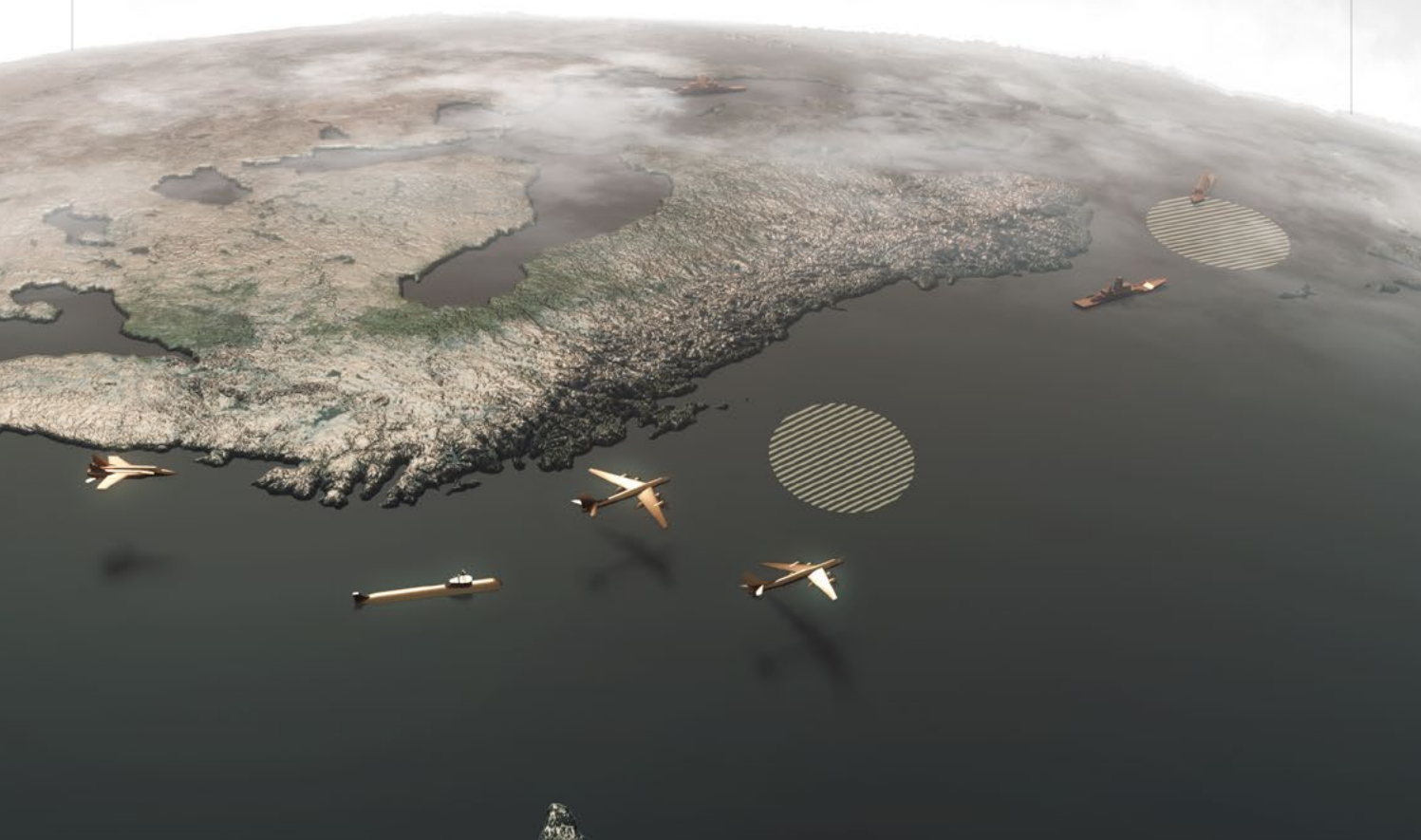




NORWEGIAN
INTELLIGENCE SERVICE

FOCUS 2020

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





The Norwegian Intelligence Service's annual report *Focus* is one of four Norwegian threat and risk assessments published each year. The other three are published by the Norwegian Police Security Service (PST), the Norwegian National Security Service (NSM) and the Directorate for Civil Protection and Emergency Planning (DSB) respectively.

■ **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. NIS's main mission is 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. This year's assessment, *Focus 2020*, contains NIS's 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 responsible for preventing and investigating crimes that threaten national security. PST's annual threat assessment covers matters, mainly Norwegian, that could affect Norway's security and harm national interests in the year ahead. Matters include threats from foreign intelligence services, relevant intelligence targets and the services' pattern of operation in Norway. The assessment also covers threats emanating from non-state actors, particularly the threat of politically motivated violence by extremist groups and individuals. The analysis has a one-year timeframe and is published in the first quarter of the year.

■ **THE NORWEGIAN NATIONAL SECURITY AUTHORITY (NSM)** is responsible for preventative national security. NSM advises and supervises the safeguarding of information, objects and infrastructure of national significance. NSM also has a national responsibility to detect, alert and coordinate responses to serious ICT attacks. In its report *Risiko*, NSM assesses the risk of Norwegian society being subjected to espionage, sabotage, acts of terror and other serious incidents. The assessment is published in the first quarter of the year.

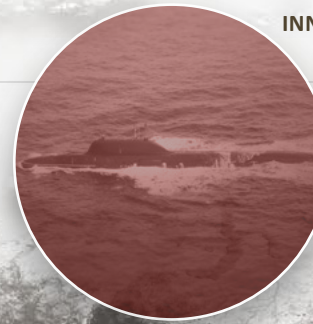
■ **THE DIRECTORATE FOR CIVIL PROTECTION AND EMERGENCY PLANNING (DSB)** is responsible for maintaining an overview of risks and vulnerabilities in Norwegian society. DSB has published scenario analyses since 2011. These cover the risk of major incidents in Norway, incidents Norwegian society should be prepared to handle. They include natural events, major accidents and deliberate acts, and the timeframe is longer than for the annual assessments published by the other three agencies.

Cover:

The Russian naval exercise Ocean Shield took place in August 2019 in the Baltic Sea, Barents Sea, North Sea and Norwegian Sea.

Design: Norwegian Intelligence Service
Foto: Scanpix, Getty images, Google, Norwegian Armed Forces

DIGITAL VERSION:
[FORSVARET.NO/FOKUS](https://forsvaret.no/fokus)



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Russian exercise activity displays a flexible and utilisable armed force.



80 Towards New Arms Races

The development of missile defences, new nuclear weapons systems and conventional long-range precision-guided weapons affect the parties' willingness to enter into arms control agreements.



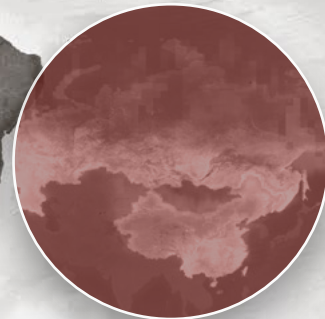
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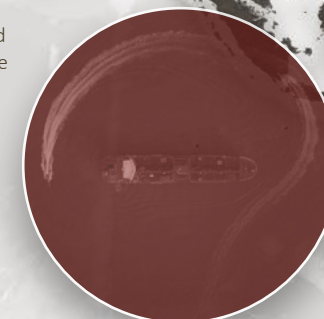
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This is the tenth edition of Focus, published by the Norwegian Intelligence Service (NIS). Since the first edition was launched in 2011 Norway and the world have witnessed developments that have given rise to a more complex threat environment than ever before. Technological developments have increased the scope for action for state and non-state actors alike.

NIS's main mission is to warn of threats to Norway and Norwegian interests, and the changing threat environment is making this mission increasingly challenging. It places fresh demands on our work and our ability to continuously adapt. Focus 2020 forms part of our response to this mission, and aims to offer an overall assessment of topics, countries and development trends which we believe will be of security-related significance to Norway in the year ahead. It also identifies trends that could be of security-related significance in a five-to-ten-year perspective.

Morten Haga Lunde
Lieutenant General
Director Norwegian Intelligence Service
Lutvann, 10 February 2020

Editing concluded on 23 January 2020.

The threat environment facing Norway at the start of 2020 is the result of structural changes that have been taking place over a period of many years. On the one hand, these changes have offered armed forces increased scope for action and made them more useful as political instruments in times of peace, crisis and war. On the other, technological developments have ensured that non-military means can increasingly be used as an alternative to armed force in pursuit of the same goals; examples include the use of economic power, disinformation campaigns, surveillance and computer network operations.

This development has picked up pace against the backdrop of mounting great power rivalry, and we are seeing a number of nascent arms races in a world order where power takes precedence over international law. It is NIS's belief that all the topics touched on in FOCUS 2020 will be of strategic importance to Norway in the year ahead, and most of them are affected by the ongoing rivalry between regional and global powers.

The factors that have the strongest impact on the threat environment facing Norway and Norwegian interests are closely linked to Russia and China, two countries with political systems in which politics and economics, the public and private and the civilian and military are all closely and intentionally intertwined. The intelligence and security services are heavily

involved in all aspects of these two societies, and it makes little sense to distinguish between public and private interests and activities when making assessments that are significant to Norway's national security.

«This is not a transitional phase. Although the Russian and Chinese systems differ, both are moving in a more authoritarian direction. »

This is not a transitional phase. Although the Russian and Chinese systems differ, both are moving in a more authoritarian direction. In their relations with the outside world, these two countries consider themselves to be in a persistent conflict with the United States and parts of the West.

Since Russia began its military reform in 2008, its armed forces have become an increasingly useful political instrument across the entire conflict spectrum, from peace to crisis and war. In this period, Russia has built increasingly layered, integrated and scalable defences. In March 2019, Chief of Defence Valeriy Gerasimov launched the concept 'Active →

Defence', which incorporates the main aspects of the developments seen within the Russian armed forces.

This is evident in the High North, where Russia has gradually reinforced its defences with a range of new capabilities, with a north-western centre of gravity. In a westerly direction, much of the Barents Sea and the areas between Svalbard and the ice edge are covered by Russian systems. The Northern Fleet's ocean-going capabilities have been bolstered by the addition of new vessels. Russia has deployed coastal defence systems on Franz Josef Land and the New Siberian Islands, in addition to those on the Kola Peninsula, and the Russian early-warning chain is being expanded with new long-range radars.

«In August the Northern Fleet, together with the Baltic Sea Fleet, staged the largest naval exercise seen near Norwegian borders since the Cold War. Parts of the Bastion Defence were established all the way down to the North Sea.»

Whereas the development and addition of new capabilities shows how Russian defences are being strengthened, Russia's military activity near Norwegian borders since the summer of 2019 have been one continuous demonstration of the defence concept's emphasis on integration and scalability. In August the Northern Fleet, together with the Baltic Sea Fleet, staged the largest naval exercise seen near

Norwegian borders since the Cold War. Parts of the Bastion Defence were established all the way down to the North Sea.

Then, with the strategic exercise Grom in October, Russia demonstrated how traditional nuclear weapons are increasingly used in combination with long-range conventional precision-guided weapons. This new dimension improves military capability and flexibility, and contributes to a more credible deterrent across the conflict spectrum from peace to war. The exercise activity seen in 2019 showed that Russia has made significant progress in developing a dynamic military capable of adapting its use of means to the situation at hand.

We will be seeing capability developments and fluctuations in the activity level for years to come, and in the Arctic this will include new submarines, surface vessels, aircraft and military bases. In addition, we can expect the development and testing of new sophisticated weapons systems near Norwegian borders. This will also present non-military challenges linked to the environment and security. In summer 2019, 19 Russians lost their lives in connection with military activity close to Norwegian borders. For years, the use of jamming systems has been disrupting civilian air traffic.

Whilst Russia's ambitions for great power status are having an impact near Norwegian borders, China has become less restrained in showing force and is increasingly prepared to dictate the terms of international cooperation. Nationalist self-assertion has replaced economic pragmatism as the guiding principle of Chinese foreign policy. In a speech given just after he acceded to the leadership, Xi Jinping indicated that his foreign policy thinking is based on his perception of a 'long-standing struggle between two social systems'. →



The Severodvinsk class is the Russian navy's newest and most modern class of multi-role submarines.

5G networks, fibre-optic cables and smart city systems offer access to big data and could be used to collect sensitive information.



Like with Russia, it is in China's interest to challenge the U.S.-dominated world order. 'The New Silk Road' is a prerequisite for achieving this, and two thirds of Europe's NATO members have joined the Chinese Silk Road strategy.

«The 'Digital Silk Road', meanwhile, lays the potential groundwork for a major global intelligence capability. By controlling 5G networks, fibre-optic cables and smart city systems, it is possible to collect vast amounts of data.»

The 'Digital Silk Road', meanwhile, lays the potential groundwork for a major global intelligence capability. By controlling 5G networks, fibre-optic cables and smart city systems, it is possible to collect vast amounts of data. The Silk Road projects are carried out by Chinese companies that are required by Chinese law to share information with the authorities in Beijing. Chinese technology companies are introducing new technical standards and assuming an increasingly dominant position in the field of digital services.

Norway is also an object of the Silk Road strategy, and China's interest in the Arctic will continue to grow. Chinese direct investments demonstrate the range of means available to Beijing.

The threat environment related to international terrorism is also affected by geopolitics, and past

collaborations to defeat terrorism are showing signs of fragmentation. In Syria, the U.S. withdrawal and Turkish intervention have both undermined the coalition's ability to fight ISIL. This offers the latter fresh scope for action, and the number of ISIL attacks in Syria is already rising.

This development is evident outside of Syria and the Middle East as well. By bolstering its affiliates elsewhere in the world, ISIL is undermining the great powers' ability to conduct joint counter-terrorism efforts.

The number of terrorist attacks in Europe carried out by militant Islamists has fallen sharply since 2017, a development which is likely to continue in 2020. Nevertheless, there are a number of signs that ISIL's decline is temporary and that the terrorist threat in Europe and elsewhere is set to increase in the years ahead. Returned foreign fighters, those who never made it to Syria or Iraq and those currently being released from European prisons are all potential recruits to Islamist terrorist networks in the coming years.

Another key element is the emergence of a more transnational form of right-wing extremism, in an increasingly polarised Europe. At present, right-wing extremism is not just an ideology focused on the nation state. There are a number of versions of this ideology that could have a unifying effect across borders and form a basis for internationalisation. In the years ahead, this could contribute to a more complex, diverse and changeable threat environment than we have seen for the past decade.

In a broader context, we are seeing that the ongoing great power rivalry is shifting the balance of power and thereby altering the dynamic in a number of conflicts, with significant implications for →



Damage after the attack on the ARAMCO plant in Abqaiq, Saudi Arabia on 14 September 2019.



international stability. This is most evident in the Middle East, where Russia has cemented its role as a great power. By fighting the opposition in Syria and setting the terms for a political solution, Moscow – together with Iran – has secured influence and control over a large proportion of Syria’s strategic resource base.

Moscow is also likely to increase its diplomatic involvement in Libya in 2020. The Kremlin has long cultivated a close relationship with Khalifa Haftar whilst simultaneously maintaining its diplomatic ties to the government in Tripoli. Should Moscow succeed in Libya as well, the Kremlin would exert strong influence in a number of vital areas stretching from the Middle East to North Africa.

«In the short term, however, the greatest threat in the Middle East is the risk of military escalation between the United States and Iran.»

In the short term, however, the greatest threat in the Middle East is the risk of military escalation between the United States and Iran. Trust between the parties has reached a nadir, and over the past six months, as sanctions have been tightened, Tehran

has demonstrated both willingness and ability to heighten the level of conflict across the Middle East. The killing of Qassem Soleimani has made the situation even more incendiary, and in a worst-case scenario the conflict could escalate into a regional war. The regime in Tehran is likely still willing to negotiate with Washington, but only on the condition that the United States offer significant sanctions relief.

Both the economic situation within Iran and the external pressure against it are moving the political centre of gravity in a conservative direction, and the balance of power is likely to shift further in the parliamentary elections in February 2020. Should Tehran’s economic and political scope for action become further restricted in 2020, the regime is likely to once again escalate the conflict with the United States.

Other conflicts that stand to be affected by the ongoing great power rivalry are those in North Korea and Afghanistan, although in the latter country internal factors are as important as external ones. The United States and the Taliban are likely to resume negotiations in 2020, yet the parties stand far apart. On the Korean Peninsula, Pyongyang’s less conciliatory tone towards Washington will force underlying lines of conflict to the surface.

Globally, developments are pointing to a new dynamic in ongoing conflicts, new arms races and a race to control and influence global digital infrastructure. Collectively, this means we are facing a more complex and changeable threat environment than in the past.



Activity Near Norway

Ocean Shield was the largest naval exercise seen near Norwegian borders since the Cold War. Russian authorities are critical of Norway's management of its NATO membership and its military relationship with the United States.



The Arctic Region

Developing the Arctic region is of great national importance to Russia. Russia is re-establishing military bases and civilian support hubs along the Arctic littoral. The country must continue to weigh its need for investment in the area against the security policy challenges arising from allowing other countries access to the region.

Russia

20 years after Vladimir Putin became the leader of Russia, his regime is increasingly struggling to maintain legitimacy at home. The average Russian's purchasing power has declined for six years in a row, and the outlook for significant economic growth is bleak.

It is becoming increasingly difficult to placate the wider populace, and a new generation of Russians, who experienced neither the Soviet Union nor the chaotic 1990s, are demanding a more transparent, democratic form of government. Active use of the internet and social media challenges the authorities' traditional monopoly on information. Putin's popularity has fallen, and his support party, United Russia, has never seen lower support ratings than at present. The local elections in autumn 2019 showed that the authorities are having to resort to various laws in order to bar or deter opposition candidates from running and win elections in the larger cities. Consequently, the lead-up to the parliamentary election in 2021 and the presidential election in 2024 will present a significant challenge to the authorities.

The Kremlin has its own idea of what is needed to keep Russia stable and safe. There are three issues in particular which the Presidential Administration will have to continue managing, and how they play out will have implications for Norway as well. The first is domestic developments, with challenges relating to the economy, resources and legitimacy. The second is Russia's relationship with the West, seen against a backdrop of heightened great power rivalry. The third is the continued modernisation of the armed forces, with an emphasis on utility and comparative advantages in the face of Western defence systems.

It will become increasingly difficult for the regime to ensure political stability in the years ahead. The demonstrations in connection with the local elections in 2019 showed that there is a genuine capacity among the populace for mobilisation, and they served as a



Regime Critique

The Kremlin must handle regime-critical protests that mobilise broad swathes of the population. Tighter control of 'RuNet' improves the government's ability to monitor digital communication channels.



Ukraine

Although Zelenskyi has invested prestige in solving the conflict in eastern Ukraine, his scope for action is likely to be limited.



Syria and the Middle East

Russia has made itself the most important mediator in the conflict in Syria.



Defence Investments

Russian defence investments remain sizeable in spite of budget limitations. Several long-range precision-guided weapons have entered into service in the Russian armed forces in recent years, increasing Russia's military scope for action.

→ clear sign of the challenges currently facing the regime. In the years ahead, the Kremlin will likely have to choose between more authoritarian measures and making democratic concessions. The latter seems an unlikely prospect; a growing willingness to protest combined with the authorities' need for control means that small incidents could quickly escalate and spiral out of control.

In his annual speech to the Federation Council on 15 January 2020, Putin announced a series of constitutional amendments. They involve transferring power from the president to the parliament; for instance, the State Duma will appoint the government, there will be tougher criteria for presidential candidates and the president will only be able to sit for two terms. The move should be seen as an attempt to create a fresh dynamic in Russian politics; it also allows Putin to take up one of the roles that will be given new power following the amendments. He could exert significant influence on Russian politics for many years to come.

The Kremlin has planned for the Western sanctions to endure, and the fact that the regime is seeking alternative solutions for technological cooperation and access to capital and markets is reflected in its foreign policy. Russia is entering into pragmatic partnerships with states that are not party to the sanctions regime; here, its relationship with China is important, but so are initiatives aimed at countries such as India, South Korea and Brazil. The Kremlin is also developing bi- and multilateral partnerships with other states subject to Western sanctions and trade restrictions. In addition to compensating for sanctions-related losses, these initiatives are intended to signal that Russia will not be dictated to by the United States and the West.

The relationship between Russia and the West is currently frostier than at any time since the Cold War, and there is little to suggest that it will improve in the year ahead. Russia is also choosing to see strained foreign relations as a sign of its renewed great power status. A lack of trust in the United States and NATO is taken to mean that these relationships constitute zero-sum games in which it is advantageous for Moscow to develop weapons systems that can offer a strategic advantage or compensate for conventional inferiority. Russia is developing and testing a range of new high-tech long-range weapons intended to penetrate Western defence systems; these weapons will have very short warning times.

Due to the termination of the INF Treaty, there is currently no agreement in place preventing Moscow or Washington from deploying land-based intermediate-range →

«It also allows Putin to take up one of the roles that will be given new power following the amendments. He could exert significant influence on Russian politics for many years to come.»

Russia's President Vladimir Putin greets Turkey's President Recep Tayyip Erdogan and Iran's President Hassan Rouhani in Sochi.

«Russia is developing and testing a range of new high-tech long-range weapons intended to penetrate Western defence systems; these weapons will have very short warning times.»

The High North and the Barents Sea are of great importance to the Russian armed forces. The image shows the Northern Fleet's strategic submarine Karelia.

→ missiles. The loss of control mechanisms is a source of uncertainty on both sides and heightens the risk of an arms race. Russia has repeatedly declared that it will respond in kind should the United States deploy intermediate-range missiles to Europe. The final remaining arms agreement between Russia and the United States, New START, expires in 2021; it remains uncertain whether it will be prolonged. Uncertainty and a lack of trust regarding the strategic balance will therefore continue to mar Russia's relationship with the West in the year ahead.

Through a decade of reform, Russia has developed a flexible and utilisable armed force. Although military developments in the High North remain a high priority, Russia's top military priority continues to be the nuclear triad and its defence. The Kola Peninsula is a military centre of gravity and the Barents Sea the key deployment area of the Northern Fleet and its strategic submarines.

Russia is re-establishing military bases and civilian support hubs along the Arctic littoral, with a centre of gravity to the west, on the Kola Peninsula and around the Barents Sea. The Arctic support hubs will be important for asserting sovereignty and maintaining search and rescue readiness in the North-East Passage, whereas the military bases will support the Northern Fleet; some will be equipped with modern weapons systems and be capable of supporting land, sea and air assets alike.

The defence of the Kola Peninsula has gained depth and improved coverage. In order to ensure control of local waters, Russia has bolstered its military command and control systems in recent years and added new military capabilities, in addition to expanding its early-warning chain with new radars.

By adding new military and asymmetric assets, Russia has expanded its military scope for action. Moscow retains the ambition of global nuclear parity with the United States, but is also developing a regional non-nuclear deterrent involving new types of weapons.

Although Russian defence investment has entered a period of stagnating allocations, defence spending continues to represent a high proportion of government expenditure. Despite the past decade's significant materiel investments, the Russian armed forces – particularly the navy – continue to struggle with old equipment and ageing platforms.

Despite tighter budgets, the Russian armament programme will ensure that the country maintains a powerful military going forward, with a range of modern weapons systems. A number of new high-tech weapons systems are in development or being phased in. The armament programme is aimed specifically at bolstering investment in long-range precision-guided weapons and modern command, control and communication systems. Russia will also be acquiring new force multipliers such as space, electronic warfare and digital capabilities as well as other high-tech weapons systems.



