





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.



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**T**he most recent editions of Focus have made for successively gloomier reading, and this year's edition is no exception. Global security is more strained now than it was at the start of 2025. Great powers are openly pursuing their own interests for rapid gain. We are seeing the return of spheres of influence and a form of politics in which might makes right. International cooperation and institutions are being undermined. The same dynamic is evident in the Arctic. Much of the foundation for Norwegian security is being challenged, and we must accept that the world order as we have known it is crumbling.

For Beijing and Moscow, this is a welcome development. Both see an opportunity for ushering in a new world order, and they are cooperating closely. A more self-confident Chinese regime will take advantage of its own economic power and supply chain dominance as well as a community of authoritarian states in order to expand its global influence.

A full-scale war continues to rage in Europe, and the suffering in Ukraine is staggering. The Ukrainians are fighting exceptionally well, yet Russia is slowly gaining ground, albeit at a high price. The outcome of the war will affect Russia's belief in military might as an instrument of power, and will have long-term consequences for Norwegian security. Going forward, the course of the war will be determined by the Russian economy and Ukrainian resilience, and we are in a position to influence both factors. Russia's economy is performing extremely poorly, in part due to sanctions, and Western military and economic support to Ukraine remain crucial to the Ukrainians' defensive struggle.

New technology is revolutionising warfare and, as a result, how we have to think about defence. In Ukraine, the use of drones has fundamentally altered the battlefield. In Russia, a larger military and new strategic weapons are intended to offer Moscow escalation options against NATO. We must acknowledge the fact that Russia is gearing up for a lasting confrontation in which Norway is counted among Moscow's enemies.

We should not underestimate the threat from international terrorism. Over the past two years, there has been an increase in attack-related activity by militant Islamists against the West. At the same time, a large proportion of attacks are being averted.

The Norwegian Intelligence Service's main task is to warn against threats to Norway and Norwegian interests. The changes we describe in Focus 2026 are not transient. Norway's security depends on an understanding of this changing threat environment, both among the general public and among decision-makers. This builds resilience. Focus is our contribution to an informed public debate.

Vice Admiral Nils Andreas Stensønes  
Director Norwegian Intelligence Service

Editing concluded on 23 January 2026



China's President Xi Jinping and Russia's President Vladimir Putin attend a wreath-laying at the Tomb of the Unknown Soldier during the Victory Day celebrations in Moscow on 9 May 2025.  
Image: Yuri Kochetkov / AP / NTB

## THE RETURN OF SPHERES OF INFLUENCE

*Russia and China are seeking a geopolitical division into spheres of influence and the ushering in of a multipolar world. The two countries share the view that the West in general, and the transatlantic partnership in particular, are fracturing. Both Moscow and Beijing see this as an opportunity to increase their influence internationally and to consolidate control closer to home.*

Overt self-interest and wilful conduct are on display in the Arctic as well. Moscow and Beijing are paying close attention to Washington's statements regarding Greenland. Changing the status quo in the Arctic carries a risk of both Russia and China rethinking their ambitions and conduct in the region.

The return of spheres of influence is just one aspect of the larger upheaval Norway is facing. There are other developments that will also come to have wide-ranging consequences for Norwegian interests.

### Another form of geopolitics

There are a number of states that are seeking a less norm-based approach to transnational issues. The undermining of international institutions set up in the wake of the Second World War allows for multilateral organisations such as SCO and BRICS to come forward. China, as the leading proponent, claims to represent a value-neutral diplomacy founded on non-intervention and state sovereignty, which is nonetheless based on great power interests. ↴



A worker examines damage to a Ukrainian power plant that has been hit by a series of Russian missile strikes, 21 January 2026. The Kremlin deliberately targets civilian critical infrastructure in order to undermine the Ukrainian people's resilience. Image: Roman Baluk / Reuters / NTB

China, Russia and Iran are also erecting alternative financial structures to make themselves less dependent on the US dollar and Western economy, and more resilient in the face of Western policies.

#### Political conduct based on military power and authoritarian cooperation

In Europe, the war in Ukraine remains a clear and brutal expression of Russian power politics. It has precipitated the greatest defence reorganisation in Europe since the start of the Cold War. The Kremlin believes it is possible to re-establish itself as a great power, with military might as its key political instrument. Domestic policy is becoming increasingly authoritarian, while cooperation with other authoritarian states is expediting Russia's withdrawal from the rest of Europe.

#### Small states, smaller scope for action

Growing use of military force, coercion and threats by the great powers reinforces Russian and Chinese narratives of how international politics actually work. A rising number of countries are joining a community of authoritarian states, led by President Xi. The military parade in Beijing on 3 September last year illustrated this perfectly: Xi led a procession of heads of state who stand in opposition to a perceived Western hegemony. Faced with this development, more states are also finding neutrality the better option.

#### Accelerating arms race and deterrence

The balance of power between the nuclear powers is shifting. China has achieved continuous second-strike capability, and is driven by an ambition to achieve parity with the United States. For Russia, the introduction of new types of nuclear weapons and other strategic weapons is intended to offer added deterrence and escalation options. In lieu of new arms treaties, test activity may increase in the longer term, as may the number and types of Russian nuclear weapons on the Kola Peninsula. Rising tensions could also trigger an increase in Russian military activity and strategic deterrence close to Norwegian borders.

#### Higher investment and trade risks

Investments and international trade are characterised by growing protectionism and resource security concerns, such as access to critical raw materials and control over infrastructure. Global dependencies that have been touted as advantageous from a security policy standpoint since the 1980s are now being identified as systemic weaknesses. Beijing believes European countries have little resilience in the face of Chinese dominance over global supply chains. China's activity and positioning is not just intended to serve current Chinese interests, but also to create further dependencies that could collectively offer China a decisive advantage in any future conflict. Russia, for its part, considers European society's dependency on digital solutions to be susceptible to various forms of coercion. □



A Russian radar site on Alexandra Land close to Nagurskoye. The site is considered Russia's northernmost military installation. Image: Alexander Zemlianichenko / AP Photo / NTB

## RUSSIA AND CHINA IN THE ARCTIC

*The Arctic is strategically important to both Russia and China, and both countries are paying close attention to statements from Washington regarding Denmark and Greenland. On the one hand, changes to the status quo are a source of concern. On the other, transatlantic disagreement over the security situation in the Arctic could serve both Russian and Chinese interests.*

It is in Russia's interest that the Greenland debate causes uncertainty and potential conflict between Europe and the United States. Moscow may also come to exploit the situation in its own narrative, in which it claims that it is legitimate for great powers to impose their will on smaller states.

Beijing views all disagreement and uncertainty in the transatlantic partnership as an opportunity to increase Chinese scope for action vis-à-vis Europe.

### Security policy developments could affect Moscow's need for control

The Russian Arctic remains important, both to the Kremlin's military and economic ambitions and for Russian deterrence. National development projects, such as investments in the Barents Sea region and along the Northern Sea Route (NSR), are intended to bolster Russian presence and activity in the region.





Reindeer wandering outside Longyearbyen in Svalbard. Climate change has caused the average temperature in the Arctic to rise almost twice as fast as elsewhere in the world, with extensive melting of glaciers and sea ice as a result. This allows for more traffic, increased competition for resources and heightened tensions amid some of the world's most vulnerable ecosystems. Norway and Russia share a 1,600-kilometre maritime border. Image: Emile Ducke / NYT / NTB

Precarious stability



Russia accuses Norway of facilitating Western militarisation of the Arctic



The largest cooperation projects are energy-related



Arctic infrastructure is important to China's use of space

While war is raging in Ukraine, the Kremlin has sought to keep the Arctic apart from its confrontation with the West. However, the regime still believes that conflicting interests between itself and other actors could cause the situation to deteriorate and threaten Russian interests.

NATO maintains a routine presence in areas close to Norway, and Russia will continue accusing Norway of facilitating Western militarisation of the Arctic. If Russia comes to perceive its own freedom of action in the region to be under threat, the result may be more self-assertive behaviour towards the West. This could take the form of more offensive conduct by Russian forces.

#### Svalbard policy shaped by distrust and ambition

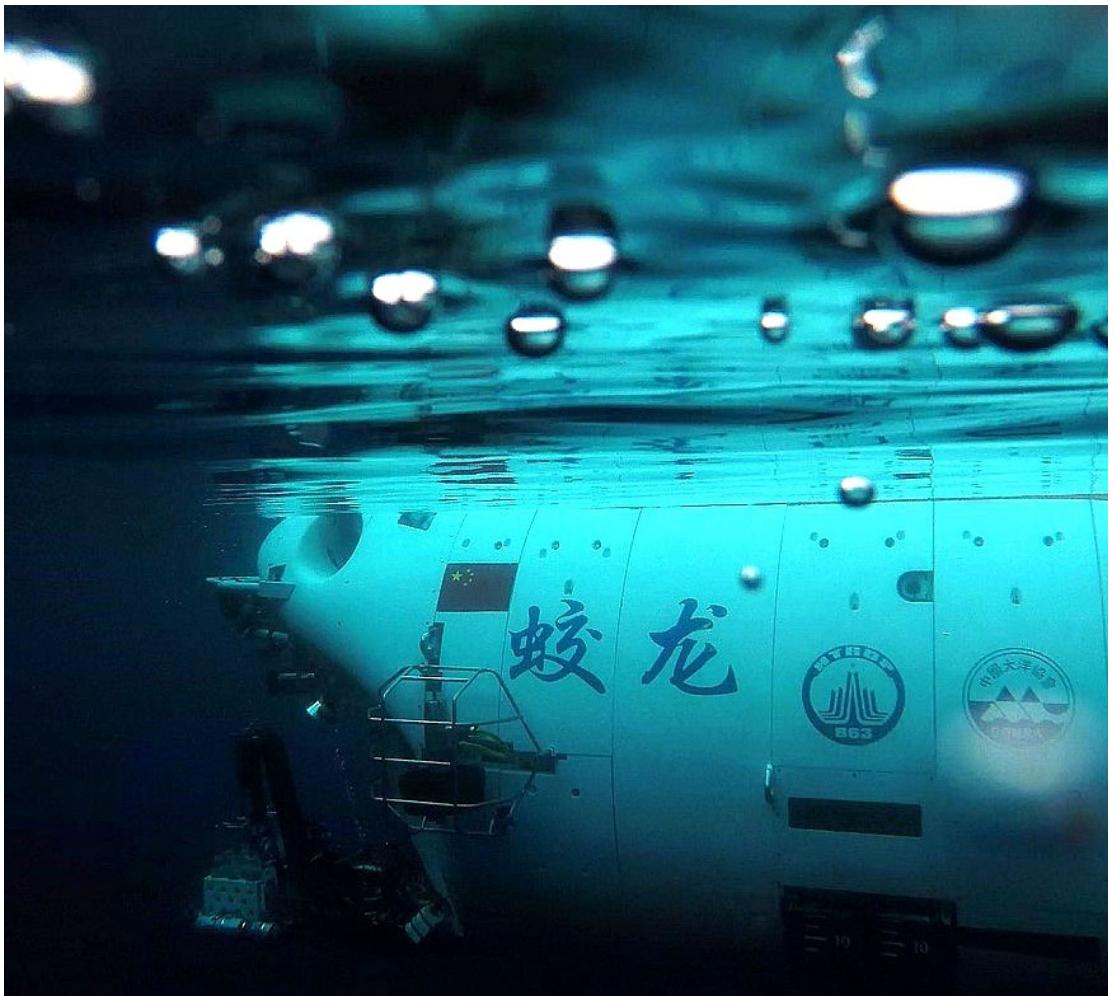
Growing distrust of allied ambitions has also sharpened Moscow's rhetoric concerning Norwegian Svalbard policy. Russia will remain intent on preventing NATO from making military use of the archipelago.

