's annual risk assessment, aims to help Norwegian enterprises manage security risks by providing information about vulnerabilities, threats and security measures.



DIGITAL VERSION:
ETJ.NO/FOCUS

DESIGN, LAYOUT AND ILLUSTRATIONS:
THE NORWEGIAN INTELLIGENCE SERVICE

ISSN
2704-2014 (digital version)

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INTRODUCTION



INTRODUCTION



Norway faces an increasingly challenging security situation. Over the past year, tensions have been rising between Russia and China on the one hand and the West on the other; they will continue to do so in the year ahead. The conditions for international cooperation have deteriorated significantly, which has led to escalation of established conflicts, a spiralling arms race between the great powers and a heightened terrorist threat.

President Vladimir Putin will continue waging war in Ukraine in 2025. Although developments are slowly moving in Russia's favour, the cost of the war is high. There are currently no signs of regime instability in Moscow, even though the country's capacity to wage war is gradually diminishing. Nevertheless, the outcome of the war depends predominantly on the West's willingness and ability to support Ukraine militarily.

A Russian victory in Ukraine would strengthen the Kremlin's belief in offensive military force as a useful tool for promoting its authoritarian and expansionist policies. This, in turn, would increase the threat to Europe. States located in Russia's self-proclaimed sphere of interest would be especially vulnerable. Russia considers Norway part of an unfriendly West.

China and Russia are cooperating more closely, and Moscow has become increasingly dependent on this cooperation. Although Beijing wants to maintain its economic collaboration with Western countries, it is preparing for the possibility that rising conflict levels could cause a breakdown in relations and confrontations with the West.

The conflicts in the Middle East have caused a significant shift in power; a weakening of the actors in the Iran-led axis of resistance, combined with the Assad regime's collapse in Syria, has weakened Iran's position. Both the Middle East and Africa will remain riddled with conflict in 2025. Conflicts here heighten the terrorist threat to Europe.

Overall, the fronts are hardening between the West and authoritarian states that seek to undermine Western influence in the international system. This is detrimental to international cooperation and leaves a growing number of conflicts unresolved.

The Norwegian Intelligence Service's main mission is to warn against threats to Norway and Norwegian interests. *Focus* is the Norwegian Intelligence Service's annual unclassified threat assessment. Our aim is to describe threat actors and developments that we consider important to Norway's security in the coming year.

Vice Admiral Nils Andreas Stensønes
Director Norwegian Intelligence Service

Editing concluded on 24 January 2025



\$	9750
	9920
€	1037
	1060

I.

RUSSIA

Russia considers itself to be in direct conflict with the West. This view will persist regardless of the outcome of the war in Ukraine, and tensions between Russia and the West will remain high in 2025.

Russia has the upper hand in the war, but has not managed to force a major breakthrough. Ending the war in Ukraine on Russian terms is Moscow's top priority in the year ahead. Western weapons support to Ukraine is obstructing Russia from achieving its aims. Russia is seeking to exert pressure on the West, including through sabotage operations. This could impact Norway.







Persistent tensions between Russia and the West

Western arms support is crucial to Ukraine's ability to defend itself against Russian aggression, and is the single most important factor that will influence the war's progress in 2025. Russia seeks to deter Western support using physical and digital sabotage and the threat of nuclear weapons. Although these courses of action demonstrate willingness to challenge the West, Moscow would like to avoid a direct military confrontation with NATO.

If Western arms support were to increase and Ukraine succeed in the difficult task of maintaining access to enough fighting personnel, the war could tip in Ukraine's favour as we head into 2026. If so, Russia would respond by taking greater risks and employing a wider range of means against Ukraine's Western supporters, in order to prevent and undermine popular support for Western arms contributions. In addition to threats aimed at Western audiences, Russia may resort to acts of sabotage against both weapons deliveries and critical infrastructure. This could also affect Norway.

An end to the war on Russian terms would strengthen Moscow's belief in military force as a foreign policy instrument and may embolden it to reconstitute and apply military force elsewhere as well. States that are located close to Russian borders and that are not NATO members are most vulnerable to Moscow's military coercion.

The war in Ukraine is taking its toll on Russia

War has been raging in Ukraine for almost three years now. The economic, military and security policy costs have been much higher than Moscow anticipated.

Weakened economy

Russia claims that its economy is strong and that it is coping well with the war and its ripple effects. The reality is very different. Russia's economy is under heavy strain and has become increasingly vulnerable. The war has weakened it significantly, and Moscow is funding its war effort by draining sectors and budget







The Russian authorities prioritise increasing budget allocations for defence and security. Here, President Putin and his entourage visit a site belonging to aircraft manufacturer Tupolev.
Image: Kristina Kormilitsyna/Kremlin/Reuters/NTB



Vulnerable war chest



The war in Ukraine is taking its toll on the Russian economy, which is now in recession



Western sanctions are hurting the economy and delaying advanced weapons programmes



It is becoming increasingly likely that the struggling economy will hamper the war effort

items that underpin the population's living standards and welfare. Russia tries to hide this from both the Russian people and the outside world by denying public access to macroeconomic figures. Adjusted for inflation, Russia's GDP development is negative and its economy is in recession. The country's current budgetary policy is unsustainable, and the risk of economic destabilisation is mounting.

Military spending has risen sharply during the full-scale war in Ukraine. Russia's official federal budget for 2025 plans for an increase in military spending of 25 per cent. In total, the budget plans for allocations to the armed forces and national security to amount to approximately 41 per cent.

Sky-high military spending and Western sanctions have put significant macroeconomic strain on Russia. The economy is marked by high demand, high inflation, high debt, a significant labour shortage, a falling trade surplus and a weaker currency. By attempting to produce more than available resources allow, Russia is creating imbalance and bottlenecks in the economy. This exacerbates existing weaknesses such as inefficient production, corruption and low

innovation, and makes the economy susceptible to economic shocks.

The Russian authorities are manipulating economic data in order to give the impression that Russia is absorbing the costs of the war well, that sanctions are ineffective and that the economy is growing. This is intended to ensure domestic stability and support for the war, undermine the Western sanctions regime and encourage investment from Russia's partners, particularly China and India.

Weakened security policy position

Russia's security policy position has become significantly weaker. Sweden and Finland have joined NATO and made the alliance stronger. Economic cooperation with China is crucial to Russia's ability to fund the war in Ukraine; the war has therefore made Moscow more dependent on Beijing. Russia has also lost influence in Central Asia and the Caucasus. The fall of Bashar al-Assad's regime in Syria was a strategic setback for the Kremlin; Russia has lost its most important supporter in the region and seen its influence in the Middle East decline.



With new rulers in Damascus, Moscow risks losing access to the military bases Hmeimim and Tartus, which are important to Russia's ability to employ its armed forces in the Mediterranean and support the Russian presence in Africa. These developments undermine Russia's main foreign policy objective, namely to consolidate its position as a great power.

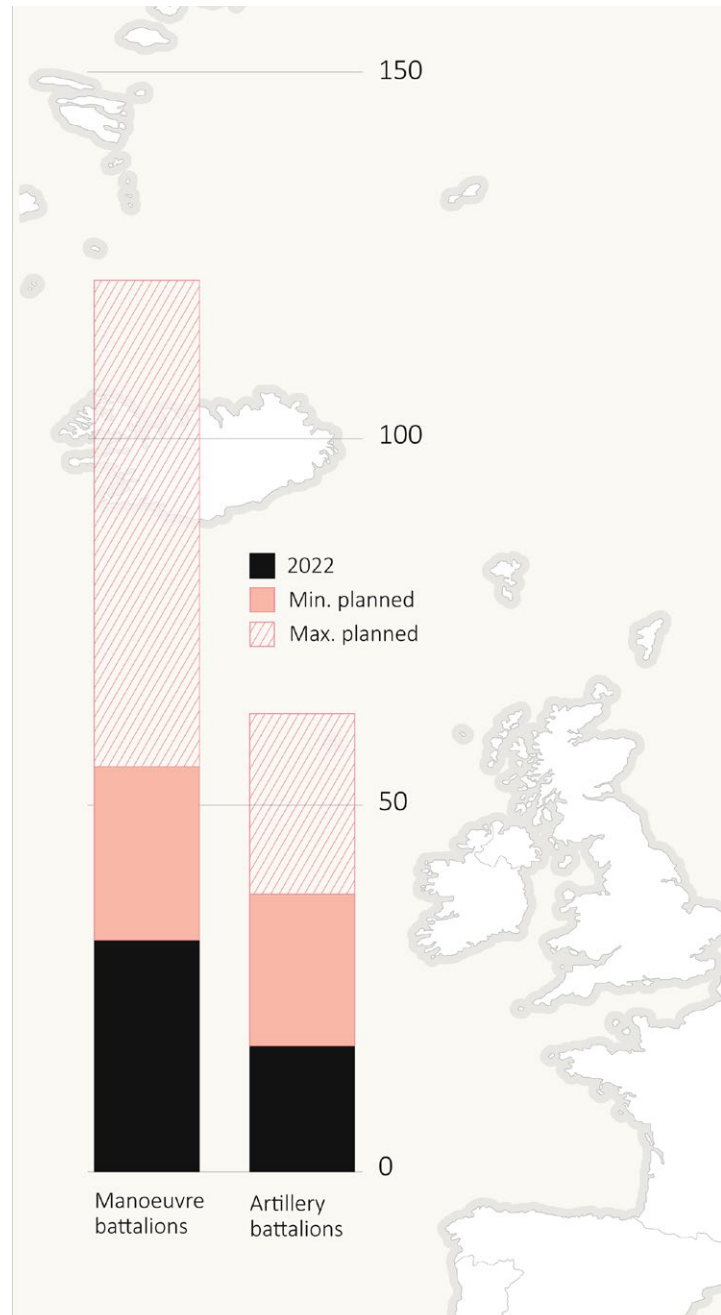
Weakened military power

Moscow is attempting to project an image of strength through ambitious plans for expanding its armed forces. However, Russia is not in a position to rebuild and expand its forces at home whilst simultaneously maintaining its war effort in Ukraine. The war is the top priority.

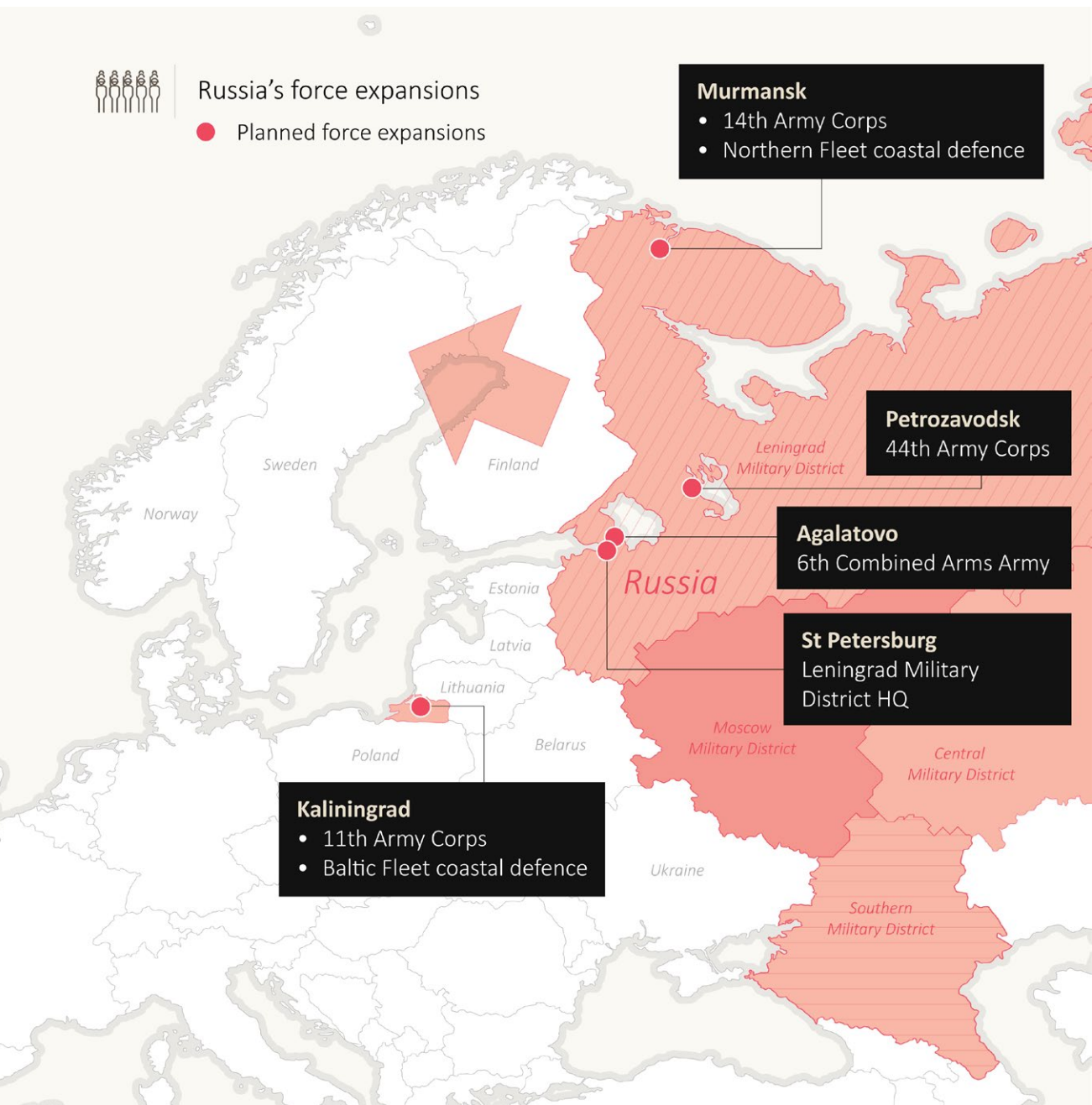
Russia has grand plans for expanding its land power, including its presence along the entire border with NATO. Near Norwegian borders, Russia wants to expand several brigades into divisions and establish a new army corps which will eventually be located in Karelia. Russia has also created the Moscow and Leningrad military districts, with the aim of increasing Russian defensive capability. Leningrad Military District is charged with defence and military operations in the Baltic Sea region and the Nordics, and possibly also in the Arctic in collaboration with the Northern Fleet. The formation of the two new military districts reverses the most recent major defence reform of 2008. The new military districts are based on the former Western Military District's force structure, with added units along the border with NATO.