[DOMESTIC AFFAIRS]

Discontent and Political Activism a Growing Challenge for the Regime.

The Kremlin's attempts to appeal to the younger parts of the Russian population are seen as old-fashioned, reinforcing young people's impression of an ageing power apparatus with a poor grasp of reality. Government-supported music videos and music festivals are being met with rejection, whilst well-known media figures – from bloggers to rappers and the hunger-striking lawyer Lyubov Sobol – have given new meaning to the idea of opposition and dissent.

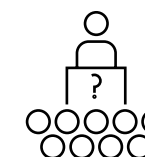
«Going forward, the challenge for the regime will be to handle regime-critical protests that mobilise broad swathes of the population.»



Higher living costs and negative socioeconomic developments pose a challenge to the administration.



The opposition will likely seek to mobilise in connection with the 2021 parliamentary elections.



There is still much uncertainty regarding what will happen when Putin's current presidential term ends.

Rising living costs and negative socioeconomic developments are challenging Putin's position and popularity. In recent years, real income in Russia has fallen by around 13 per cent, as living costs have risen faster than wages. The number of Russians living below the poverty line is growing, and is currently at the same level as in Putin's second presidential term. Putin has sought to respond to these challenges by stimulating growth through major government investments in national healthcare, infrastructure and education projects. However, there is much uncertainty regarding both the implementation and the impact of these projects.

Russia has seen several protests over the past year, primarily linked to single local issues. Such issues will continue to have the potential to mobilise protesters, but will mostly remain manageable for the Kremlin.

Demonstrations of a more anti-systemic nature pose a greater challenge. Prior to the local elections in Moscow in autumn 2019, tens of thousands protested against the barring of opposition candidates.

These protests eventually took on an anti-systemic character, and the authorities used considerable force to keep the situation in check.

Going forward, the challenge for the regime will be to handle regime-critical protests that mobilise broad swathes of the population. The opposition is likely to seek to mobilise in connection with the parliamentary election in 2021. In light of the regime's fear of protests and revolutions similar to that in Ukraine, it is more likely that regime criticism will be met with violence than with concessions. The Kremlin will likely seek to prevent protest movements from developing in the first place.

The Russian economy is stagnating, with international estimates suggesting a growth rate of 1.6 per cent in the longer term. This is far from the Russian government's own estimate of 2.9 per cent, and contrasts with Putin's pledge that Russia will become one of the five leading world economies in his fourth presidential term. Without structural reform, there is little to suggest that the country will see major economic →



A protester wearing several different logos protesting against a new law that tightens government control of RuNet.

growth, and fear of dwindling popularity makes the implementation of such reforms unlikely.

There is great uncertainty as to what happens when Putin's presidential term ends, and an answer is unlikely to come in the near future. The proposed constitutional amendments strengthen this uncertainty and open up a range of scenarios in which Putin retains power after his current term ends. This uncertainty has prompted members of the elite to seek to position themselves, and various groups have offered different responses to the growing popular discontent.

New Legislation Tightens Government Control of RuNet.

A new piece of Russian internet legislation entered into force on 1 November. The new law offers the government tighter control of 'RuNet', the Russian internet, and moves the country one step closer to breaking away from the global internet.

The law requires Russian service providers and regulatory bodies to take a number of steps to strengthen Russia's digital infrastructure. For instance, they are obliged to develop technical solutions that will ensure that RuNet works independently of the global infrastructure, and traffic must be routed through government-controlled hubs. In addition, the authorities are establishing a centre for monitoring and controlling public communication networks.

The Russian authorities have said that the law is necessary due to the need for greater national sovereignty over the internet, in order to protect Russia and Russian citizens from foreign – primarily Amer-

ican – aggression. In 2018, a computer network operation caused a power outage at the troll factory in St Petersburg, and in 2019 the Russian authorities accused the United States of placing malware in the Russian power grid. Such incidents and statements have brought the need for stronger digital readiness to the fore.

Together with other countries, Russia has repeatedly proposed measures that would limit U.S. influence over the internet. However, regardless of developments on the global internet, the new Russian legislation will improve Russia's ability to maintain critical national functions.

«In 2018, a computer network operation caused a power outage at the troll factory in St Petersburg, and in 2019 the Russian authorities accused the United States of placing malware in the Russian power grid.

The new law also serves a domestic policy purpose by improving the government's ability to monitor digital communication channels. It is likely that the protests that took place in connection with the local elections in autumn 2019 reinforced the authorities' need for control. The new legislation facilitates the establishment of a sweeping filter and blocking system, similar to that in place in China, which could make it harder for oppositionists to mobilise in advance of future protests.

Mariya Zakharova, spokesperson for the Russian Ministry of Foreign Affairs, has mentioned Norway several times over the past year.

[FOREIGN AFFAIRS]

Norway Mentioned More Frequently in Official Russian Rhetoric and Media.

Although Norway's NATO membership and support to the EU's sanctions regime against Russia continues to affect the bilateral relationship, the two countries are re-establishing contact in a number of fields that have remained defunct since 2014.

«The overall message conveyed by the Russian media is that Norway is increasingly taking on the role of host and starting point for NATO's militarisation of the Arctic.»

The attention paid to Norway in the official rhetoric of the Russian Ministry of Foreign Affairs has increased noticeably since 2017, although compared to the larger issues Norway is still mentioned fairly infrequently. The statements are often critical of Norway's management of its NATO membership in general and its military relationship with the United States in particular. Norway is accused having abandoned its 'basing policy' by allowing the stationing of American and British soldiers to Norway in peacetime. The Russian claims suggest that the Norwegian authorities exaggerate the threat from Russia in order to justify their policies of increased military activity and closer integration with the United States, thereby fuelling anti-Russian sentiment in the Norwegian population. It is also claimed that NATO activity in the Arctic undermines stability and trust between Norway and Russia.

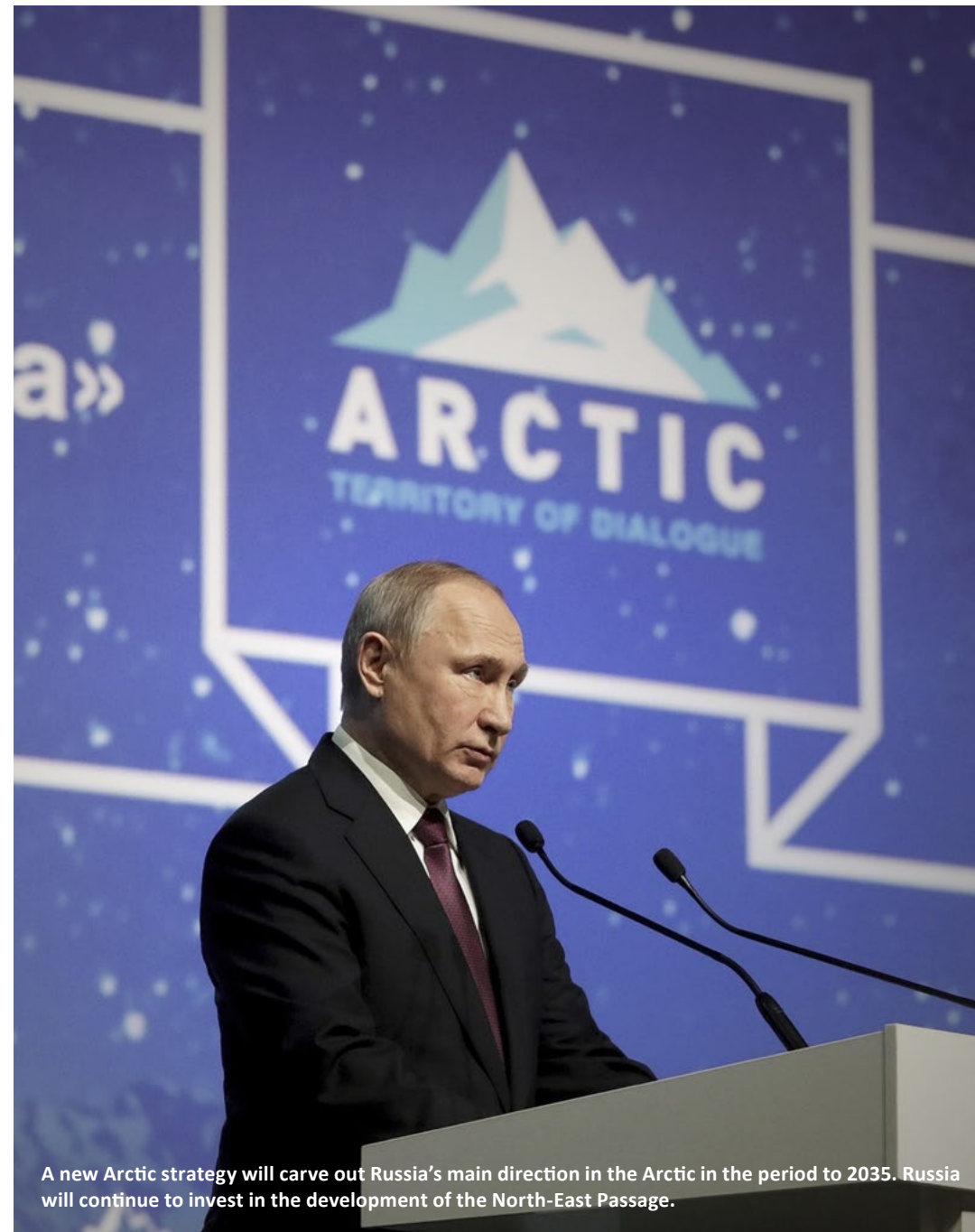
Norwegian support of the Western sanctions regime is also met with criticism. Recently, however, official Russian statements have also praised Norway's role in the negotiations between the Maduro regime and the opposition in Venezuela.

Whilst criticising Norway's security policy, Russia has simultaneously expressed a desire for closer dialogue and pragmatic cooperation. 2019 saw increased contact at both the senior government official level and the political level. The commemo-

ration of the liberation of Kirkenes in 2019 showed that Norway and Russia are cognisant of their shared war history and a long tradition of peaceful neighbourly relations. At a time when Russia feels that its version of the war is being challenged, this has had a positive impact on the bilateral relationship. Russia is expected to continue its efforts to broaden bilateral co-operation in 2020.

Overall, Russian media coverage of Norway is generally low, as coverage of international affairs is primarily limited to the great powers and Russia's most important bilateral partners. When Norway is mentioned, it is mostly in the context of defence and security policy and what Russia perceives to be a shift in an anti-Russian direction. Among the much-criticised issues in 2019 was the topic of what Russia refers to as Norway's re-arming in the High North, with a particular emphasis on the establishment of a new battalion and Norway's decision to facilitate the arrival of nuclear submarines in Troms. The overall message conveyed by the Russian media is that Norway is increasingly taking on the role of host and starting point for NATO's militarisation of the Arctic. This is in line with the picture being painted in official Russian channels.

In 2019, there was an increase in Russian media coverage of Norwegian environmental policy. Whilst the international attention given to this topic over →



A new Arctic strategy will carve out Russia's main direction in the Arctic in the period to 2035. Russia will continue to invest in the development of the North-East Passage.

the past year is likely to be part of the explanation, it is also the result of a growing Russian investment in environmental journalism. In recent years, two new media platforms have been set up with the aim of acting as counterweights to Norwegian media coverage of environmental issues in the Arctic. These platforms are supported by the Russian government and are mostly critical of how Norway manages its role as an environmental actor in the Arctic. Generally, the Norwegian authorities are accused of double standards by giving the impression that Norway is world-leading on environmental measures when the reality is different. Among the issues that received relatively wide coverage in 2019 was the storing of mining waste in Repparfjorden and Norwegian whaling. However, Russian media outlets have also on several occasions emphasised the good working relationship with Norway on environmental issues; one example is the media coverage of the Norwegian-Russian environmental commission, which held its annual meeting in Moscow in 2019.

New Arctic Strategy Indicates Russian Direction in the Period to 2035.

A new federal Arctic strategy is likely to be launched in the first half of 2020. It will outline the main direction Russia will be taking in the Arctic in the period to 2035.

The strategy is likely to have a strong socio-economic aspect and may cover a greater geographic area than in the past. Over the past year, Russia has made several structural changes which have tied the Arctic and the Russian Far Eastern federal district more closely together. These new links could influ-

ence future investment in the Arctic, and it may be that developments in the north could increasingly be understood in light of developments in the east.

«Although the Russian authorities want to see increased activity in the North-East Passage, they also want to bolster situational awareness and national control in what they consider a strategically important area.»

Russia will continue to develop the North-East Passage, with a particular focus on the area defined by Russia as the Northern Sea Route. One example of the priority given to this project is the new and expanded role given to Rosatom, with the establishment of a dedicated 'Directorate for Developing the Northern Sea Route'. According to Russian media, Rosatom has drawn up a development plan for the sea route that runs to 2035, involving further investment and development of icebreaker and hydrographic support.

Although the Russian authorities want to see increased activity in the North-East Passage, they also want to bolster situational awareness and national control in what they consider a strategically important area. One illustrative example is a proposal from the Russian Ministry of Defence in spring 2019 of introducing new procedures for foreign naval vessels and other official vessels sailing in Russian →



A new bridge linking the Russian city of Blaboveshchensk and the Chinese city of Heihe. The bridge is expected to increase trade and economic development on both sides of the border.

territorial waters and internal waters along the Northern Sea Route.

Developing the Arctic region and exploiting its natural resources is of great national importance to Russia, and a stable and predictable situation there is consequently in the Russian authorities' interest. The Kremlin has placed an emphasis on cooperation and low tension when describing the area. When Russia takes up the chairmanship of the Arctic Council in 2021, it is likely to use the forum as an important platform for facilitating cooperation in the region and for reinforcing its image as a responsible actor.

New Dimensions to Russian Cooperation with China.

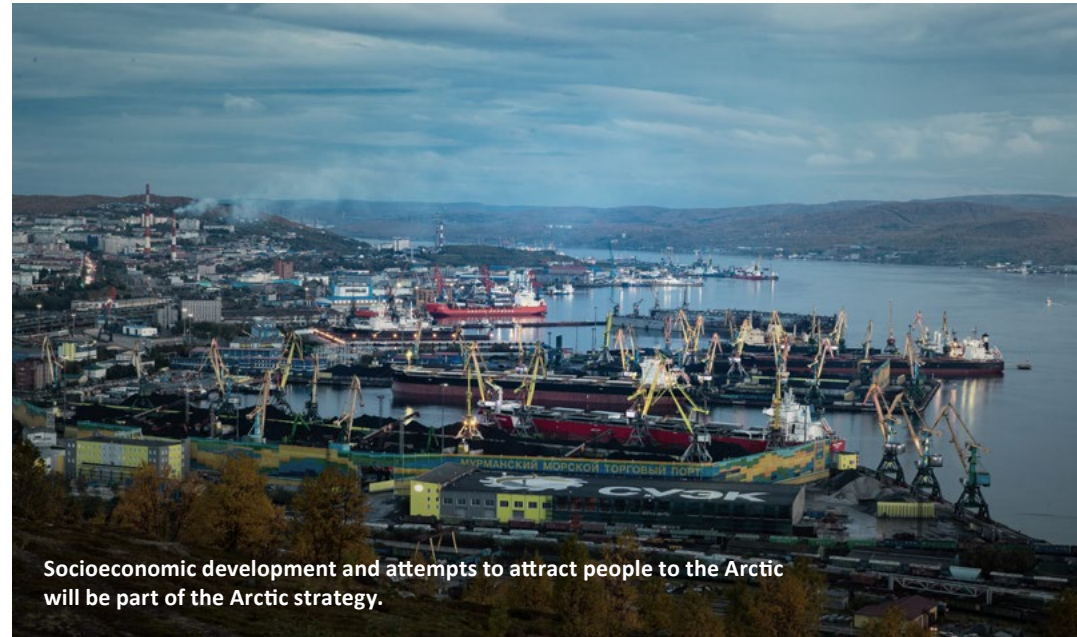
Russia will continue to work for closer relations with China in 2020, particularly in the form of economic and military partnerships. The strong personal bond between the countries' two leaders is an important premise for this. In June 2019, Putin and Xi decided to upgrade the status of the bilateral relationship. Several important collaborative projects have been completed in the past year, including the new gas pipeline 'Power of Siberia', which will transport Russian gas to China for the next 30 years. Contracts have also been signed for new large-scale projects, including Chinese investment in Russian energy projects. Due to the enduring Western sanctions, Russia wants to diversify its energy exports whilst seeking alternative sources of capital, technology and investment. At a time of geopolitical confrontation with the West, it is important

for Russia to signal that it has not become isolated. In addition, Russia and China have a mutual interest in challenging the U.S.-dominated world order.

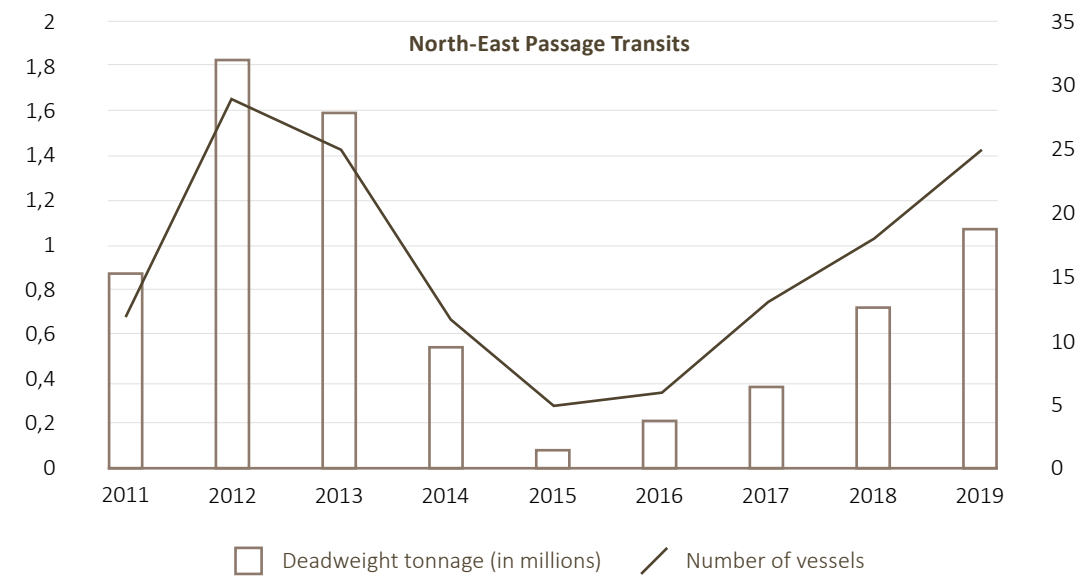
China is currently Russia's largest trading partner. Over the course of 2018, trade increased by nearly a quarter, totalling USD 108 billion. In September 2019, when the Chinese prime minister visited Russia, the countries agreed to double trading volumes by 2024. They plan to achieve this by investing in energy, industry, high technology and agriculture. Although it remains uncertain whether the two countries will achieve this five-year aim, new large-scale projects are likely to be initiated in 2020 and cooperation to increase in the coming years. However, low productivity and widespread corruption will continue to make it difficult to attract Chinese investment to anything other than large, state-run projects.

«In September 2019, when the Chinese prime minister visited Russia, the countries agreed to double trading volumes by 2024.»

Military cooperation forms a key part of the bilateral relation. For Russia, the sale of advanced weapons systems to China is economically advantageous, and the latter country is an important source of technological components. Over the course of 2019, Russia and China expanded their cooperation through →



Socioeconomic development and attempts to attract people to the Arctic will be part of the Arctic strategy.



increased operational collaboration and technological partnerships. The Russian Ministry of Defence has signalled that it is planning to sign a new military cooperation agreement with China in 2020, the first since 1993. Nevertheless, a formal military alliance between the two countries is considered an unlikely prospect.

Russian and Chinese politicians have repeatedly stated that the bilateral relationship is at a historic high point, and both regimes are careful not to criticise each other in public. Nevertheless, there are a number of factors that could complicate cooperation in the longer term. The Chinese economy is currently six times larger than the Russian, and the gap is widening. There are also challenges linked to China's growing influence in Central Asia, a region Russia considers its own privileged sphere of interest. Moreover, a too-close cooperation with China risks undermining Russia's goal of maintaining good bilateral relations with other Asian countries such as India, Vietnam and Japan. Russia also has to preserve its trade relations with the EU, which collectively represents a larger trading partner than China and would continue to do so even if Russian trade with China were to double.

Diversifying Financing Sources in the High North Could Ease Dependence on Chinese Funds.

The overall economic situation in Russia makes it difficult for the country to realise costly state-run projects in the Arctic alone. Given that investments by Russian federal actors are insufficient, non-state investment from both Russia and elsewhere is likely required. The chairman of the Russian Arctic Commission has put off-shore development high on the agenda, and a

new bill allows private companies – including foreign ones – access to the Russian Arctic shelf. The desire for access to Asian markets and investors is likely one of the reasons why Russia has made a number of structural changes in order to link the Arctic and the Russian Far East closer together. In 2019, responsibility for developing the Arctic was given to the existing Ministry for Development of the Russian Far East, now re-named the Ministry for Development of the Russian Far East and Arctic.

«The overall economic situation in Russia makes it difficult for the country to realise costly state-run projects in the Arctic alone.»

The expectation is that the development of infrastructure along the North-East Passage and the realisation of costly projects, such as new ice-breakers, will involve cost-sharing between the state and private actors. The need for investment in the High North is also evident from Putin's oft-mentioned ambition to transport 80 million tons' worth of goods annually through the area defined as the Northern Sea Route by 2024. Putin's personal involvement could also be seen as an attempt to introduce a new powerful driver of increased activity. Although the North-East Passage may become an international transport route in the longer term, initially the main objective is likely to ensure the implementation of planned energy and infrastructure projects in the area.

Russia will likely seek to diversify its funding sources in the Arctic and involve Western actors – where →

possible, in light of the sanctions regime – as well as partners from the East. The relationships that the Ministry for Development of the Russian Far East and Arctic has already formed with several Asian countries could make it easier to bring Asian partners into Arctic projects.

Russian attempts to diversify funding in the Arctic have been fuelled in particular by fear of becoming overly reliant on Chinese money. The country must continue to weigh its need for investment against the security policy challenges arising from allowing China access to the region. This means that Russian measures to maintain national control in the Arctic are likely aimed as much at China as at the West.

Fresh Talks Despite Well-Known Dynamic in the Ukraine Conflict.

The confrontation in the Kerch Strait in 2018 and the Ukrainian Church's secession from the Moscow Patriarchy in 2019 are evidence of a persistently high level of conflict between Russia and Ukraine. Despite weekly clashes, the situation along the line of contact in Donbass is relatively static. Nevertheless, the change of president in Ukraine opens up the possibility of fresh peace talks.

In many respects Volodymyr Zelenskyi, the new Ukrainian president, has maintained the confrontational line towards the Kremlin pursued by his predecessor, Petro Poroshenko. This became clear in July 2019, when the Ukrainian authorities arrested a Russian tanker for taking part in the Kerch Strait blockade in October 2018. Zelenskyi has also proved unafraid in the public debate with Putin, not least on the topic of passports for the two countries' citizens.

He wants a normalisation of the relationship with Russia, but on Ukrainian terms.

Despite this line, Russia wants to reopen ceasefire negotiations with the new Ukrainian administration. A high-profile prisoner exchange has helped raise hopes of dialogue. Kiev and Moscow discussed possibilities over the summer of 2019, with the Normandy format and the trilateral contact group in Minsk as the superstructure and the Minsk Protocol as the operational framework.