From Moscow's perspective, Svalbard's strategic location makes it necessary to maintain a Russian presence there.

There are signs that the Kremlin is looking to make the Barentsburg settlement less dependent on Norwegian supply and transport infrastructure. Regular port visits by ships from Russia constitute one planned step in this direction. As before, the grounds for the Russian presence in Svalbard will primarily continue to be coal mining, tourism and research.

#### Russian development ambitions scaled back

Russia is nowhere near meeting its development targets in the Russian Arctic, and its ambitions will probably be scaled back. Limitations are caused by infrastructure and materiel attrition combined with the lack of an economic basis. The same applies to cooperation within the BRICS framework. Russian authorities have launched several Arctic cooperation initiatives in recent years, but, with the exception of ↴



Chinese research submarine diving in the Arctic Ocean, 6 August 2025.  
Image: Liu Shiping / Xinhua / NTB

China, these have received a lukewarm response from non-Arctic states.

### China and Russia expand their Arctic cooperation

Sino-Russian cooperation in the Arctic will continue growing, especially while the Ukraine war continues and Western sanctions remain in place. For China, Russia is still central to gaining access to the Arctic, while Russia has few other partners to turn to in order to meet its development targets in the region.

Joint Sino-Russian investments continue to grow, particularly in the fields of research, energy and infrastructure. The largest cooperation projects are found in the energy sector, especially liquefied natural gas (LNG). The two countries also collaborate on the development of the Northern Sea Route, aiming to increase traffic, expand infrastructure, build polar vessels, train workers and increase the route's competitiveness compared to other maritime routes. China provides capital and industrial capacity, while Russia has icebreaker expertise and access to natural resources.

### China bolsters its polar capability

China is increasing its presence and capability development in both the Arctic and the Antarctic. Beijing aims to strengthen Chinese influence over how the polar regions are managed, and to secure access to strategic sea lanes and natural resources.

In 2025, China operated five research vessels in the Arctic Ocean, an increase from three vessels in 2024 and one in previous years. Additional icebreakers allow for more frequent trips and improve China's ability to survey the region for civilian and military purposes. China also conducted its first crewed dive to the Arctic seabed.

In the longer term, China is looking to improve its ability to conduct independent military and civilian operations in the polar regions. The People's Liberation Army (PLA) considers the polar regions to be of military-strategic value and want to use technology and skills from both the civilian and military sector to conduct operations there.

Chinese actors are also expected to work towards enhancing the Chinese presence in Svalbard. The archipelago is strategically placed for future shipping routes and polar research, which are central to cementing China's role as an Arctic actor.

Moreover, the polar regions play a key role in China's exploitation of space. Beijing is looking to improve access to Arctic infrastructure in order to support the national space programme. □



Russia's President Vladimir Putin speaks at the launch of the multirole submarine Perm in Murmansk on 27 March 2025. Image: Gavriil Grigorov / AFP / NTB

## MOSCOW: LASTING CONFRONTATION

*The Putin regime is seeking a new golden age for Russia. This is especially evident in Ukraine, where Russia's ambition to secure political control remains unchanged after four years of war. The Ukraine war will remain Russia's top priority in 2026. The Russian armed forces continue to make progress, and regularly attack civilian Ukrainian targets.*

### No genuine willingness to negotiate while war optimism reigns

The Kremlin has shown no willingness to negotiate, seeking instead to use the negotiations to shift the United States' approach in its favour.

Western support remains crucial to Ukraine's ability to defend itself against Russian aggression. The Putin regime believes that Russia is better able to endure war and confrontation than Ukraine and the West, and will therefore continue to make maximalist demands. Despite facing considerable economic challenges, the regime still has means available to continue the war effort.

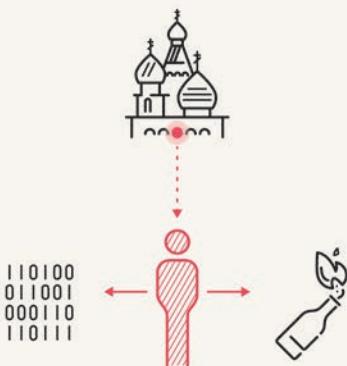
### Sights set on European security architecture

The Kremlin aims to dismantle and then re-establish a world order that aligns with Russia's great power interests. The regime is preparing for lengthy confrontation, and seeks to deter the West with the means it has available. Dialogue with the United States will be included in the Kremlin's strategy so long as the regime believes it can gain acceptance for its views. If not, there is an increased chance of more overt use of means, including the threat of nuclear weapons.

Moscow expects its relationship with Europe to continue deteriorating, and is developing new ↗



### Russian services' use of proxies



Russian intelligence and security services often use proxies to carry out both physical and digital operations in Europe.

This is a way to compensate for the expulsion of many Russian intelligence officers from embassies across Europe. Although the method helps conceal links to the state, it may also result in operations being carried out by untrained personnel and affords the Russian services less control of their execution.

Proxies may include non-state cyber groups, extremists, criminals, companies, organisations and private individuals who carry out tasks on behalf of the Russian services.



### Influence and sabotage

Influence activity aims to create uncertainty and fear, affect political activity or change attitudes and decisions in another country, both among the public and the authorities.



**Covert activity** is conducted by an undisclosed actor and includes fake social media accounts, websites with hidden government links, cyber operations, the use of proxies and covert operations carried out by special forces



**Overt means** may include public statements, political decisions or threats of military intervention



**Sabotage** involves operations that cause considerable damage or disruption. They may be physical or digital, and are intended to destroy or severely disrupt targets of importance to society

strategic weapons and expanding its armed forces along the border with NATO. Although the Kremlin will still seek to avoid direct military conflict with Europe and NATO, the tense situation heightens the risk of misunderstandings and unintended escalation.

### Russian operations in Europe could increase in scope and gravity

Russia is seeking to reduce Western support to Ukraine and undermine European and transatlantic cohesion. Moscow lacks the economic and diplomatic means to influence NATO, making covert means and strategic deterrence all the more important. Russia is operating in grey areas in order to prevent trails from leading back to Moscow. The means used are often referred to as 'hybrid', 'complex' or 'covert'. Espionage, sabotage and influence operations are all examples of this, and the Russian intelligence and security services (RISS) play an important role.

Moscow is well aware of the fact that Norway is a major supporter of Ukraine, but usually considers Norway as part of the Western bloc, one of many so-called 'non-friendly' Western countries. Russian actors will seize on relevant issues whenever they consider it advantageous, and Norway has certain characteristics which could affect Russian interest. This includes Norwegian proximity to the Arctic and energy supply to Europe as well as the country's role as a logistics and receiving hub for allied forces. The Kremlin aims to increase Russian scope for action in Svalbard, to influence attitudes to Norwegian defence policy, to instil fear, polarisation and political apathy in the population and to undermine trust in Norwegian authorities – in addition to weakening support to Ukraine.

Following the assault on Ukraine in 2022, there have been reports of several dozen operations in Europe that can be linked to Russia, including arson attacks

and vandalism; assassination plots have also been uncovered. Russia will retain an intention to carry out such operations, and the Kremlin is paying close attention to how the West responds to Russian conduct. If security policy relations with Europe were to deteriorate further, Russia would be likely to carry out more frequent and more serious operations.

If Russia were to perceive the war to be less likely to end in its favour, Moscow may become more willing to escalate its use of means against the West. The same could happen if the economy were to take a significant turn for the worse or the regime were to consider itself under threat.

Pro-Russian and anti-Western narratives are being disseminated by Russian actors on digital platforms and in social media, often through channels with covert links to Russian authorities. In recent years, Russian actors have set up websites that claim to be legitimate media platforms with editorial content. It is not always obvious that the content is propaganda; it could also include polarising material intended to spark engagement or divert attention. Dissemination is reinforced by using artificial intelligence, which enables large-scale production of text, images, video and sound in order to increase the statements' credibility and reach. Examples include fake videos that copy established news organisations and state leaders during European elections, as well as voice cloning of experts and academics. There have also been detected attempts at feeding manipulated information into Western large language models (LLMs), in an effort to have the models respond in line with Russian interests.

### European uncertainty advantageous to Russia

Russia considers it advantageous when incidents outside of Ukraine create uncertainty regarding ↴



A police car is parked by train tracks in Mika, Poland that were damaged by an explosion in autumn 2025. The Polish government has stated that the explosion was sabotage and connected it to Poland's support to Ukraine.

Image: Wojtek Radwanski / AFP / NTB

whether they were intentional and controlled by Moscow. Therefore, even unintended incidents could support Russia's aim of creating uncertainty in European countries regarding Russian motives and capability. A tense political climate combined with Western societies' tendency towards catastrophising could have a self-reinforcing effect.

Meanwhile, the strained relationship between Russia and the West, combined with low training levels in parts of the Russian armed forces, heightens the risk of unintended incidents and misunderstandings between Russian and allied units. Russia will be paying attention to how Norway and allies handle various incidents; Western responses offer Russian decision-makers insight into military and political matters, which they can use in operational planning and for influence purposes.

Russian drone strikes on targets in western Ukraine carry a persistent risk of drones straying into NATO airspace. Navigation systems could be affected by jamming, weather conditions, faulty programming or technical errors, which could cause drones to miss their intended targets.

At present, most of Russia's drone production is targeted for use in Ukraine. Russia has been flying drones close to Norway for surveillance purposes for several years, but in very small numbers.

### Intelligence threat to remain high

The intelligence threat from Russian services will remain considerable in 2026. Norwegian targets are constantly subjected to intelligence operations. For information gathering, Russia relies heavily on cyber operations, civilian ship crews and proxies without formal links to Russian authorities. Weapons deliveries to Ukraine, training of Ukrainian personnel, allied presence, government targets, critical infrastructure and Norwegian defensive capability will all remain

topics of interest in Russian intelligence operations.

The NATO exercise Cold Response, which is staged in March, is one of the most important annual activities for the Norwegian Armed Forces in Norway. Russia will monitor the exercise and gather information in order to detect any changes to NATO's structure and plans. In Norwegian waters, Russia uses military intelligence vessels and aircraft, as well as covert intelligence collection, including by non-military vessels. Despite strained resources, the Russian navy will allocate vessels to demonstrating Russian presence during major NATO exercises. These demonstrations could take place either locally or in close proximity to the exercise.

### Military measures serve both economic and military interests

After the West introduced more rigorous checks of shadow fleet vessels in 2025, Russia took steps to secure and escort them through the Baltic Sea. This mission continues in 2026 and lays claim to several naval vessels, but is important to keeping Russia's war economy going.

Ukraine's ability to use drones to hit targets deep inside Russian territory has increased since 2022. Russia has taken protective measures, including by disrupting GNSS signals around Russian infrastructure. Since 2022, GNSS disruptions have been registered regularly off the Kola Peninsula, and have increased in scope following Ukraine's drone strikes on Olenegorsk in 2024. The systems used have long range and are causing disruptions in Norwegian airspace as well. These measures are expected to remain in place.

In addition, Ukrainian attacks on Russian areas far from the front line have prompted Russia to avoid gathering several military systems in one place. In 2025, Moscow announced that Navy Day celebrations would be scaled back considerably, despite this being an important celebration in Russia.