Russia will have little chance of realising these plans while the war continues at the current intensity. At the earliest, Moscow may be able to fully realise these plans five to ten years after the war in Ukraine is over.

The war occupies much of Russian land power. This includes the forces on the Kola Peninsula, many of

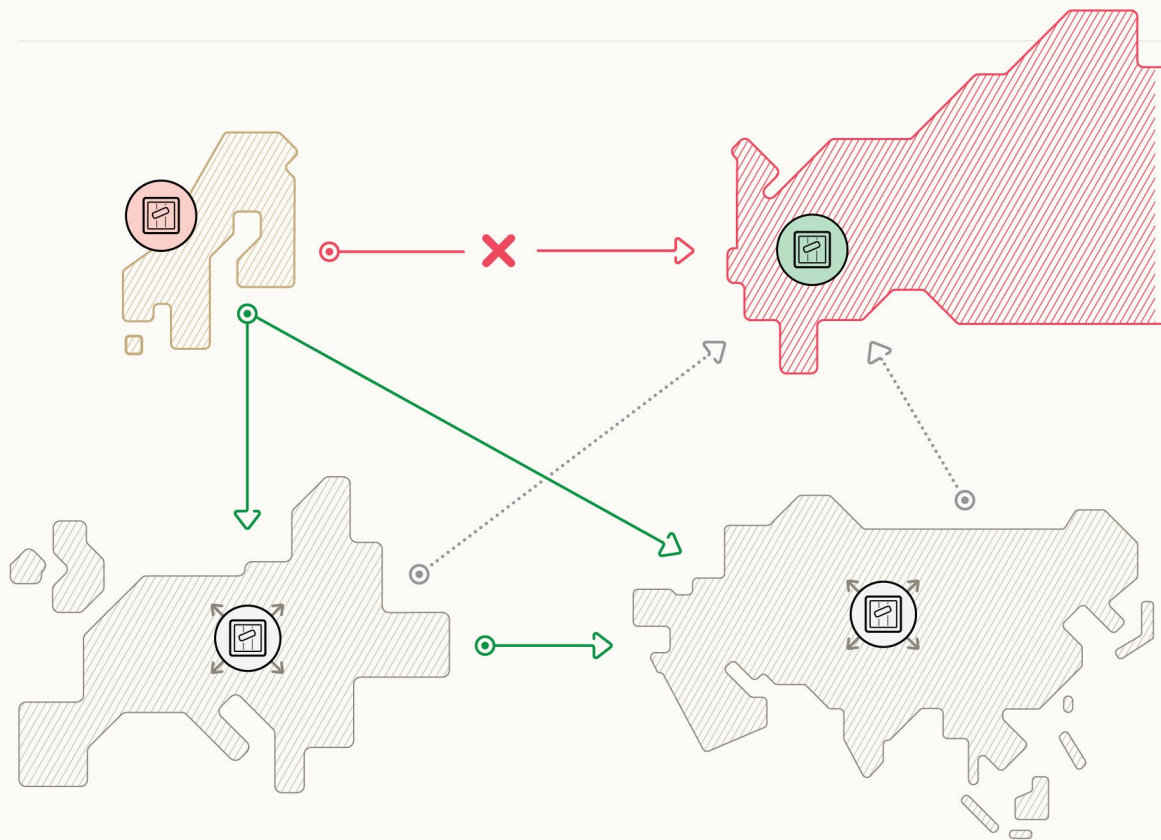


RUSSIA





Complex procurement networks (Conceptual illustration)



SANCTIONS AND EXPORT CONTROL

LEGITIMATE EXPORT

CIRCUMVENTION OF SANCTIONS AND EXPORT CONTROL

Russia is among the countries that acquire sanctioned and export-controlled technology through complex procurement networks that span several continents.

■ Military use of civilian technology challenges export controls

The use of civilian technology in military weapons programmes challenges traditional export controls. Civilian technology can be used in weapons and military surveillance, detection, monitoring, planning, construction and maintenance systems.

Russia, China, Iran and North Korea are among the countries that use a variety of methods to obtain and exploit civilian Western technology for military purposes. Complex procurement networks conceal the end user from both the supplier and national export control mechanisms.

These actors also gain access to Western technology with military applications by participating in international science and technology research collaborations.

Norwegian-manufactured maritime technology and communication and navigation technology, as well as Norwegian research and development in the fields of semiconductor and sensor technology, material technology, cryptology, IT security, biotechnology and artificial intelligence, are all attractive targets of covert procurement by actors who are subject to sanctions and export controls.



whom have been deployed to Ukraine. The war has also led to a sharp decline in Russia's ability to reinforce land, airborne and combat air forces in the High North.

Russia has suffered high losses in Ukraine. At least 115,000 Russian soldiers have been killed, and when those wounded, imprisoned or missing are taken into account, Russia has lost more than 600,000 soldiers in this war, as well as over 11,000 armoured fighting vehicles.

In order to uphold combat power in Ukraine, Russia has likely multiplied its production of new land power materiel since 2022. The country has also brought large amounts of ageing military materiel out of strategic storage, and restored and modernised it. This is cheaper and likely also quicker than producing new materiel, which is advantageous to a country that is in major economic difficulties and suffering high materiel losses in Ukraine. Overall, Russia's combat-ready store of military materiel remained almost unchanged throughout 2024, and the Russian land forces are larger at the start of 2025 than they were prior to the full-scale assault in 2022.

However, materiel brought out of strategic storage is often of lower quality than the materiel it replaces, and several materiel categories will likely have next to no reserves for the next two years. This will reduce the land forces' combat endurance for a very long time to come.

The Russian naval forces are facing a widening gap between ambitions and resources. This is forcing the Northern Fleet to choose between solving missions and performing necessary maintenance. Difficulties at the shipyards cause maintenance backlogs that impair many ageing vessels' capability. High allied activity in the High North inflicts further attrition and strain on the Russian forces. This affects force generation and puts combat power in the Russian navy

under pressure; the only exception is submarines, which are a top priority.

Russia circumvents Western sanctions

The Russian defence industry is struggling with Western sanctions and tightened export restrictions. Russia relies on Western technology to develop and manufacture military materiel. As military requirements increase, Russia will make growing use of civilian technology in its weapons programmes. Norwegian-manufactured maritime technology and communication and navigation technology is highly attractive to Russia. Civilian navigation equipment can be used in artillery systems, weapon stations and UAV navigational antennas.

Russian actors use a range of methods to circumvent Western sanctions and export restrictions. One involves setting up complex procurement networks using legitimate European companies as contacts for European technology providers. The actors use the EU free market to obtain Western technology, concealing parts of the supply chain and the Russian end user. To support technology procurement, Russian actors have set up a plethora of new companies in Central and South-East Asia. Russia also gains access to Western technology through China, which re-exports Western-manufactured technology and exports Chinese-manufactured technology with Western components.

Russian procurement networks mostly operate covertly, employing a wide range of methods and a high degree of adaptability. Despite this, Western sanctions are restricting Russia's access to Western technology and causing delays in a number of advanced Russian weapons programmes.

A shadow fleet, freighting oil, petroleum products and liquefied natural gas, offers Russia energy reve- ➔



Ukraine's President Volodymyr Zelenskyy and NATO Secretary General Mark Rutte at the NATO Defence Ministers' Meeting in Brussels, Belgium, in October 2024. *Image: Remko de Waal/ANP/NTB*



nue that is essential to the country's war economy. The shadow fleet transports a growing proportion of Russia's ocean-going oil exports.

The shadow fleet undermines sanctions and safe shipping, and presents a challenge to Norway. In addition to circumventing sanctions, the shadow fleet distorts competition and carries a risk of accidents and incidents occurring near Norwegian borders that could prove difficult to handle. Shadow fleet vessels are characterised by being old, technically unsound and not insured according to industry standards. Ship ownership and liability is often unclear, and the ships are often in breach of international maritime standards for verification of operational status, working conditions and safe navigation.

Russian export infrastructure and refinery capacity is concentrated in the western part of the country, and in 2024 Russia shipped more than half of its ocean-going oil exports out of ports on the Baltic Sea. Consequently, many shadow fleet vessels sail close to Norwegian waters.

The war in Ukraine will remain Russia's top priority

Although the warfighting is weakening Russia's economy, military and security policy position, the war in Ukraine remains President Putin's top priority. To Moscow, the war is not just about Ukraine's future, but also an attempt to influence Europe in line with Russian security interests. Russia considers itself more willing and able to endure war and confrontation than Ukraine or the West.

Russia's war objectives remain unchanged

Russia's overall objectives in Ukraine remain unchanged. The country's territorial ambitions include, at a minimum, the four annexed oblasts of Luhansk, Donetsk, Zaporizhzhya and Kherson, and likely also include Kharkiv oblast and the Ukrainian Black Sea coast in the longer term. Russia will prioritise reclaiming lost territory and securing the northern border to Ukraine.

Moscow's political ambition is for Ukraine to remain outside NATO, to lack any credible Western security guarantees and to be subject to Russia's sphere of influence. In order to achieve this, Russia is trying to exhaust Ukraine militarily and inflict such high costs on the civilian population that the Ukrainian government will be forced to negotiate peace on Russian terms. Russia is also seeking to weaken the West's military, diplomatic and economic support to Ukraine.

Russian upper hand, yet no breakthrough

In 2024, the war developed to some extent in Russia's favour, increasing its territorial control of Ukrainian territory by approximately 3,400 square kilometres; this is an area slightly smaller than the Norwegian county of Østfold. Russia did not succeed in translating this initiative into a larger breakthrough, and lost tens of thousands of soldiers each month, at times up to 30,000, in order to achieve this marginal territorial advance.

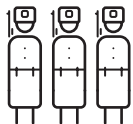
In August, Ukraine tried to reclaim the initiative by conducting a military operation in the Russian oblast of Kursk. The operation showed that Ukraine is capable of conducting offensive military operations; it also surprised Russia and reflected badly on the Kremlin. Despite this, Russia prioritised upholding its effort in Donetsk over regrouping forces to retake control of Kursk.







Russia's military power diminishing



The war favours quantity over quality, resulting in a high demand for personnel



Counting those killed, wounded, imprisoned or missing, Russia has lost more than 600,000 soldiers



Russia is unable to expand its forces at home while maintaining the war effort

The war continues

Russia has approximately 1,150,000 active soldiers and up to 22 million people of fighting age. This means the country is well placed to recruit and mobilise military personnel, and that it is likely to maintain its access to combatants throughout 2025. It may be that the economic incentives to enlist are sufficient, and there is no sign that Russia is planning another mobilisation.