Positions are unlikely to have changed significantly since the talks stranded in 2018. Despite enduring sanctions, the Russian authorities have rejected the prospect of negotiations on the subject of Crimea, and they want the ability to block Ukraine's option of NATO membership. From Kiev's perspective, direct negotiation with the separatists in Donbass – as demanded by the Kremlin – is undesirable. The Kremlin's understanding of the implementation order of the protocol's remaining measures is directly opposed to that of Kiev. Although Zelenskyi has invested a lot of prestige in solving the conflict in eastern Ukraine, his scope for action is likely to be very limited. Powerful forces within his own administration, security structure and the population at large would carefully scrutinise any concessions he would consider making.

Elsewhere in the post-Soviet region, Belarus, Moldova and Uzbekistan will be subject to particular →

«Although Zelenskyi has invested a lot of prestige in solving the conflict in eastern Ukraine, his scope for action is likely to be very limited.»



The Ukrainian president, Volodymyr Zelensky, visits Ukrainian soldiers in Donetsk oblast.

Russian attention and positioning in 2020. In 2019, the Kremlin exerted significant economic pressure on Minsk in order to persuade it to fulfil parts of the 1996 agreement regarding the so-called 'union state' between Russia and Belarus. As a result, the Russian and Belarussian authorities are said to have drawn up a plan for establishing an economic confederation in 2022. Following a lengthy government crisis and joint diplomatic pressure from the United States, the EU and Russia, Moldova installed a new coalition government in June 2019, consisting of both pro-European and pro-Russian parties. The pro-Russian side is stronger, and the Kremlin will likely seek to increase its influence on the Moldovan government. Closer economic integration between the Eurasian Economic Union and Uzbekistan will be another Russian priority in 2020.

Russia Plays Influential Role in the Middle East and Expands in Africa.

In October 2019, Putin met with representatives, many of them state leaders, from all the African states in Sochi, and pledged major investment in African countries. The meeting was testament to the marked development seen in Russia's relationship with several African countries. The Russian authorities will continue to work towards increasing Russian

«Private Russian military companies will likely increasingly accept missions in African countries and may be used as a covert foreign policy instrument.»

influence in Africa, partly with the aim of developing new trading markets for Russian businesses hit by Western sanctions, and partly to increase international support for Russia's political positions. Russian business actors and the establishment of military collaborations are likely to be Moscow's key tools in this effort, closely followed by extensive diplomatic contact. Cost efficiency will be a guiding principle for the activity in Africa.

Russia will continue to enter into military cooperation agreements with African countries, including agreements regarding exercises and training, the purchase of Russian military materiel and intelligence. Since 2014, Russia has signed more than 20 military cooperation agreements with African states. The agreements are of high symbolic value, yet unlikely to be followed by significant investments. Private Russian military companies will likely increasingly accept missions in African countries and may be used as a covert foreign policy instrument.

In 2019, Russia cemented its role as a great power and influential actor in the Middle East. For years, the Kremlin has been employing a range of means in order to position itself in the region. Developments in northern Syria are indicative of Russia's current position: through extensive diplomatic activity and contact with all parties in Syria, Russia has made itself the most important mediator in the conflict. In 2020, the country will work towards reinforcing its relations with all countries in the region, thereby strengthening its negotiating power regionally and vis-à-vis the West. The Kremlin will be seeking to attain a balance in its relationships with regional powers, and work to prevent the escalation of regional conflicts.

Moscow's military support to Damascus has been crucial to developments in the Syrian conflict and will continue to provide Russia with leverage vis-à-vis the other parties involved, including the Syrian regime. In 2020, Russia will seek to bolster the Assad regime's →



Syrian soldiers take part in a Russian-led exercise on the outskirts of Damascus on 24 September 2019.



Mikhail Bogdanov, Russia's deputy foreign minister and special envoy to the Middle East and Africa.



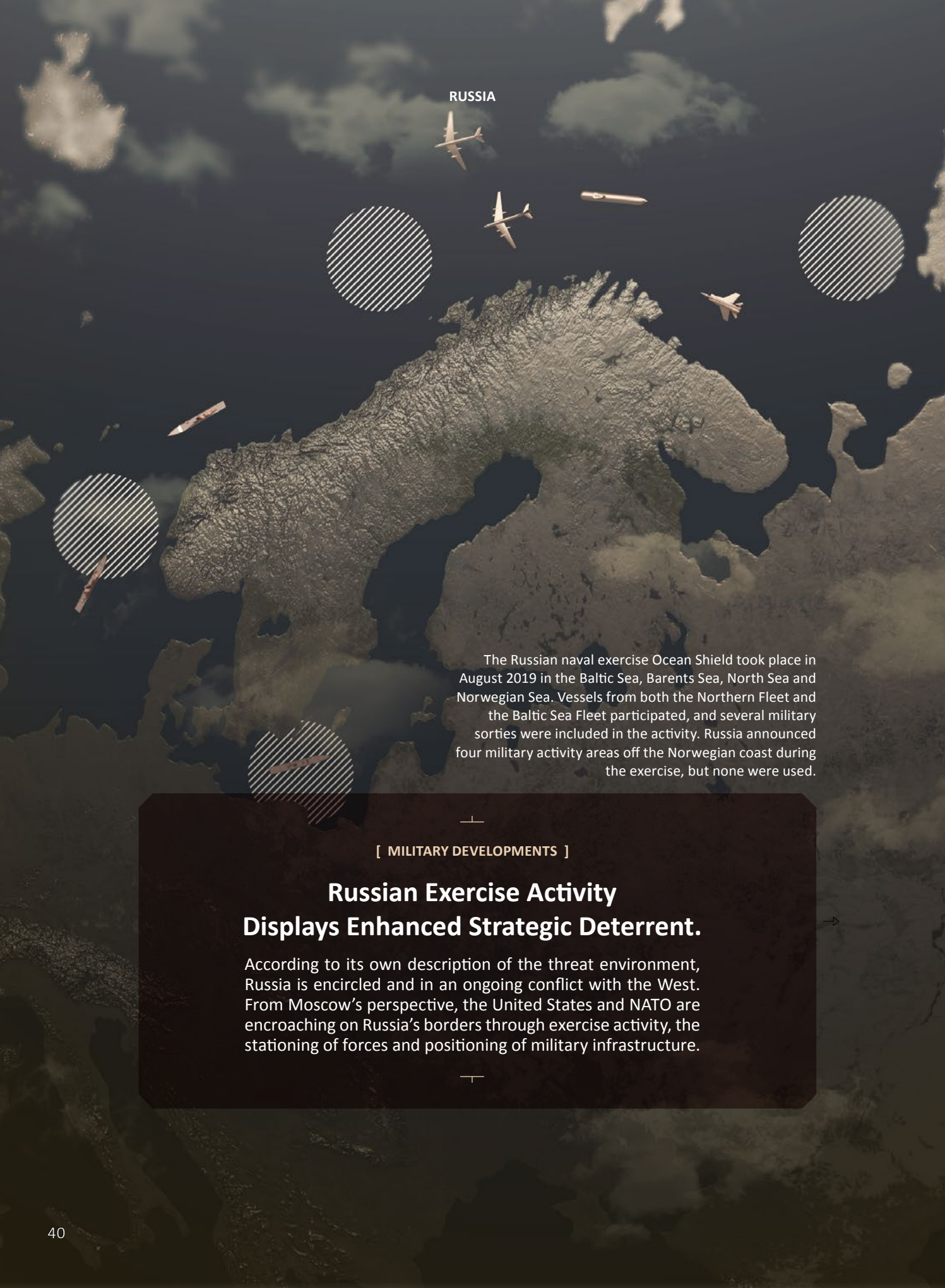
legitimacy and strengthen cooperation with regional and European states in Syria. Moscow will attempt to retain control of some of the processes involved, but will also work to strengthen the legitimacy of Russian initiatives in international forums. Russia will use its seat on the UN Security Council both to demonstrate diplomatic prowess by linking its own initiatives to the UN, and to share the responsibility for difficult and costly initiatives among several countries. In dialogue with European states, Russia will continue to call for increased cooperation and coordination of refugee returns, humanitarian access and the rebuilding of infrastructure. Russia's own willingness and ability to contribute to the rebuilding process will be limited.

Russia is likely to use its experiences from Syria to position itself as a mediator in other conflicts in the Middle East and Africa, including in Libya. Moscow is maintaining relations with Khalifa Haftar and its diplomatic ties to the government in Tripoli simultaneously. Should it succeed in Libya, the Kremlin will exert strong security policy influence from the Middle East to North Africa, which in turn would offer

Moscow greater influence on oil and energy activity in the region.

«Russia is likely to use its experiences from Syria to position itself as a mediator in other conflicts in the Middle East and Africa, including in Libya.»

Iran will remain an important partner to Russia in the Middle East, and Moscow could seek to position itself in a mediator role in the Iran conflict as well. Tehran's pressure campaign and increased appetite for risk will challenge Moscow's ability to secure its own interests whilst avoiding choosing sides. Russia is likely to maintain a pragmatic relationship with Iran in order to avoid undermining its relationships with the other regional powers.



RUSSIA

The Russian naval exercise Ocean Shield took place in August 2019 in the Baltic Sea, Barents Sea, North Sea and Norwegian Sea. Vessels from both the Northern Fleet and the Baltic Sea Fleet participated, and several military sorties were included in the activity. Russia announced four military activity areas off the Norwegian coast during the exercise, but none were used.

[MILITARY DEVELOPMENTS]

Russian Exercise Activity Displays Enhanced Strategic Deterrent.

According to its own description of the threat environment, Russia is encircled and in an ongoing conflict with the West. From Moscow's perspective, the United States and NATO are encroaching on Russia's borders through exercise activity, the stationing of forces and positioning of military infrastructure.

MILITARY DEVELOPMENTS

«One of the direct consequences of the military modernisation in Russia is that the country has become more willing and able to use military force as a foreign policy instrument.»

In order to face this challenge, Russia is building a so-called 'active defence'. This concept was launched in 2019 by Chief of Defence Gerasimov, and systematises key aspects of the development undergone by the Russian armed forces since the military reform began in 2008, following the invasion of Georgia. An active defence involves an emphasis on high readiness, mobility, strong coordination and the ability to launch massive firepower.

In 2019, Russia staged two major exercises intended to support these ambitions. In August, the naval exercise Ocean Shield took place, constituting the largest naval activity seen near Norwegian borders since the Cold War. The exercise involved naval and air forces, and took place in the Baltic Sea, North Sea, Norwegian Sea and Barents Sea.

The exercise likely had a number of subsidiary aims, not least of which were exercising elements of the Bastion Defence as part of the defence in a

westerly strategic direction as well as the Russian fleets' ability to cooperate. Nevertheless, the primary intention was likely to demonstrate Russia's strategic deterrence capability. The Bastion in the High North, with its strategic submarines, forms part of the nuclear triad and is therefore a significant part of Russia's overall deterrence and defence concept.

In October, Russian staged the strategic command post exercise Grom ('Thunder') 2019, with the aim of training the strategic deterrence forces. The starting point was a scenario in which Russian sovereignty and territorial integrity were challenged. These exercises are staged annually, but this time Russia announced the exercise through foreign defence attachés and the media, which was novel.

Traditionally, such exercises have focused on strategic operations involving nuclear weapons, but Exercise Grom was indicative of enhanced ambitions and capabilities. Intercontinental ballistic missiles →



«Russia’s prioritisation of the High North and the Arctic will lead to large-scale infrastructure re-establishment, the addition of new military equipment and a higher number of exercises in the region.»

were launched, as were cruise missiles from strategic bombers and ballistic missiles from the ground-based Iskander system. Whilst demonstrating Russia’s continued prioritisation of the nuclear deterrent, the exercise also illustrated how long-range precision-guided weapons have become a significant component.

The exercise activity in 2019 showed that Russia has made headway in establishing an active defence – a dynamic military capable of adapting its use of means to the situation at hand. One of the direct consequences of the military modernisation in Russia is that the country has become more willing and able to use military force as a foreign policy instrument.

According to Russian thinking, there is no clear distinction between war and peace. Russia wants to be able to use its military in a range of different ways and in a range of different scenarios. Russian military

planning suggests that the country would resort to a complex use of means, with military and non-military assets used simultaneously and in coordination, and where the military assets will increasingly come to dominate more the higher one ascends the escalation ladder.

Military Reinforcement of the High North and Arctic to Continue.

Russia is re-establishing military bases and civilian support hubs along the Arctic littoral, with a centre of gravity to the west, on the Kola Peninsula and around the Barents Sea. The Arctic support hubs will be important for asserting sovereignty and maintaining search and rescue readiness in the North-East Passage, whereas the military bases will support the Northern Fleet’s operations; some will be equipped with modern weapons systems and be capable of supporting land, sea and air assets alike.

In order to ensure control of local waters, Russia has bolstered its military command and control systems in recent years and added new military capabilities. The defence of the Kola Peninsula has become deeper and coverage has improved. The Russian early-warning chain is being expanded with new radars.

Protecting the strategic submarines and their bases on the Kola Peninsula will remain the →



In January, Russia displayed its new land-based intermediate-range cruise missile 9M729 (NATO designation: SSC-8 SCREWDRIVER).



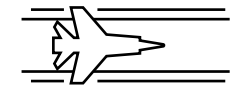
Several new weapons systems are being phased in as a result of Russia's new armament programme. This image shows the first joint sortie of the new combat aircraft Su-57 and the drone S-70 Okhotnik.



The north-western early warning chain is being expanded with additional radars.



Protecting the strategic submarines and their bases on the Kola Peninsula is the Northern Fleet's primary mission.



Several Arctic airports have been reopened with new runways.

Northern Fleet's primary task. In addition, defence of the North-East Passage and the area's natural resources will be important missions. Russia's prioritisation of the High North and the Arctic will lead to large-scale infrastructure re-establishment, the addition of new military equipment and a higher number of exercises in the region. Several Arctic airports have reopened, with new runways. The deployment of air and coastal defence systems improves Russia's ability to assert sovereignty and defend its Arctic region.

Termination of INF Treaty Increases Likelihood of Arms Race.

Without the INF Treaty, the likelihood of a new arms race – a prospect desired by neither party – increases. Technological innovation and ongoing weapons development causes greater uncertainty regarding other countries' capabilities, whilst growing mistrust in the intentions of others strengthens the need for new capabilities.

The direct cause of the INF Treaty's collapse was Russia's development and deployment of SSC-8 SCREWDRIVER, a land-based intermediate-range

cruise missile. The missile system is mobile and can carry either conventional or nuclear warheads. It is very precise and has short warning times, and could threaten military and civilian infrastructure throughout Europe. The fact that the treaty did not include China was another significant factor in its collapse.

Although Russia has previously stated that it does not want an arms race, the Kremlin considers it necessary to respond to U.S. deployment of new weapons. Russia already has a number of possible countermeasures at its disposal, including the acceleration of SSC-8 production and deploying it in a forward position.

«These missiles have ranges of several thousand kilometres and are central to Russia's strategic deterrent.»

The SSC-8 is just one of several long-range precision-guided weapons that have entered into service in the Russian armed forces in recent years; a majority are sea- and air-launched systems. These missiles

have ranges of several thousand kilometres and are central to Russia's strategic deterrent. They could pose a significant defence challenge to NATO. In addition comes the air-launched hypersonic intermediate-range missile Khinzal, which Russia is currently completing. Not only does it increase Russia's military scope for action, but it could also play a part in future arms control negotiations. The development of intermediate-range weapons could potentially lead to a new arms race between Russia, the West and China.

Russian Defence Investment Continues Despite Budget Issues.

Although Russian defence investments are characterised by a long-term tendency towards lower allocations, they remain sizeable both when compared to other government expenditure and to other countries' defence spending. The defence budget is limited by the size of the economy, yet in the current global security policy climate, defence is unlikely to become a lower priority than it is today. Defence spending is planned to be cut from 3 per cent of GDP in 2019 to 2.6 per cent in 2021. This equates to the level of defence spending seen during Putin's first term as president, and seems to be the new normal. Putin has promised that areas such as healthcare, infrastructure and education will be given a higher political priority in the period to 2024.

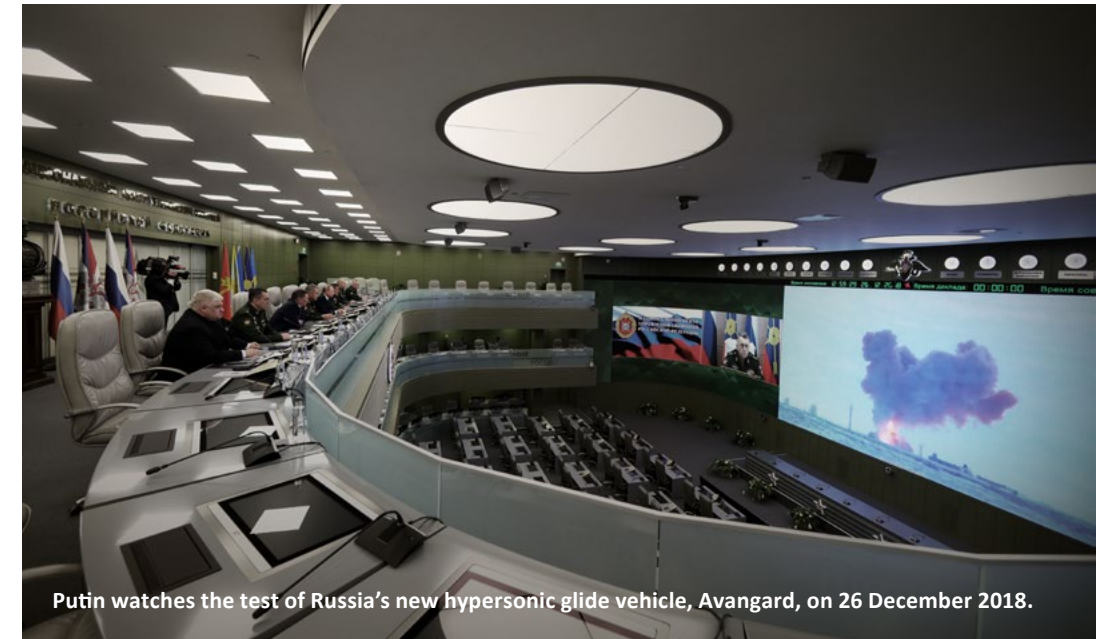
For the next three years, around one sixth of all federal funds will be allocated to the Russian defence budget. Spending on defence that is allocated from other policy areas in the Russian budgets comes in

«The modernisation of the armed forces continues, but a lower rate of acquisition is expected in the years ahead.»

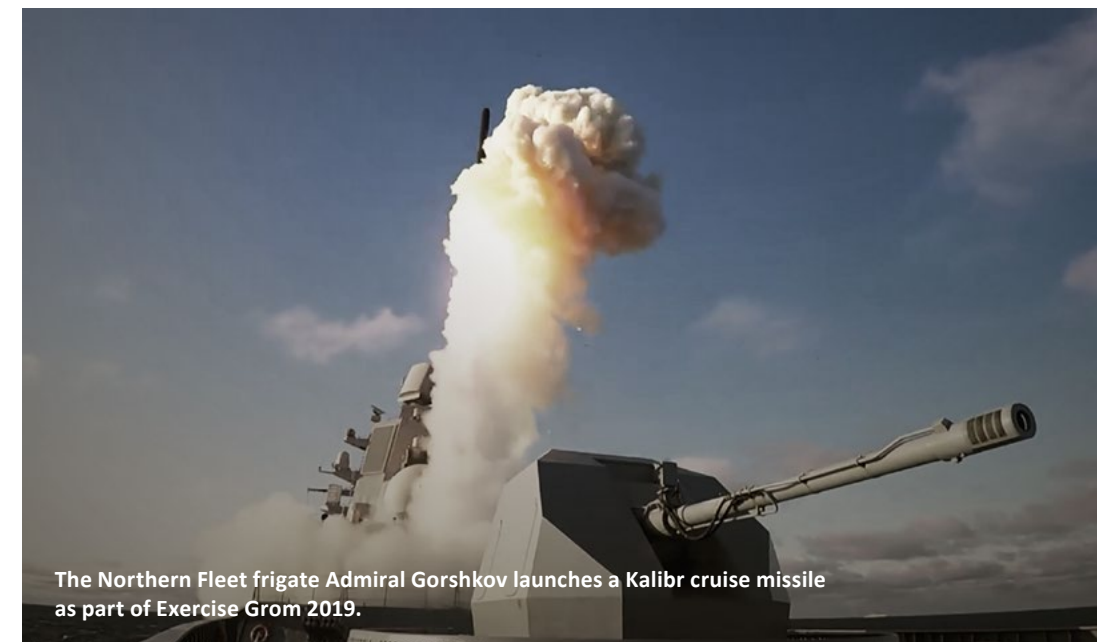
In addition to this, including spending on paramilitary forces such as the National Guard, the Coast Guard and the Border Service, the Ministry of Defence's education institutions and healthcare services. According to SIPRI¹, Russia has the world's sixth highest defence expenditure measured in USD, and the Russian defence burden is higher than in any other European country.

Tighter defence budgets, technological challenges and limited production capacity all have an impact on Russia's new armament programme, GPV-2027. The programme contains few new development and acquisition plans, and predominantly appears to be an extension of its predecessor, GPV-2020. The modernisation of the armed forces continues, but a lower rate of acquisition is expected in the years ahead. The military leadership has said that the modernisation of Russian materiel is proceeding according to plan and that it expects to reach the target of having 70 per cent modern military materiel and technology in the armed forces in 2020. However, a significant proportion of the equipment distributed to the forces in recent years has been modernised and upgraded versions of Soviet models. There are also variations in how the modernisation is progressing, both geographically and among the services, with the central and eastern command areas having the lowest proportion of modernised materiel.

¹ SIPRI: Stockholm International Peace Research Institute



Putin watches the test of Russia's new hypersonic glide vehicle, Avangard, on 26 December 2018.



The Northern Fleet frigate Admiral Gorshkov launches a Kalibr cruise missile as part of Exercise Grom 2019.

China

Xi Jinping's new title of 'People's Leader', bestowed upon him by the media, emphasises the concentration of power around his person. However, this is taking place in an increasingly challenging economic and political climate.

GDP growth continues to decline. Over the past 40 years, the legitimacy of the Communist Party of China (CPC) has rested on a broad and rapid increase in welfare, and stagnation will erode the social contract as understood by the Chinese populace. The CPC is therefore increasingly seeking to base the regime's legitimacy on national identity politics rather than on continued rapid economic growth. The emphasis on nationalism and ideological 'education' are clear indicators of this. Increasing nationalism and authoritarian power concentration are fuelling discontent in China's political periphery, as evidenced by the demonstrations in Hong Kong.

Under Xi Jinping, China finds itself at an important crossroads. The country is actively seeking to alter the world order in its own favour. Xi has made explicit his own interpretation of the CPC's history and its contribution to society as a three-pronged project aimed at reclaiming China's global position. First, China was united and restored under Mao, before it became rich under Deng, and Xi now defines himself as the uncontested leader of a 'new era' that will make China strong and significant on the world stage. In 2020, economic and political challenges will accelerate the ideological shift away from Deng's emphasis on economic growth and foreign policy stability towards Xi's project of national greatness.

The most important measures Beijing will take in the year ahead to ensure domestic stability involve placing a greater emphasis on ideological conformity and implementing the new social credit system. In terms of foreign policy, the New Silk Road will remain a key strategy in order to ensure China's superpower status. China is also seeking a digital information advantage, whilst military power is becoming a more prominent political instrument. Chinese influence will increasingly challenge European freedom of action and unity.