War graves in Vladivostok for Russian soldiers killed in the Ukraine war. More and more Russians are feeling the effects of the war. Image: Nanna Heitmann / NYT / NTB

#### ▪ *Political and economic development*

##### **Enemy perception and threats of repercussions aim to pacify the public**

Being seen as the losing side in the Ukraine war is not an option for the Kremlin. The war has been touted as a 'rescue operation', and Moscow has linked it to the victory over the Nazis in the Second World War, an event which is central to Russian identity construction. Meanwhile, the war is depleting Russian resources, which necessitates cost-cutting at home. It is therefore becoming increasingly important for the Kremlin to prevent poor living conditions from fomenting discontent which in turn could trigger protests. Russian regime stability is consequently closely linked to the outcome of the war in Ukraine and the confrontation with the West.

Through the war years, the Kremlin has continued centralising power and tightening its control of both the elites and the population at large, through systematic and ruthless repression of any and all opposition. While the majority of those who enlist for the war, as well as those working in the Russian defence industry, are seeing their wages rise, a growing proportion of Russians are feeling the effects of the war; war-weariness is widespread. In the Murmansk region,

the impact of the war comes on top of long-standing problems caused by dilapidated buildings, frequent heating and hot water outages in winter, a shrinking population and budget deficits.

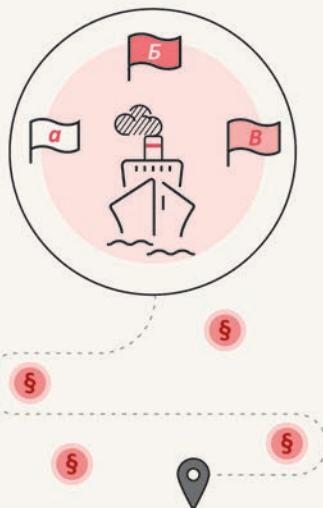
As these developments unfold, the Kremlin is seeking to change the so-called 'social contract'. The regime is no longer capable of offering its citizens steadily rising living standards in exchange for them eschewing political activity. To compensate for this, the Kremlin has reinforced the narrative that Western forces are undermining Russia. This enemy perception is meant to have a unifying effect while simultaneously casting aspersions on the opposition and cutting off its connections to Western support.

The regime has threatened powerful retribution against individuals and groups that do not toe the line. In March 2022, a new article was added to Russia's public administration act regarding public actions that 'discredit' the Russian armed forces. Since then, vast numbers of police inquiries have been opened into statements regarding the Ukraine war.

Such repressive legislation has been introduced and tightened for years, and offers the authorities legal instruments with which to pursue their opponents. Journalists, opposition politicians and anyone ↴



### Russian shadow fleet secures export revenue



The Russian shadow fleet consists of tankers used to circumvent sanctions and price ceilings in connection with Russian energy exports. The fleet consists of several hundred vessels, which are characterised by old age, poor maintenance and unclear insurance and ownership status. A significant number of trading and shipping companies both in Russia and abroad are also involved.

Although this activity has increased considerably since the West introduced sweeping sanctions against Russia in 2022, it declined slightly in 2025. Mounting sanctions pressure and lower oil prices have reduced the commercial incentives for using sanctioned vessels. New checks have been also introduced in the Baltic Sea, including for tankers.

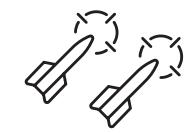


The oil tanker Eagle S anchored off Porvoo, Finland. The vessel is registered to the Cook Islands and suspected of being part of the Russian shadow fleet.

Image: Heikki Saukkomaa / Lehtikuva / NTB



**The Kremlin is looking to dismantle Europe's security architecture**



**Strategic weapons are intended to create uncertainty and play on escalation fears**



**Norway will remain part of Russia's enemy perception**

**Permanent change**

who dares to raise their voice are labelled 'foreign agents', 'extremists' or 'terrorists'. For example, in November 2025 the Russian supreme court declared the Anti-Corruption Fund (FBK) set up by the late Alexsey Navalny a 'terrorist organisation'.

This strategy has so far proved effective at preventing and managing incipient social unrest. Domestic political pressure sufficient to prompt the regime to alter its course is unlikely in 2026. The elites will remain loyal, and the population will lack both the ability and the will to make organised resistance.

### Bleaker views on Norway in Russian society

From Moscow's perspective, there is little to distinguish Norway from the rest of the Western bloc. The regime's control of information and its targeted use of propaganda and indoctrination help shape Russian thinking in a way which deviates more and more from Norway and the West's perception of reality. This applies to Russians in all walks of life.

### Economy to remain vulnerable

Russia remains in recession and from an economic standpoint, 2026 is likely to be the most difficult year since the assault on Ukraine in 2022. The priority given to the war is depleting Russian resources. Production of military materiel and incentives for recruiting soldiers help preserve military capability, but come at the expense of the economy and workforces in other sectors. Tensions within the government apparatus are therefore expected to rise.

The regime is manipulating economic data in order to paint a rosier picture, but also has other means at its disposal to ameliorate the current problems, such as reallocating funds from the civilian sector to military purposes, raising taxes, issuing and forcing the purchase of government bonds and sanctions circumvention. Although these instruments offer flexibility in terms of keeping the economy seemingly afloat, in reality the economy is extremely vulnerable, especially to fluctuations in oil prices and Western sanctions.

A Russian Tu-95 strategic bomber takes part in an exercise in autumn 2022. Russia's strategic deterrence forces regularly participate in exercises. Image: Russian Ministry of Defence / AP / NTB



▪ ***Military developments***

From Moscow's perspective, the threat environment has worsened and the risk of a new regional war has increased due to the war in Ukraine. The Russian land forces are therefore expected to continue expanding in the years ahead. The strategic deterrence forces will remain the bedrock of Russian security policy, and the Northern Fleet will retain its key role in Russian nuclear and conventional deterrence and in its strategic communication towards NATO. Moreover, the testing of new and sophisticated weapons systems in areas close to Norway will continue.

**Land power growing steadily**

Despite its strained economy, Russia will continue prioritising production and recruitment, both to maintain combat power in Ukraine and to expand the land force structure. Russia's strategic stockpiles are depleting, and the land power will increasingly have to rely on new production. Heavy materiel is less exposed now than it was earlier in the war, and the rate of loss has come down. Russian personnel losses will remain substantial, but both production and recruitment will continue to exceed losses on the battlefield.

The war in Ukraine has evolved into a relatively static war of attrition. Unmanned systems have gained far more importance, and the two parties' ability to manoeuvre using mechanised forces on the battlefield is very limited. For now, all indications suggest that Russian military doctrine remains unchanged, and that Russia will seek to settle any future armed conflict as quickly as possible. Particularly against a conventionally superior adversary, Russia will seek to prevent the conflict from developing into a lengthy war of attrition. Although new technology and experiences from the war in Ukraine have raised the importance of defensive land-based operations, Russian land forces will continue to be ↴



A Sineva intercontinental ballistic missile is test launched from a Russian strategic submarine in the Barents Sea in autumn 2022.

Image: Russian Ministry of Defence / AP / NTB

postured for offensive, manoeuvre-based warfare, with main battle tanks, infantry fighting vehicles and artillery the core materiel. This is reflected in Russia's continued prioritisation of the production of heavier land based military equipment. That being said, unmanned systems, long-range precision-guided fire and electronic warfare systems are set to play a more important role in Russia's future land power.

#### **The Northern Fleet's role remains unchanged**

The Northern Fleet secures Russia's important northern flank, and its primary task is to ensure a credible deterrent by protecting the fleet's own strategic submarines. Additionally, it provides deterrence through other capabilities, including missile-carrying surface combatants and submarines that are capable of threatening military and civilian targets in NATO countries as well as NATO's maritime supply routes. The fleet also assists the Baltic Fleet in escorting shadow fleet vessels that carry Russian oil and gas.

The Northern Fleet's strategic submarines and cruise missile-carrying multirole submarines maintain a presence close to Norwegian borders. Regular deployments to the Atlantic Ocean are a priority.

A maintenance backlog will continue to limit the Russian navy's combat power. The gap between mission numbers and available resources is widening. The exception thus far has been the most advanced submarines; they have been shielded and are able to maintain a high operational tempo.

The modernisation of the Northern Fleet is progressing slowly. More naval platforms are being armed with modern long-range precision-guided weapons. Over the course of 2026, the Northern Fleet will come to have three Severodvinsk-class multirole submarines and three frigates available, all carrying hypersonic Tsirkon missiles. The Kirov II-class cruiser Admiral Nakhimov has undergone modernisation and will become the Russian navy's new flagship. Armed with both Kalibr

and Tsirkon missiles, she will be extremely powerful. She will continue sea trials and weapons testing throughout 2026, and may be ready for active service towards the end of the year. The Northern Fleet is also expected to receive one modernised Akula I-class attack submarine and six conventional Kilo II-class submarines in the years ahead, all armed with Kalibr missiles.

#### **Ability to attack critical undersea infrastructure evolving**

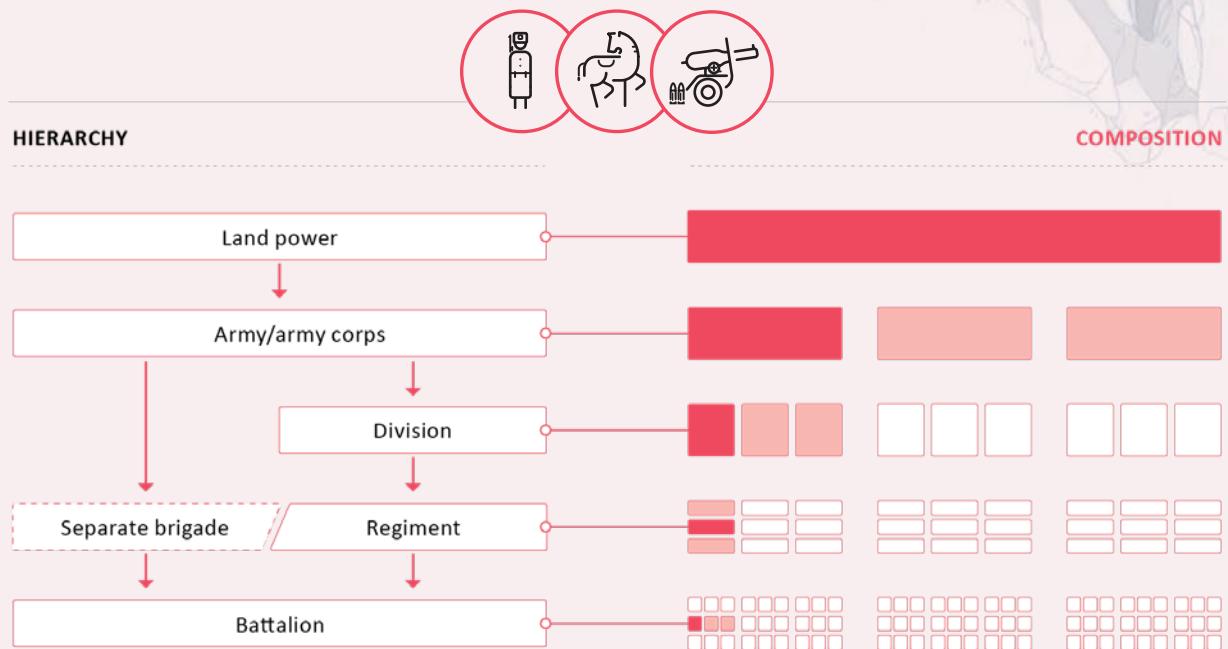
Russia continues developing its military capability to attack Western critical deep-sea infrastructure. Shallow-water infrastructure is vulnerable to both intended destruction and unintended damage by anchors and trawls. The deeper the target is located, the more complex sabotage becomes. Operations at depths of several hundred metres require vast resources and careful planning. Much of Norway's critical infrastructure is located in deep water.