The warfighting in Ukraine currently favours quantity over quality. Russia's access to North Korean soldiers therefore eases personnel demand somewhat in certain front sectors, but is negligible compared to the total number of Russian combatants and losses along the front. Efficient integration with Russian forces is hampered by a lack of joint training and language barriers. For now, the North Korean soldiers' warfighting on European soil is primarily of political significance, and would have to increase sharply in order to reduce the need for Russian personnel to any significant extent.

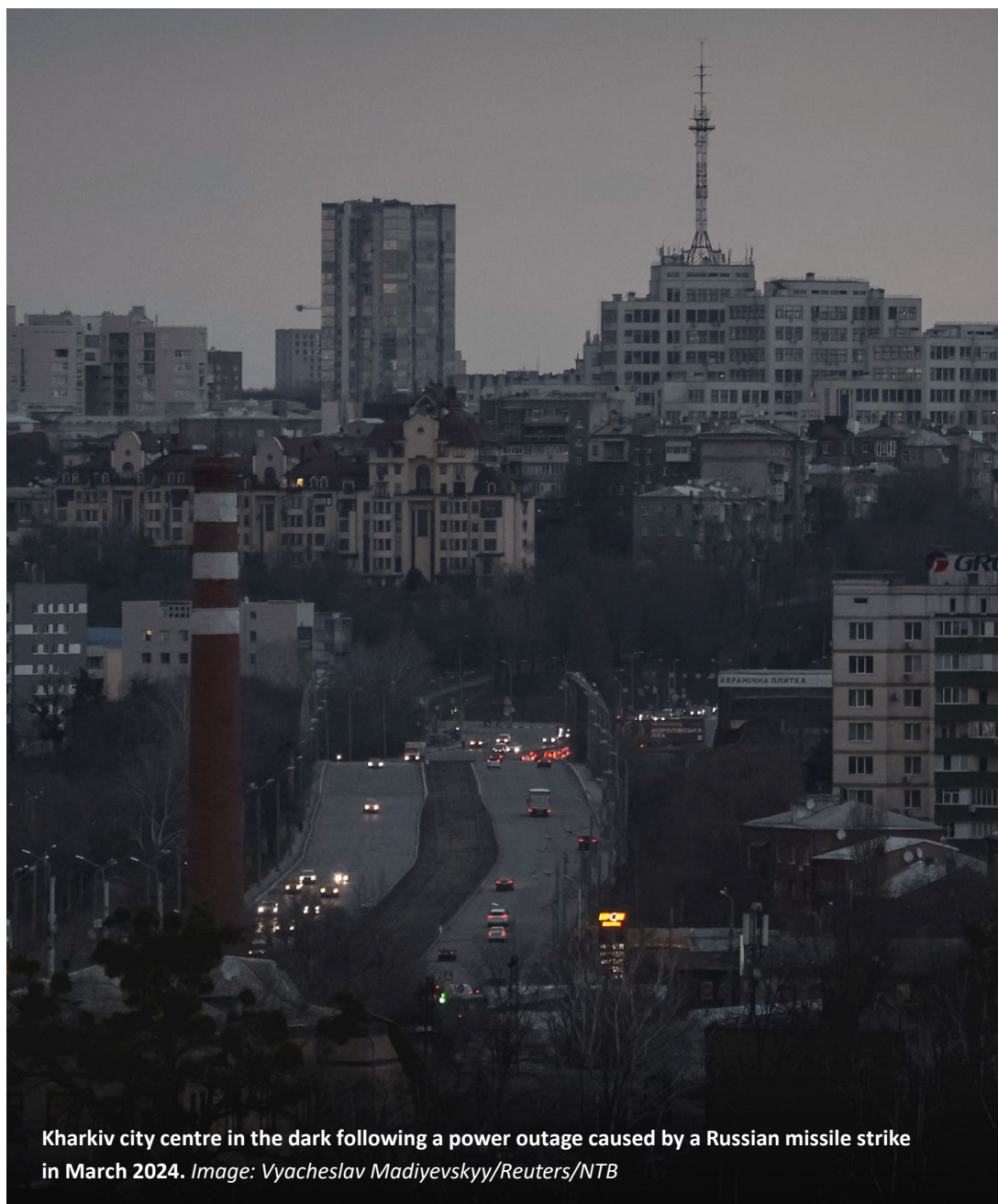
Although Russia has economic scope to sustain the war in 2025, starting from 2026 there is a growing

risk that the war effort will be impeded by a lack of funds. The Russian authorities can boost their ability to finance the war by raising taxes on the population, the elite and major exporters, and by cutting in other budget items; however, this carries a high risk of domestic instability.

Russia has an extensive trade and defence industry cooperation with third countries, which supports the war effort in Ukraine and the long-term development of the Russian armed forces. North Korea and Iran supply military materiel, including drones and artillery shells, directly to Russia. China is Russia's most important trading partner and supports the war economy by importing Russian oil and exporting Chinese components, materials and production equipment to the Russian military industry. As a result, Russia has the funds and military materiel required to sustain the warfighting intensity throughout 2025, and will highly likely retain the initiative and secure gradual territorial advances.

These essential requirements will gradually diminish, however – particularly in 2026. This could prompt Russia to alter its approach to the war, ➔

RUSSIA



Kharkiv city centre in the dark following a power outage caused by a Russian missile strike in March 2024. Image: Vyacheslav Madiyevskyy/Reuters/NTB



provided that Ukraine is able to continue recruiting and training personnel and receives sufficient amounts of Western military materiel. In order to reclaim the initiative, Ukraine would have to increase personnel recruitment and training sharply and improve access to military materiel.

Growing number of attacks on rear areas

The importance of attacks deep inside enemy territory will increase in 2025. Since the invasion began, Russia has attacked critical infrastructure in Ukraine using both missiles and drones, and in 2024 it directed massive missile strikes against Ukraine's energy sector. The purpose is to exacerbate war-weariness and weaken industrial output and other critical functions, as well as to cause an exodus of refugees intended to undermine Western support for Ukraine's defensive struggle.

Russia has increased domestic UAV production and established production of Iranian UAVs. Improved access to UAVs will increase the scope of attacks deep inside Ukraine in 2025.

Ukraine also directed long-range drone strikes against oil and energy installations and military targets on Russian soil in 2024. This included attacks on Russian strategic bombers stationed at Olenegorsk airbase on the Kola Peninsula. These attacks have weakened Russian revenue, inflicted reconstruction costs and forced the Russian military to disperse and operate across greater distances, which in turn complicates logistics. The attacks also make the realities of war clearer to the Russian people, thereby challenging Russian propaganda about the course of the war. Ukraine will continue these attacks in 2025, including against Russian military-strategic targets close to Norwegian borders.

Much uncertainty regarding negotiations

There is a possibility of attempted peace talks in 2025. The new US administration's approach to arms support and negotiations is a great source of uncertainty in both Moscow and Kyiv.

At the start of 2025, Russia has a stronger negotiating position than Ukraine. However, the strength of Russia's negotiating position could weaken towards the end of the year and into 2026, provided that Ukraine retains access to military personnel and equipment.

In any potential negotiations, Russian demands would be maximalist in nature. In addition to demands concerning Ukrainian territory and security policy neutrality, Russia would demand restrictions on Ukraine's military power and easing of Western sanctions. If China were to reduce its support to Russia and the West increase its support to Ukraine sufficiently to tip the war in Ukraine's favour, Russia's willingness to negotiate would increase and its negotiating position weaken.

Reduced Western support, increased Western pressure to negotiate, growing war-weariness due to high casualty rates, symbolic defeats or winter power outages are all factors that could make Ukraine more willing to negotiate and weaken its negotiating position. A significant weakening of the country's military power could force a negotiated solution whereby Ukraine accepts Russian demands.

Regardless of the outcome of the war in Ukraine, Russia will continue to perceive the West as a threat. Therefore, Moscow would consider a negotiated solution a pause in, rather than an end to, its confrontation with Ukraine and the West. Russia would take advantage of this pause to rebuild its economy, industry and armed forces. As with a Russian military victory, a negotiated solution on Russian terms would mean that Russia would pose a persistent threat to Europe. ➔

RUSSIA





Image: Valentyn Ogirenko/Reuters/NTB

□□□

Patrol: A Norwegian F-35 identifies a Russian Tupolev Tu-95 BEAR H on patrol north of Norway.

NATO in the Baltic Sea: Finland's President Alexander Stubb and Sweden's Prime Minister Ulf Kristersson at a NATO meeting in Helsinki, Finland in January 2025, discussing threats to critical undersea infrastructure.

Weapons systems: Ukraine needs air defence systems in order to defend itself against Russian air strikes. The image shows a US Patriot air defence system.

Increased Russian focus on the Nordics, the West and NATO

Sweden and Finland's memberships have strengthened NATO. Russia believes that the NATO enlargement has heightened the threat to its western border and challenged its scope for action in the Baltic Sea. At the same time, Moscow is uncertain how the enlargement will affect NATO's military-strategic posture in the north. It is therefore turning more of its attention, both politically and militarily, to the Baltic Sea and the Nordics.

Russia responds to the NATO enlargement

Russia will continue its threatening rhetoric and attempts at influencing Sweden, Finland and NATO in general. The aforementioned establishment of the →



The Northern Fleet's multirole submarine Kazan arrives in Havana in June 2024, during a deployment to the Atlantic. By appearing in Cuba just before NATO's 75-year anniversary summit in Washington, D.C., Russia sent a signal to NATO. Image: Ariel Ley/AP/NTB



Leningrad and Moscow military districts indicates a stronger military focus in a westerly and north-western direction. The war in Ukraine limits Russia's ability to augment the land forces' military presence and capability in real terms along the north-western border with NATO, and a major strategic land power exercise in 2025 therefore seems unlikely.

Instead, Russia will prioritise surveillance and intelligence collection against the Nordic countries, in order to detect changes to NATO strategies, plans and basing policy. The Northern Fleet will maintain a presence in order to stay on top of developments and display defensive capability in the north, including near Norwegian borders. Russia may also bolster its naval presence and activity directed at NATO in the Baltic Sea, should it perceive its ability to defend and resupply Kaliningrad to be under pressure.

The Northern Fleet poses a considerable threat

The Northern Fleet secures Russia's important northern flank. Its primary mission is to provide strategic deterrence, defend the northern bastion and threaten NATO's strategic locations, naval forces and key maritime supply lines. The fleet adapts its activities and activity levels to convey dissatisfaction and adjust tension levels with NATO. Russia has transferred operational command of the Russian fleets from the military districts to the commander of the Russian Navy. This offers greater flexibility in the use of naval forces across the fleets.

New multirole submarines and modern frigates are important to solving the Northern Fleet's missions. No major changes to Russian naval power are expected, but the Northern Fleet is gradually taking receipt of new vessels. In 2025, the fleet will have three modern SEVERODVINSK-class multirole submarines and three modern frigates armed with hypersonic

Tsirkon missiles. The missiles' extremely high velocity makes them very difficult for air defence systems to handle.

The Northern Fleet's strategic multirole submarines, armed with cruise missiles, maintain a presence and provide deterrence close to Norwegian borders. In 2025, the Northern Fleet will prioritise regular deployments to the Atlantic Ocean, and possibly a large-scale strategic naval exercise.

Strategic bombers to remain on the Kola Peninsula

Russia has stationed strategic bombers at airbases on the Kola Peninsula in order to reduce their vulnerability to Ukrainian attacks. The aircraft will remain here throughout 2025. They will primarily conduct cruise missile strikes on Ukraine, but also fly sorties westwards towards Europe and northwards towards the United States, in order to deter NATO. Russian strategic bombers will conduct regular strategic patrols near Norwegian borders.

Crucial weapons testing continues in the High North

Russia has announced a new armament programme that will be launched in 2025. It is likely to emphasise reconstitution of the land forces, with the addition of heavy materiel such as main battle tanks, armoured vehicles and artillery, as well as autonomous systems and strategic deterrent capabilities.

The submarine programme, long-range missiles and attack drones are all given high priority. Russia will continue research and development of anti-satellite weapons, strategic intercontinental weapons, strategic air defence, missile defence and long-range precision-guided weapons, and will be testing several of these weapons systems in the High North in 2025. ➔

RUSSIA



The British authorities are prosecuting several individuals for an arson attack conducted in London in 2024 on behalf of Russian actors. *London Fire Brigade/X*



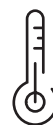
Russia's covert operations in Europe



European proxies are used for intelligence, subversion, influence and sabotage



Arson and vandalism are intended to deter and sabotage Western arms support



Russian risk appetite in sabotage operations could increase if Ukraine gains the upper hand in the war

Russia's Arctic policy to remain unchanged

Moscow is nowhere near achieving its lofty ambitions for developing Arctic Russia. In 2024, Russia transported just under 40 million tonnes of goods along the Northern Sea Route, approximately half of the annual target of 80 million tonnes.