Systems of Control

The social credit system facilitates institutionalised, extensive systems of control and also covers foreign companies.



The New Silk Road

The Silk Road Strategy is Central to China's Political Ambitions and strengthens the country's global position in a number of ways, not least by boosting intelligence collection capability.



Ties to Europe

China's policy towards Europe is based on a desire to work bilaterally or in smaller formats rather than with the EU and other supranational institutions.



Nationalism

The Chinese Communist Party is increasingly seeking to base the regime's legitimacy on national identity politics. Xi is emphasising that the CPC reflects a uniquely Chinese social system.

Cyberspace Superpower

Xi has announced that China will become a superpower in cyberspace. China is adopting an innovation-oriented and nationalist industrial policy and opening the domestic finance market to more foreign capital in order to increase China's economic scope for action.



Military power

China's armed forces are becoming a more prominent political instrument.

CHINA

Xi Jinping speaking on a big screen in Beijing on 1 October 2019, in connection with the 70th anniversary of the People's Republic of China.



[DOMESTIC AFFAIRS]

Domestic Challenges Met with Authoritarian Nationalism

Whilst China's GDP growth continues to decline, the authorities are placing a stronger emphasis on national prestige and international standing in order to legitimise domestic policy. This will likely mean that China will continue to move in a more self-assertive and less compromising direction internationally.

DOMESTIC AFFAIRS

«Xi has tightened his own control of the party, whilst the party in turn has strengthened its grip on government institutions. In addition, work continues to bolster the CPC's presence in all sectors of society, including business, the media, the courts and religious institutions.»

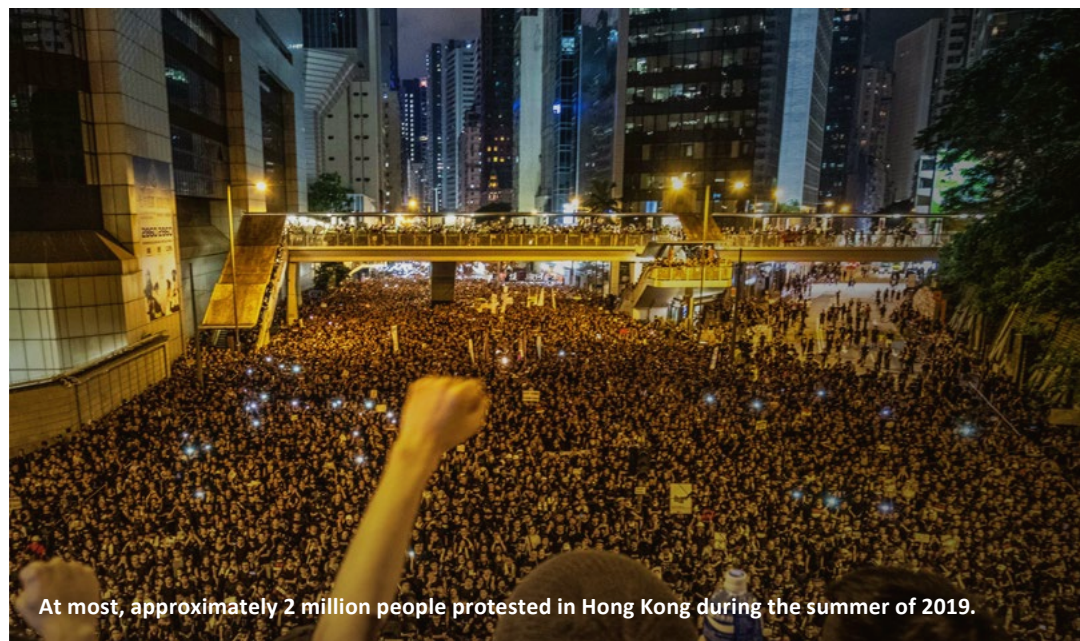
In the years ahead, China will be facing many of the same economic challenges as in the past, but will have less room for manoeuvre to tackle them. The country has a growing debt burden, a large proportion of defaulted loans and struggles with significant environmental issues. Unemployment rose in 2019, and socioeconomic differences are vast: one per cent of China's population controls a third of the country's wealth. The CPC has introduced certain stimulus measures in order to prevent a sharp decline in growth and increased social unrest, but these do not address the underlying causes of the growth decline.

The party state is pursuing a long-term strategy to increase China's economic scope for action. This involves opening the domestic finance market to

more foreign capital, adopting an innovation-oriented and nationalist industrial policy and acquiring high technology expertise from abroad. China's demand for high technology is the reason why the CPC fears a Western alliance against Chinese technology acquisition more than it fears higher tariffs.

Beijing is preparing for a lengthy industrial and technological conflict with Washington. The authorities have emphasised the importance of self-sufficiency in key sectors, have issued orders to step up high technology efforts and have instructed public institutions to replace foreign computer technology with Chinese equivalents within three years.

The CPC's leadership is preparing for a more challenging domestic policy climate by cementing its position →



At most, approximately 2 million people protested in Hong Kong during the summer of 2019.



in society, using authoritarian nationalism as a tool. Xi has tightened his own control of the party, whilst the party in turn has strengthened its grip on government institutions. In addition, work continues to bolster the CPC's presence in all sectors of society, including business, the media, the courts and religious institutions. Xi's dominant political role marks a further move away from the principle of collective leadership.

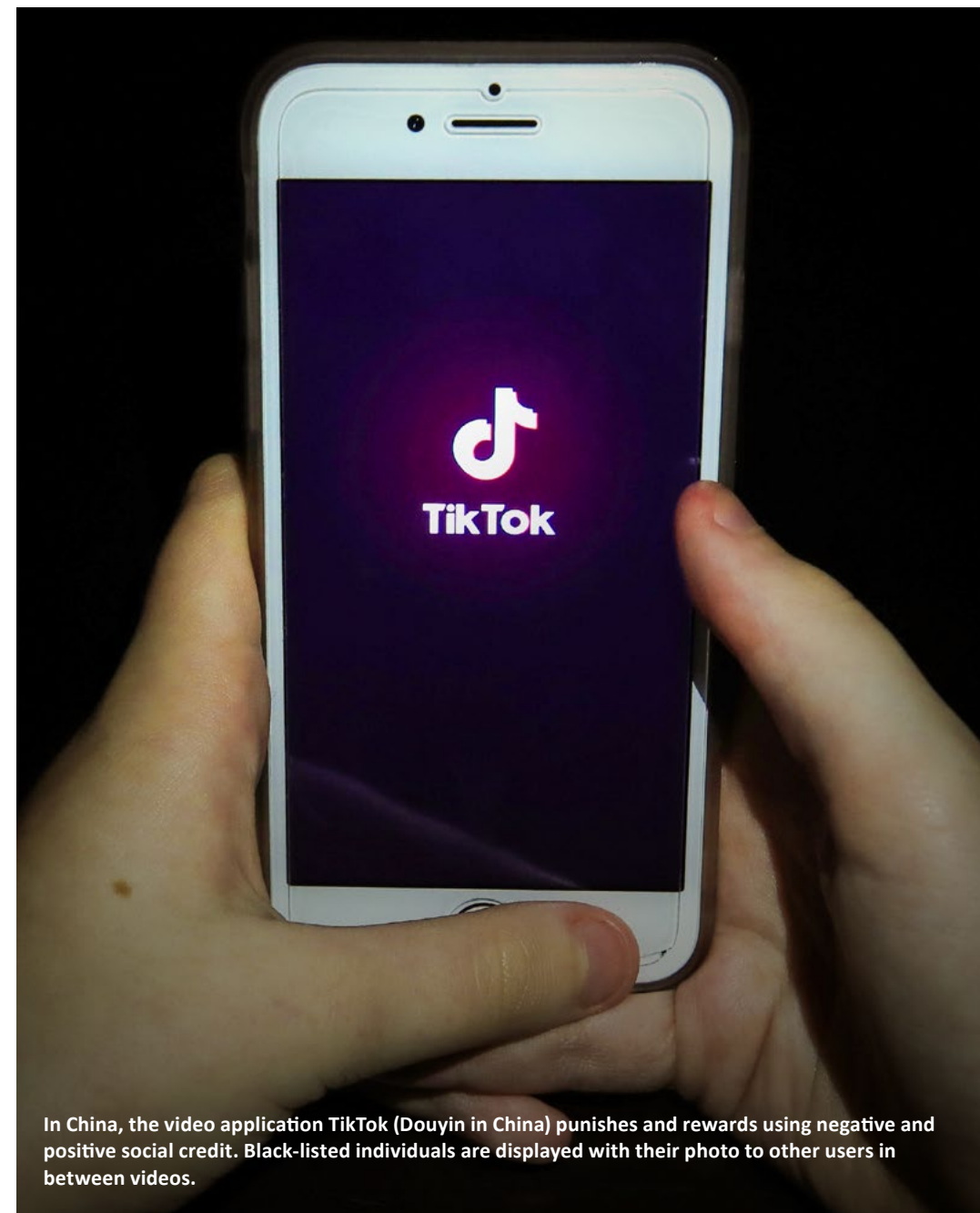
Xi has stressed that China and the CPC must be ready to tackle a number of challenges and prepare for 'a new long march'. In addition, he has emphasised that the CPC reflects a uniquely Chinese social system. Chinese schools and universities have been given more nationalist curricula which actively limit exposure to 'Western ideology'. The ideological fusion of state, nation and party means that the CPC has

positioned itself as the legitimate heir to a distinctly Chinese civilisation, one that demands allegiance from all Chinese citizens.

The growing Han Chinese nationalism is finding little favour in Hong Kong, Taiwan, Tibet and Xinjiang. Rather, a counter-reaction has emerged there, which has rallied considerable support for a regional nationalism critical of Beijing.

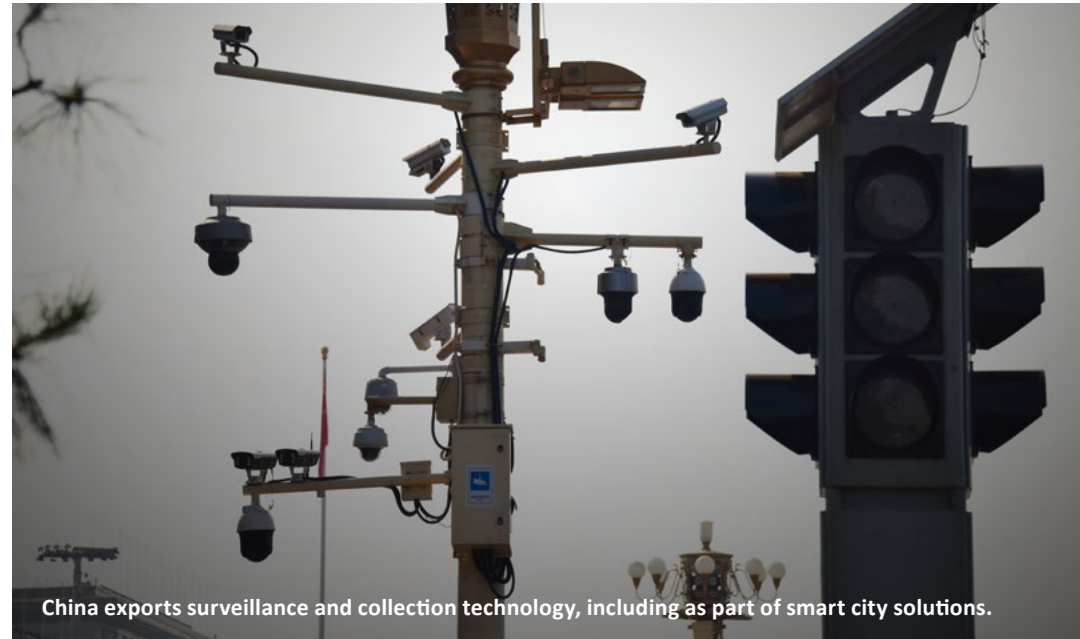
Social Credit System Tightens Beijing's Political Control.

The social credit system is now entering the implementation stage. The system uses punishment and reward in order to influence the behaviour of individuals →



In China, the video application TikTok (Douyin in China) punishes and rewards using negative and positive social credit. Black-listed individuals are displayed with their photo to other users in between videos.

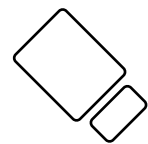




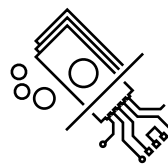
China exports surveillance and collection technology, including as part of smart city solutions.



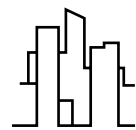
Over the course of 2020, a comprehensive system for social credit assessments of companies will be put in place:



The social credit system is supported by high-tech solutions.



Both Chinese and foreign companies operating in China are covered by the system.



China exports technology used in the social credit system, including smart city solutions.



Last year, United Airlines was threatened with poor social credit unless it described Taiwan as part of China.



and companies. Control mechanisms have historical roots in China; what is novel about the current mechanisms is that they are supported by high-tech solutions, not least artificial intelligence. This facilitates more institutionalised, extensive and effective systems of social and political control than in the past. The penalty aspect is prominent, and behaviour deemed strongly deviant could lead to blacklisting. Blacklisted individuals may be denied access to jobs, goods and services.

Over the course of 2020, a comprehensive system for social credit assessments of companies will be put in place, covering Chinese firms globally as well as foreign companies operating in China. The system incentivises companies to comply with public policy and

legislation. Moreover, the social credit system gives Chinese companies that operate as investors, creditors or contractors abroad greater incentive to act in accordance with party state objectives.

The social credit system must be considered in light of the Chinese national security act of 2015. The law contains an extremely broad definition of national security, and as a consequence regime opposition and human rights and democracy activism may be prosecuted as threats to national security.

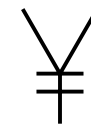
China is already exporting surveillance and data collection technology used in the social credit system, including as components of smart city solutions. Social credit systems are attractive to states with authoritarian forms of government.



The railway line between Mombasa and Nairobi is funded by Chinese loans. Chinese creditors account for two thirds of Kenya's bilateral debt.

«Xi has announced that China will become a superpower in cyberspace.»

The Silk Road projects strengthen China's global position in a number of ways:



Infrastructure development and investments are expected to benefit the Chinese economy.



The projects leave countries vulnerable to political influence and pressure.



5G networks, fibre-optic cables and smart city systems could bolster China's intelligence capability.

The New Silk Road Central to China's Political Ambitions.

[FOREIGN AFFAIRS]

The New Silk Road, also known as the Belt and Road Initiative, is one of Xi Jinping's key strategies for securing superpower status for China. The strategy has become central to the Chinese discourse and activity abroad. The Silk Road concept has grown to cover larger geographic and thematic areas, and now includes communication, public transport and energy infrastructure development, as well as lending and investment both at home and abroad.

Chinese companies are the primary executors of the Silk Road projects. Beijing has set up a number of organisations to promote the Silk Road strategy, including media organisations, think-tanks and courts.

There are a number of ways in which the Silk Road projects strengthen China's global position of power: Firstly, infrastructure development and investments are expected to be beneficial for the Chinese economy, by exporting industrial overcapacity, importing raw materials and gaining access to high technology. In addition, China exports technical standards, which offers Chinese companies a competitive advantage.

Secondly, Silk Road projects could make countries more susceptible to political influence and pressure. Many large-scale projects have been financed by Chinese loans, increasing the debt burden of many countries.

Thirdly, the Silk Road strategy boosts China's intelligence collection capability. 5G networks, fibre-optic

cables and smart city systems could be used to collect sensitive information. They also offer access to big data, which is valuable to Chinese investment in artificial intelligence.

Finally, the Silk Road strategy could bolster China's military capabilities and presence.

China Seeks Greater Influence in Europe.

China's policy towards Europe is based on a desire to work bilaterally or in smaller formats rather than with the EU. For instance, Beijing set up the so-called 16+1, now 17+1, dialogue as a forum for cooperation between China and a number of Southern and Central European countries. The regime also exerts pressure on individual states; in 2018, for the very first time, this caused the EU to refrain from →

«European countries are divided in their views on a number of key issues concerning China, and what it means for Europe that China is becoming a world power.»

→ formulating a statement on the human rights situation in China in the UN Human Rights Council. There has also been a lack of clear-cut criticism of Chinese claims in the South China Sea.

Many of the countries forming closer ties to China within the framework of the New Silk Road are members of both the EU and NATO. European countries are divided in their views on a number of key issues concerning China, and what it means for Europe that China is becoming a world power.

China Seeks Digital Information Advantage.

Xi has announced that China will become a superpower in cyberspace. In recent years, the PLA and Chinese intelligence services have invested significant resources in developing network operations and other new capabilities. As part of the Silk Road strategy, China seeks to establish itself in the digital infrastructure of other countries, not least through new mobile networks and smart cities.

By establishing itself in digital infrastructure, an actor gains control of key information nodes and access to large data sets. China is leading in the development of relevant technology, including sensor technology and next-generation mobile networks (5G). In parallel, Beijing seeks to influence the development of international technological standards. Chinese businesses would stand to gain a competitive advantage should Chinese technology become the basis for new standards. Meanwhile, China is using a wide range of means to persuade public authorities and private businesses in Western countries to choose Chinese products and service providers.



China's President Xi Jinping and Italy's Prime Minister Giuseppe Conte in Rome during the announcement of Italy's affiliation with China's Silk Road strategy on 23 March 2019.

«In order to resolve what the party refers to as a domestic military operation, the PLA must also be capable of deterring the outside world, including the United States.»

[MILITARY DEVELOPMENTS]

China's Armed Forces a More Prominent Political Instrument

The CPC's most recent whitepaper on military power gradually erases the distinction between the internal and external missions of the People's Liberation Army (PLA).

This should be seen in light of the party's ambition to reclaim what it considers China's rightful place in the world. The paper describes Chinese threat perceptions, in which the United States is the dimensioning threat. The party outlines the use of military force to secure territorial integrity, not just in Xinjiang, Tibet and Hong Kong, but also vis-à-vis Taiwan. The emphasis on internal security is a reflection of the fact that, over time, the PLA has been given command of PAP, the People's Armed Police.

In order to resolve what the party refers to as a domestic military operation, the PLA must also be capable of deterring the outside world, including the United States. For the past 15 years, the PLA has focused on building regional military capabilities that would complicate U.S. military operations near China's borders. The PLA will continue to improve its ability to conduct large-scale regional military operations.

Local waters are given priority, both when it comes to the considerable strengthening of maritime capability and the development of sophisticated capabilities on the mainland; these capabilities are intended to support large joint operations against another powerful military power. In just a few years, the PLA will be able to establish a nuclear triad in order to reinforce deterrence at a strategic level, whilst the navy is steadily improving its ability to operate regionally and globally.

The CPC's legitimising of military force as a political instrument is testament to the fact that the party is under growing pressure. In many ways, the PLA is now closer to having the traditional role of a military force in a Communist system, where it serves as the party's armed wing, for use at home as well as abroad. The party has reserved the right to use the PLA as a tool to achieve its ambitious targets.

Intelligence, Influence and Threats in Cyberspace

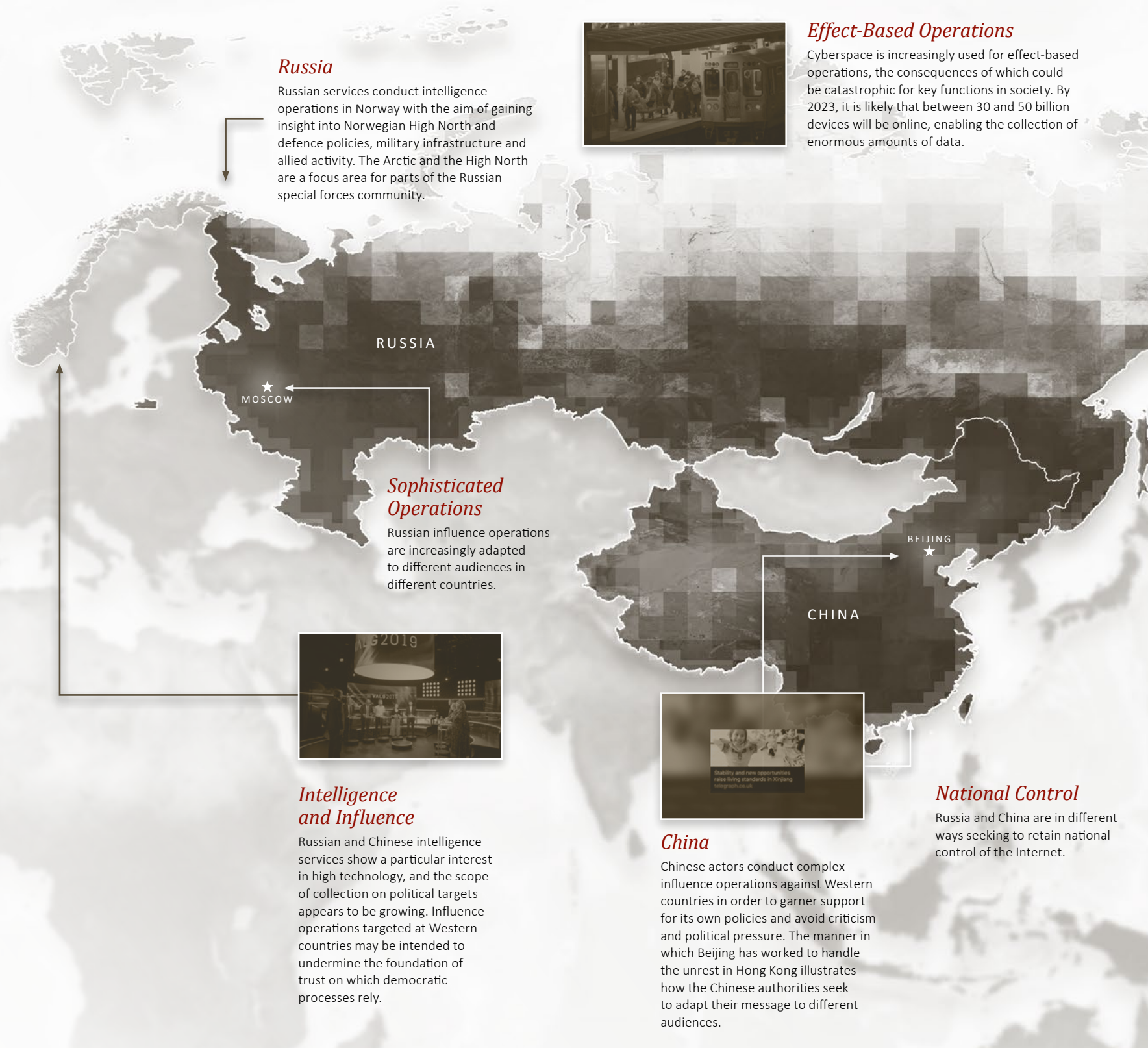
The past decade's heightened rivalry and level of conflict in international politics has coincided with a digital revolution which has made technology, information and online media much more accessible, and also led to a sharp increase in the number of devices and systems connected to the internet.

These trends have converged to create a situation where influence and intelligence activities have become crucial, integrated tools in the struggle for status, influence and economic and military power that Russia, China and other states are involved in. Intelligence is used actively against Norway and will continue to pose a serious security threat to Norwegian interests going forward. Intelligence activity aimed at political targets could be part of preparations for influence operations. Influence activity has the potential to inflict enduring damage, particularly in tense political situations.