Russia's Main Directorate for Deep-Sea Research, or GUGI for short, has surface vessels tailored to mapping Western undersea infrastructure, and submarines purpose-built to destroy infrastructure. The offensive capability provided by these special-purpose submarines is found only on the Kola Peninsula.

#### **Testing of advanced weapons in the High North continues**

Russia will continue developing new weapons and improving existing systems, with the aim of enhancing range, precision and penetrability in the face of jamming and other countermeasures. High priority is given to submarines, long-range missiles and attack drones. Russia will continue research and development on anti-satellite weapons, strategic intercontinental weapons, strategic air defence, missile defence and long-range precision-guided weapons. Several of these systems will be tested in the High North in 2026.

## Russia's land force structure



Major military reforms between 2008 and 2010 produced a leaner land force structure with brigades directly subordinate to the armies, without a division superstructure. This system is now once again being expanded. Multiple new divisions have been formed, and several existing brigades are being expanded into divisions. Close to Norwegian borders, the 200th Separate Motorised Rifle Brigade on the Kola Peninsula has been expanded into the 71st Motorised Rifle Division, and the 61st Separate Naval Infantry Brigade is scheduled for expansion into a division in the coming years. Russia has also established a new army corps, which in the longer term will be garrisoned in Karelia.

Although the expansion has not yet materialised close to Norwegian borders, units have been stood up and are involved in operations in Ukraine, and these can be transferred in their entirety. Units based on the Kola Peninsula and in Karelia are expected to return to their respective garrisons after the war, or when the situation allows. It is not a given that the new military structure will be stood up or professionalised in its entirety; parts of the force may become based on mobilisation and conscripts, like it was prior to the assault on Ukraine in 2022.

In a division structure, the land forces' combat power is organised in divisions rather than separate brigades that are directly subordinate to the armies. The transition to a division structure entails a larger, heavier and more powerful Russian land power in the event of a regional war. A Russian infantry or tank division consists of between 5,000 and 10,000 soldiers, with subordinate regiments that number between 2,500 and 3,500 soldiers. A brigade typically comprises around 3,000 to 4,000 soldiers.

**71st Motorised Rifle Division (MRD):** the former 200th Separate Motorised Rifle Brigade. The division will be garrisoned in Pechenga, with at least two motorised rifle regiments and one tank battalion. The division belongs to Leningrad Military District.

**61st Separate Naval Infantry Brigade (SNIB):** scheduled for expansion into a division. The brigade is garrisoned in Sputnik and consists of three naval infantry battalions. It belongs to the Northern Fleet.

Almost all personnel and materiel belonging to the 71st MRD and the 61st SNIB have been transferred out of the Kola Peninsula and are involved in the war in Ukraine.



## Main submarine types

- 1) Strategic submarines** help preserve the second-strike capability. In the event of a nuclear attack, they can launch intercontinental ballistic missiles with nuclear warheads. They are also armed with weapons such as mines and torpedoes, which can be launched through their torpedo tubes.
- 2) Multirole submarines** can attack targets above and below the surface and on land. They carry cruise missiles in dedicated launch tubes, as well as weapons that can be launched from their torpedo tubes.
- 3) Attack submarines** are used to search for and attack targets both above and below the surface, for intelligence collection and to protect the strategic submarines. Attack submarines are armed with mines, torpedoes and missiles that can be launched from their torpedo tubes.
- 4) Special-purpose submarines** are designed for deep-sea operations. Almost all Northern Fleet submarines are nuclear-powered.



## Strategic bombers on the Kola Peninsula

Following Operation Spiderweb in June 2025, when Ukraine used drones to destroy aircraft at several Russian airbases, strategic bombers stationed on the Kola Peninsula that were still operational were relocated to bases elsewhere. The purpose was to protect the aircraft against fresh Ukrainian attacks.

Like the Russian GNSS disruptions near eastern Finnmark – another defensive measure – this shows how events in Ukraine have consequences in areas close to Norway.



Summer 2025: netting has been hung to protect against drones in the city of Orikhiv at the Ukrainian front. Image: Dmytro Smolienko / Ukrinform / NTB

## ■ The war in Ukraine

### No willingness to compromise despite marginal progress

As long as the Kremlin believes it retains the military advantage, it sees no reason to make concessions or compromises in the war against Ukraine. Russia is exerting sustained pressure on Ukrainian lines of defence. It continues making limited territorial progress along the front, primarily in central parts of eastern Ukraine and in Donetsk oblast.

Generally speaking, Russian progress is nevertheless marginal. In 2025, Ukraine lost only 0.8 per cent of its lawful territory. In 2024, the figure was 0.6 per cent. In the areas that the Kremlin has politically annexed,

Ukraine still controls just shy of 20,000 square kilometres.

Russia has lost close to 1,100,000 soldiers since 24 February 2022; this figure includes those killed, wounded, missing and taken prisoner of war. Around half of these will never return to the battlefield. Russia has also lost more than 13,000 armoured vehicles. However, it remains able to recruit personnel and upholding materiel production. Barring any significant changes off the battlefield, the relative strength will therefore continue shifting in Russia's favour.

In addition, Russia continues making extensive use of one-way attack drones. In 2025, Russia used more than four times as many drones as the year before.

### The use of drones in the Ukraine war

*Both Russia and Ukraine use a variety of drones in their warfighting:*

**Surveillance and reconnaissance drones** are used to locate enemy targets and build situational awareness for own forces.

**Attack drones** locate and engage the enemy using missiles, grenades or other effectors.

**One-way attack drones/kamikaze drones** are flown into an area in order to crash and detonate. The term covers long-range one-way attack drones, which are mostly pre-programmed, and FPV (first person view) drones, which are controlled by an operator using VR goggles.

**Interceptor drones** are used to locate and incapacitate enemy drones.

difficult for Ukraine to draw up long-term operational plans and coordinate a unified defence strategy.

Ukraine has established deep defences and is using drones to compensate for its inferiority in terms of personnel and materiel. However, the battlespace close to the front is complex, with intense fighting over heavily fortified cities in Donetsk. The presence of surveillance drones makes surprise and re-supply very challenging for both sides, and has enabled Ukraine to stem Russian progress so far. For its part, Russia has demonstrated an inability to concentrate forces and to coordinate and exploit the smaller breakthroughs it has achieved. It is therefore highly unlikely that Russia will succeed in converting its force superiority into major progress in the months ahead.

Ukraine has succeeded in using innovation and different parts of society in its defensive struggle. Its warfighting has been adapted along the way, and Ukraine's ability to target Russian rear areas and conduct sophisticated operations has improved through four years of defensive war. Nevertheless, Ukraine relies on Western support to avoid losing the war. The West plays a key role for Ukrainian combat power, with financial and political support as well as direct military donations. Although Ukraine's own production of military materiel has increased, the industry still relies on Western funding and access to electricity. If the West continues its support, Ukraine's production capacity is likely to continue growing, enabling the country to defend its own territory. In the longer term, Western support will be important to enable Ukraine to increase the impact of attacks on strategic Russian targets. The most critical requirements are air defence, artillery shells and long-range precision-guided weapons. □

Since the summer of 2025, more than 5,000 attack drones have been launched against Ukrainian territory every month. This puts enormous strain on Ukraine's armed forces and the population.

Russia is expected to continue making limited progress along the front throughout 2026. Meanwhile, both sides will continue attacking critical civilian infrastructure and military targets in each other's rear areas.

### Ukraine's defensive capability still dependent on Western support

Ukraine has fewer soldiers than Russia along the front. Recruitment drives over the past year have not fully succeeded. Dependence on Western support makes it



Electric cars from the Chinese manufacturer BYD are ready to be shipped in Suzhou, China, 16 January 2026. Image: AFP / NTB

## BEIJING HOLDS THE INITIATIVE

*The Chinese authorities see the coming of a new, multipolar world order as both inevitable and desirable, and are devoting considerable effort to positioning China as an arbiter of a changing international system.*

Beijing and Washington have both identified the other as the greatest threat to their respective national security, and Beijing considers rivalry with a Western world led by the US to be China's main geopolitical challenge. In this context,

Beijing works closely with Moscow, which shares China's goal of reducing the West's power to dictate the terms of international relations and the United States' leading position globally.





### *An alternative international community emerging*

Beijing is devoting considerable effort to reshaping international institutions and norms to align them with China's core interests and great power ambitions. The existing world order is portrayed as an outdated system where the needs of the global south always come last.

China continues to promote alternative multilateral arenas, including BRICS and the Shanghai Cooperation Organisation (SCO), as counterweights to the established forums.

In addition, Beijing has in recent years launched a set of global initiatives which, in combination with the Belt

and Road Initiative (BRI), provide the framework for an alternative global governance model:

- Global Security Initiative, GSI
- Global Development Initiative, GDI
- Global Civilization Initiative, GCI
- Global Governance Initiative, GGI

Beijing seeks to use these initiatives to guide a reform of the United Nations. They are presented as being for the common good of the international community, with territorial sovereignty, economic cooperation and the principle of non intervention at their core.



### *Near monopoly on critical minerals and rare earth elements*

Minerals are natural, solid substances that are typically extracted by mining. Some are used directly in manufacturing processes, while others are processed into metals, or rare earth elements are extracted from them. The latter have certain properties, such as mechanical strength, electrical conductivity and magnetic or optical properties, which are essential to many technological products.

Beijing aims to increase the West's dependence on Chinese goods and inputs, with the aim of expanding China's political and economic power. China's position in the extraction of rare earth elements and other critical minerals is central to this effort.

China controls around 60 per cent of global extraction of rare earth elements and a significant share of several critical minerals. The country also accounts for 85–90 per cent of refining and processing. No other country is expected to be able to challenge China's position in the next five to ten years.

By imposing export restrictions on rare earth elements, the Chinese authorities are limiting the West's ability to develop military equipment and advanced technology, and to build infrastructure for completing the green transition.

### ■ *Security policy and the economy*

Over time, the Chinese regime has worked to make its economy more resilient to sanctions, and China's capacity to withstand external pressure has improved. The trade war with the United States has acted as a stress test for the Chinese economy, which has proven robust in the face of high US tariffs.

China has secured a dominant position in supply chains covering defence materiel, technology development and energy. Europe's need for military rearmament and its ambition for a green transition require access to many of the supply chains that China controls. For Beijing, other countries' dependence on Chinese imports offers scope for action. China will seek to exploit the situation to strengthen its position vis-à-vis individual states and to undermine any attempts to create a unified European bloc for handling China-related issues.

### **Trade policy as instrument for global influence**

China is positioning itself as a great power, mobilising support for its efforts to change the current world order. China seeks to present itself as a stable, predictable and reliable partner, and as an alternative to the United States.

Emphasis on non-intervention has made cooperation with China attractive to several countries. Beijing does not require partners to strengthen democratic institutions or human rights. However, China dictates the terms for cooperation, which have to benefit China economically as well as politically.