Despite strong mistrust in the other Arctic states, Russia has remained on the Arctic Council. Moscow wants to counter political isolation and dependency on China, preferably by drawing other BRICS members into developing Russian energy and infrastructure projects in the Arctic. Access to non-Arctic states' technology, capital and markets is crucial for Russia to succeed in these endeavours.

No improvement in relations with Norway

Russia considers Norway one of several 'unfriendly countries'. This has caused Moscow to discontinue its policy of cooperation, which previously balanced Russian criticism of Norway as a NATO ally. The Russian state apparatus is allocating fewer resources and personnel to addressing its relationship with Norway and Norway-related matters. Rather, Russia

is strengthening its cooperation with non-Western countries. Many new cooperation initiatives look eastwards, and both China and India have been singled out as key strategic partners.

It has always been important to Russia to prevent NATO from using Svalbard militarily. The current tensions between NATO and Russia have brought Svalbard's military-strategic value to the fore in Moscow. Russia's ambition to maintain a presence on Svalbard remains unchanged. Russia is seeking new collaboration partners for its activity in Barentsburg and the Pyramid, and has invited China and other BRICS countries to collaborate on research projects. China and Russia are likely to engage in research collaboration on Svalbard in 2025.

More extensive use of means

The expulsion of Russian intelligence personnel from European countries has compelled Russia to make more frequent use of proxies in covert operations in Europe. These proxies conduct influence operations, political subversion, sabotage and information gathering on behalf of Russian state actors.





In December 2024, the Romanian Constitutional Court annulled the country's presidential election due to alleged Russian election interference. Image: Daniel Mihailescu/AFP/NTB



In 2024, the Russian intelligence and security services (RISS) recruited Europeans via digital platforms, offering them payment for performing specific and gradually more serious acts of sabotage. It would seem that a spate of arson attacks and vandalism across Europe over the past year have been part of a large-scale, coordinated Russian effort to deter and sabotage Western arms support to Ukraine. The use of proxies weakens RISS's control of the execution phase, and demonstrates that Russia has lowered the threshold for sabotage operations against Western targets and accepts a greater amount of risk associated with this type of operation. Russian risk appetite may increase further should the war develop in Ukraine's favour.

RISS uses artificial intelligence and the internet to disseminate anti-Western narratives and encourage extremists, for instance in connection with controversial media stories. The purpose is to subvert and spark unrest in Western countries.

In December, the justice system in Romania annulled the country's presidential election due to extensive Russian influence on TikTok and economic support to one of the candidates' election campaigns. In 2024, the United States, France, Moldova and Georgia also reported Russian election influence. Reported activity includes widespread dissemination of anti-Western and pro-Kremlin content on TikTok, X, encrypted messaging apps and other web-based platforms. The purpose of these activities is to influence the elections to further Russian interests.

Pro-Russian hacktivist groups associated with RISS regularly conduct distributed denial of service (DDoS) attacks against Norwegian businesses. These attacks paralyse web-based services temporarily by overwhelming them with vast amounts of data traf-

fic, and could sow doubts about Norwegian public institutions' ability to provide services. Threat actors that support or are supported by Russia will probably continue to conduct DDoS attacks against Norway in 2025.

Russia uses non-military vessels as intelligence platforms near its own borders. Enhanced Norwegian efforts to exercise authority combined with port bans have limited this capability in Norwegian waters. In 2025, Russia will adapt to these limitations by using different types of vessels with legitimate access to Norwegian waters and ports.

In 2025, Russian threat actors will conduct computer network operations against Norwegian decision-making bodies, foreign service missions, the Norwegian Armed Forces, critical infrastructure, academia and technology companies, for the purpose of collecting intelligence. Collection efforts directed at critical infrastructure could also be intended to prepare for future digital sabotage. □

Insight
The threat to undersea infrastructure
Sources:

The threat to undersea infrastructure

The recent cable breaks in the Baltic Sea have highlighted the vulnerability of critical undersea infrastructure. Shallow-water infrastructure is especially exposed to intentional sabotage and to ships that unintentionally cause damage by dragging anchors or trawls along the seafloor.

The deeper the water, the more complex intentional sabotage campaigns become. In shallow waters, an anchor, a trawl or a diver may suffice, whereas operations at depths of several hundred or thousands of metres require very different assets, capabilities and planning. Much of Norway's critical infrastructure is located at great depths. Although damage to such infrastructure could have natural causes, it is often necessary to consider whether it could be the result of a deliberate act involving military capabilities.

Cables above 1,600 meters are buried 1 metre below the seafloor while cables on greater depths are not buried.



RUSSIA

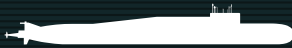


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Norwegian Intelligence Service
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Divers



Submarines



Remotely operated vehicles
(ROVs), autonomous under-
water vehicles (AUVs), deep-
submergence vehicles (DSVs)



For decades, Russia has been developing a military capability to survey and sabotage Western undersea targets, in order to be in a position to threaten critical undersea infrastructure in the lead-up to or during a conflict. Russia will seek to conduct this type of operation without being held responsible, and to take advantage of the fact that damage to undersea infrastructure could have natural or unintended causes. The threat to communication cables linking Europe and the United States and to energy supply such as gas pipelines is especially grave.

Russia continues to develop military capabilities for threatening Western undersea infrastructure.



II. CHINA

China has grown powerful within the framework of a liberal and rules-based world order. Beijing is now using its instruments of power purposefully to replace this order with one that sets China's interests and values first.

Beijing knows that this creates a conflict of interest with the West. China will continue to reap economic benefits from cooperating with Western countries, while setting up its economy, diplomacy and military to handle a breakdown in relations and confrontations.







Economic means for global power and influence

China is the second largest economy in the world, and economic means remain its most important foreign policy tool. Beijing has launched several initiatives that are to help establish a China-centric world and boost its international power and influence. The initiatives are designed to offer other countries good relations with, market access to, and significant investments from China. In return, these countries promote China's interests by providing access to technology, natural resources and global supply chains, as well as by supporting Chinese positions internationally.

China seeks independence from Western markets

Structural challenges hamper and dampen the growth potential of the Chinese economy, and growth has

slowed. These challenges include weak consumer confidence, a volatile property market, high youth unemployment and high debt levels among local authorities.

Since the pandemic, China has also struggled with low domestic consumption. In autumn 2024, the Chinese authorities launched a set of measures to stimulate the economy, and additional measures are expected in 2025. These measures will probably increase domestic consumption, though not enough to prevent growth from stagnating further in the years ahead.

In 2024, the Chinese authorities set a growth target of around five per cent. Due to structural economic challenges and low consumer confidence in the Chinese population, China relies on exports to reach this growth target. Hence, China is vulnerable to sanctions at a time marked by increasing international tension over issues such as the war in Ukraine and the question of Taiwan.

In spite of the growth target, China prioritises economic security over growth. The government has set new and ambitious goals for China's economy to →

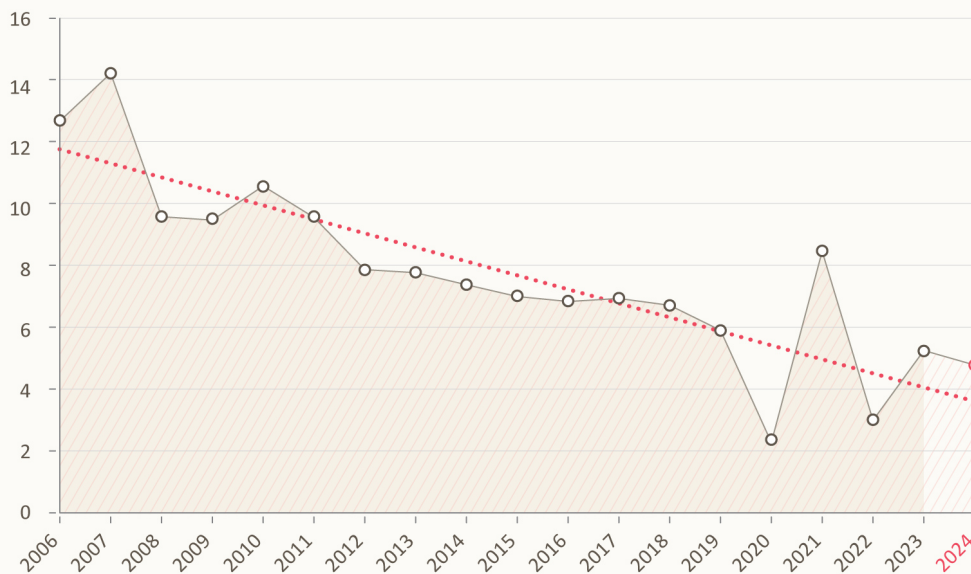
CHINA



CHINA



China's annual economic growth rate



The figure shows China's annual economic growth as a percentage, with trend line for the years 2006–2024. The growth rate for 2024 is an estimate. Source: IMF



China seeks economic dominance



China's ambition is independence from Western markets and economies



Port and maritime infrastructure investment secures global access to trade routes



State subsidies are used strategically to establish dominance in global value chains

become 'risk-controlled and self-sufficient' by 2029. By reducing its dependence on Western markets and increasing the West's reliance on Chinese goods and inputs, China can make itself less vulnerable to Western sanctions and gain more leverage to advance its own interests.

Strategic state subsidies

State subsidising of advanced technology and strategically important sectors will continue, increasing China's global competitive advantage and market shares. Chinese state-subsidised production includes batteries, solar cells and electric vehicles.

Combined with intelligence activity and an offensive diplomacy, China uses subsidies as a strategic tool to establish dominance in important value chains, production and infrastructure. China can exploit this dominance to exert pressure on countries and organisations.

China exported five million electric vehicles to the global market in 2023, and figures were expected to be 25 per cent higher in 2024. To shield European electric vehicle manufacturers from the competitive advantages that state subsidies provide to Chinese manufacturers, the EU increased tariffs on Chinese electric vehicles in the autumn of 2024. Continued Chinese subsidisation of export-oriented production in key sectors will continue to create tension between Western and Chinese trading partners.

Infrastructure investments

China aims to dominate important value chains and secure import routes for critical minerals, energy, food and other bulk goods that the country cannot produce itself. Investments in physical and digital infrastructure abroad are to create efficient Chinese supply chains.

China has an ambition to gain free access to global trading routes and is investing in ports and →



other maritime infrastructure globally. These kinds of investments in Europe have increased sharply in recent years. Over time, the Chinese state-owned company COSCO Shipping has shown an interest in constructing and establishing port infrastructure in Norway as well.

A new approach to business activity abroad

Military-civil fusion is to harness relevant technology developed or procured in the civilian domain for military purposes. A large proportion of the emerging and disruptive technologies that China's armed forces and security services seek to acquire is dual-use technology developed by commercial actors in the civilian sector.

US export restrictions on technology have boosted China's interest in European tech providers. For example, China has increased its investments in the electric car industry in Europe, Asia and the Middle East to offset harsher US trade restrictions. China's interest in acquisitions of and investments in European tech companies will continue.