Several countries are making systematic, large-scale use of universities and research institutions in order to make acquisitions for their weapons of mass destruction (WMD) and other military programmes. Research partnerships with Norwegian actors offer access to information, knowledge, technology, infrastructure and partner networks that could be used in such programmes. This access not only presents a challenge to export control, but could also compound the threat environment facing Norway.

The fact that the intelligence and influence threat has become more complex is most evident in cyberspace. The rapid changes there can be described as a race between the development of new technology and the ability to discover and prevent unwanted use of that same technology. The latter will represent a lasting challenge to the authorities in open societies. Threat actors use the internet as a tool to map vulnerabilities and opportunities, conduct criminal activities and manipulate the general public's perception of reality. In some countries, the authorities use technology to monitor their own citizens.

The rivalry among global and regional powers is also a race to control and influence global digital infrastructure. Russian authorities have presented alternatives to the current internet, whereas Chinese digital infrastructure has been constructed from the ground up with the option of limiting contact with other countries. The key role that 5G will play in all communication, meanwhile, will challenge traditional views on territorial integrity and national sovereignty.



Russia

Russian services conduct intelligence operations in Norway with the aim of gaining insight into Norwegian High North and defence policies, military infrastructure and allied activity. The Arctic and the High North are a focus area for parts of the Russian special forces community.



Effect-Based Operations

Cyberspace is increasingly used for effect-based operations, the consequences of which could be catastrophic for key functions in society. By 2023, it is likely that between 30 and 50 billion devices will be online, enabling the collection of enormous amounts of data.

Sophisticated Operations

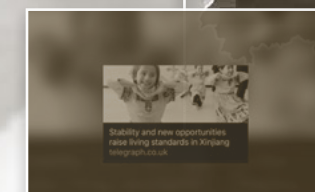
Russian influence operations are increasingly adapted to different audiences in different countries.



Intelligence and Influence

Russian and Chinese intelligence services show a particular interest in high technology, and the scope of collection on political targets appears to be growing. Influence operations targeted at Western countries may be intended to undermine the foundation of trust on which democratic processes rely.

China



China

Chinese actors conduct complex influence operations against Western countries in order to garner support for its own policies and avoid criticism and political pressure. The manner in which Beijing has worked to handle the unrest in Hong Kong illustrates how the Chinese authorities seek to adapt their message to different audiences.

National Control

Russia and China are in different ways seeking to retain national control of the Internet.



INTELLIGENCE, INFLUENCE
AND THREATS IN CYBERSPACE

Russian and Chinese intelligence services are showing an interest in political matters in Norway, including public bodies and political decision-making processes.

INTELLIGENCE, INFLUENCE
AND THREATS IN CYBERSPACE

«Chinese actors have shown a particular interest in high technology that can have both military and civilian applications, and have succeeded in compromising several Norwegian targets in recent years.»

[INTELLIGENCE, INFLUENCE AND THREATS IN CYBERSPACE]

Both Civilian and Military Sector Targeted by Russian and Chinese Intelligence.

Norway is a prioritised intelligence target for Russian intelligence and security services, not least because of its NATO membership and location near the Arctic and the High North.

The Russian services conduct intelligence operations in Norway with the aim of gaining insight into Norwegian High North and defence policies, military readiness plans, the establishment of new military infrastructure and allied activity. They also show an interest in political matters in Norway, including public bodies and political decision-making processes, Norway's Arctic policy and Norwegian positions in international negotiations.

Norwegian industry and Norwegian knowledge and research institutions will remain targets of espionage. Russia has shown a particular interest in companies possessing unique skills and technology, including within the arms industry, space research, the maritime sector and the healthcare sector. The Western sanctions regime has likely forced Russia to seek alternative methods of acquiring technology and skills critical to developing military capabilities. The use of private actors will make it more challenging to discover and prevent covert acquisitions.

Chinese intelligence activity in Norway targets areas which support the Chinese authorities' political, military and economic interests. Chinese actors have shown a particular interest in high technology that can have both military and civilian applications, and have succeeded in compromising several Norwegian

targets in recent years. The scope of collection on political targets appears to be growing.

China has one of the world's most active and sophisticated space programmes. Only a few of China's satellites are categorised as military, yet civilian imaging satellites are used for both intelligence and military purposes. The government space budget has risen sharply in recent years, and in 2018 China surpassed the United States in the number of launches conducted.

The investment in space must also be considered in light of the development of Beidou, an alternative global positioning and navigation system that will have military applications as well. The space investment is also linked to the digital part of the Silk Road initiative, which includes the development of computer and telecoms infrastructure within and between countries.

Russian and Chinese Intelligence and Security Services Have Broad Range of Means at Their Disposal.

The Russian intelligence and security services are close allies of the regime in its efforts to secure domestic stability and foreign policy interests alike. →

«The Russian services collect intelligence on Norway across all the traditional intelligence disciplines, and rely on both military and private businesses to complement traditional collection activity.»

The services have sweeping powers and a high degree of autonomy. Over time, the Kremlin has taken organisational steps and added capabilities that have made the services more capable, coordinated and efficient.

The Russian services collect intelligence on Norway across all the traditional intelligence disciplines, and rely on both military and private businesses to complement traditional collection activity. These businesses are used either knowingly or unwittingly.

The Russian special forces have historically had close links to the country's intelligence and security services. They are used as a security policy instrument in both open and covert operations in order to achieve military-strategic and political aims. The Arctic and the High North have increasingly become a focus and investment area for parts of the Russian special forces community. In Norway, military infrastructure and allied military presence as well as civilian infrastructure supporting allied reinforcement would be relevant targets in a conflict.

The most important task of the Chinese intelligence and security services is to identify and monitor potential threats to the Communist Party of China (CPC). The services monitor all forms of organised political resistance, including democracy activists, separatists and religious groups. In addition, China

uses its intelligence capabilities to bolster the armed forces.

Chinese intelligence takes a comprehensive approach and systematically uses a combination of state and non-state actors. The key state intelligence actors are the civilian intelligence service (MSS), the civilian security service (MPS) and the military intelligence service (MID). The services possess considerable capabilities across the traditional intelligence disciplines. They are most active in China's immediate vicinity, but also conduct operations in and against Western countries.

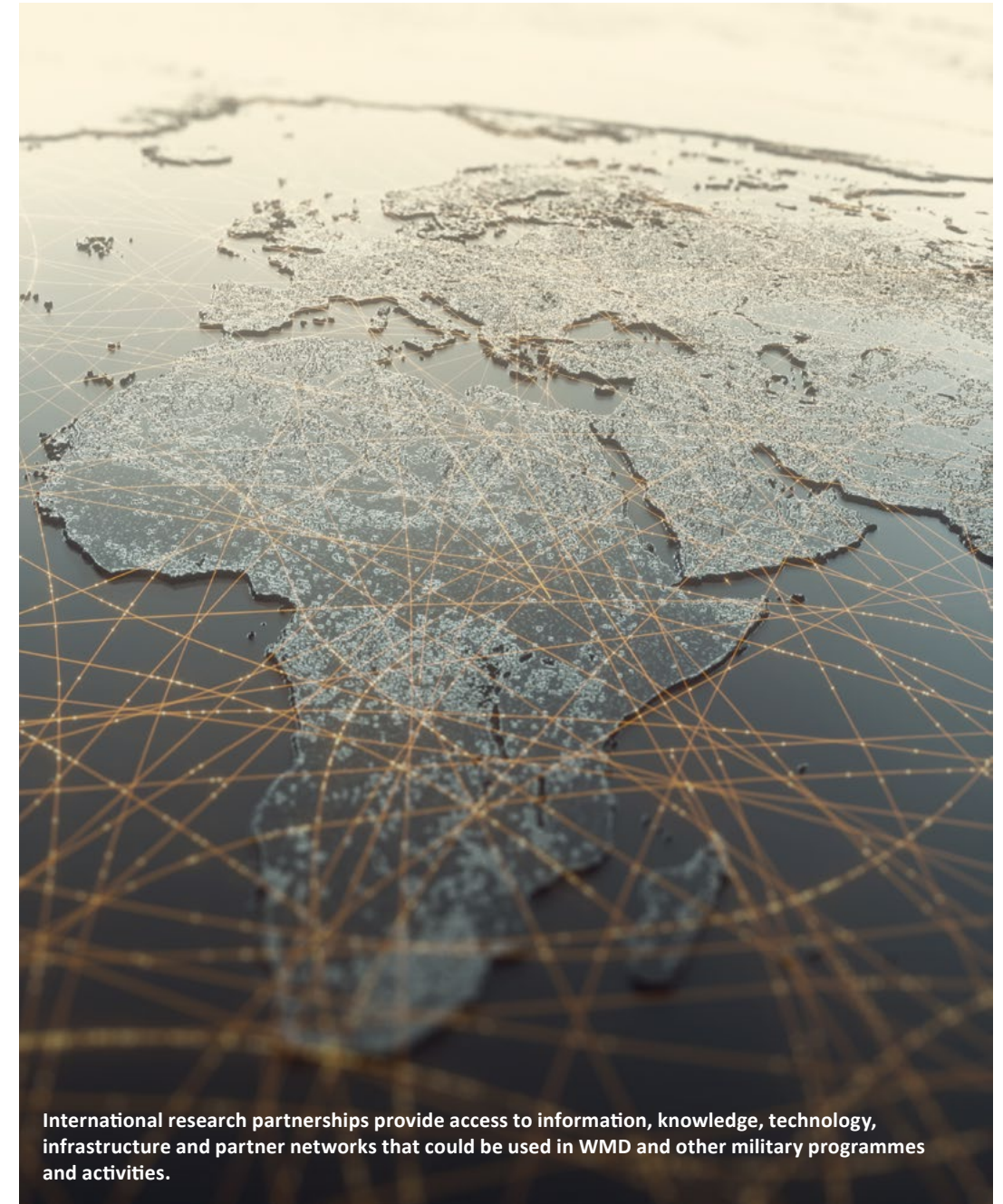
In addition, a number of non-state actors conduct intelligence collection on China's behalf, including commercial entities, employees in foreign companies, researchers and students. The CPC's power to order private individuals to carry out tasks on behalf of the Chinese intelligence services is founded in the Chinese intelligence act of 2017.

Research Cooperation Challenges Export Control.

International research partnerships provide access to information, knowledge, technology, infrastructure and partner networks that may be used in WMD programmes and other military programmes and activities.

Norwegian universities and research institutions are being used systematically by countries that seek information and knowledge linked to weapons of mass destruction and their means of delivery. Foreign researchers and students connected to foreign universities with ties to military research and development are involved in this activity.

Countries that are subject to international sanctions are also seeking Norwegian technology and →



International research partnerships provide access to information, knowledge, technology, infrastructure and partner networks that could be used in WMD and other military programmes and activities.



Iranian missile test on 5 November 2018. Countries that are subject to international sanctions are seeking Norwegian technology and knowledge in order to develop production capacity for their own nuclear- and missile-related industries.

knowledge in order to develop production capacity for their own nuclear and missile-related industries.

Furthermore, there is a persistently high and disconcerting interest in sophisticated Norwegian underwater technology. The range of actors is complex and often involves third-party countries. Although the technologies being pursued often have primarily civilian applications, they can in many cases also be used to build military capability.

The identity of the real end user becomes increasingly difficult to determine, in part due to complicated acquisition procedures and ownership structures. Efforts are further complicated by the fact that technologies that build military capability often have civilian applications as well and are therefore not subject to export control.

Moreover, the development and manufacture of civilian and military technologies has become increasingly integrated, particularly research and development. Research partnerships with Norwegian actors provide access to information, knowledge and technology, as well as infrastructure such as laboratories, supercomputers, computer networks and software. In addition, such partnerships facilitate contact with technological and industrial actors linked to Norwegian research networks.

Technological Developments Drive Increasingly Sophisticated Russian Influence Operations.

Russian influence operations now appear more sophisticated than in the past. For one thing, rapid developments in information technology have led to

the emergence of new platforms and methods for spreading misinformation and promoting specific viewpoints. For another, the evolution of the operations show that the actors are increasingly adapting their operations to audiences in different countries.

«The items disseminated often cover polarising topics or seek to promote a specific message.»

Fake profiles and automated accounts in social media continue to form part of the Russian influence threat. However, the approach to Norway – and others – has seen a shift in the content spread via digital platforms. Whereas emphasis in previous years has been on targeted campaigns with the help of fake news, there is now an emergence of non-independent news platforms spreading content from established media platforms. The items disseminated often cover polarising topics or seek to promote a specific message. This change in operational pattern could be an attempt at circumventing measures intended to fight fake news. The use of second-hand content also makes it more challenging to distinguish influence activity from real political disagreement and exchange of views.

Influence operations may be intended to undermine the public's trust in election processes, the authorities, politicians or the media. The intention may also be to steer the public debate in a specific direction, sow doubt regarding facts or discredit →

specific opinions, thereby undermining the foundation of trust on which democratic processes rely.

Russia employs its secret services, research communities, think-tanks and private companies in order to exert influence. The use of non-state actors in influence operations against the citizens of other states makes it easier to conceal links to the Russian government apparatus. It also tests Norwegian readiness systems and countermeasures.

Chinese Influence in Western Countries Targets Range of Social Sectors.

With the main aim of influencing political processes and public opinion, Chinese actors conduct complex influence operations against Western countries. There have been examples of individuals with close links to the CPC cultivating Western politicians and seeking to exert influence through donations or other forms of support. However, the party state's influence strategy targets a range of social sectors and uses a variety of open and covert methods and means. This comprehensive approach makes it difficult to distinguish illegal and unwanted activity from legal activity.

China's objectives in influencing other countries can be divided into three main categories. The first concerns domestic affairs: the CPC uses influence strategies in order to build international legitimacy for the Chinese form of government and garner support for its own policies, whilst seeking to avoid criticism and political pressure. Prominent issues that are subject to Chinese influence activity include Taiwan, Xinjiang, Hong Kong and Tibet.

Secondly, the Chinese authorities are working to create the best possible economic climate for their

«The main aim is influencing political processes and public opinion.»

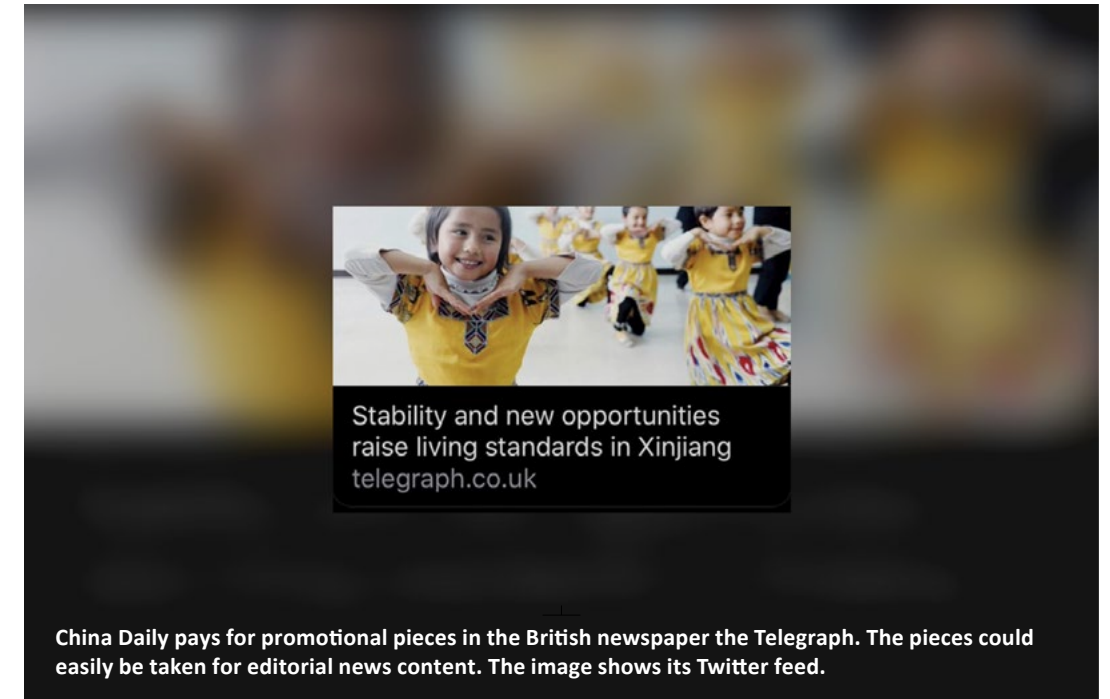
country. Here, key elements include promoting an image of China as a peaceful and friendly world power and establishing a narrative of economic cooperation between China and other countries as a win-win strategy, with Chinese growth posing no threat to other countries. Xi Jinping's ambitious external economic policy relies on countries along the so-called New Silk Road remaining committed to close economic cooperation with China.

Thirdly, the CPC uses influence activity to achieve security policy aims without having to resort to military force. This applies in particular to questions of sovereignty, where China uses influence operations to support its own territorial demands, for instance those linked to Taiwan and the South China Sea.

Control of the Hong Kong Narrative Example of Sophisticated, Resource-Intensive Influence Operation.

The manner in which the CPC's propaganda apparatus has worked to handle the unrest in Hong Kong is a good example of how the party is making targeted efforts, and illustrates how the Chinese authorities draw on experience in order to adapt their message to different audiences.

On the mainland, the CPC has used state-owned media outlets to portray the reunification with Hong Kong as a question of sovereignty and a struggle against imperialism and foreign interference. Through propaganda campaigns, the party has portrayed the pro-



testers in Hong Kong as violent terrorists supported by foreign intelligence services. Meanwhile, the authorities censor heavily in order to prevent information which challenges this narrative from reaching the general Chinese public.

Even in Hong Kong, Beijing is to some extent able to influence which information is presented via the media, including through a combination of ownership and political control of media houses. The CPC is also making active use of social media, with a strategy intended in part to reduce support for the democracy movement among the general public. In order to avoid censorship, many protesters and activists in

Hong Kong migrated from Chinese social media to Facebook and Twitter; the CPC followed suit, which prompted several Western social media platforms to crack down on both official and fake accounts spreading misinformation about the situation in 2019.

Beijing does not exert the same level of control of the narrative in Hong Kong as it does on the mainland. Access to a wide range of foreign platforms and communication channels enables protesters to organise and communicate their version of events to an international audience. For instance, many have live-streamed clashes between protesters and the police.



[INTELLIGENCE, INFLUENCE AND THREATS IN CYBERSPACE]

Both State and Non-State Actors Operate in Cyberspace

New technical opportunities and relatively low risk have tempted a growing number of actors to use computer network operations to achieve their objectives.

«Today states, amateurs and highly skilled criminals all operate in the digital domain. This has given rise to a complex landscape in which it is difficult to identify the perpetrator of a given operation.»

A decade ago, such operations were conducted by the state, primarily for intelligence purposes. Today, cyberspace is increasingly used for so-called effect-based operations. These operations seek a specific outcome, the consequences of which could be catastrophic for key functions in society. Examples include operations against industrial control systems, forced power outages (such as in Ukraine in 2015 and 2016), the use of ransomware for economic blackmail (such as WannaCry in 2017) or the use of wipeware purely for digital sabotage (such as NotPetya in 2017 and the Shamoon campaigns in 2012 and 2018).

Today states, amateurs and highly skilled criminals all operate in the digital domain. This has given rise to a complex landscape in which it is difficult to identify the perpetrator of a given operation. It is becoming increasingly challenging for governments to uncover and trace threat actors' activity.

The Internet of Things to Create New Security Challenges.

In the coming years, the number of devices linked to the internet is set to rise sharply. By 2023, it is likely that between 30 and 50 billion devices will be online,

compared to 10–15 billion in 2013. A large proportion of this increase can be ascribed to the development of the Internet of Things, a term referring to the online status of primarily everyday devices.

These devices all contain sensors, which in addition to communicating with the user often form part of extremely complex information exchange systems. This makes it difficult to know who has access to the information and how it is used. One example is smart city solutions, which often involve local authorities in collaboration with private businesses using the Internet of Things to provide public services, such as transport, healthcare and environmental services. This technology involves the collection of enormous amounts of data that would be of great interest to commercial entities and potential threat actors alike.

With the introduction of 5G, mobile networks have become part of geopolitics. This was brought to the fore in 2019 with the debate regarding the technology company Huawei and the demands imposed by Beijing on all Chinese companies, including those that are privately owned. The development of 5G involves capacity expansion and changes to the networks' basic architecture, which could affect network operators' ability to secure communication. Next-generation communication networks will be crucial in order to maintain key societal functions, and →

Accessible Malware

In recent years, sophisticated malware has become affordable and readily available in illegal marketplaces. It can be used for a variety of operations, from crime for gains to intelligence activity. Whereas tailoring malware to specific targets requires reconnaissance and technical skill, generic malware can also cause considerable damage.

Ransomware:

blackmail campaigns using encryption viruses to hold information hostage. The malware infects a computer system, encrypts and locks its contents and demands a ransom for unlocking the data. Norsk Hydro was affected by this type of activity in March 2019.

Wipeware:

malware that prevents computer functionality by deleting information required by the computer to perform its task. Wipeware inflicts logical damage and differs from destructive computer attacks, where the code has been made to inflict physical damage.

«This technology involves the collection of enormous amounts of data that would be of great interest to commercial entities and potential threat actors alike.»

control of information nodes may be used for political, economic and military intelligence and to facilitate computer network operations intended for sabotage.

The key role that 5G will play in all communication in society challenges traditional ideas of territorial integrity and national sovereignty and security. The development and maintenance of communication infrastructure will create a dependency on service and infrastructure providers. The increasing complexity of both physical components and associated software makes it hard to detect vulnerabilities through testing. The supply chains for digital services are difficult to secure, as providers of components, software, management and operation, as well as systems integrators, all form part of the chain. Therefore, Norwegian businesses will need to have complete faith in developers and suppliers, without having the practical means of fully verifying the level of security.



Protesters wearing Guy Fawkes masks carry the logo of the hacker group Anonymous during a protest in Hungary.



The development and maintenance of communication infrastructure create a dependency on service and infrastructure providers.

«Meanwhile, several countries have proved willing to shoulder the political costs of conducting computer network operations in the form of intelligence and sabotage operations.»

GREAT POWER POLITICS IN CYBERSPACE

Over the past decade, capability developments in cyberspace have outpaced the establishment of security policy norms. The constantly changing technological landscape is characterised by testing and boundary-pushing. If an opponent acknowledges vulnerabilities, these could be exploited in negotiations on new international regulations. Despite the international agreement that international law does apply, cyberspace offers plenty of opportunities to carry out covert and deniable operations. This gives the actors involved a wide scope for action. Meanwhile, several countries have proved willing to shoulder the political costs of conducting computer network operations in the form of intelligence and sabotage operations. Many countries are likely to continue taking this risk so long as the benefits outweigh the consequences. However, security policy in this domain is maturing as states gain more experience.

CHINA'S NATIONAL CONTROL OF THE INTERNET

From the start, China's digital infrastructure has been built to limit contact with other countries. China first used the term 'cyber sovereignty' in 2010; at the heart of this is the idea that states should be able to control cyberspace in the same way that they control the areas inside their territorial borders. The state retains national control at every turn. Meanwhile, other countries are increasingly using Chinese components, software and services, thereby becoming technologically dependent on China. This offers the country an advantageous starting point as it seeks to become a superpower in cyberspace.