### **New ventures in Europe offer greater scope for action**

China's large ownership stakes across a variety of supply chains are illustrative of its approach. For example, Chinese firms are investing in the extraction of metals and minerals used in electronics and batteries. Chinese state-owned enterprises have a substantial global footprint in minerals and mining, while the Chinese authorities simultaneously promote investment cooperation and trade cooperation.

In Europe, China's investment in electric cars has led to a series of new battery manufacturing plants. This is an example of geographic dispersal of production facilities, which spreads China's exposure to regulatory measures and makes it easier to circumvent them. The flexibility this offers is reinforced by far-reaching control of certain supply chains and by support through government mechanisms.

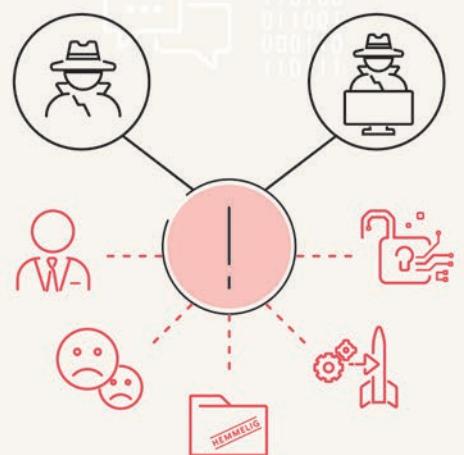
Control of large parts of a supply chain makes it very difficult for other actors to develop competitive alternatives in the short term. This is something that the Chinese authorities are well aware of and will seek to exploit.

### **Persistent intelligence and influence threat to Europe**

Several instances of Chinese intelligence and influence activities in Europe have come to light in recent years. These activities have taken place in the United Kingdom, Belgium, Germany, Estonia and Sweden, ↴



### Chinese intelligence services in Europe



The Ministry of State Security (MSS) and the Ministry of Public Security (MPS) are the most active Chinese services operating in Europe.

Their methods span from traditional human intelligence to sophisticated operations in cyberspace.

They are adaptable, and exploit opportunities as and when they arise.



A promotion video from Megvii showcases the company's facial recognition technology, 4 February 2020. Megvii develops deep learning software which is used by, among others, Chinese security authorities. Image: Mehdi Chebil / Polaris / NTB

### Anti-corruption drive hits defence sector



**Xi Jinping has spearheaded an extensive anti-corruption drive in recent years**



**The campaign has had a major impact on the Chinese defence sector, with scores of leaders dismissed**



**The revelations have prompted the PLA to focus more on ideological training**

and in most instances the individuals involved were citizens of the country where they carried out their assignments. The cases include attempts to obtain sensitive political information, surveillance of Chinese expats and efforts to influence politicians. The most prominent topics have been trade policy, Taiwan and the human rights situation in China.

Chinese intelligence services have been collecting intelligence and pursuing dissidents and Chinese minorities across Europe for several decades. Chinese cyber actors carry out operations against the West

primarily to exfiltrate data, but ultimately also to be able to inflict damage. Compromise attempts have targeted both public and private sectors, with technology and electronic communication manufacturers being especially vulnerable. China employs a network of private companies to obscure any direct links to the state. In addition, there have been examples of Chinese cyber actors positioning themselves in Western infrastructure; such access could potentially be used to inflict damage during times of heightened tension.

### ▪ Military developments

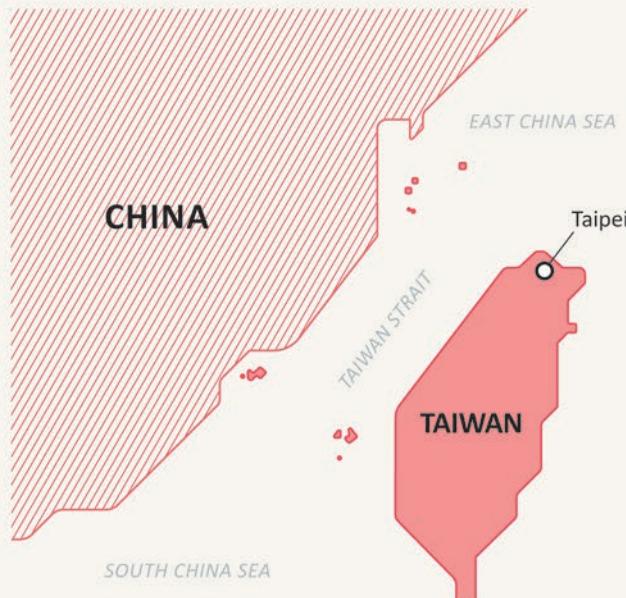
#### Modernisation of PLA geared toward centenary celebration

In 2027, it will be one hundred years since the foundation of China's armed forces, the People's Libera-

tion Army (PLA). For Beijing, this is a milestone on the path to 'a world-class military' by 2049. In recent years, China's defence budget has increased by about seven per cent annually, and it is expected to continue growing at the same pace. This means larger and more ↴



*In the event of armed conflict*



The situation in the Taiwan Strait has intensified, with a growing risk of accidents and misunderstandings.

Due to distrust between Washington and Beijing, incidents in the Taiwan Strait are more likely to escalate, which risks pulling the two parties into armed conflict.

This would disrupt international trade and may have enormous consequences for the world economy. A conflict would shift US political attention and military resources away from Europe and other parts of the world towards Asia.



The LY-1 shipborne laser showcased in a military parade in Beijing on 3 September 2025.  
Image: Zhao Wenyu / Alamy Stock Photo / NTB

realistic exercises, integration of new technology and further development of network-centric warfare.

China's civilian industry makes rapid modernisation possible. One example is the country's ship-building capacity. China currently builds more than half of all ships worldwide. With around 400 combat and auxiliary vessels, the Chinese navy is the largest in the world in terms of number of ships, and it is set to expand further in the years to come. An aircraft carrier capable of operating large drones and helicopters is due to be delivered to the navy in 2026 or early 2027. Construction has also begun on China's fourth aircraft carrier, and work on quieter submarines continues.

The PLA nonetheless faces certain challenges. The forces lack combat experience, and the PLA's ability to perform in an armed conflict remains untested. In addition, the capability to interact during combat is limited. Many of the exercises designed to showcase interoperability are scripted, and parts of the PLA are hampered by outdated materiel; for example, the bomber fleet consists of ageing aircraft with short range.

**PLA seeks capability to incorporate Taiwan by force**

Beijing maintains that Taiwan is an inseparable part of China, and reunification with the mainland is central to China's great power ambitions. China aims to coerce Taipei into making concessions without unilaterally escalating to an armed conflict, and to deter other states from getting involved in the Taiwan issue. One manifestation of this is the expansion of Chinese joint exercises close to Taiwan.

Beijing has normalised a high level of training activity around the island. There are almost daily operations both at sea and in the air, in addition to one or two large-scale annual exercises that bring together multiple services and theatre commands. In December 2025, China conducted the second major blockade exercise around Taiwan that year, shortly after the United States announced its largest ever arms sale to the island. Activity around Taiwan is expected to continue increasing. □



China's President Xi Jinping is welcomed in Moscow on 20 March 2023.  
Image: Xie Huanchi / Xinhua / NTB

## A UNITED FRONT AGAINST THE WEST

*A zero sum mindset characterises both Russian and Chinese geopolitics. Both regimes argue that the United States and the West are pursuing a coordinated containment policy against their countries. Consequently, China and Russia have each identified the other as their principal partner. Their cooperation aims to bolster both countries' military, political and economic power vis-à-vis the West, thereby reducing security-related, technological and economic vulnerability. Everything points to a strengthening of this relationship in the coming years.*

The partnership is built on mutual respect for the other's core interests. Beijing expects Moscow to support its views on the Taiwan issue and that the Russian authorities restrict the scope for action of Taiwanese actors in Russia and elsewhere. Russia is also expected to clamp down on supporters of the 14th Dalai Lama and Falun Gong. Moscow expects China to refrain from undermining Russia's war effort in Ukraine and back Russian ambitions for a new European security architecture in which NATO no longer accepts new members.

For Russia, the partnership provides an opportunity to develop a more robust military. Similarly, the PLA's ability to operate in areas close to

China is improved by procuring Russian military platforms and drawing on Russian experiences from the war in Ukraine.

Since 2022, Beijing has been mindful of the risk of Western secondary sanctions and adjusted the flow of capital, technology exports and trade with Russian actors accordingly. At the same time, this caution also forms part of a strategy to exploit Russia's dependence in order to secure favourable bilateral agreements. The war has increased Russia's reliance on China, further skewing the power dynamic between the two. Nevertheless, these factors do not threaten the general trajectory of the relationship.



## China and Russia in Africa

Beijing and Moscow view Africa as an arena for geopolitical rivalry with the West and have built substantial spheres of influence on the continent.

China has made considerable investments, including in infrastructure, energy and technology. In exchange, it obtains exclusive access to critical raw materials, which bolsters Chinese innovation and manufacturing capacity and reinforces its dominance of global supply chains. Moreover, Beijing is progressively converting its influence on the continent into political backing in international forums.

In the past, China primarily involved itself in relatively stable areas, particularly in southern and eastern Africa. More recently, the regime has increased its involvement in the conflict-ridden Sahel region, where Western actors have largely been forced out. Weak government control of natural resources offers Chinese companies considerable opportunities for profit.

Protection requirements have led to security cooperation with Sahel's authoritarian regimes, which also import large amounts of light military equipment from

Chinese manufacturers. China's growing footprint provides access to new markets for Chinese defence industry and companies with limited access to Western markets. Moreover, China has become a major supplier of surveillance and telecoms technology in North and West Africa.

Russia has in recent years forged ties with a number of African states that were formerly Western allies, aiming to secure strategic partnerships and long-term dependencies.

Moscow, far more than China, has shown a willingness to become directly involved in armed conflicts for economic and political gain, and maintains a significant military presence in several African countries. Russia's involvement reinforces authoritarian tendencies, and in areas under strong Russian influence it becomes virtually impossible for international organisations to run projects related to human rights and democracy.

## A UNITED FRONT AGAINST THE WEST

Internationally, China and Russia will continue to cooperate on expanding multilateral forums such as BRICS and the Shanghai Cooperation Organisation, to counterbalance NATO and the EU. One particular goal is to diminish US international reputation and influence.

### Despite sanctions, China remains Russia's main trading partner

China makes a significant contribution to Russia's state finances. In addition to consumer goods, China exports components and technology that are instrumental to Russian war-fighting.

Trade between China and Russia grew steadily from the mid-2010s and accelerated markedly after Russia's assault on Ukraine. In 2024, total bilateral trade reached almost USD 245 billion – more than double the 2020 level. In 2025, trade fell for the first time in five years, to approximately USD 228 billion. This represents a natural stabilisation of trade levels, driven in particular by fluctuating energy prices. Both sides are facilitating further growth towards 2030, aiming for a substantial benchmark of USD 300 billion, including through upgrades of transport infrastructure.

Both parties will nevertheless aim to shift the focus away from consumer imports towards joint ventures and technological cooperation, with the aim of reducing vulnerability to Western sanctions. Moscow and Beijing are continuously seeking new ways to circumvent sanctions, and China is particularly set on shielding its Western-exposed Chinese enterprises from risk. Beijing is using the West's sanctioning of Russia to learn, and the cooperation with Moscow provides opportunities to test different circumvention mechanisms.

The trade balance between China and Russia is relatively even, with the two economies complementing each other across different product groups.