This requires Chinese businesses to adapt to an investment climate with increasing restrictions and scrutiny from the West. China will have to work more purposefully and strategically in host countries than before in order to secure investment contracts and win tenders. Over time, Chinese businesses have cooperated with businesses in host countries in order to gain market access. In addition, Chinese actors utilise several commercial and financial mechanisms to conceal business activities that promote Chinese

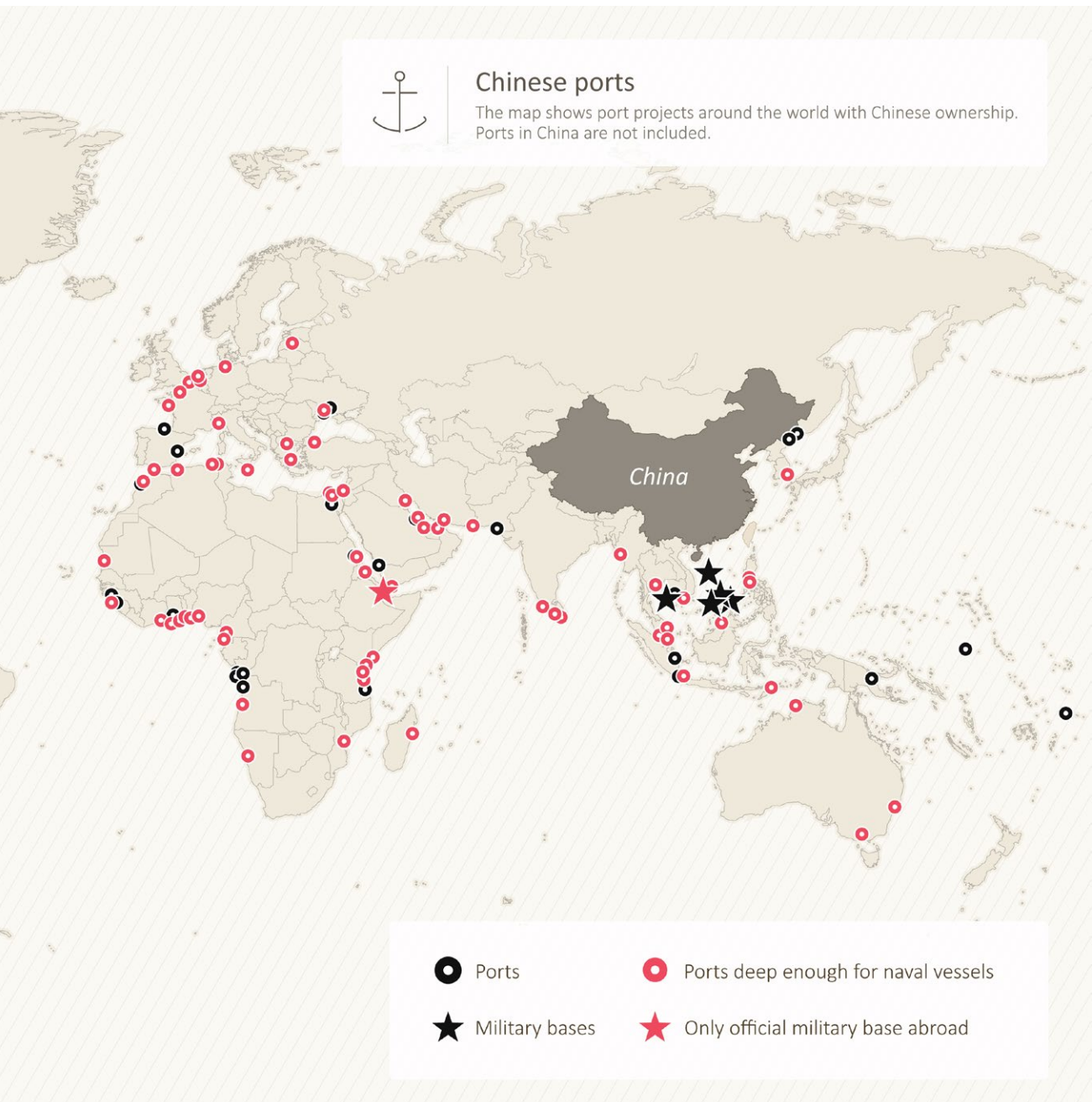


CHINA



Chinese ports

The map shows port projects around the world with Chinese ownership. Ports in China are not included.



CHINA



Xue long 2 breaks ice for a Chinese freighter. Image: Zhu He/Xinhua/NTB



Chinese business and intelligence in Europe



Extensive intelligence efforts targeting European politics, business and research



Chinese businesses and individuals are required by law to assist the intelligence services



Chinese businesses have close links to and carry out foreign assignments on behalf of the intelligence services

interests abroad. Chinese intelligence and influence activity in Europe supports both Chinese business policy and other national interests.

ties. Chinese businesses, journalists, interest groups and private individuals carry out foreign assignments on behalf of CISS.

Chinese intelligence and influence actors are active in Europe

Chinese intelligence and security services (CISS) are conducting physical and digital operations against a wide range of targets in Europe, including political decision-makers, civil society, businesses and research and development institutions. The purpose of these operations is traditional intelligence collection of sensitive information, political subversion and industrial espionage.

In addition to its own intelligence personnel, CISS is authorised by Chinese law and has the resources to utilise all Chinese companies and individuals for intelligence, influence and other state purposes. There are close links between CISS and Chinese corporate enti-

Continuous interest in Norway

In order to weaken the West's, and particularly the United States', dominant international position, China routinely criticises Western initiatives and actions. China also pressures states, companies and individuals to refrain from or moderate critical discussions about China. It is becoming increasingly important for Beijing to maintain good relations with individual European countries, to prevent the EU from uniting around a more critical policy toward China.

Because of Norway's NATO membership and strong integration into the international system, a good relationship with Norway has political symbolic value for Beijing. The Norwegian Arctic also remains important to China.

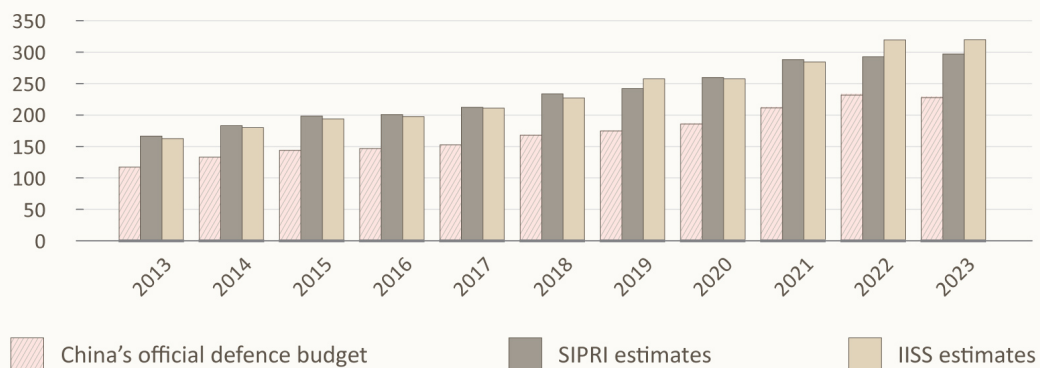


CHINA

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China's defence budget



The figure compares the development of China's official defence budgets with budget estimates from Stockholm International Peace Research Institute (SIPRI) and International Institute for Strategic Studies (IISS), measured in USD billions. China's official budget is the second largest in the world. Although it constitutes only about a third of the US budget, the real budget is likely much higher, and with lower production costs, China gets more in return for its spending.



Limited but growing presence in the Arctic

The Polar Research Institute of China has a presence and conducts activities on Svalbard, supporting China's scientific and strategic ambitions in the region. However, China's overall presence in the Arctic is limited. Investments in Russian liquefied natural gas projects are the largest and most prominent Chinese activities in the region.

China has ambitions to strengthen its presence, capabilities and influence in the Arctic in the coming years. China is facilitating this by strengthening cooperation with Russia on research and commercial activities, as well as by increasing China's national icebreaker capacity. China currently has five polar icebreakers and is working on developing heavier icebreakers and icebreakers with nuclear propulsion. This enables more Chinese sailings in the Arctic, thereby increasing the ability to map the region for both civilian and military purposes.

cyber capabilities, space capabilities and advanced precision weapons in its thinking on strategic deterrence, and by adding a significant amount of nuclear weapons to its arsenal.

President Xi Jinping has tightened his control over parts of the People's Liberation Army (PLA). In spring 2024, the PLA replaced the strategic support forces with an information support force, a cyber force and a space force. These new forces are directly subordinate to the Central Military Commission, led by President Xi.

The PLA's cyber forces are further developing the capability to digitally sabotage critical Western infrastructure. The forces have targeted critical infrastructure in the US, aiming to set the stage for future sabotage. Operations of this kind are part of the forces' preparations for a potential military conflict with Western adversaries in areas close to China, particularly Taiwan.

Intensified assertiveness in the South and East China Sea

China is becoming increasingly assertive and confrontational in its surrounding regions. It has militarised outposts and repeatedly used force against neighbouring countries in the South China Sea.

The navy, coastguard and maritime militia will continue to enforce China's national interest vis-à-vis other actors in the region. The PLA will continue to train blockading and invading Taiwan, using the exercises to introduce new elements that fuel the military coercion campaign against Taipei. The coastguard will also participate in this coercion campaign, including by patrolling close to Taiwan and participating in military exercises. □

Faster military modernisation

China has the world's second largest official defence budget, and the real defence-related allocations are probably far higher than indicated by the official numbers. This enables the fastest and most extensive military armament the world has seen since World War II.

China is further accelerating its defence modernisation leading up to the centennial of the People's Liberation Army in 2027. Over several years, China has strengthened the strategic deterrent capability of the People's Liberation Army (PLA) by integrating

Space

Space has long been militarised and is now characterised by increased integration of military, civilian and commercial sectors.



Launch of the Chinese surveillance satellite Yaogan-42 02 from Xichang Satellite Launch Centre in southwest China on 21 April 2024. Image: Yang Xi/Xinhua/NTB

An arena for future conflicts

Societies across the world rely on satellites for critical services such as communication, navigation and earth observation. Modern military operations are also increasingly dependent on functioning space capabilities.

This imbues civilian and commercial space actors and services with geopolitical relevance, making them potential targets for actors seeking geopolitical influence.

Russia is one of the world's most capable space nations, but lags behind the two

leading space powers China and the United States, especially when it comes to satellite capability. The sanctions regime is limiting Russia's ability to develop new space technology. To remedy this, Russia cooperates with China and the other BRICS countries. Russia plans to enhance its situational awareness in the High North and the Arctic by increasing the number of surveillance satellites.

Anti-satellite weapons

The West is increasingly dependent on space-based technology. With rising tension between China and Russia on the one hand and the West on the other, China and Russia's interest in anti-satellite weapons is growing.

More actors are developing and deploying anti-satellite weapons on the ground and in space. These could destroy or disrupt satellites and the services that depend on them. With this in mind, protecting satellites and the services they render against potential threat actors becomes all the more urgent.

Russia and China have demonstrated their capability to hit and destroy satellites in low orbit using missiles launched from the ground. Both countries have carried out one such anti-satellite weapons test against their own satellites.

On several occasions, Russian jamming has disrupted both satellites and satellite-dependent services, including the GPS navigation system. Several countries in Europe have also accused Russia of jamming satellite communication.

The nature of threats against satellites and satellite-dependent services varies and can be divided into four main categories:



Kinetic attacks destroy satellites or their ground infrastructure using bombs, bullets or missiles. These generate considerable amounts of space debris, which may harm other satellites and space capabilities in the same orbit; hence, they also have negative effects for the actor carrying out the attack. Attacks on satellites require specialised anti-satellite missiles, while traditional weapons can attack the satellites' ground infrastructure.



Non-kinetic attacks emit energy that permanently destroys or damages satellites. This can involve electromagnetic pulse, nuclear detonations or lasers. In the event of a nuclear detonation, a large portion of communication and Earth observation satellites would be destroyed by direct radiation, and further would fall over time due to exposure to radioactive fallout. Non-kinetic anti-satellite weapons can also generate large amounts of space debris.



Cyber operations can target and damage both satellites and their ground infrastructure. The intention may be unclear and attribution is challenging.



Electronic warfare (EW) can target and temporarily disable satellites, their ground infrastructure or satellite-based services. EW includes jamming ground-based sensors for space traffic surveillance, satellite communication, Earth observation satellites, satellite control and navigation.

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Церемония открытия VIII Российско-Китайского



III.

RUSSIA INCREASINGLY DEPENDS ON CHINA

Geopolitical interests pull China and Russia closer together, and the two countries have strengthened their strategic partnership over the past year. This is reflected in established cooperation platforms across many sectors and persistently high bilateral meeting activity at both political and official level. Russia has become more dependent on China, including for its ability to wage war in Ukraine. Trade is the main area of cooperation, with trade volume increasing, but Russia and China have also expanded their cooperation militarily and in the Arctic.

Nevertheless, caution and friction put some restraints on the relationship. China holds back to avoid incurring Western sanctions and to leverage Russia's dependence in their negotiations, while Russia shields its strategic core interests.

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5%

95%

40%

60%



Geopolitical interests drive the relationship

Geopolitical interests and development trends are bringing China and Russia closer together. A key driver is their shared ambition to challenge the power and influence of the United States and the West. China and Russia coordinate and collaborate to strengthen multilateral forums like BRICS and the Shanghai Cooperation Organization as a counterbalance to the EU and NATO, to erode the international standing of the United States, and to deepen the integration of their economies. The war in Ukraine has bolstered the relationship and made Russia even more dependent on China.

Caution and points of friction

Despite their strengthened partnership, both China and Russia remain cautious, which creates friction and prevents the relationship from deepening.

China wants to avoid secondary sanctions

Beijing is moderating its support to Moscow in order to avoid Western secondary sanctions. This limits the cooperation of larger Chinese companies and institutions with Russian counterparts, while smaller actors without direct ties to the Chinese state have more leeway. China's caution is also part of its negotiating strategy.