RUSSIA'S NATIONAL CONTROL OF THE INTERNET

A new piece of Russian internet legislation entered into force on 1 November 2019. It gives the authorities greater control of 'RuNet', the Russian internet, and takes the country one step closer to breaking away from the global internet. The Russian authorities have repeatedly proposed alternatives to the global internet of today. In November 2017, the Russian Security Council launched an initiative to develop an independent internet infrastructure. This would also allow the other BRICS countries² to link their registers together so that they would work independently of the rest of the internet. Collectively, the BRICS states are home to 40 percent of the world's population, and if these countries were to link their internet systems, it would present an alternative and a competitor to the global internet, which is currently dominated by Western actors.

² BRICS Countries: Brazil, India, China, South-Africa and Russia

Notable Computer Network Operations 2010-2020



South-Eastern Norway Regional Health Authority

January 2018: Essential servers of the South-Eastern Norway Regional Health Authority compromised.

NORSK HYDRO ASA

March 2019: Ransomware targets the Norwegian aluminium and energy company Norsk Hydro ASA.

NOTPETYA – MAERSK

2017: NotPetya wipeware hits globally. Shipping giant Maersk among targets.

POWER OUTAGES UKRAINE

2015: Ukraine's power grid targeted, causing widespread power outages. Grid targeted again in 2016.

WANNACRY

2017: WannaCry ransomware hits over 200,000 computers globally. About 70,000 of the servers belong to the British National Health Service. Large number of targets also in Russia, Ukraine, India and Taiwan.

SHAMOON – SAIPEM

2018: Shamoan wipeware targets the Italian petroleum company Saipem.

SHAMOON – SAUDI ARAMCO

2012 Shamoan wipeware targets Saudi Aramco.

STUXNET – IRAN

2010: Stuxnet targets Iran's nuclear programme.

YAHOO

2013: More than 500 million usernames and passwords stolen from YAHOO.

HILLARY CLINTON AND DNC

2016: Widespread spearphishing campaign, email account of Hilary Clinton among successful targets. Servers belonging to the Democratic National Committee (DNC), the governing body of the Democratic Party, compromised.

TV5 MONDE

April 2015: The French TV channel TV5 Monde is taken off air for several hours.

TWITTER, AMAZON, SPOTIFY, NETFLIX

2016: A distributed denial of service (DDoS) attack against Twitter, Amazon, Spotify, and Netflix hindered services.

2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020

STUXNET – IRAN

SHAMOON –
SAUDI ARAMCO

YAHOO

POWER OUTAGE
UKRAINE

TWITTER, AMAZON,
SPOTIFY, NETFLIX ...

NOTPETYA –
MAERSK

SHAMOON – SAIPEM

NORSK HYDRO ASA

TV5 MONDE

HILLARY CLINTON
AND DNC

WANNACRY

SOUTH-EASTERN
NORWAY REGIONAL
HEALTH AUTHORITY

```
user@localhost:~$ ssh login@ctf.cybertalent.no
Authentication succeeded (publickey).
```

```
login@corax:~$ id
uid=1000(login) gid=1000(login) groups=1000(login)
login@corax:~$ find / -type f -perm -4000 | grep X11
/usr/X11R6/bin/xterm
```


Towards New Arms Races

Current security policy developments are characterised by great power rivalry. The INF Treaty was terminated in August 2019 and it remains uncertain whether the last remaining nuclear disarmament treaty, New START, will be prolonged.

Meanwhile, China is cementing its position as an advanced nuclear-armed power, and a number of countries are expanding their military capabilities with sophisticated weapons systems.

Following the INF Treaty's collapse, there are two trends in Russian arms development of particular relevance to nuclear weapons and arms control. One is the development and deployment of sea- and air-launched long-range cruise missiles, equivalent to those the United States and NATO have had for decades. The other is Russian development of several types of sophisticated new weapons for penetrating Western missile defences.

Since May 2019, Iran has gradually reduced its compliance with the nuclear deal. Should the remaining parties fail to offer Iran sanctions relief, a further escalation of the conflict is expected. The development of ballistic missiles with longer range continues, together with the modernisation of short-range missiles; the aim is to improve precision and thereby enable their use against individual military targets in the region.

On New Year's Eve 2019, Kim Jong-un announced an end to North Korea's pause in nuclear weapon and long-range missile testing. Although North Korea has refrained from testing strategic weapons systems since 2017, these capabilities have nonetheless increased over the course of 2018 and 2019. The regime is likely to have produced more fissile material and evolved its long-range missile systems, and is likely to demonstrate this progress should the disarmament talks stall and sanctions relief remain elusive.

Technological developments are driving the development of new offensive and defensive weapon types alike. The roles of the different weapons classes and the platforms that carry them are becoming increasingly blurred, as is the distinction between them. These factors, combined with the development of missile defences, new nuclear weapons systems and conventional long-range precision-guided weapons, affect the parties' willingness to enter into arms control agreements. Nation states' prospects of challenging the status quo with new weapons systems are increasing, and the world may be facing new arms races in which China will play a more prominent role.



New Russian Weapons

Russia is developing several new types of sophisticated weapon. Sea- and air-launched long-range cruise missiles have become a fundamental part of Russian non-nuclear deterrence.



China

China is the world's third largest nuclear-armed power and many have pointed out that Beijing should also be a signatory to treaties involving Washington and Moscow.

MOSCOW

RUSSIA

TEHRAN

IRAN



Iran Responds

Tehran has rejected all limitations on its enrichment programme, which could reduce the time Iran needs to enrich fissile material for a potential nuclear weapon.



Expanding Military Capabilities

Several countries in the Middle East and Asia are expanding their military capabilities to include sophisticated weapons systems and production facilities.

BEIJING

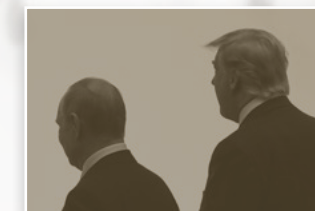
PYONGYANG

CHINA



North Korea

The North Korean regime has retained skills, research and development linked to missiles and nuclear weapons. For Pyongyang, the role of the nuclear weapons is first and foremost to serve as a guarantee of regime survival.



Blurred Distinctions

The roles of the various weapon classes and the platforms that deliver them are becoming blurred, as are the distinctions between them, influencing the parties' threat perceptions and willingness to commit to agreements.



A Russian MiG-31 Foxhound combat aircraft armed with a Kinzhal hypersonic missile during the 9 May parade in 2018.

[TOWARDS NEW ARMS RACES]

New Weapons with Specialised Features Add New Dimensions to Nascent Arms Races.

The INF Treaty was terminated in August 2019, and it remains uncertain whether the last remaining disarmament treaty, New START, will be extended. Whereas the INF Treaty only regulated a delimited class of land-based nuclear weapons, Russia has a considerable arsenal of nuclear weapons divided among the land, sea and air forces.

«The new Russian systems include hypersonic glide vehicles, underwater drones and nuclear-powered missiles.»

Russia has several thousand operational nuclear warheads, spanning from tactical – also known as non-strategic – nuclear weapons to strategic intercontinental ballistic missiles. Moreover, Russia is testing new weapons systems extensively, including several of the new nuclear weapons Putin announced in 2018.

Following the INF Treaty's collapse, there are two trends in Russian arms development that have become particularly relevant to nuclear weapons and arms control. The first is the development and deployment of sea- and air-launched long-range cruise missiles, equivalent to those the United States and NATO have possessed for decades. This weapon category was not regulated by the INF Treaty, and such missiles are fitted on a growing number of Russian platforms. The cruise missile systems have a range of several thousand kilometres, and have become a fundamental part of Russian non-nuclear deterrence.

Russia has also deployed a new land-based cruise missile; this was the direct cause of the U.S. withdrawal from the INF Treaty. Together with the sea- and air-launched systems, this system heightens the potential threat to European NATO members.

These weapons systems can be fitted with either conventional or nuclear warheads, which can cause uncertainty as to whether a launched missile is conventional or nuclear. There is consequently a risk of serious misunderstandings.

The second trend is Russia's development of several new types of sophisticated missiles and weapon categories for penetrating Western missile defences, including the most advanced such defences. The new Russian systems include hypersonic glide vehicles,

underwater drones and nuclear-powered missiles. Two Avangard hypersonic glide vehicles, which cannot be stopped by any known defence system, were delivered to the Strategic Rocket Forces in December 2019.

Following the termination of the INF Treaty, the Kremlin stated that it would not be deploying intermediate-range missiles aimed at Europe until such a time as the United States or NATO were to deploy similar missiles. The regime has also expressed a desire to resume arms control talks, both to avoid a costly arms race and to ease tensions with the West. The last remaining major nuclear arms control agreement, New START, covers both Russian and American strategic nuclear weapons. The agreement is in force until 2021 and can be extended by up to five years. Putin has already signalled that the Kremlin wants to prolong it, whereas the United States has argued for a new deal that would cover additional weapon categories and would incorporate China.

In addition to the aforementioned development trends, missile defences and asymmetric capabilities such as anti-satellite weapons and computer network operations are becoming more prominent. This is having a greater impact on the balance now than in the past, and instead of classic rearmament with an increase in the number of weapons, the current developments involve new weapon categories with specialised features.

Russia will continue modernising and evolving its armed forces regardless of the outcome of any arms control negotiations. This will ensure the preservation of Russia's strategic nuclear balance with the United States whilst enabling Moscow to bolster its conventional deterrent.



Poseydon
Underwater drone with nuclear propulsion



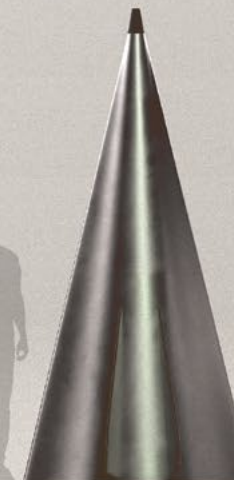
Sarmat
Intercontinental ballistic missile



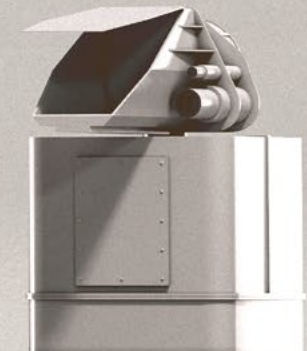
Burevestnik
Intercontinental cruise missile with nuclear propulsion



Kinzhal
Air-launched ballistic missile



Avangard
Hypersonic glide vehicle



Peresvet
Laser weapon

Russia's New Weapons Systems

In March 2018, during his annual speech to the nation, Putin announced six new Russian weapons systems.

Several of the new weapons have special features and will constitute new weapons categories. Although the weapons are in various stages of development, both Avangard and Kinzhal have reportedly already been put in position. The Kremlin has stated that Avangard and Sarmat could be included in existing arms control agreements, whereas the other systems would require new agreements.



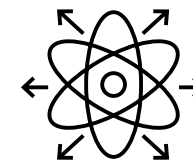
Missiles on show at a junction in Tehran.

[TOWARDS NEW ARMS RACES]

Iran to Use Nuclear Programme as Leverage and Maintain Missile Programmes.

In response to the United States' withdrawal from the nuclear deal in 2018, the Iranian authorities have gradually been decreasing their compliance with the deal since May 2019.

«Any restrictions on inspector access would be cause for concern.»



Iran has rejected all restrictions on its enrichment programme.



IAEA, the International Atomic Energy Agency, retains access to the enrichment plants.



Iran's arsenal consists of large numbers of intermediate-range and short-range missiles.

Tehran has rejected all limitations on its enrichment programme, meaning that it will be able to increase its enrichment capacity and uranium enrichment grade. Growing stores of low-enriched uranium, higher enrichment grades or increased enrichment capacity would all reduce the time Iran needs to enrich fissile material for a potential nuclear weapon.

As long as Iran continues to grant the International Atomic Energy Agency (IAEA) extensive access to its enrichment plants, the outside world can see that the country is not racing to produce a nuclear weapon. Any restrictions on inspector access would be cause for concern.

Meanwhile, the building of a plant reportedly linked to the Revolutionary Guard's long-range ballistic missile programme continues. In parallel, Iran is developing a new intermediate-range ballistic missile that could have sufficient range to reach large parts of Europe. This comes in addition to new sophisticated short-range ballistic missiles which increase

Iran's ability to attack individual military targets in the region.

Iran's operational arsenal consists of a large number of intermediate-range ballistic missiles with ranges up to 2,000 kilometres, and these will remain central to the country's defence concept. In addition, it has a large number of short-range ballistic missiles, such as those used in the retaliatory attacks on bases in Iraq following the drone strike that killed Qassem Soleimani.

In addition to ballistic missiles, Iran has several cruise missiles in development. When this capability matures, it will increase the country's ability to attack individual military targets in the region. When used in combination with ballistic missiles, there is a higher likelihood of penetrating missile defences.

Iran has likely retained critical competence in the military part of its nuclear programme, thereby possessing a nuclear threshold capability. Should Tehran decide to produce a nuclear weapon and enrich sufficient fissile material to weapons grade, this →



North Korea tests a ballistic missile in the Sea of Japan.

competence may be used to produce a nuclear warhead mounted on a ballistic missile.

A More Confrontational North Korea Makes Missile and Nuclear Programmes More Visible.

On New Year's Eve, Kim Jong-un announced an end to the pause in nuclear and long-range missile testing. The past two years have constituted a thaw in which North Korea has shown restraint and limited its provocations. Nevertheless, the regime has retained skills, research and development linked to missiles and nuclear weapons. In this way, Pyongyang is able to play for time whilst continuing to develop its nuclear deterrent.

From a U.S. perspective, the aim is for North Korea to shut down its entire nuclear programme. However, the latter country appears to remain a nuclear-armed power with few reductions in its capability. Although it tested a submarine-launched missile and several short-range missiles in 2019, the regime maintains a lower profile for its more controversial programmes.

Throughout this period, North Korea has refrained from testing long-range missiles and nuclear weapons. Its longest-range ICBM system can allegedly reach

«The role of the nuclear weapons is first and foremost to serve as a guarantee of regime survival, and secondly as a bargaining chip.»

much of the United States, yet will require further testing in order to become reliable. Given that there is no agreement in place, North Korea sees no reason to scale back development in its weapons programmes. The regime will be using its capabilities to put pressure on alliances and seek to limit the U.S. presence in the region.

For the nuclear programme, a long pause in testing normally involves freezing the development of new nuclear capabilities. This also applies to the powerful new hydrogen bomb that was reportedly tested in 2017. However, for years North Korea has been testing simpler nuclear weapons similar to those used against Japan during WWII. The regime is likely to have sufficient material for several dozen of these weapons, and they may be ready for operational use.

It is likely that North Korea's capabilities increased in 2018 and 2019 and that it produced more fissile material and honed its long-range missile systems. Should the disarmament talks and attendant sanctions relief fail to progress further, the regime is likely to demonstrate the progress it has made. North Korea tested submarine-launched missiles in October 2019, and may resume testing of ICBMs in 2020.

The nuclear and missile programmes are extremely important to North Korea, as is its ability to deliver nuclear weapons. The role of the nuclear weapons is first and foremost to serve as a guarantee of regime survival, and secondly as a bargaining chip. North Korea's foremost ambition is to become an accepted nuclear-armed state with a credible deterrent. The regime is therefore unlikely to agree to the U.S. demand of total denuclearisation.

Trump and Putin during the G20 summit in Osaka, Japan in 2019.

Disarmament Agreements and Arms Races

Historically speaking, arms control agreements have been very important. Since 1972, such agreements have led to the decommissioning and dismantling of several thousand nuclear weapons in the United States and Russia.

This type of agreement has a stabilising impact on security policy and is therefore of great significance to global security. Arms control agreements build trust between the parties and force transparency regarding capabilities. With a well-functioning verification regime, the parties can exchange location data and conduct inspections of military bases. Another key factor is bilateral channels and venues which ensure dialogue and thereby reduce the risk of misunderstandings.

The INF Treaty banned land-based intermediate-range missiles with a range of between 500 and 5,500 kilometres. With the treaty's collapse in 2019, this class of weapons systems will be re-introduced. The deal, signed in 1987 by the U.S. and Soviet leaders Reagan and Gorbachev, stemmed from a time when the United States and the Soviet Union were the only major armed powers. Over time, security, military and technological developments undermined the treaty's importance. Although the number of nuclear weapons is much lower today than during the Cold War, the overall picture has become

much more complex. China is strengthening its position as a nuclear-armed power, and several countries in the Middle East and Asia are expanding their military capabilities to include sophisticated weapons systems and production facilities. Both Pakistan and China have acquired land-based missiles with ranges that were regulated by the INF Treaty.

«New START is in force until 2021, and could be prolonged by another five years.»

New START is in force until 2021, and could be prolonged by another five years. It is the last remaining major nuclear arms control treaty, and given its uncertain future there is a risk that the world could be without regulatory mechanisms for strategic nuclear weapons for the first time in almost 50 years. This would increase individual countries' scope for challenging the status quo by introducing new weapons systems, and the world could be facing a

«It would prove challenging to get China, with its superpower ambitions, to agree to commit to arms control.»

technological arms race in which China would play a more prominent role.

China is currently one of the largest actors in the global great power rivalry, and many have pointed out that it should also be a signatory to treaties involving the United States and Russia. Beijing is unlikely to agree to this; over the past decade, China has developed a sophisticated missile arsenal with both intercontinental and regional range, and including both conventional and nuclear warheads. The country is the world's third largest nuclear-armed power, although numerically inferior to both the United States and Russia. China is developing several new weapons in the same category as Russia, and in a number of areas China has made greater progress. It would prove challenging to get China, with its

superpower ambitions, to agree to commit to arms control.

New START was challenging to negotiate a decade ago, and now the challenge is to create new treaties which reflect a new reality. There are a number of complicating factors: the use of new technology driving the development of new offensive and defensive weapon types, the development and deployment of missile defences, new nuclear weapons systems and the development of conventional long-range precision-guided weapons. The roles of the various weapon classes and the platforms that deliver them are becoming blurred, as are the distinctions between them. All these factors influence the parties' threat perceptions and willingness to commit to agreements.

Although there is not enough time to negotiate a new comprehensive arms control agreement before New START expires, a prolongation may be possible, provided the political willingness exists. If new international arms control treaties fail to materialise, the consequence could be an intensified technological arms race.

International terrorism

The number of terrorist attacks conducted by militant Islamists in Europe has fallen sharply since 2017, a development which is likely to continue in 2020.

However, a number of aspects are making the threat from international terrorism more complex and changeable than before.

In 2019, ISIL lost its top leader and last remnants of territorial control and saw its propaganda apparatus diminished and a large proportion of its members killed or captured, including foreign fighters. Although the organisation has become weaker, the terrorist threat it poses to the West is likely to increase in the longer term and ISIL will remain the greatest international terrorist threat to the West. The reasons for this are threefold: firstly, ISIL has changed its strategy and increased its focus on achieving growth elsewhere in the world. Secondly, the organisation has been well prepared for the loss of the so-called caliphate in Syria and Iraq. Thirdly, great power rivalry in the region has offered it renewed scope for action.

Other terrorist organisations have also changed their strategy. This is most evident in al-Qaeda, which is also taking advantage of the great power rivalry to build alliances and recruit. Al-Qaeda is experiencing favourable growth conditions globally, and the organisation currently has more members than ever before. The links between local and global groups in the various organisations give rise to a more complex threat environment, whilst rivalry between the great powers makes it less likely for multiple states to agree on how to fight international terrorism.

In parallel with the rise and fall of the so-called caliphate, the West has become more polarised. Militant Islamist communities in Europe now have their own dynamic, based on extensive international networks. These networks are likely to pose the greatest militant Islamist terrorist threat to Europe in the years ahead. Meanwhile, there is growing support for right-wing populist parties and an increase in right-wing rhetoric and right-wing extremist terrorism targeting Muslim parts of society. Right-wing extremism has increasingly become an international phenomenon and contributes to a more complex and challenging threat environment in the West.

Returned Foreign Fighters

International networks established by returned foreign fighters are likely to pose the greatest militant Islamist terrorist threat to Europe in the years ahead.

Right-Wing Extremism

Right-wing extremism is increasingly a transnational phenomenon, both in terms of online radicalisation and organisation-building.

ISIL's New Strategy

ISIL has announced affiliates and presence in a range of new countries, including Turkey, Ukraine, Azerbaijan, the Central African Republic, Iran, India and Pakistan.



ISIL Far From Beaten

ISIL is likely to currently have several thousand active members in Syria and Iraq, and its finances are sufficiently robust for it to be able to continue to pursue its insurgent strategy for a long time to come.

Al-Qaida Growing

ISIL's decline has increased al-Qaeda's scope for action. In addition to Syria, al-Qaeda may experience growth in Afghanistan, Iraq, Libya and Mali in the year ahead.

Great Power Rivalry

Great power rivalry has made the fight against international terrorism a lower priority.

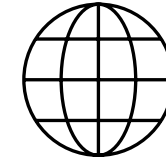
«In the longer term, ISIL is likely to once again re-focus on the West, and the affiliates on the fringes of Europe are likely to represent the greatest ISIL terrorist threat to Europe in the years ahead.»

Baghouz, Syria on 23 March 2019.
The SDF seizes the final ISIL-controlled area in Syria.

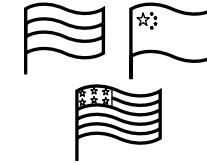
[INTERNATIONAL TERRORISM]

ISIL with New Global Strategy.

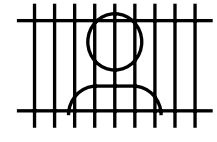
In April 2019, ISIL published its first video recording of al-Baghdadi since the caliphate's establishment in 2014. One of the main intentions behind the video was to outline the organisation's new strategy: to go from being a form of proto-state to a global rebellion.



ISIL has announced new affiliates and a presence in several new countries.



Great power rivalry has made the fight against ISIL a lower international priority.



Radicalisation and networking in prisons presents a particular challenge.

In the video, and on several subsequent occasions, ISIL has announced affiliates and presence in a range of new countries, including Turkey, Ukraine, Azerbaijan, the Central African Republic, Iran, India and Pakistan. This could have a significant impact on how ISIL develops in the years ahead and on the threat it will pose to the West.

In part, the propaganda focused on ISIL's global spread is intended to detract attention from its defeat in Syria and Iraq. However, the propaganda is also a reflection of the current state of affairs. By placing the strategic focus on its affiliates, the organisation is likely seeking to reduce its greatest weaknesses. One is geographic concentration in a single core area, Syria and Iraq. By bolstering the affiliates and the central leadership's command and control of them, ISIL forces its opponents to disperse their assets rather than concentrate their effort on a single area. Moreover, it may become easier to recruit new members, as it will increasingly be possible to recruit regionally to an affiliate rather than administering travel to Syria and Iraq.

In the short term, this change in strategy is likely to lead to a lighter emphasis on operations targeting the West. Furthermore, ISIL is likely lacking a working central unit in Syria and Iraq responsible for external attack planning. In the longer term, the organisation

is likely to once again re-focus on the West, and the affiliates on the fringes of Europe are likely to represent the greatest ISIL terrorist threat to Europe in the years ahead.

Although the Middle East will remain ISIL's most prominent theatre, in the longer term the Caucasus, South Asia and Africa could also experience a surge. In Asia, ISIL in Khorasan Province (ISKP), which primarily operates in Afghanistan, will likely seek to exploit a potential peace deal between the United States and the Taliban. Similarly, ISIL affiliates in India and Pakistan will seek to take advantage of New Delhi's decision to end Kashmir's self-rule in order to fan sectarian tensions in the region. Due to low membership numbers, a lack of resources and pressure from local security forces, these affiliates likely lack the capacity to succeed in this effort in the short term.