### Russian gas exports to China

China currently receives gas both via the Russian LNG (liquefied natural gas) shadow fleet and through the pipelines that run between the two countries.

In the autumn of 2025, China began receiving shipments from the sanctioned Russian Arctic LNG 2 facility. This decision signals a shift in Beijing's risk calculations, with China testing the West's willingness to enforce sanctions.

In 2025, China took delivery of at least 22 LNG shipments, 21 of which came from Arctic LNG 2. All of the shipments were routed to the same terminal, allowing China to avoid exposing other terminals to sanction risk.

According to Gazprom's own reports, in 2025 it supplied 38.8 BCM (billion cubic metres) of gas to China via the Power of Siberia 1 pipeline – the first time more gas was supplied to China than to Europe (including Türkiye). 2025 was also the first year Power of Siberia operated at planned full capacity.

China and Russia are continuing negotiations on the establishment of a new gas pipeline (Power of Siberia 2). Once completed – expected sometime in the 2030s – the capacity for Russian gas exports to China will nearly double.



Military helicopters fly over an exercise area near Orenburg, Russia during a joint exercise involving Russia, China, Kazakhstan, Kirgizstan, Tajikistan, Uzbekistan, India and Pakistan in autumn 2019. Image: Sergei Grits / AP / NTB

While China exports manufactured and consumer goods, Russian exports to China consist mainly of energy and other natural resources. Russia's reliance on these exports is a weak point in its economy, and particularly vulnerable to a decline in Chinese demand.

China is the world's largest importer of Russian energy, with crude oil being Moscow's biggest source of revenue. Energy cooperation has strengthened in recent years, and China benefits from importing sanctioned Russian energy at low prices.

#### **Military partnership strengthened in several areas**

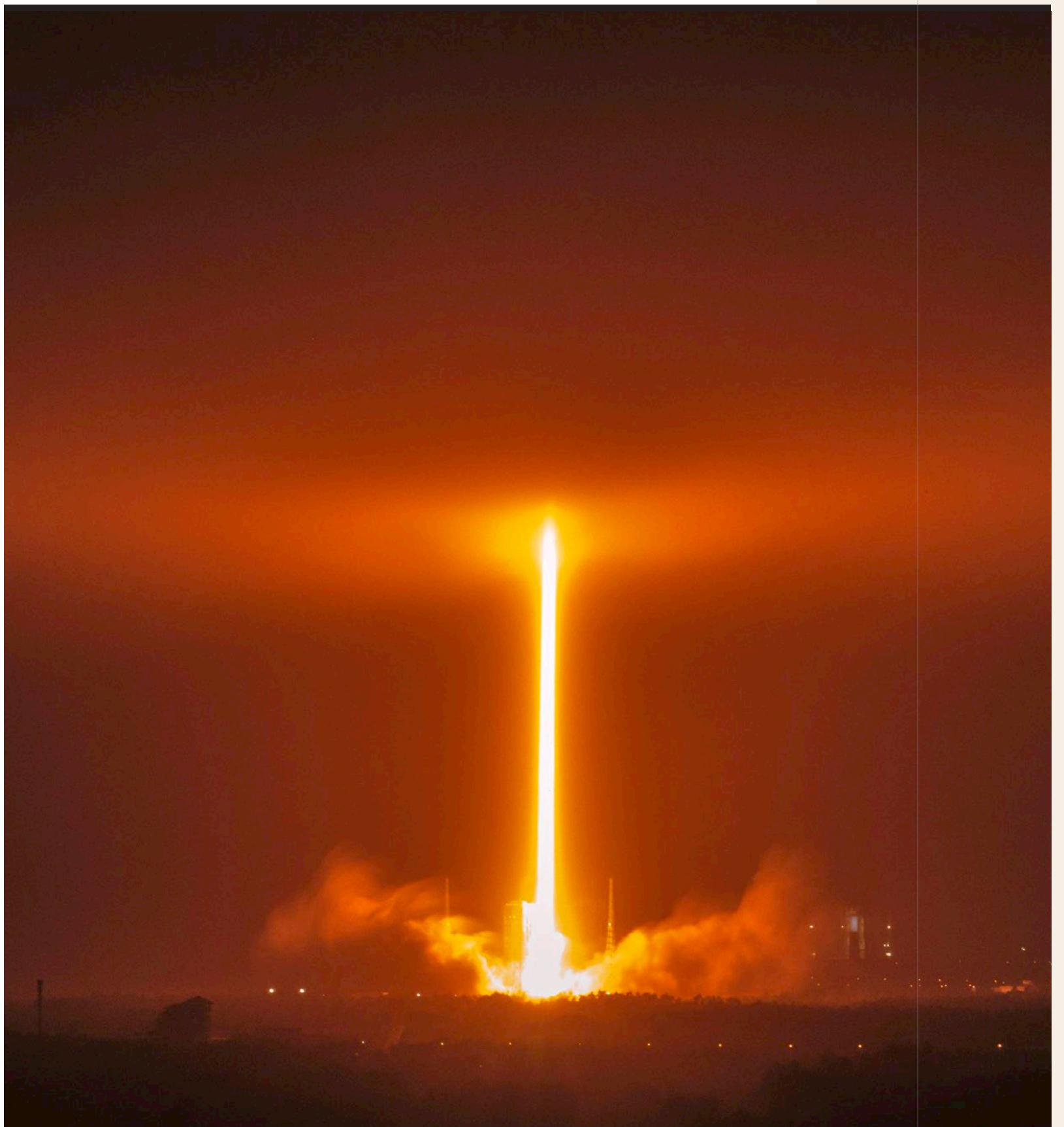
China and Russia will continue to deepen their military cooperation in 2026 through joint exercises and increased defence industry exchanges. Over the past few years, the two countries have conducted progressively larger and more complex joint exercises, incorporating new elements. The two military powers still have limited interoperability, and the primary aim is strategic signalling to the United States and its allies. Nevertheless, Chinese forces in particular gain valuable experience from real-world operational environments and have the opportunity to train alongside a far more seasoned military power.

Defence industry cooperation will also be deepened in the coming years, but the parties will attempt to keep the contents of the partnership concealed. Russia has been a key contributor to China's defence

modernisation for years. Moscow seeks to remain a significant supplier of key materiel and to provide capabilities and expertise that could prove important to operations around Taiwan. For Russia, the Chinese drone industry is vital to the development and production of its own attack drones and for devising counter-measures against Ukrainian drones.

Beijing is prepared to go to great lengths to support Moscow in order to prevent a Russian defeat in Ukraine. China remains the single most important supplier of non-lethal military materiel and dual-use items to the Russian defence industry. This ranges from raw materials and parts to advanced technology and computer-controlled production equipment, and is central to Russia's military capability. Nevertheless, Beijing will continue to calibrate its assistance to avoid being subjected to Western sanctions.

If Beijing assesses the risk of secondary sanctions to have come down, the Chinese defence industry is expected to contribute even more substantially to Russian military modernisation, for example by supplying more complete systems. Combined with technological innovations emerging from a nascent development partnership with China, this will allow new components, unfamiliar to the West, to be phased into Russian weapons. □



A modified Long March 7 launch vehicle carrying the satellite Shijian-28 blasts off from Wenchang Space Launch Site in China on 30 November 2025.  
Image: Wang Jiangbo / Xinhua / NTB

## A GLOBAL TECHNOLOGY AND ARMS RACE

*The global strategic arms race has always been closely intertwined with the development of high technology. The Kremlin's prioritisation of advanced weapons systems intended to play up European fears of nuclear escalation has been a marked factor in recent years. Beijing, for its part, is chasing nuclear parity with the United States. Russia and China are both developing weapons intended for use against critical space-based services. Civilian technology is used extensively for military purposes, and attempts to obtain Norwegian and allied technology will continue.*

### Western tech companies subject to targeted procurement attempts

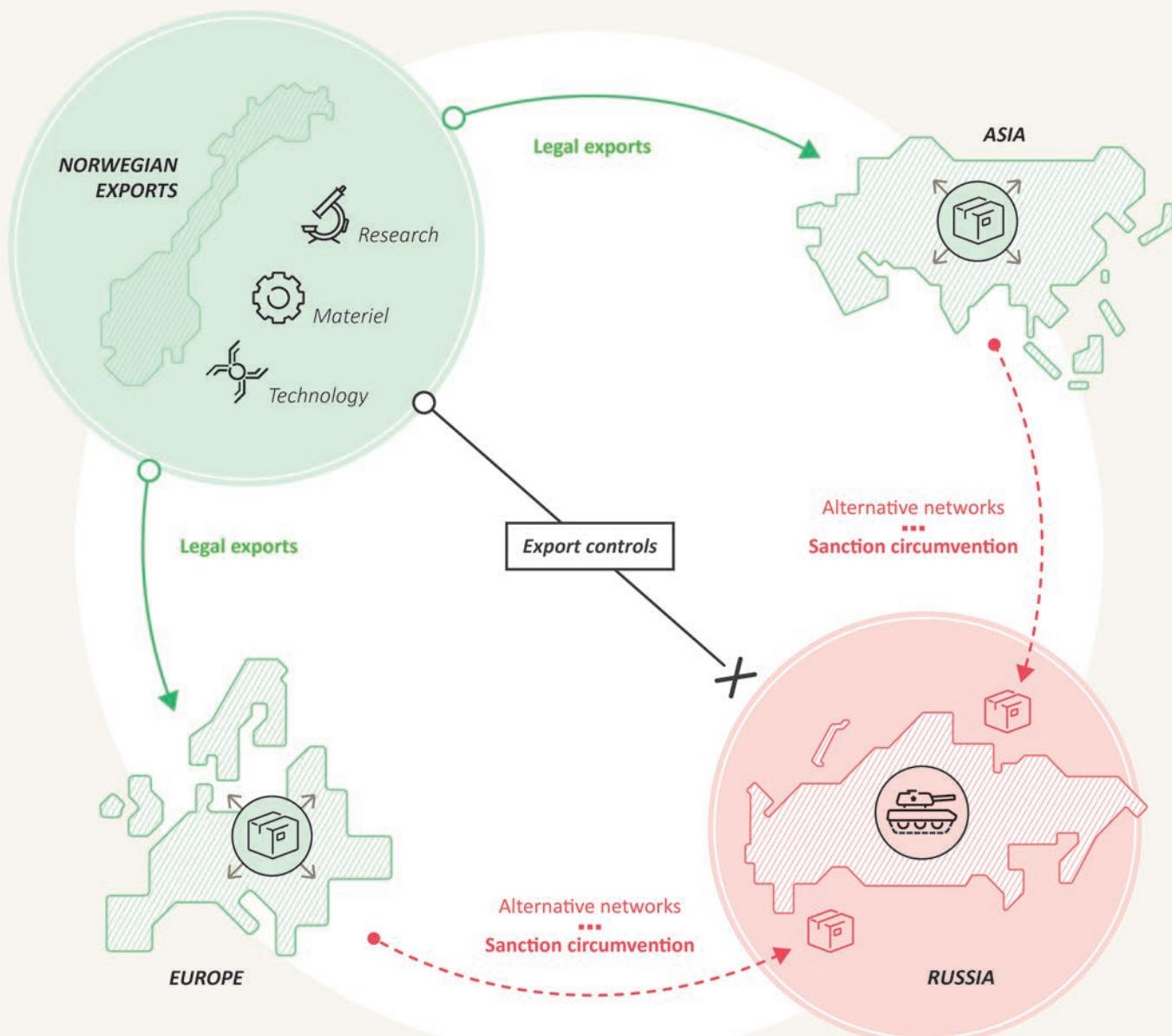
Russia still uses significant amounts of Western technology in its development and production of weapons, and consequently also in its war against Ukraine. The Chinese, Iranian and North Korean armed forces also use Western technology. Strategic cooperation between these states, and the use of civilian technology in military weapons programmes, presents a challenge to mechanisms intended to prevent

sensitive goods and technology from falling into the wrong hands.