Sector-specific self-interest in the Arctic

In 2024, Russia and China expanded their cooperation in the Arctic, but the initiatives seem poorly coordinated. Arctic cooperation will continue to increase, but friction and self-interest will continue to mark the relationship. China has a long-term perspective on its Arctic presence and will put national interests first, which means capitalising on Russia's dependence in order to negotiate favourable bilateral agreements.

Russia and China strengthened their cooperation on the Northern Sea Route in 2024. In May, President Xi and President Putin announced that China and Russia will establish a commission for cooperation on →



China's President Xi Jinping and Russia's President Vladimir Putin during the BRICS summit in Kazan, Russia in October 2024. *Image: Sergey Bobylev/ Photohost agency brics-russia2024.ru Kazan Republic of Tatarstan Russia/NTB*

RUSSIA INCREASINGLY DEPENDS ON CHINA

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Russian and Chinese aircraft on what China's Ministry of Defence referred to as a joint strategic air patrol over the Sea of Japan in November 2024. Image: Sun Liren/Xinhua/NTB



China and Russia's cooperation



China and Russia have a shared ambition of challenging US and Western power



Defence industry cooperation is sensitive, and the two countries try to conceal it from the outside world



Military cooperation is intended to show unity and strength, but is marked by mutual distrust

this maritime route. China will exploit the cooperation to increase Russia's dependence on Chinese expertise and investments, thereby further shifting the power balance in its favour.

Following up on their first joint coastguard exercise, China and Russia conducted a joint coastguard patrol in the Bering Strait in 2024. According to Russian media, the two countries will carry out joint coastguard exercises on an annual basis from now on.

Russian opposition to Chinese military capabilities in the Barents Sea and the western Arctic will persist, but in 2024, China and Russia conducted their first joint strategic bomber sortie north of the Bering Strait, in the eastern Arctic. The sortie is one of several indications that the parties are ramping up their bilateral military cooperation.

Strengthened military cooperation

China and Russia will further strengthen their military cooperation in 2025, with joint exercises and defence

industry exchanges as the most prominent forms of collaboration.

Exercises and joint training but mistrust remain

In recent years, Russia and China have carried out progressively more comprehensive exercises involving their naval and air forces. The main objective of the joint exercises is to demonstrate strategic cohesion and strength vis-à-vis the US and the West. The exercises build trust, yet enduring mutual distrust will likely continue to limit the countries' military cooperation.

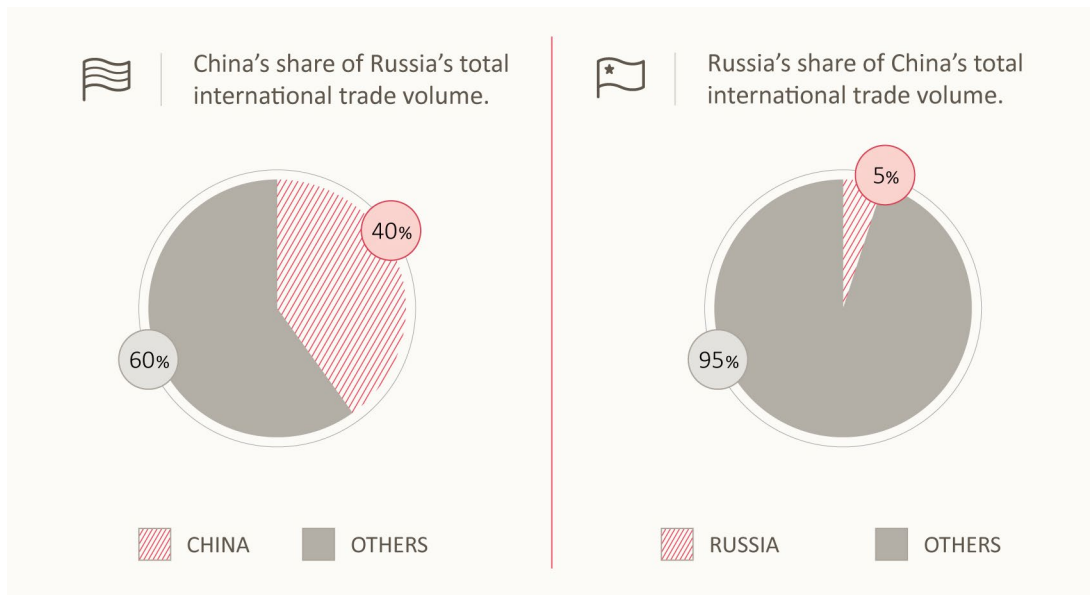
Chinese defence industry supports Russia's warfighting in Ukraine

China and Russia have prioritised and strengthened their defence industry cooperation. This cooperation strengthens the defence industry and defence modernisation in both countries, but it is sensitive, and the two sides strive to keep the cooperation concealed from the outside world.

China supports Russia's warfighting in Ukraine by providing critical resources to the Russian defence industry, including machinery and dual-use equip-

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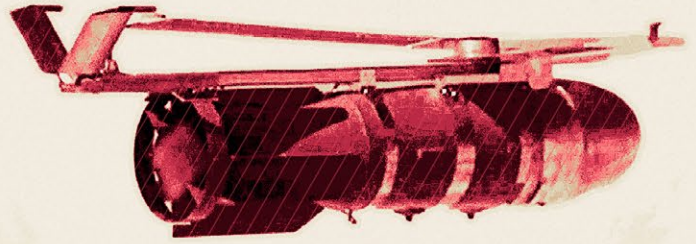


ment and components. China is willing to go far in supporting Russia, to avoid a Russian defeat in Ukraine and subsequent risk of regime collapse. China will continue to support Russia in 2025 despite Western pressure to end it, but carefully adjust it so as to avoid incurring Western sanctions.

Strengthened but lopsided trade relationship

Trade is the most extensive form of cooperation between China and Russia, and it has increased sharply, especially after Russia's full-scale invasion of Ukraine. Chinese customs data indicate that the value of bilateral trade rose to a record-high USD 240 billion in 2023, and looked to increase further in 2024.

The trade relationship is increasingly asymmetrical in China's favour. China is Russia's most important market for export of Russian raw materials, the primary supplier of inputs to Russia's defence industry and a significant provider of consumer goods to the Russian market. Trade with China accounts for nearly 40 per cent of Russia's international trade volume, making China by far Russia's most important trading partner. China's trade with Russia, on the other hand, only accounts for five per cent of its international trade volume. The war in Ukraine has increased Russia's dependence on trade with China, which is crucial to mitigating the impact of Western sanctions. □



IV.

ACCELERATING ARMS RACE

The days of arms control are numbered. With the expiry of New START in February 2026, the last arms control treaty between the United States and Russia that regulates nuclear weapons will be terminated. Russia suspended New START in 2023, but has nonetheless adhered to the treaty's limit on the number of strategic nuclear weapons.

China, who, like the other nuclear-armed powers, remains outside the arms control regime, is increasing its nuclear weapons arsenal significantly. The prospect of three major and rival nuclear-armed states is different and more complex than the traditional strategic deterrent established by the United States and the Soviet Union during the Cold War. The great powers are heading towards a new strategic arms race.





Russia intensifies its deterrence against the West

Russia has a comprehensive and highly ambitious weapons programme that includes testing and developing both strategic and non-strategic weapons. In his annual address to the nation in 2018, President Putin announced that Russia is developing a range of new weapons systems in response to the United States' investment in missile defence. Russia has continued all these programmes, with some of the weapons fully developed and placed into operational service, while others still require several more years of development and testing. The most prominent development from 2024, however, is the change in rhetoric surrounding the country's non-strategic nuclear weapons.

Non-strategic nuclear weapons rhetoric

Russia has a considerably higher number of non-strategic nuclear weapons than the other nuclear-armed states. This includes nuclear weapons for use by land, naval and air forces, as well as for air and missile

defence systems. Russia stores non-strategic nuclear weapons in dozens of nuclear storage facilities across the country.

Russia conducts regular exercises with its non-strategic nuclear forces, but has traditionally done so without publicly announcing them. In the summer of 2024, Russia changed tack by mentioning and publishing videos from one of these exercises. With the goal of deterring the West in general and Western support for Ukraine in particular, Russia reminds both domestic and Western audiences of its non-strategic nuclear weapons capability through its rhetoric.

Using intermediate-range missile Oreshnik for deterrence

In November 2024, Russia launched an Oreshnik intermediate-range ballistic missile (IRBM) with 36 small, conventional warheads against Ukraine. The missile is not new, but this was the first known use of Oreshnik, and the first operational use of an IRBM ever. The missile is considerably more expensive than the other →

Putin's new weapons – where are they now?

Burevestnik SKYFALL

Burevestnik is a long-range cruise missile under development. Burevestnik features a nuclear reactor for propulsion. This propulsion system gives the missile a very long range and therefore the ability to attack targets across the globe in any direction. Burevestnik can take unpredictable flight paths and exploit blind spots in the detection and interception capabilities of air defence systems. Russia has been testing Burevestnik since 2016, including from Novaya Zemlya. It will still take some time before the missile is fully developed and can be deployed to the armed forces.

Poseidon

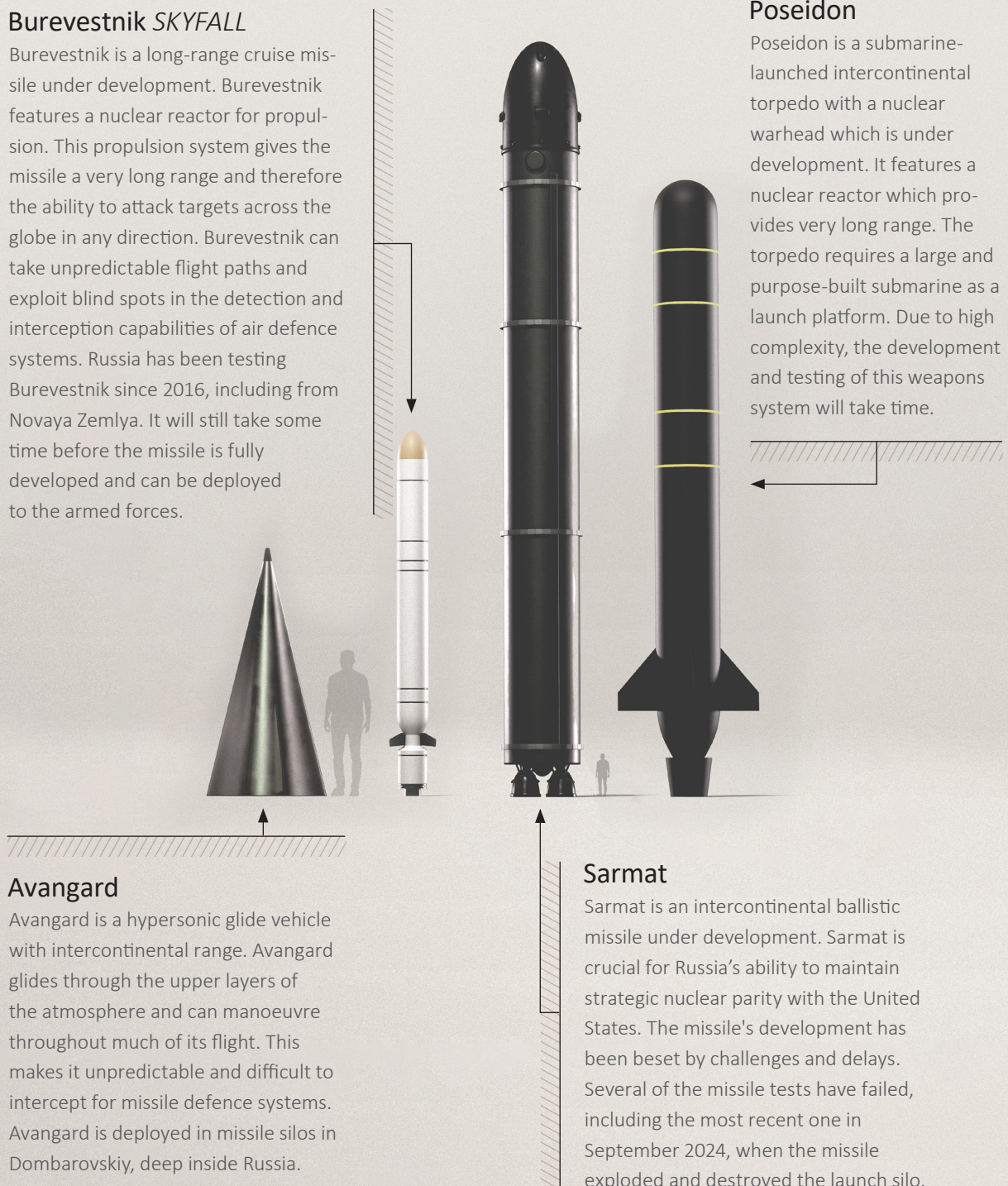
Poseidon is a submarine-launched intercontinental torpedo with a nuclear warhead which is under development. It features a nuclear reactor which provides very long range. The torpedo requires a large and purpose-built submarine as a launch platform. Due to high complexity, the development and testing of this weapons system will take time.