In North Africa, ISIL is most active in Libya and Egypt, and this is where the threat potential to Western interests is highest. There is a chance of opportunistic attacks on international presence or tourists and representatives of Western authorities.

In West Africa, ISIL maintains a presence through its Sahara affiliate (ISGS) and West African affiliate (ISWA). These primarily operate in Chad, Niger, Nigeria and Mali. ISWA is ISIL's most powerful affiliate in Africa; over the past year, it has experienced growth →

and expanded its area of operation. ISIL's affiliates in this region focus on local rather than international targets.

ISIL is also growing stronger in East and Central Africa. The group has announced an affiliate in Congo, ISIL Central Africa Province, after a local rebel group pledged allegiance. This affiliate's area of operation includes eastern Congo and north-eastern Mozambique, where there have been a number of attacks on civilians.

ISIL Far From Defeated.

ISIL has had ample time to prepare a line of succession, and Abu Bakr al-Baghdadi's death is unlikely to trigger a significant decline for the organisation. Although al-Baghdadi likely played an important part at the overarching level by contributing to the formulation of ISIL's strategy, he had little operational scope for action in recent years. ISIL's leadership appears to agree on the current direction, and the organisation's strategy is therefore unlikely to change.

In Syria and Iraq, ISIL has been preparing for the fall of the caliphate since 2015. The organisation is now rebuilding, initially in rural Sunni areas in western Iraq, where its foothold has traditionally been strong. Here, it operates as a traditional insurgent group by primarily conducting attacks on local leaders and security forces. In this way, ISIL is demonstrating that the government is failing to provide security for its people and reinforcing sectarian fault lines. It has also been able to maintain a working central propaganda apparatus, which disseminates this narrative.

Compared to 2008, when ISIL's precursor was at its weakest, the organisation is currently in a much better position. It is likely to have several thousand

active members in Syria and Iraq, and its finances are sufficiently robust for it to be able to continue to pursue its insurgent strategy for a long time to come. Although it no longer enjoys the significant revenue from oil and taxation it had during the so-called caliphate, it no longer has the expenses associated with running a state. In addition, ISIL has largely succeeded in retaining its international funding network.

«The U.S. withdrawal from Syria and the subsequent Turkish intervention have undermined the coalition's ability to fight ISIL.»

Many of the factors which enabled ISIL's growth remain unchanged in Syria and Iraq, including sectarian and ethnic tensions, corruption and poverty. The U.S. withdrawal from Syria and the subsequent Turkish intervention have undermined the coalition's ability to fight ISIL. All of this makes it more likely that the organisation will once again succeed in rebuilding itself in the region.

Great Power Rivalry and Conflicts To Be Exploited by Terrorist Organisations.

Growth conditions are particularly good for terrorist organisations in conflict zones. Great power rivalry has made the fight against ISIL a lower international priority, a situation which ISIL, but also other militant →



Abu Bakr al-Baghdadi's first appearance since the so-called caliphate was declared in 2014. In this video, Baghdadi announces a strategic shift from caliphate to insurgency.



Al-Qaida leader Ayman al-Zawahiri.



Syrians throw stones during clashes with Turkish forces following a demonstration against the Turkish presence in northern Syria in the city of al-Bab on 17 November 2019.

Islamist organisations, will be taking advantage of.

Al-Qaeda is also using the great power rivalry to build alliances and recruit. The organisation currently appears stronger than it has in years. Following a period of marginalisation in the wake of Osama bin Laden's death and the strong international campaign against it, al-Qaeda's leadership appears to have strengthened its position, communication and influence on the organisation's affiliates over the past two years.

«Al-Qaeda is also using the great power rivalry to build alliances and recruit. The organisation currently appears stronger than it has in years.»

Syria is a prioritised conflict zone for al-Qaeda. Other conflict zones where both ISIL and al-Qaeda may experience growth in the year ahead include Afghanistan, Iraq, Libya and Mali. The great powers have diverging interests in these areas, and the international community is unlikely to once again agree on a joint coordinated effort similar to that made against ISIL's caliphate in Syria and Iraq. The threat will therefore become more dispersed and consequently harder to defeat.

ISIL's decline has increased al-Qaeda's scope for action, and the latter organisation will likely seek to take advantage of this through an increased propaganda effort, in order to attract new supporters. The organisation has bolstered its propaganda capability in recent years, emphasising that affiliates openly profess their al-Qaeda affiliation. It is likely that

al-Qaeda's propaganda will increasingly link local attacks to the global resistance.

The organisation is likely to prioritise local alliance-building and recruitment in the year ahead, in the hope of strengthening its various affiliates. Al-Qaeda is actively seeking to take part in conflicts in the Muslim world, and is focused on uniting Islamist movements through extensive alliance-building. It will continue to position itself as a more moderate alternative to ISIL, and will be targeting a wider audience. Although it is unlikely to outcompete ISIL's brand in 2020, in the longer term there is an even chance that al-Qaeda could strengthen its ideological significance globally. In the short term, although al-Qaeda is likely to have the ability to target the West, the senior leadership is likely to lack the intention.

Collectively, the various links between the organisations' local and global groups create a more complex threat environment for radical Islamist terrorism. In addition, spiralling great power rivalry makes it less likely that states will be able to agree on how to fight international terrorism.

Foreign Fighters Continue to Pose a Threat.

Europe currently finds itself in a historically unique situation. No other conflict in modern times has mobilised such a high number of militant Islamists in Europe as the war in Syria. More than 5,000 European foreign fighters travelled to Syria and Iraq, the vast majority joining ISIL. Of these, more than 1,500 have returned. Many have combat experience, which means they have an increased propensity for violence, an international network that often stretches across borders and a stronger ideological conviction that could lead them to radicalise others upon their →

«Many of the women in the camps remain strongly radicalised. A large proportion of the female foreign fighters are likely to become further radicalised by extended stays in captivity, and their antipathy against the West is likely to grow.»

return. Radicalisation and networking in prisons represents a particular challenge.

Due to the fight against ISIL, several thousand foreign fighters have been arrested and are currently being held in Kurdish detention in north-eastern Syria. Female foreign fighters and children have been interned in refugee camps, some of which struggle with significant security challenges. This applies in particular to the al-Hol camp, where foreign fighters are kept separate from the other internees and where the situation is deteriorating. Many of the women in the camps remain strongly radicalised; a large proportion of the female foreign fighters are likely to become further radicalised by extended stays in captivity, and their antipathy against the West is likely to grow. There have been several successful escape attempts from al-Hol, and more are likely in future.

Arrested male foreign fighters are being held in various prisons in northeastern Syria. Many of them, including Western foreign fighters, have been transferred to Iraq. There have been escape attempts from

the prisons as well, yet it is unlikely that many will succeed, and the risk of foreign fighters currently in captivity conducting attacks on the West is therefore limited.

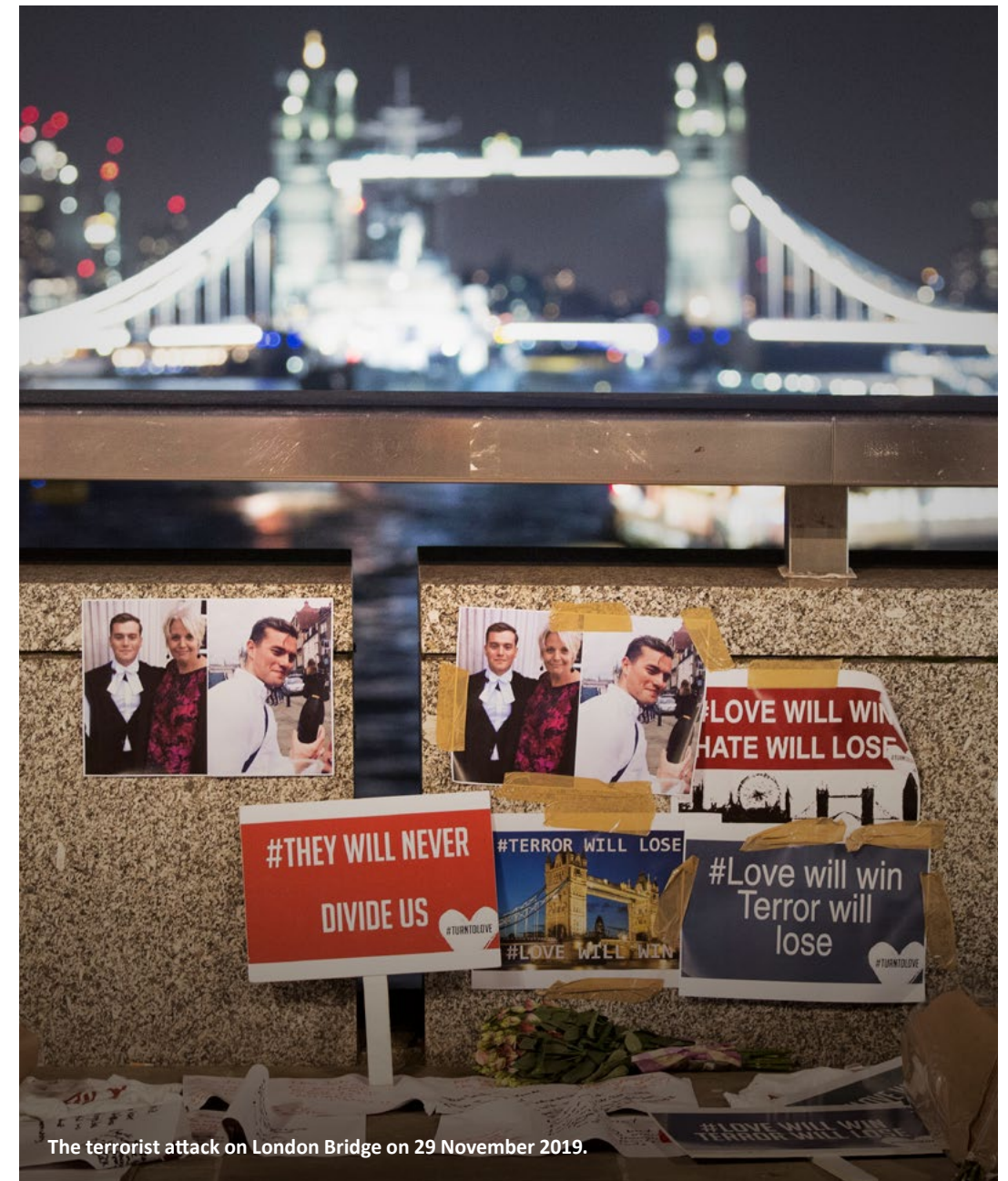
Several thousand foreign fighters remain unaccounted for. Many are likely to have been killed in the anti-ISIL campaign and will never be identified. A minority are still alive and at large, and some will have returned undetected to the West or relocated to another conflict zone. Some remain in Syria and Iraq.

The remaining foreign fighters in Syria and Iraq pose a limited threat to the West. As ISIL no longer retains territorial control, their scope for action and freedom of movement have become restricted. They primarily pose a threat by virtue of their contact with and skill transfers to supporters in the West.

Europe to Become Further Polarised in 2020.

The West is becoming more polarised. There is growing support for right-wing populist parties and an increase in right-wing extremist rhetoric and terrorism targeting Muslim parts of society. Meanwhile, militant Islamist communities in Europe have seen strong growth over the past decade. Militant Islamists convicted of terrorism contribute to radicalisation in prisons. Over the coming year, several hundred terrorist convicts will be released from European prisons, including leadership figures who will once again be able to influence their followers.

Returned foreign fighters with veteran status are also recruiting to Islamist communities. Together with →



The terrorist attack on London Bridge on 29 November 2019.



individuals who wanted to join ISIL but did not make it to Syria or Iraq, they continue to encourage and guide others to conduct attacks in Europe, especially via encrypted communication technology. International networks established by returned foreign fighters from various countries form the basis for organising militant Islamist communities across borders. These networks are likely to pose the greatest militant Islamist terrorist threat to Europe in the years ahead. Militant Islamist networks in Europe have their own dynamic and are less reliant on the conflicts in the Middle East than before.

Over the past year, there have been several right-wing extremist terrorist attacks in the United States and Europe, including in Norway, with the attack on the al-Noor mosque in Bærum. The right-wing extremist attacks have mostly been planned and conducted by individuals, the perpetrators often inspired by previous attacks in other countries and active in international online forums. The attacks have mainly been carried out in the perpetrator's country of residence, and at present there is little to suggest that any attacks are being planned and executed across borders; this is liable to change, however.

Right-wing extremism is increasingly a transnational phenomenon, both in terms of online radicalisation and organisation-building. One of the factors

that make today's right-wing extremism more transnational is that it is not limited to an ideology focused on the nation state. There are several nuances of right-wing extremist ideology that could have a uniting effect across borders, thereby forming a basis for internationalisation.

«Militant Islamism and right-wing extremism copy each other and are likely to fuel each other in the future.»

Social media and electronic communication offer ample opportunities for right-wing extremist communities to form working international networks and terrorist cells, similar to the Islamist terrorist networks in Europe.

All of the above contributes to a threat environment that is more complex than in the past. Militant Islamism and right-wing extremism copy each other and are likely to fuel each other in future.



Right-wing extremists demonstrate in Dortmund, Germany on 25 May 2019.



Right-wing extremists take part in the 'March Against Marrakech' near the European supranational institutions in Brussels on 16 December 2018.



Regional Conflicts and Great Power Rivalry

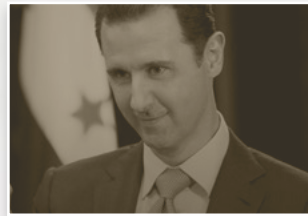
Great power rivalry is shifting the balance of power and thereby altering the dynamic in several ongoing conflicts; this is most evident in the Middle East.

In the short term, the risk of a military escalation between the United States and Iran poses the greatest threat. Over the past six months, Iran has demonstrated both willingness and ability to raise the conflict level across the region should the U.S. sanctions regime remain in place. The killing of Qassem Soleimani in January 2020 has further heightened tensions. Tehran remains willing to negotiate with the United States, but is unlikely to come to the negotiating table unless Washington lifts some of its sanctions first. Should its economic and political scope for action become further restricted in 2020, Tehran is likely to once again escalate the situation.

A number of states in the Middle East and Africa are forming ties to several global powers simultaneously. This widens their political scope for action and may reduce the impact of external pressure. Authoritarian regimes can reap benefits in the form of internal stability whilst seeking to dictate policy in weaker neighbouring states. This struggle for influence fuels an already strong rivalry between the region's states. Turkey and Qatar are cooperating on one side, Saudi Arabia and the United Arab Emirates, and intermittently also Egypt, on the other, and Iran with its regional allies on a third side. Over the past year, this dynamic has affected developments in Syria, Iraq and Libya, the Nile states and the Horn of Africa.

Russia has cemented its role as a great power in the Middle East. By fighting the opposition in Syria, Moscow has set the terms for a political solution and now, together with Iran, exerts influence and control of much of Syria's strategic resource base. The Kremlin has become an increasingly attractive partner to Middle Eastern and African regimes, both as a diplomatic ally and as a military supplier. Meanwhile, China is assuming a more visible role in the region. Whilst its already considerable economic influence is growing in a number of countries, China is becoming increasingly dependent on Middle Eastern petroleum.

Over the course of 2020, Moscow is likely to increase its diplomatic involvement in Libya. The Kremlin has long cultivated a close relationship with Khalifa Haftar, whilst →



Syria

Bashar al-Assad is placing his own supporters in key positions, likely in an effort to consolidate his personal power as the regime retakes more of Syria.

North Korea

The North Korean regime aims to consolidate the country as a nuclear power and secure sanction relief in the process.



Iran

Iran would likely be willing to work for a new deal with the United States in 2020. If Tehran's pressure campaign should fail to yield results, the likelihood of it provoking a military escalation increases.



Mali

In Mali the level of conflict between the parties is likely to increase when the militia soldiers are to be integrated into the army, with new ceasefire violations a likely consequence.



Iraq

The Iraqi political system will not be able to meet the demands of the populace, and 2020 will see fresh protests and periods of significant social unrest.



Waters Off the Arabian Peninsula

The threat to petroleum-related shipping will remain high in the Persian Gulf, the Gulf of Oman and the Strait of Hormuz.



Afghanistan

In Afghanistan the domestic lines of conflict continue to harden. Without agreement, the likelihood of civil war and the loss international aid increases.



Vessels belonging to the Iranian Revolutionary Guard's naval forces circle the British-flagged vessel Stena Impero.

→ simultaneously maintaining diplomatic ties to the government in Tripoli. In 2019, the United Arab Emirates and Russia increased their military support to Haftar's militia coalition, the LNA. On the other side of the conflict, Turkey in particular has stepped up its support to the Government of National Accord (GNA) in Tripoli. After the LNA remained on the offensive throughout 2019, a stronger Turkish involvement could even out the balance of power between the two sides, which in turn could create scope for fresh negotiations, negotiations in which Moscow and Ankara would play key parts. If Moscow succeeds with its strategy in Libya, the Kremlin will be exerting strong security policy influence in a belt stretching from the Middle East to North Africa.

Iraq's future is once again being reforged, and developments in 2020 will largely depend on neighbouring Iran. The province elections in April 2020 are likely to cause unrest, and due to structural weaknesses the Iraqi economy will remain vulnerable. Government expenditure is growing as rapidly as its oil revenue, and there are limited funds for rebuilding war-torn provinces. The political system will not be able to meet the people's demands, and fresh protests will lead to periods of considerable social unrest in 2020.

The spread of militant Islamism will continue to characterise the Sahel and West Africa. External actors are increasingly involving themselves in East Africa, along the Nile, on the Horn of Africa and in the Red Sea, which could destabilise individual countries and parts of the region. Although there is also the possibility of lowered tensions, as a whole the region remains conflict-prone.

The conflicts in Afghanistan and North Korea will also be affected by the ongoing great power rivalry. In Afghanistan, the United States and the Taliban are likely to resume talks in 2020, although the parties remain far apart. Without an agreement, the risk of civil war increases; this is also a likely scenario should the United States withdraw its forces from the country without reaching an agreement with the Taliban that stipulates an inclusive peace process. In addition, the conflict between the United States and Iran is a source of concern. Pyongyang's less conciliatory tone towards the United States will force underlying lines of conflict on the Korean Peninsula to the surface. Kim Jong-un will make sure that the country's weapons programme becomes more visible, and he will continue to cultivate North Korea's ties to China and Russia.

Syria's President Bashar al-Assad.

[REGIONAL CONFLICTS AND GREAT POWER RIVALRY]

Assad Consolidates Power, Yet the Syrian Regime is Weaker.

In 2020, the Syrian regime will tighten its control of the state.

«The Syrian armed forces are significantly weaker following the long civil war.»

Bashar al-Assad is placing his own supporters in key positions, likely in an effort to consolidate his personal power as the regime retakes more of Syria. Although Damascus may make smaller compromises in the ongoing constitutional process, Assad would not accept solutions that could affect the positions of those in his inner circle.

The Syrian armed forces have become significantly weaker following the long civil war. The country's ability to conduct military operations without support from Iran and Russia is limited, and it is years away from posing any real threat to neighbouring states. Nevertheless, the armed forces remain powerful enough to influence developments locally and spoil any great power agreements which Damascus considers disadvantageous. Regime forces could quickly fill the void should the United States or Turkey reduce their presence in the country.

The Syrian economy is in tatters: much of the country's agricultural land lies fallow, much of its industry and infrastructure has been destroyed, and the economy is subject to sweeping international sanctions. Any significant improvement is unlikely in the next two years. Damascus is facing a challenging period, and the humanitarian situation may deteriorate further. Iran and Russia have a limited ability to contribute financially to the rebuilding. Chinese companies are

present in Syria, but will likely limit themselves to smaller projects. The United Arab Emirates and Bahrain have restored diplomatic relations with Damascus, but any economic investment from these countries would likely be limited. Furthermore, the Syrian economy will remain vulnerable to any cuts in the oil supply from Iran, a steadily depreciating Syrian currency and reductions in humanitarian aid. Nevertheless, the regime's position is unlikely to be affected by these economic challenges.

Turkey has seized military control of the provinces in northern Syria and is forming economic and administrative ties in order to secure influence over developments in the area. Ankara is also taking steps to prevent Kurdish organisations from becoming a threat to Turkey in the longer term. Meanwhile, Kurdish rebel movements will continue to seek to inflict losses on Turkey and on groups loyal to Ankara. The Assad regime has joined forces with the Kurds in order to limit the Turkish presence. However, antagonism between Damascus and the Syrian Kurds is strong, and will become more prominent in the constitutional process, where Damascus and Ankara have a mutual interest in restricting the Kurds' position.

Re-taking the Idlib zone is crucial in order to normalise the situation in Syria, and the regime – supported by Russia – will likely seek to seize control of much of →

Idlib in 2020. 2019 ended with a Russian-supported ground offensive which according to the UN displaced up to 300,000 people from the south-eastern parts of Idlib. There are now likely around a million internally displaced people in the border areas between Turkey and Idlib, and the humanitarian situation there is extremely vulnerable. The refugee situation increases pressure on Turkey, and developments in northern Syria will therefore remain central to Ankara's relationship with Moscow in the time ahead.

Controlling recently reclaimed areas will remain challenging for the Syrian regime. In central Syria, ISIL continues to threaten the regime's economic infrastructure and lines of communication. In southern Syria, parts of Daraa serve as a hotbed for insurgency and internal unrest, despite several military security operations.

Political Blocs Fragmenting in Iraq.

In 2020, developments in Iraq will remain linked to neighbouring Iran and its conflict with the United States. Through its Iraqi militias, Tehran is tightening its grip on the Iraqi security apparatus. In the year ahead, several influential positions in the security apparatus will likely be filled by individuals linked to these militias. The Badr group has secured a dominant position for itself in the Iraqi interior ministry, and parts of the civil service at large is likely to undergo a similar 'militiafication'.

The Kurdish independence project has been put on hold, and in the year ahead the Kurdish parties will increasingly become integrated into Baghdad's political sphere. The Barzani family, which dominates the KDP, the largest Kurdish party, considers this necessary in order to retain power in the Kurdish region in Iraq following the defeat in the 2017 referendum.

«In connection with the province elections in April 2020, unrest is likely in areas such as Kirkuk and Mosul, in addition to Baghdad and southern Iraq.»

The Kurdish autonomous government relies on federal transfers, and wage payments from Baghdad are extremely important to the region's stability. Budgetary and oil export agreements between Baghdad and Erbil will serve as pragmatic ad hoc solutions that are vulnerable to any changes to the political situation in the capital.

In connection with the province elections in April 2020, unrest is likely in areas such as Kirkuk and Mosul, in addition to Baghdad and southern Iraq. In Kirkuk, ethnic tensions between Kurdish, Arab and Turkmen groups could flare up. In Mosul, discontent with the lack of rebuilding and local politicians' links to Shia militias could trigger protests. In Basra, the election may prompt the protest movement to mobilise, with demands for larger budget allocations and greater autonomy.

Despite significant oil exports, structural weaknesses mean that the Iraqi economy remains vulnerable. The expenditure side of the government budget is growing as quickly as the oil revenue. The state has an inflated public sector and ownership of unproductive companies; large sums are also lost to corruption. There are limited funds for rebuilding in provinces such as Nineveh and Anbar. In addition, any significant fall in oil prices in the medium term could destabilise the country. Popular discontent with the lack of economic development and the corrupt political elite became apparent during the violent protests in



Protesters attack the U.S. embassy in Baghdad.