The use of civilian technology in military programmes is a global phenomenon, also found in Russia, where Norwegian-manufactured maritime, communications and navigation technologies are highly sought-after. For instance, navigation equipment developed for civilian use may be used in artillery systems, air defence systems and drone navigation antennas. China and Iran are also looking to Norwegian technology in these areas.



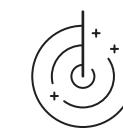
How sensitive technology ends up in the wrong hands



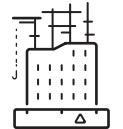
Military applications for civilian technology



Production, repairs and maintenance of weapons systems



Surveillance, detection and mapping



Planning, building and maintaining military infrastructure

Actors involved in this kind of activity are circumventing Western sanctions by setting up covert procurement networks and exploiting the EU's single market in order to obtain Western technology. The use of European intermediaries helps conceal links to the recipient country. Companies in free trade areas such as the United Arab Emirates are also used to obscure the end user.

China is helping Russia by selling Chinese-manufactured technology, which often contains Western components. Chinese businesses are also re-exporting large amounts of Western technology. Finally, Russia procures considerable amounts of technology, as well

as sanctioned goods, from or via India, Türkiye and several Central and South-East Asian states.

Nevertheless, sanctions are having a considerable impact. The Western sanctions regime is driving both costs and lead times on foreign technology. It has caused significant delays in the production and development of several Russian weapons systems. Russian dependence on Western technology will not lessen in the near future, and various forms of procurement attempts directed at Norwegian and allied technology manufacturers will continue.

#### ▪ Strategic weapons

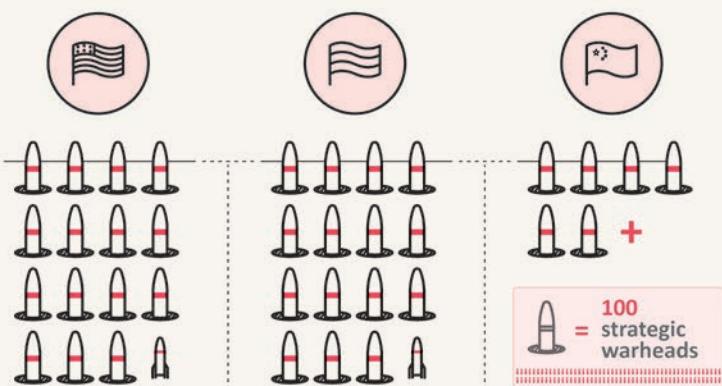
##### New START soon to be history

If the United States and Russia allow New START to lapse in February 2026, there will, for the first time since 1972, be no bilateral agreement between the two countries that regulate nuclear weapons. The lack of a binding

agreement will pave the way for nuclear rearmament. New START regulated the number of deployed intercontinental nuclear weapons, and despite Russia's suspension of the agreement in 2023, the Kremlin has kept to its basic limitations.



### Chasing strategic parity

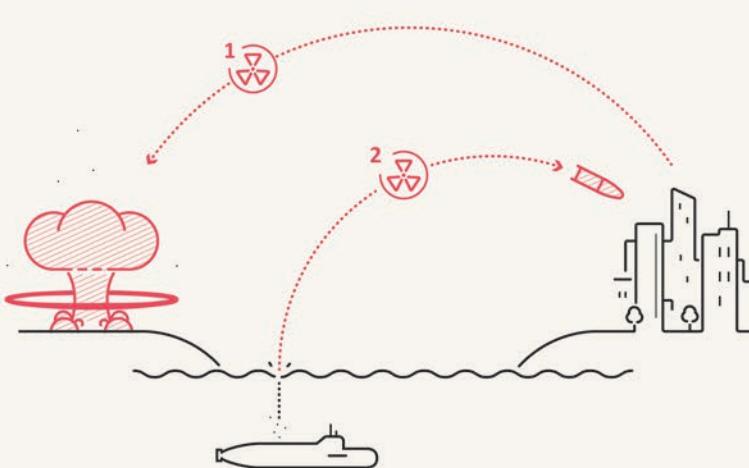


New START limits the number of strategic nuclear warheads that the United States and Russia may deploy, to 1,550 each. China's arsenal now exceeds 600 and is still growing.

Both the United States and Russia have tactical nuclear weapons in addition to this, with Russia assessed to have around twice as many as the United States, approximately 2,000.



### Retaliatory capability and second-strike capability



In nuclear weapons strategy, retaliatory capability and second-strike capability involve ensuring an attacker can be subjected to a nuclear counter attack with unacceptable consequences. Second-strike capability is therefore key to strategic deterrence.

Both strategic submarines and mobile, land-based launch platforms can offer second-strike capability and retaliatory capability.

Russia is looking to use strategic dialogue and the prospect of a 'New New START' as a bargaining chip in its relationship with the United States, and to present itself as a responsible nuclear weapons power. Although the United States has expressed a desire to bring China into any potential future agreements, Beijing considers this to be out of the question until it achieves parity with the United States. As a result, the prospect of a trilateral agreement equivalent to New START seems remote.

### Russia: new weapons to challenge Western defence systems

Despite its struggling economy, Russia is prioritising the development of new strategic weapons systems. On the one hand, the Kremlin is seeking to create uncertainty in NATO and play up European fears of nuclear escalation. On the other, the Russian regime is uncertain of its own ability to keep up with nuclear and conventional development in the West.

Russia's growing military cooperation with China is an important factor in Russian arms development, as are experiences gained from the Ukraine war. Systems such as hypersonic glide vehicles and nuclear-powered cruise missiles and torpedoes are designed to penetrate existing defence systems and circumvent arms control treaties. Some weapons are intended to challenge NATO countries' ability to detect, track and avert a nuclear assault. They are also intended to ensure retaliation regardless of the prevailing conditions.

One example is the Skyfall cruise missile, which has nuclear propulsion. The missile has demonstrated extreme range, enabling it to attack from unexpected directions and thereby circumvent air and missile defences. In autumn 2025, the missile travelled several thousand kilometres over a test site on Novaya Zemlya. Even with this progress, years of testing remain before the system can enter into service.

A Skyfall missile crashing during testing could cause local radioactive emissions, with heightened radiation levels limited to a few kilometres from the impact site.

Another example is Oreshnik, an intermediate-range ballistic missile. Russia has used this missile twice in Ukraine, first in an attack on an industrial site in Dnipro in autumn 2024, and then again in January this year, when a missile was fired against Lviv in western Ukraine.

The Kremlin has repeatedly mentioned Oreshnik in its rhetoric against European support to Ukraine, as well as directly to Ukraine. The missile is capable of reaching anywhere in Europe and is armed with 36 small warheads that impact ground targets at very high speeds. Due to the small size of the warheads, this system does not add significantly more firepower than other Russian short- and intermediate-range missiles, but the large number of warheads offers high penetrability against missile defences.

Poseidon is a submarine-launched, nuclear-powered torpedo capable of carrying a nuclear warhead. The reactor is intended to give this weapon intercontinental range. The torpedo requires a large and purpose-built submarine as a launch platform. Due to its high complexity, developing this system will take a long time.

Russia is also developing Sarmat, a new intercontinental missile. Testing in the High North was suspended after the missile exploded in its silo at Plesetsk in autumn 2024, and testing continues from a base further south. This weapon is important to Moscow because it is considered crucial to Russia's continued strategic deterrence.

### China: rapid armament

China's nuclear arsenal has grown substantially in recent years, from more than 200 warheads in 2020 to over 600 at the start of 2026, and is set to increase further. Land-based nuclear weapons will remain the backbone of China's arsenal, divided among mobile launch pads ↗



DF-61 intercontinental ballistic missiles on display during a military parade in Beijing on 3 September 2025.

Image: Ethan Hunter / Alamy Stock Photo / NTB

and silo sites. However, China is also investing in submarine- and air-launched strategic nuclear weapons.

China's submarine-launched ballistic missiles are capable of reaching the US mainland from Chinese littoral waters, while air-launched ballistic missiles are well-suited to attacking pinpoint targets in the Indo-Pacific. By dispersing its strategic nuclear weapons across multiple platforms, China can achieve rapid retaliation by using silo-based missiles and secure retaliation by mobile, land-based launch platforms and submarines.

#### ▪ *Chemical and biological weapons*

##### **Russia and China preserve ability to produce lethal weapons**

Although Russia is signatory to both the Biological Weapons Convention and the Chemical Weapons Convention, the country retains the ability to produce weapons and means of delivery due to existing expertise as well as industrial and research facilities. In addition, Russia continues using less-lethal agents such as teargas and chloropicrin in Ukraine.

Although China signed the Biological Weapons Convention in 1984, Chinese research institutions affiliated with the armed forces have for years been working to identify and test highly toxic substances. This dual-use research, combined with extensive biotechnology investments and historic expertise from previous biological weapons programmes, means that China possesses a considerable capacity for developing and producing biological weapons.

In parallel with the increase in nuclear weapons, China is continuing its development of missiles capable of carrying both conventional and nuclear warheads. China is likely developing nuclear warheads with lower yield for its regional missiles, making them suitable for use against military targets. By prioritising the development of ballistic missiles and hypersonic glide vehicles for use against targets at sea, China is seeking to shift the area of operations for US carrier strike groups further away from the Chinese mainland.

##### **Technological progress revolutionising scope for biological weapons**

Advanced biotechnology combined with artificial intelligence (AI) and big data makes it possible to design new toxic substances and microorganisms with specific characteristics. AI tools could be used to generate recipes for toxic substances that would not be detected in standard analyses, and which could be ordered from commercial suppliers.

Access to large amounts of genetic big data and health data will facilitate medical progress. However, state actors could use AI to process such data in order to identify genetic traits that are unique to potential targets. The ambition could be to develop agents with discriminating effect, in order to target both humans and food production. □



## Space as a theatre of war

Society is increasingly dependent on space-based services, and protecting national space assets has become more important. The loss of GNSS signals and time synchronisation from satellites would cause major disruptions in global trade, finance and digital infrastructure, among others.

Alongside a massive increase in commercial satellite-based services, Norway and Norwegian allies are building military capabilities in space. In-orbit systems are crucial for military support functions such as communications, navigation and surveillance.

Russia is developing several kinetic and non-kinetic anti-satellite weapons, including a nuclear weapon intended to destroy large numbers of satellites. Although the system has allegedly not been deployed, a satellite launched in 2022 is linked to its development programme.

In addition, Russia is displaying increased willingness to use instruments constructed for jamming commercial space-based services. Moscow has stated that satellites which support Ukraine's defensive war are considered legitimate jamming targets. Several Western countries have issued official complaints against Russia's disruption of satellite-based communication. Civilian operators of earth observation satellites have also reported disruptions. Some instruments have temporary effects and may be confused with environmental disturbances; these are an especially attractive option for threat actors.

Russia and China have satellites that manoeuvre in orbit and position themselves close to other states' satellites. Although the purpose of this may be intelligence collection, physical proximity is also a prerequisite of various co-orbital attack concepts. The latter refers to operations where one satellite is used to attack another.