Avangard

Avangard is a hypersonic glide vehicle with intercontinental range. Avangard glides through the upper layers of the atmosphere and can manoeuvre throughout much of its flight. This makes it unpredictable and difficult to intercept for missile defence systems. Avangard is deployed in missile silos in Dombrovskiy, deep inside Russia.

Sarmat

Sarmat is an intercontinental ballistic missile under development. Sarmat is crucial for Russia's ability to maintain strategic nuclear parity with the United States. The missile's development has been beset by challenges and delays. Several of the missile tests have failed, including the most recent one in September 2024, when the missile exploded and destroyed the launch silo.





One of 300 new Chinese intercontinental ballistic missile silos under construction in the Chinese desert. *Image: AFP PHOTO/PLANET LABS, INC./NTB*



Nuclear deterrence



**The last remaining
nuclear arms control
treaty will soon expire**



**Russia is using nuclear
weapons rhetoric to deter
Western support to Ukraine**



**China's nuclear weapons arsenal is
growing, and the country no longer
practices minimal deterrence**

missiles Russia uses against targets in Ukraine. The large number of warheads ensures high penetrability against air defences, but does not add any significant firepower. The purpose of using this missile was to strengthen Russia's escalation control and deterrence against the West. The missile has sufficient range to reach targets across Europe from Russia.

China enhances its nuclear weapons capability

China still has considerably fewer nuclear warheads than Russia and the US, but its arsenal has grown and will continue to grow rapidly. Land-based nuclear weapons are the backbone of China's strategic deterrence, but the country is also expanding its capability to deliver nuclear weapons from the sea and the air. This means that China no longer practices minimum deterrence.

China has built and started to equip 300 new silos with intercontinental ballistic missiles carrying nuclear warheads. The silos are vulnerable to an initial nuclear weapons attack. At the same time, these silo-based nuclear weapons have a shorter preparation time and are therefore suited to first-strike use and immediate retaliation against a nuclear attack.

China is developing new strategic submarines and bombers in order to strengthen the ability to launch nuclear weapons from the sea and the air as well. The diversification of nuclear forces across multiple delivery platforms on land, under the sea and in the air increases flexibility and reduces vulnerability in China's nuclear forces.

In addition to long-range strategic nuclear weapons, China is developing advanced conventional weapons and nuclear weapons with regional range, suitable for tactical use. China is particularly investing in weapons systems designed to penetrate regional missile defence systems, including manoeuvrable and unpredictable hypersonic glide vehicles. □

Insight
Game-changing weapons
Sources:

Game-changing weapons

Several development trends are reshaping modern warfare. The use of drones is especially notable, but advancements in glide bombs and biological weapons are also enabling new methods of warfare.



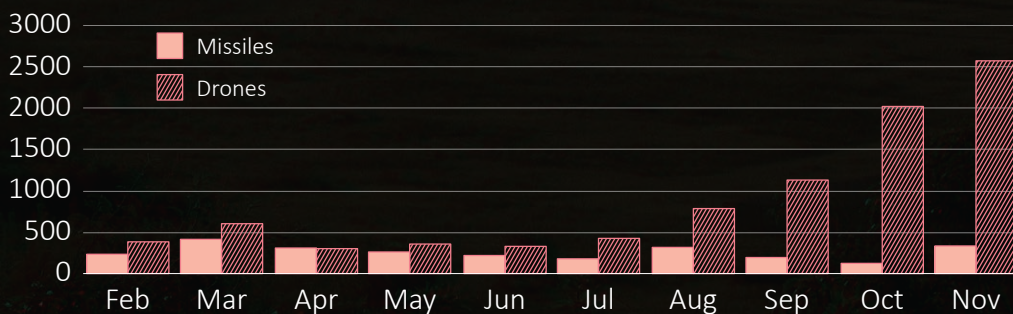
A Ukrainian soldier examines a Shahed drone used in a Russian attack on Ukraine in November 2024. Image: Efrem Lukatsky/AP Photo/NTB



A Ukrainian soldier prepares an FPV drone with an explosive charge at the front in Donetsk in March 2024. Image: AP Photo/Efrem Lukatsky, File/NTB

Drones

Both Russia and Ukraine use a tremendous number of drones on a daily basis. Both sides possess a wide range of drones capable of striking all sorts of targets, from frontline trenches to critical national infrastructure deep inside enemy territory. Ukrainian authorities say the country produced around 1.5 million drones in 2024. The war is driving rapid innovation in both drone warfare and counter-drone defences.



Development in the number of attack drones and missiles launched against Ukraine in 2024, according to official Ukrainian figures. The figures do not include the tens of thousands of small FPV drones used at the front.

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Norwegian intelligence service
Insight
Accelerating arms race
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Ukrainian-developed sea drones have downed Russian helicopters and sunk Russian warships, denying the Black Sea Fleet access to parts of the Black Sea.



A Ukrainian sea drone with air-to-air missiles converted to naval anti-aircraft missiles. Image: Forbes/Telegram



Ukrainian sea drones attacking Russian naval vessels in the Black Sea. Image: Defence Intelligence of Ukraine (GUR)



A Russian glide bomb in flight towards Ukrainian targets at the front. Image: Russian Defence Ministry Press Service/AP/NTB

Glide bombs

Russia retrofits traditional aerial bombs with deployable wings and satellite navigation. These modifications are inexpensive, but enhance the bombs' range and precision. Consequently, Russian combat aircraft can attack Ukrainian targets from a safer distance.

Tailored biological weapons



Advances in technology are transforming the production of biological weapons. Advanced biotechnology combined with artificial intelligence (AI) and big data makes it possible to tailor toxic substances and microorganisms. State actors can exploit this to develop substances that are undetectable by laboratory analyses, for which there is no protection, and that can target specific population groups.

Access to health databases and genetic data is crucial for research and development of both precision medicine and genetically targeted bioweapons. This development narrows the gap between medical research and weapons development.

State actors are acquiring the capability to develop advanced bioweapons. The application of this technology will be guided by their security policy assessments.



V.

CONFLICTS IN THE MIDDLE EAST AND AFRICA HEIGHTEN THE TERRORIST THREAT



The Middle East and Africa are marked by political instability and armed conflict. Throughout 2024, Israel was in armed conflict with a growing number of actors in the Iran-led axis of resistance, and the dominant militia in Syria toppled President Bashar al-Assad's regime. The balance of power in the region has changed significantly. In Africa, Russia has increased its influence. This effort is strategically motivated and undermines Western interests.

The conflicts in the Middle East and Africa leave opportunities that terrorist groups have utilised in order to radicalise and recruit members, and to step up their attack activities locally and in the West. The terrorist threat against the West has increased and will continue to do so, with the Islamic State and al-Qaeda as the main threats.





The Middle East

The Gaza conflict has increased the conflict level in the Middle East and slowed down established normalisation and de-escalation processes in the region. The level of conflict will remain high in 2025.

Sharp conflict escalation and destabilisation

The Gaza conflict has increased the level of conflict between Israel on one side and the Iran-led axis of resistance, including Hezbollah, Shia militias in Iraq and the Houthi movement in Yemen, on the other. The conflict between Israel and the axis of resistance rapidly changed pace and scope in 2024; Israel's air and ground operations in Lebanon during the summer and autumn could have long-lasting negative consequences for the country.

In 2024, the Iran- and Russia-backed Houthi movement carried out several attacks against Western ships and targets in Israel. The attacks demonstrate that the Houthis have access to various types of weapons capable of targeting international shipping and regional adversaries. In addition, Iran-affiliated militias

in Iraq have attacked targets in Israel and Western targets in Syria and Iraq.

The Gaza conflict has also slowed down established normalisation and de-escalation processes in the region, including those between Saudi Arabia and Iran and Saudi Arabia and Israel. Saudi Arabia's intention to normalise these relations remains in place, and ceasefires between Israel and Hamas or Hezbollah could restore the normalisation processes.

Syria's future is uncertain after Syrian rebel groups toppled President Bashar al-Assad's regime in Damascus. Israel has responded by reinforcing its presence in and control over the occupied border area in the Golan Heights, as well as by launching missile strikes against weapons stores in Syria to prevent the weapons from falling into the hands of the new rulers.

Iran is weakened

Israel has attacked and gradually diminished the threat posed by the axis of resistance, including Iran. Air strikes on Iranian territory have weakened Iran's defensive capability and illustrate that Tel Aviv is willing to engage in direct confrontation with Tehran; Iran's



An Israeli main battle tank at the border with Gaza in December 2024. Image: Jack Guez/AFP/NTB

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Image: Abd Elhkeem Khaled/REUTERS/NTB

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Withdrawal: Syria's future is uncertain. A Russian military vehicle in transit from a military base to the Mediterranean after the fall of the Bashar al-Assad regime in December 2024.

Celebration: Burning of the Israeli flag in Tehran, Iran during celebrations of Iran's missile attack on Israel on 1 October 2024.

Ruins: Much of Gaza lies in ruins.

presence and influence in Syria have also collapsed in parallel with the Assad regime in Damascus.

Iran is unable to restore credible deterrence against Israel and will possibly resume talks and negotiations with the West, primarily related to the nuclear deal, with the goal of securing sanctions relief.

Iran's military vulnerability renders a confrontational course unlikely. However, if negotiations do not yield satisfactory economic profit, an intensification of the nuclear programme and military attacks against Western presence in the region could become a possibility.

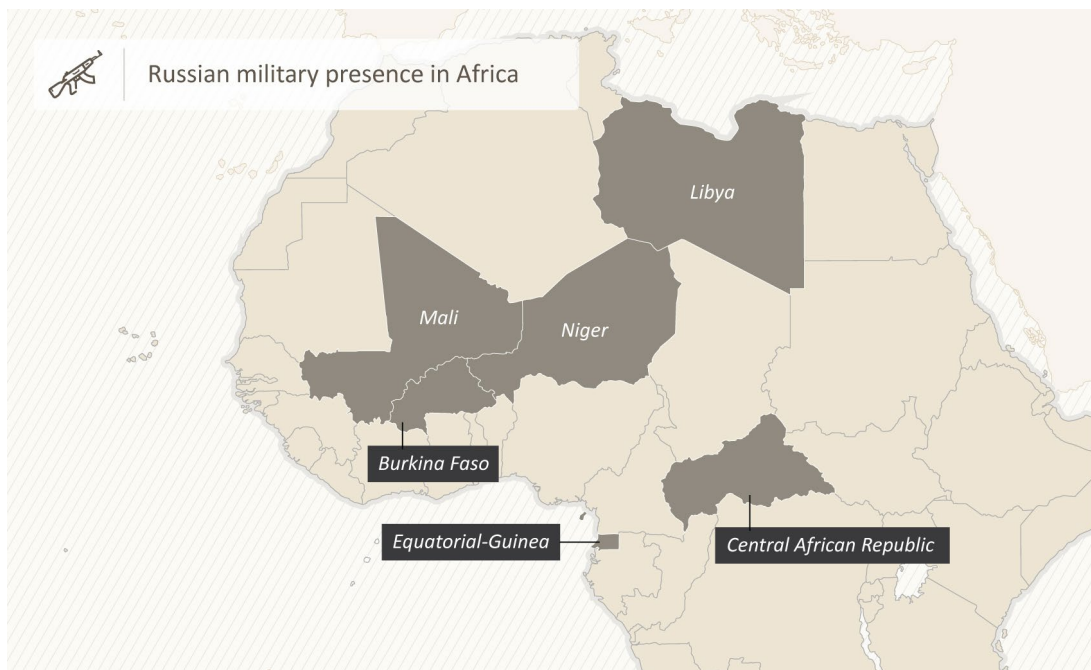
Still unstable and riddled with conflict in 2025

The Middle East will remain unstable and riddled with conflict in 2025. The Houthi movement will continue its attack campaign and thereby threaten shipping in the Red Sea, including Norwegian civilian shipping. The situation in Syria is uncertain and fraught with risk at the start of the year. Ceasefires in Gaza and Lebanon will be fragile, and the conflicts could rapidly flare up again. An unstable and conflict-ridden Middle East increases the threat to Norwegian interests in the region. ➔



The Burkinabe and Russian flags on a mural in Burkina Faso in May 2024.

Image: Guerchom Ndebo/The New York Times/NTB





Russian efforts in Africa

Russia has significantly increased its influence in Africa over a period of several years. This development is strategically motivated and undermines Western interests. Russia will seek to further strengthen its influence in Africa in 2025.

Russia established several new political, military, economic and cultural partnerships with African countries in 2024. This bolsters Russia's influence on the continent and secures access to raw materials and minerals in exchange for Russian security support, primarily to the countries' authoritarian regimes. Russia has maintained a military presence in Libya, the Central African Republic and Mali for an extended period of time; in 2024, it also dispatched forces to Niger, Burkina Faso and Equatorial Guinea. This demonstrates Russia's ability to expand its involvement in Africa, even militarily, despite the substantial burden of the war in Ukraine.

Undermining Western interests

Russia's involvement in Africa secures access to resources and counters political isolation and Western sanctions. Russia is also taking advantage of these partnerships to undermine the West.

For several years, Russian information operations have fuelled anti-Western sentiment and tarnished the West's reputation in Africa, and on several occasions, new partnerships with Russia have led African countries to terminate political and military cooperation with Western nations. In Mali, Niger and Burkina Faso, Russia supported leaders of successful military coups and was a driving force behind the countries' development of an anti-Western and pro-Russian alliance in the Sahel region.

Russia's efforts in Africa subvert democracy and human rights on the continent. These partnerships

provide authoritarian regimes with military assets that help suppress both political and armed opposition. Authoritarian African regimes' brutal and arbitrary use of power against their own populations also provides favourable conditions for the growth of terrorist groups on the continent.

Terrorism

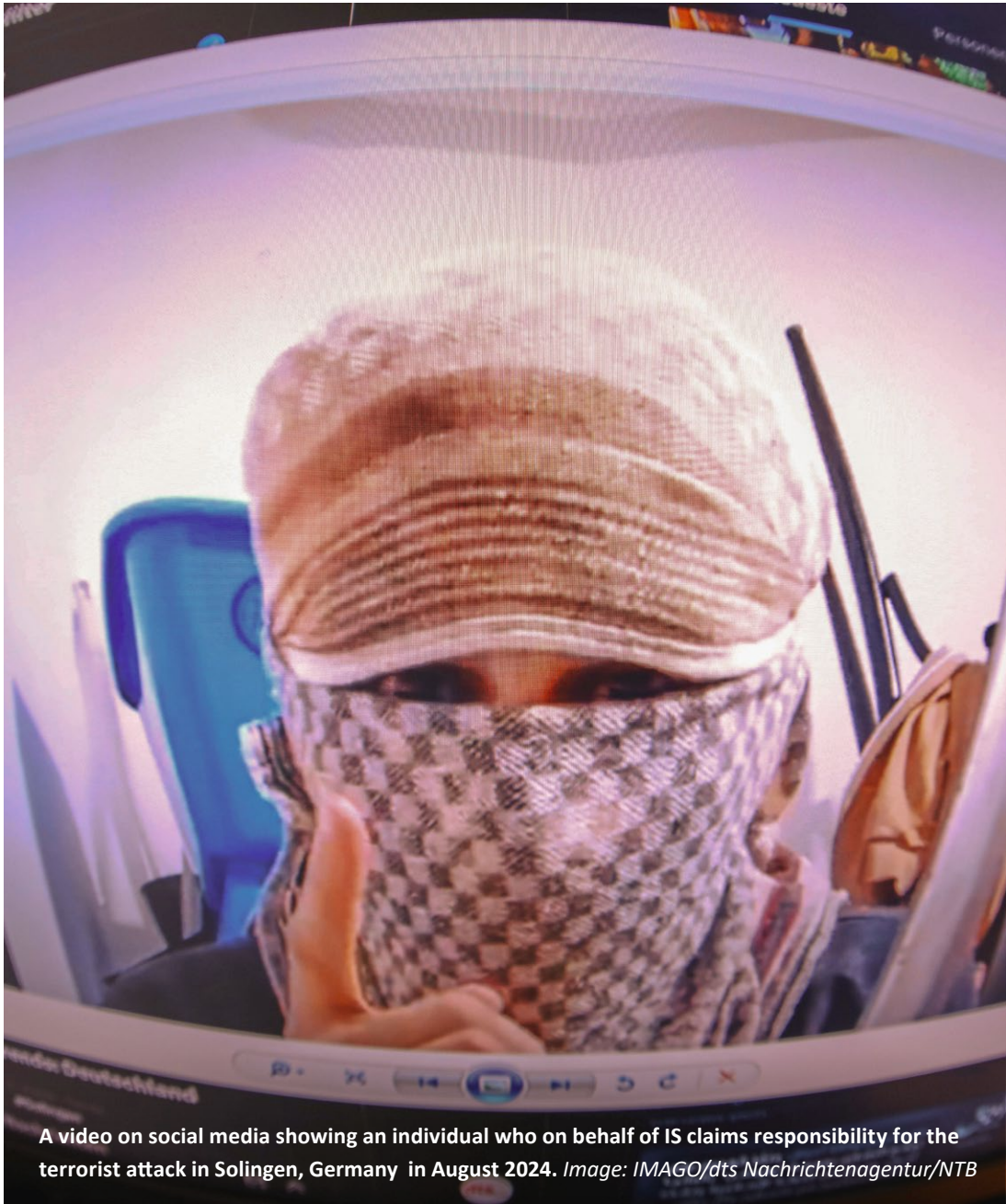
Conflict and political instability in various parts of the world have offered terrorist groups fertile ground for growth and greater scope for action. Terrorist organisations in particular are exploiting the Gaza conflict in order to recruit and mobilise for terrorist attacks. Great power rivalry and a weakened international cooperation climate make the terrorist threat more challenging to tackle.

Terrorist organisations are gaining strength

Developments in the Middle East and Africa provide significant scope for action. The Islamic State (IS) and al-Qaeda are adapting to political turmoil and counterterrorism campaigns, and they remain the greatest global terrorist threat. These groups have a significant growth potential in areas marked by conflict, poor living conditions and weak government control. IS and al-Qaeda are marshalling support and will continue to attract sympathisers in 2025.

The Gaza conflict has a considerable polarising effect and fuels anti-Western sentiment in many parts of the world. IS and al-Qaeda exploit this for radicalisation and recruitment purposes and devote extensive attention to Gaza in their propaganda.

The fall of the Assad regime increases IS's scope for action in Syria. The regime's Russia- and Iran-backed operations in the central desert regions have ceased, ➔



A video on social media showing an individual who on behalf of IS claims responsibility for the terrorist attack in Solingen, Germany in August 2024. Image: IMAGO/dts Nachrichtenagentur/NTB



Growing terrorist threat



The Gaza conflict is a source of anti-Western sentiment and is used for terrorist recruitment



Both IS and al-Qaeda are on the rise in Africa and pose a threat to Western targets and interests



Lone actors can use simple means to pose a potent threat

the Syrian Democratic Forces (SDF) are under pressure in north-eastern Syria and Hay'at Tahrir al-Sham (HTS) is under national strain as a result of the group's takeover in Damascus. In addition, Israeli air operations have significantly weakened Syria's military capabilities. This limits the Syrian actors' ability to exert pressure on IS, giving IS new and substantial scope for action in the country.

As Russian influence increases and Western influence wanes, both IS and al-Qaeda continue to strengthen their positions in Africa. The two groups have been particularly successful in Mali, Burkina Faso, Nigeria, the Democratic Republic of the Congo and Somalia. The progress in Africa enables IS and al-Qaeda to retain their global foothold. The two groups pose a significant threat in their own core areas, including against local Western interests, as the terrorist threat to targets in the West also grows.

Mounting terrorist threat to the West

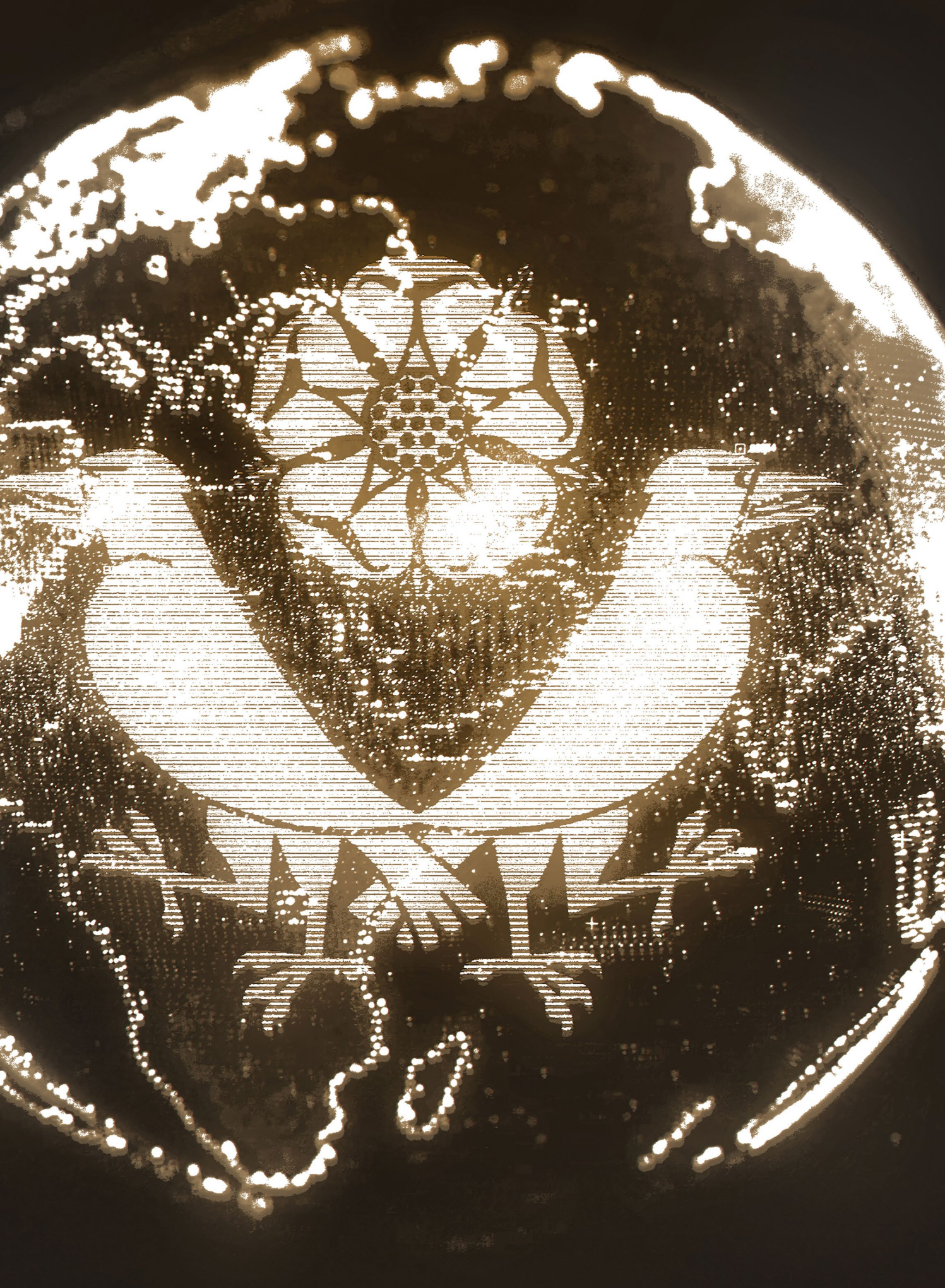
Militant Islamist attack-related activity in the West increased significantly in 2024. The number of executed and averted Islamist terrorist attacks rose

to the same level as in 2017. The terrorist threat will probably increase further in 2025. IS in particular is increasingly targeting Western interests, both locally and globally. Jewish and Israeli targets are especially vulnerable.

IS is taking advantage of individuals and networks that are already present in European countries. Individuals and networks linked to IS's Afghanistan branch, the Islamic State in Khorasan Province (ISKP), pose the greatest terrorist threat to Europe. ISKP has attempted several attacks in Europe over the past few years.

The main threat from right-wing extremists is posed by lone actors affiliated with transnational, internet-based groups and networks. A persistent lack of established right-wing organisations limits the ability of right-wing extremists to systematically recruit and plan more complex attacks. Single actors with simple means of attack pose the most likely right-wing extremist threat to targets in Europe. □







DIGITAL VERSION:
ETJ.NO/FOCUS

ISSN 2704-2014
(digital version)