*Global Navigation Satellite System, or GNSS, is a collective term for satellite-based systems that provide position, navigation and time (PNT).*

*GNSS is used in cars, aircraft, ships and mobile phones, in telecommunications, agriculture and research and in monitoring natural phenomena.*

*GPS, the European system Galileo, Russia's GLONASS and China's BeiDou are all GNSS systems. There are also regional systems such as Japan's QZSS and India's NavIC.*

*Recipients use signals sent from satellite constellations to calculate precise positions, speeds and time. Multiple systems may be used concurrently to increase precision.*

## Targeting space infrastructure

Space-related infrastructure can be targeted in a number of ways, with varying prospects of recovery.



**Kinetic means** destroy ground infrastructure or satellites by using missiles or projectiles.



**Non-kinetic weapons** include nuclear weapons, lasers and microwaves. A nuclear weapon detonated in space would destroy electronics through radiation, while lasers and microwaves would inflict temporary or irreversible damage on satellite electronics or sensors.



**Electronic warfare assets** can target both satellites and ground infrastructure, and temporarily deny or disrupt access to satellite services.



**Cyber operations** can cause satellite control systems to become unavailable or data to be corrupted or stolen.



A burnt-out bank in Tehran after the protests in January 2026.

Image: Majid Asgaripour / Reuters / NTB

## THE MIDDLE EAST

*Whereas Israel has strengthened its position in the region considerably, the Iranian regime now sees a real risk of having to handle both internal and external conflict simultaneously. Tehran is prioritising the rebuilding of its missile programme in order to restore its deterrent towards Israel and the United States, and it retains the ability to produce nuclear weapons. Being capable of attacking Israeli and Jewish targets elsewhere in the world has become more important. The level of conflict in the region has put regional normalisation processes on hold.*

### Shifting balance of power and persistent threat of escalation

The regional balance of power in the Middle East changed after the 12-day war between Israel and Iran in the summer of 2025. Israel has strengthened its position at the expense of Iran and the Iran-led axis of resistance, consisting of Hezbollah in Lebanon, Hamas in Gaza, Shia militia groups in Iraq and the Houthi movement in Yemen, among others. Iran was already marked by two years of Israeli military

pressure, but after the 12-day war, the country's nuclear programme and military capability have both become diminished, and hence also Tehran's deterrent. Nevertheless, Israel sees Iran's nuclear programme, missile arsenal and allied groups as a threat, and the risk of renewed escalation in the region persists.

There are still skirmishes between Israel and Hamas, in spite of the ceasefire agreement. The US peace plan is supported by a UN resolution, but neither Israel nor Hamas have committed to the plan in its entirety. Israel will seek to ↵



Members of the Houthi movement protesting in Yemen after Israeli airstrikes on Iran in summer 2025. Image: Ameen Ali / Alamy Stock Photo / NTB

### Risk of destabilisation



Tehran risks major conflict both at home and abroad



Great power rivalry could spill over to the Persian Gulf



The ceasefire between Israel and Hezbollah is strained

prevent the agreement from enabling the formation of a Palestinian state, while Hamas will not accept full disarmament. A Hamas that remains militarily capable would be a target of new Israeli attacks and jeopardise humanitarian assistance in Gaza.

Following the ceasefire in Gaza, the Houthi movement halted its attack campaign against Israel and shipping linked to the country. The movement will likely resume the campaign in the event of renewed escalation in Gaza, or if Israel carries out large-scale attacks in Yemen. Although any new attack campaign would be aimed primarily at Israeli interests, it would also represent a renewed threat to Norwegian and other shipping in the region. In addition, it would cause disruptions in global supply chains and markets.

In Lebanon, the November 2024 ceasefire between Israel and Hezbollah is strained. Without clear steps towards a disarmament of Hezbollah, there is an increased likelihood of a wider Israeli occupation in Lebanon and intensified Israeli air operations against Hezbollah targets. This would challenge the Lebanese

army's ability to counter a military escalation between Israel and Hezbollah; the Lebanese army plays a key role in disarming Hezbollah.

### Normalisation processes have stalled

The level of conflict in the region has put regional normalisation and de-escalation processes on hold. Israel's warfighting in Lebanon and Gaza has made it harder for the Arab countries to normalise relations with Israel. It is unlikely that Saudi Arabia will implement the normalisation plan until Israel makes concessions on Palestinian self-rule in both Gaza and the West Bank.

The Gulf states will continue to develop their security cooperation with the United States, but at the same time they are seeking to increase their scope for action by strengthening ties with Russia and China. Consequently, they could become more receptive to Russian and Chinese positions on Ukraine and Taiwan ↴



Iran's leader Ali Khamenei speaks in Tehran on 17 January 2026. Khamenei claims that the regime retains full control both at home and vis-à-vis neighbouring countries.

Image: Shadati / Xinhua / NTB

in multilateral forums. In addition, great power rivalry could spill over to the Persian Gulf, resulting in the involvement of all three great powers – the United States, Russia and China.

Russia's influence in the Middle East has become considerably weaker following the collapse of the Assad regime in Syria in December 2024. Russia pulled out most of its forces after the regime's fall, but has retained two bases on the coast. Moscow is now looking to strike a deal with Damascus to maintain a Russian military presence in the Mediterranean and have a hub for operations in Africa.

### Iran-Israel conflict could trigger broad regional destabilisation

The protests in early 2026 are the most serious that the Iranian authorities have had to face. They posed a significant threat to the stability of a regime that was already at risk. Tehran perceives the risk of new attacks from Israel and aggressive rhetoric from the US as imminent threats, and sees that its worst-case scenario – being embroiled in conflict both externally and internally – could become a reality.

Iran therefore needs to restore its deterrent capability vis-à-vis Israel and the United States. In order to achieve this, Tehran prioritises rebuilding its missile programme. Rebuilding its nuclear programme and its regional network of non-state actors carries a greater risk of fresh attacks from Israel. Iran seeks to find a balance between restoring its deterrent and not provoking a new military conflict, one which could involve the United States.

In the event of a new round of military escalation, it is likely that Iran would threaten to attack shipping traffic in the region.

With Iran lacking a deterrent against Israel in the region, Tehran's ability to attack Israeli and Jewish targets elsewhere in the world becomes more important. A series of attack plots in recent years show that Tehran views Scandinavia and the rest of Europe as legitimate and potential targets for such operations.

### Iran retains ability to develop nuclear weapons

Iran's enrichment infrastructure has been destroyed as a result of the 12-day war in June. However, Iran still has the technological expertise needed to make nuclear weapons, and likely still has access to highly enriched uranium. It is technically possible to rebuild enrichment capacity sufficient for nuclear weapons production within months. In a situation where Tehran perceives the regime's survival as threatened, it may view nuclear weapons as the only option for deterring the United States and Israel.

In any event, rebuilding missile production capacity is a priority. Iran still possesses a large arsenal of missiles capable of delivering nuclear warheads that can reach the entire Middle East and large parts of Europe. □



One person was killed and seven wounded in a knife attack in Mulhouse, France on 22 February 2025. The French president condemned the attack, calling it an 'Islamic terrorist act'. Image: Jean-Francois Frey / EPA / NTB

## THE TERRORIST THREAT TO EUROPE

*Although attack-related activity against the West by militant Islamists has increased considerably since 2023, executed attacks have mostly been of a simpler nature, and the prevention rate has been high. The most powerful al-Qaeda and Islamic State affiliates are now found in Africa, where both organisations aim to establish a caliphate. The terrorist threat from right-wing extremists stems mainly from lone actors linked to communities that focus on violence rather than ideology.*

### Terrorist threat to the West persists

In the past two years, attack-related activity against the West by militant Islamists has increased sharply. The terrorist threat from militant Islamist groups mainly stems from the Islamic State (IS), either via inspired or directed attacks. IS's Afghanistan affiliate (ISKP) and IS Somalia pose the greatest threat in terms of providing attack direction.

Over the past decade, the IS threat to Europe has taken on a different character. Today, the number of averted attacks is high, and the ones carried out are mainly conducted by IS-inspired lone actors using simple means.

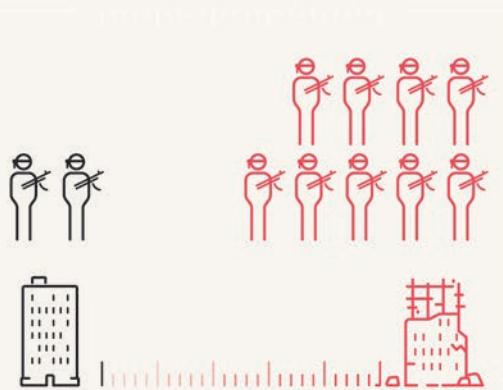
### Towards a new caliphate

The most powerful affiliates of al-Qaeda (AQ) and IS, both militarily and financially speaking, are now located in Africa. Several communities on the continent are marked by deep, local lines of conflict and an absent state apparatus. Both organisations exploit this by absorbing or forming alliances with local militant groups.

Both IS and AQ have an overarching goal of establishing a caliphate ruled according to their ideology. Both seek to position themselves as rivals to the national authorities. In particular, IS's West Africa Province (ISWAP) in Nigeria and the AQ affiliates al Shabaab and JNIM in Somalia ↵



### Terrorist groups on the rise in conflict areas



Conflict and political instability provide fertile ground for terrorist groups. The Islamic State (IS) and al-Qaeda (AQ) are set on expanding in such conflict areas, where living standards are poor and the authorities are either wholly or partially absent.

Both organisations are re-building systematically, expanding their affiliates in Africa and Asia while bolstering their finances, military capabilities and ability to carry out terrorist attacks.



A convoy of Malian lorries in Côte d'Ivoire are waiting to cross the border, carrying fuel back to Bamako, the capital of Mali, on 31 October 2025. The convoys are escorted by military vehicles in order to protect them from attacks by the Malian al-Qaeda affiliate JNIM, which has stated that no more tank lorries will be allowed into Mali.

Image: Issouf SANOGO / AFP / NTB

### Online groups and networks



Young right-wing extremists are influenced through online groups and networks



The exchange is dominated more by severe violence than ideology



Russian-affiliated actors are likely seeking to incite right-wing extremists

and Mali respectively have made significant territorial gains. The progress in Africa has been vital in order to maintain a global foothold. The groups pose a considerable threat in their own core areas, including against Western interests.

Should IS and AQ succeed in establishing a caliphate, this could inspire Western sympathisers to join them; an increase in European foreign fighters would further exacerbate the threat to Norway and the West. European foreign fighters have used their contacts and language skills to incite and direct terrorist attacks in Europe in the past.

is less central than before, with discussion increasingly dominated by intensely violent content. This particularly applies to groups with a younger membership demographic. However, the lack of established right-wing terrorist organisations limits their ability to plan, finance and coordinate complex attacks.

It is likely that actors linked to the Russian state are active in digital right-wing extremist networks, and that they may both contribute to radicalisation and help right-wing extremists become better equipped to carry out attacks. The focus on violence combined with the involvement of state-affiliated actors could heighten the right-wing extremist threat in the longer term. □

### Persistent terrorist threat from right-wing extremists

In 2025, there was a slight increase in right-wing extremist attack activity in the West, and the activity is expected to stay at a comparable level in 2026. The terrorist threat from right-wing extremists stems mainly from lone actors linked to transnational online groups and networks. In these communities, ideology



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