October 2019. The political system is not able to meet the demands of the populace, and 2020 will see fresh protests and periods of significant social unrest that will threaten Iraq's stability.

Iran Must Reduce Impact of U.S. Pressure.

The conflict between Iran and the United States has come to a head following the killing of the Iranian general Qassem Soleimani in early January 2020, which was perceived as a direct attack on the regime in Tehran.

Iran has responded to the United States' 'Maximum Pressure' campaign with a pressure campaign of its own, which follows two tracks: reduced compliance

with the nuclear deal and increased military pressure. Tehran has already gradually reduced its compliance with the nuclear deal, and in January it rejected all limitations on its enrichment programme. However, it has not withdrawn from the deal, and will continue to offer access to IAEA inspectors. Militarily, Iran has attacked military and civilian targets throughout the Middle East either directly or through allied militias. The purpose is to make it clear to the United States and its allies that Iran is willing to jeopardise security in the entire Middle East as long as the economic sanctions against it remain in place.

Tehran's strategic objective is sanctions relief, and it would likely be willing to work for a new deal with the United States in 2020. However, the regime fears ending up in a situation where the sanctions continue to work whilst negotiations with Washington fail to →

yield results. Tehran would therefore require sanctions relief or other trust-building measures from the U.S. side before coming to the negotiating table.

The regime's pressure campaign has a limited timeframe: Iran's economic situation will continue to deteriorate, and measures that reduce compliance with the nuclear deal will make it difficult to maintain the diplomatic line towards the deal's remaining parties. Should its campaign fail to yield results, Tehran's economic and political scope for action will diminish further in 2020. This increases the likelihood of it provoking a military escalation as a means of starting negotiations.

«Should its campaign fail to yield results, Tehran's economic and political scope for action will diminish further in 2020. This increases the likelihood of it provoking a military escalation as a means of starting negotiations.»

Meanwhile, Iran will seek to reap economic and security-related benefits from the influence it has secured in Syria and Iraq. In the economic sphere, the regime is exerting significant pressure on Damascus and Baghdad in order to secure advantageous deals, and in 2020 Tehran will step up its efforts to build infrastructure linking Iran, Iraq, Syria and Lebanon

closer together economically. Iran is likely to bolster its military deterrent by enhancing its allies' ability to target Israel, Saudi Arabia and U.S. bases in the region.

Should the sanction pressure remain in place, Iran's economic recession will continue in 2020. It will become increasingly challenging to uphold import subsidies on vital goods such as food and medicines, and most Iranians will experience a further decline in their purchasing power. Together with growing unemployment rates and conflicts regarding the distribution of Iran's limited resources, the recession will breed more social unrest. Popular unrest arose across much of the country following the government's cut in fuel subsidies in November 2019, and several hundred people were killed. Fresh unrest could break out due to the difficult economic situation. Although covert oil exports and trade with neighbouring countries are mitigating some of the negative economic impact, Iran needs to increase its cooperation with the outside world. The authorities are unlikely to be able to maintain stability in the country should the current economic pressure last for more than two to three years.

The economic situation and external pressure is moving Iran's political centre of gravity in a more conservative direction. The balance of power is likely to shift further in the conservatives' favour at the parliamentary elections in February 2020. If so, President Rouhani's successor following the presidential election in 2021 will be more likely to pursue a more confrontational foreign and security policy line. Such a shift would make negotiations with the United States and Europe even more challenging.



Iranians protest against higher petrol prices in the capital of Tehran on 16 November 2019.

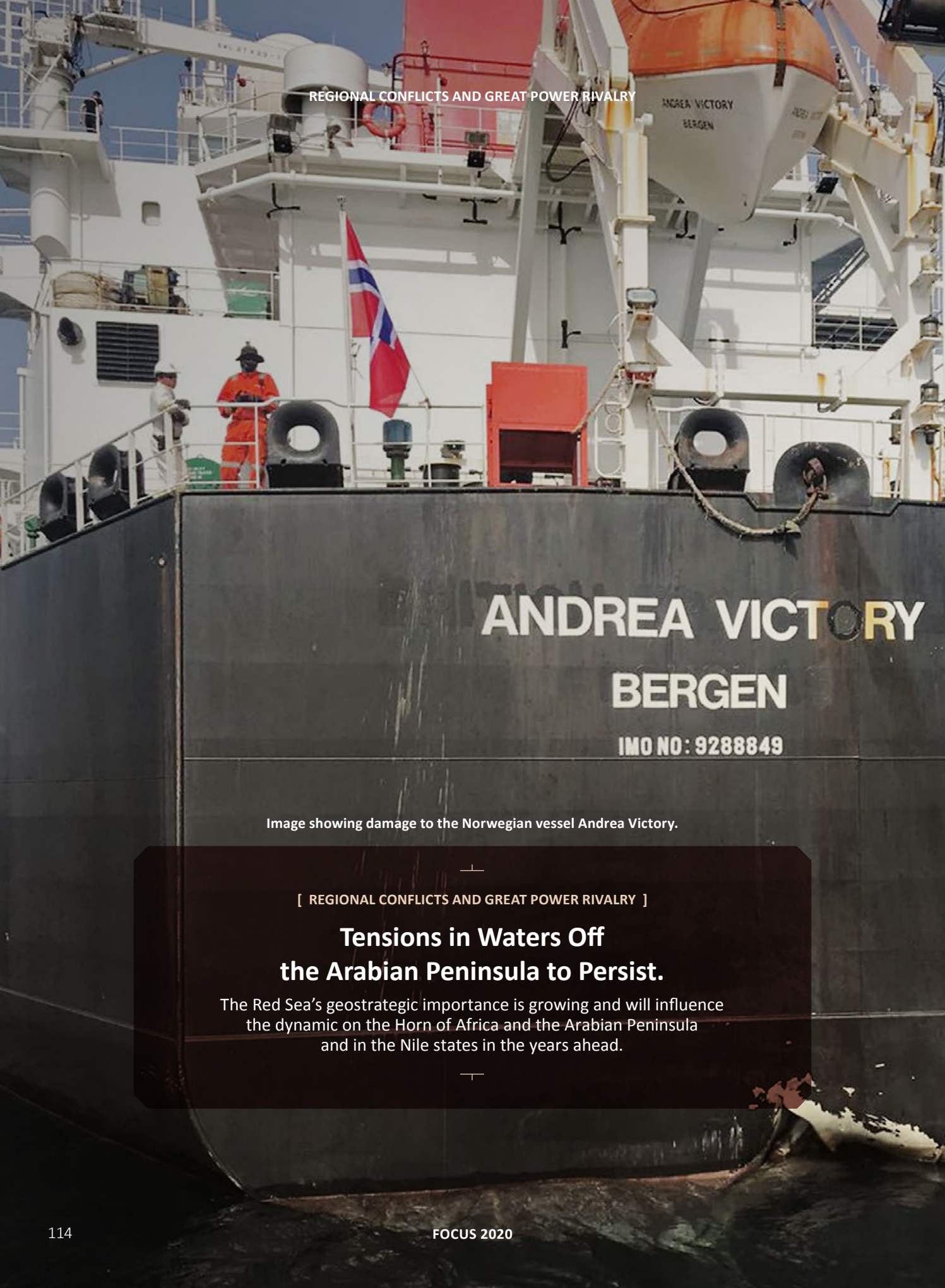


Image showing damage to the Norwegian vessel Andrea Victory.

[REGIONAL CONFLICTS AND GREAT POWER RIVALRY]

Tensions in Waters Off the Arabian Peninsula to Persist.

The Red Sea's geostrategic importance is growing and will influence the dynamic on the Horn of Africa and the Arabian Peninsula and in the Nile states in the years ahead.

«Over a period of several years, Iran has acquired the ability to block petroleum exports through the Strait of Hormuz and has demonstrated its ability to attack infrastructure on the Arabian Peninsula.»

In parallel, the pattern of petroleum exports from the Gulf is changing. A large proportion of petroleum-related shipping through the Strait of Hormuz is headed for Asia. China, India, South Korea and Japan receive nearly two thirds of all oil exports from the Persian Gulf, and oil deliveries to these countries would be particularly affected by larger disruptions in traffic. Over a period of several years, Iran has acquired the ability to block petroleum exports through the Strait of Hormuz and has demonstrated its ability to attack infrastructure on the Arabian Peninsula.

Part of Iran's response to the U.S. 'Maximum Pressure' campaign is a campaign intended to demonstrate willingness and ability to complicate or block the transport of petroleum products from the Gulf states. Insofar as the U.S. and Iranian pressure campaigns continue in 2020, the threat to petroleum-related shipping will remain high in the Persian Gulf, the Gulf of Oman and the Strait of Hormuz, while the world powers are likely to increase their military presence in the area.

There is significant growth potential in the Nile states and on the Horn of Africa, particularly due to the infrastructure plans linked to the Chinese Silk Road strategy. For the petroleum-exporting Gulf states, strategic positioning in the Red Sea and along the Nile will be important, and the Gulf states bring

sorely needed capital to the authorities in Khartoum and Mogadishu. Meanwhile, their support reduces the local authorities' political scope for action and exposes the countries along the Red Sea and the Nile and those on the Horn of Africa to intervention from the Gulf states' rivals.

Increased External Involvement in Libya, Yet No One Will Gain Military Advantage.

Libya is in the throes of the struggle between Khalifa Haftar's Libyan National Army (LNA) and the Government of National Accord (GNA), supported by a number of militia groups. The parties are fighting around the capital of Tripoli, along the coast of western Libya and in certain areas inland. The military situation is deadlocked, and the political process has been the same for a long time now. The prospect of peace and reconciliation among the key political and military actors is limited, as is the prospect of national elections or other important steps in a state-building process.

External intervention is keeping the armed conflict going. Thus far, Haftar and the LNA have received the most substantial external support, primarily from Russia, the United Arab Emirates, Saudi Arabia and →



Haftar's forces have hit a private building in Tripoli.

Egypt. In the summer and autumn of 2019, Russia increased its military support and secured oil infrastructure in the eastern part of the Gulf of Sidra for Haftar. However, Russia is unlikely to involve itself sufficiently to increase the LNA's military foothold in the Tripoli area.

On the other side of the conflict, Turkey and Qatar have increased their support to the GNA. Increased military support from Turkey could intensify the conflict, but could also create scope for fresh talks by evening out the relative strength of the two parties. The likelihood of a negotiated solution would also increase should Turkey and Russia succeed in facilitating a diplomatic dialogue regarding Libya's future, modelled on the Astana framework used to mediate the conflict in Syria.

Should Haftar secure a major military victory over the GNA, it is unlikely that he would be able to install himself as political leader in control of Tripoli and other major areas in western Libya. The GNA and its allied militias, for their part, will not be able to secure a permanent victory over the LNA in the year ahead.

Trust in the international community has worn thin among the Libyan populace, and the hostilities are likely driving further discontent with the UN. Revenue from Libya's oil production continues to be distributed among the general public, yet this practice would become threatened should the conflict last for much longer. The enduring armed conflict is reducing people's living standards and making it harder to introduce measures to stabilise the country.

The hostilities in Libya have attracted actors from neighbouring countries, primarily insurgents and mercenaries from Sudan and Chad, who have entered southern Libya. Any further destabilisation of the already lawless areas in the south could spill over to the Sahel countries and lead to heightened tension and violence among the population groups

in the areas bordering the Sahel. Libya's neighbours Niger and Chad would be vulnerable to such developments. The support received by the LNA from foreign mercenaries inland in Libya helps it maintain pressure around Tripoli.

«Any further destabilisation of the already lawless areas in the south could spill over to the Sahel countries and lead to heightened tension and violence among the population groups in the areas bordering the Sahel.»

The fight for Tripoli has allowed militant Islamist groups to once again increase their activity inside Libya, with ISIL-Libya conducting several attacks in the country in 2019. Although the group's activity has primarily been concentrated in the Fezzan region of south-western Libya for the past three years, it will be seeking to exploit the current situation in order to grow stronger in 2020 and to once again pose a distinct threat to the more populous areas of Libya.

Militant Islamism Could Spread From Mali and the Sahel to West African Coastal States.

The security situation in Mali has continued to deteriorate over the past year. Ethnic conflicts, militant Islamism and military operations create a high level of violence and exacerbate the humanitarian situation. →

The authorities have lost further ground to militant Islamists in northern and central Mali and they are unable to stop ethnic conflicts in central parts of the country. The conflicts are growing in complexity and geographic scope, and it is becoming harder and more dangerous for the UN and other international actors to operate in the country.

It has been four years since the authorities and the largest militias agreed to a deal which would form the basis for peace in northern Mali. It has proven extremely difficult to implement the deal; the key components, security sector reform and integration of militia soldiers in the army, have barely begun. Trust between the parties is very low and is further reduced by struggles for territorial control and influence. The peace process is likely to continue in 2020, but without any notable results. The level of conflict between the parties is likely to increase when the militia soldiers are to be integrated into the army, with new ceasefire violations a likely consequence.

The volatile security situation combined with weak government control offers militant Islamist groups significant scope for action. Both al-Qaeda in the Islamic Maghreb (AQIM) and a local ISIL sub-group known as ISIL in the Greater Sahara (ISGS) have their core areas in Mali. The groups cooperate and coordinate their activity in a growing area of operation in central Mali and the border areas between Mali, Niger and Burkina Faso.

The conditions are ripe for militant Islamism to spread to the Sahel states and West African coastal states in 2020. The northern parts of Cote d'Ivoire, Ghana, Togo and Benin, which border Mali, Burkina Faso and Niger, are potential new theatres for militant Islamist groups. Like in the Sahel, these areas are characterised by weak governance, poor socio-economic conditions, high unemployment among young

people and porous borders. These factors facilitate radicalisation and militant Islamism. In the years ahead, as a consequence of militant Islamists' gradual spread southwards, the threat to local security forces and Western NGOs in the Sahel and countries bordering the Sahel is likely to increase, as is the kidnapping threat.

«The volatile security situation combined with weak government control offers militant Islamist groups significant scope for action.»

The countries in the Sahel are vulnerable to influence from neighbouring states. In 2019, Algeria and Sudan saw major political change; in a region that has undergone sweeping changes since 2011, these two countries have until now represented continuity and relative stability. Their large and efficient security services have quashed militant Islamism within their own borders and border areas. Whether the new governments in Algeria and Sudan will be able to maintain border security and internal stability in a similar way could be of great significance to the future of the Sahel.

Increased Positioning in Delicate Afghan Peace Process Fraught with Uncertainties.

Over the course of 2020, the United States and the Taliban are likely to resume talks and agree on a U.S. →



Akli-Ikman Ag Soleiman commands 400 fighters linked to the MNLA, the National Movement for the Liberation of Azawad, in south-eastern Mali.



Afghan security forces on patrol in Helmand, Afghanistan.

force withdrawal in exchange for counter-terrorism guarantees. A new round of talks is expected to be based on the 2019 draft agreement and may proceed quickly. Only when a deal has been secured will the Taliban involve itself in intra-Afghan peace talks. The movement has a clear ambition of assuming a leading role in the process. It will also demand that the government step down in favour of a new constitution and a new form of government. The Taliban wants a supreme Islamic emirate based on sharia law and to bar the West from dictating the new direction of the country.

The Afghan government, GIROA, will oppose talks in which it is not the most influential Afghan party. The president will use the election victory and renewed Western support to argue that the Taliban must respect the constitution and accept a GIROA-led peace process; the Taliban will not accept this. However, the new Afghan leadership will have to heed the wishes of the United States and the international community in order to secure continued military and economic support, which is crucial to GIROA's survival. Western positions are therefore expected to play a decisive role in the peace process.

At the start of 2020, the parties stand far apart, and the domestic lines of conflict continue to harden. Without agreement, the likelihood of civil war and the loss of international aid increases. Civil war is also a likely scenario should the United States withdraw its forces from Afghanistan without reaching a deal

«The Taliban's main bargaining chip vis-à-vis the United States and the Afghan authorities is its considerable military capability and support among much of the populace.»

with the Taliban which stipulates an inclusive intra-Afghan peace process. The conflict between the United States and Iran is another source of great uncertainty in the region. If Afghanistan is pulled into that conflict, the parties' fundamental positions may change, the peace process could become delayed and the level of violence in the country could increase further.

The Taliban's main bargaining chip vis-à-vis the United States and the Afghan authorities is its considerable military capability and support among much of the populace. 2019 was the eighth year in a row in which the Taliban strengthened its military and civilian position at the expense of the government and the security apparatus, ANSF. Recently, ANSF has become more reliant on Western militaries, which largely finance and lead the military effort against the Taliban and other insurgent networks. Special forces carry out most of the offensive operations, and this is where the dependency on Western military support is the greatest. The army and the police have been →

«At the start of 2020, the parties stand far apart, and the domestic lines of conflict continue to harden. Without agreement, the likelihood of civil war and the loss of international aid increases.»

given a lower priority than the special forces, which has resulted in higher casualty rates and low morale.

The regional actors have strong and at times opposing interests in Afghanistan, yet in 2019 all the neighbouring states were positive to a force withdrawal. Khalilzad, the special envoy, has travelled extensively in the region in order to garner support for U.S. talks with the Taliban. He has spent a lot of time on Pakistan, Russia and China in particular. The two latter countries have been put forward as guarantors when the deal is signed. However, the escalated conflict between the United States and Iran is a complicating factor for Khalilzad.

In parallel with a controlled force withdrawal, the United States would retain a residual force capable of conducting counter-terrorism operations against al-Qaeda and the Islamic State Khorasan Province (ISKP). Such operations would take place in agreement with the Taliban, as an extension of the Taliban's pledge that Afghanistan never again be used as a base for planning and conducting attacks on the West. The peace talks between the United States and the Taliban represent a dual-edged sword for ISKP; on the one hand, it presents a recruitment opportunity for discontent and irreconcilable Taliban soldiers, whilst on

the other a deal between the two parties could lead to a more targeted effort against ISKP itself, provided good conflict-preventing mechanisms are in place.

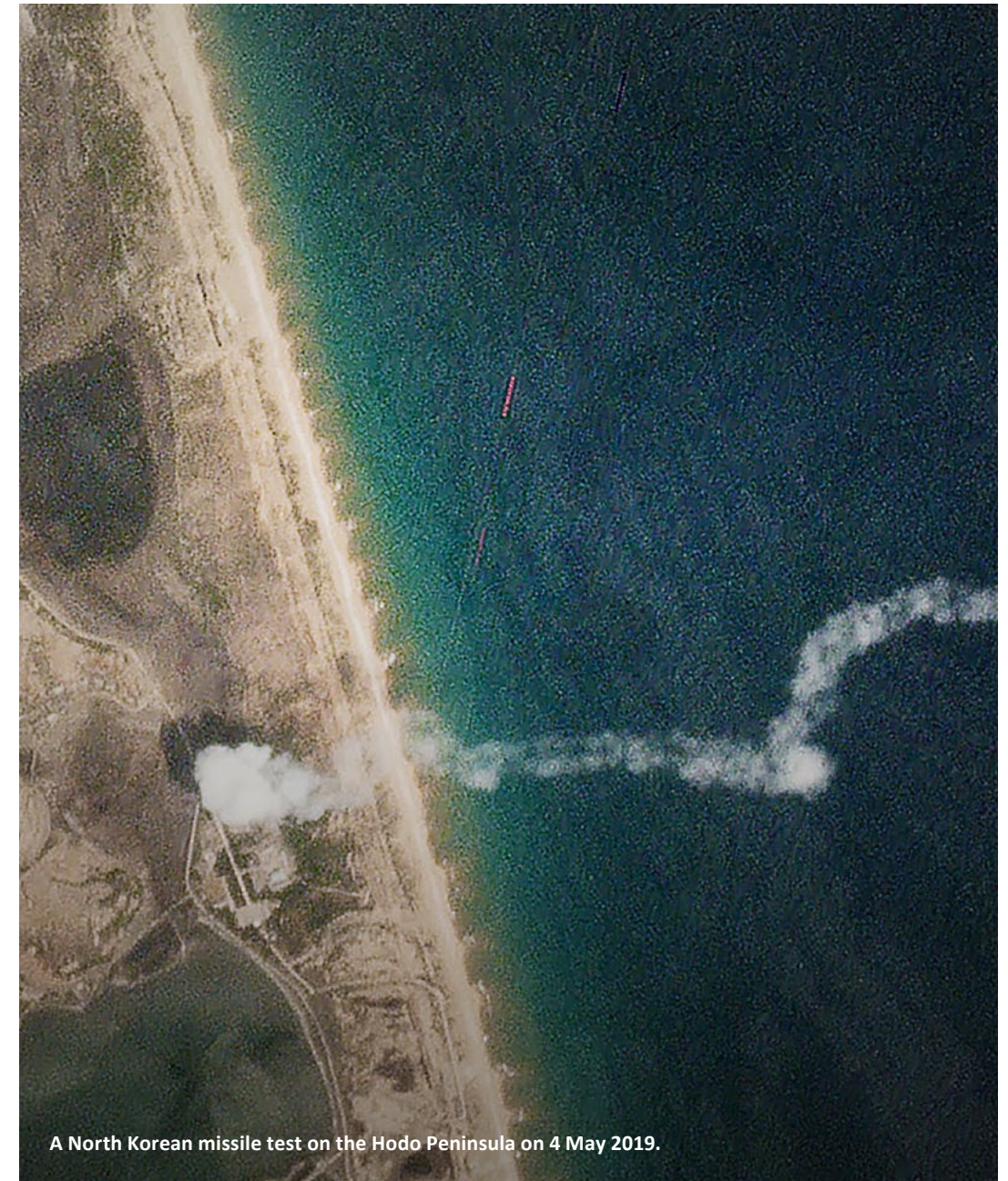
Confident North Korea Consolidates Nuclear Power and Seeks Cooperation with China and Russia.

North Korea will adopt a less conciliatory tone towards the United States in 2020, thereby forcing underlying lines of conflict on the Korean Peninsula to the surface. The rapprochement between Pyongyang and Washington concealed rather than resolved these lines of conflict.

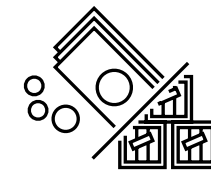
2019 was a productive year for Kim Jong-un. Several countries are increasingly treating North Korea as an established nuclear power, and Kim has been able to further develop nuclear weapons and missiles in peace and quiet. He has also expanded his foreign policy scope for action by strengthening links to China primarily, but also to Russia.

However, neither the summits with Trump in Hanoi and Panmunjom nor the working-level negotiations in Stockholm fulfilled North Korean hopes of U.S. sanction relief. In accordance with the domestic policy expectations of economic growth Kim himself has created, sanctions relief was high on the foreign policy agenda in 2019.

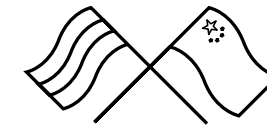
The authorities continue to prioritise the survival of the state and the regime above all else. In the North Korean security policy calculus, nuclear weapons remain much more reliable than security guarantees from neighbouring countries and the United States. It is therefore highly unlikely that Kim Jong-un would be willing to relinquish the ability to wage war with →



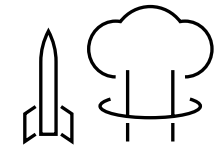
A North Korean missile test on the Hodo Peninsula on 4 May 2019.



North Korean hopes of U.S. sanctions relief thus far remain unfulfilled.



Kim Jong-un will be promoting a foreign policy agenda which also serves Chinese and Russian interests.



North Korea will continue to develop its arsenal of warheads and delivery systems.

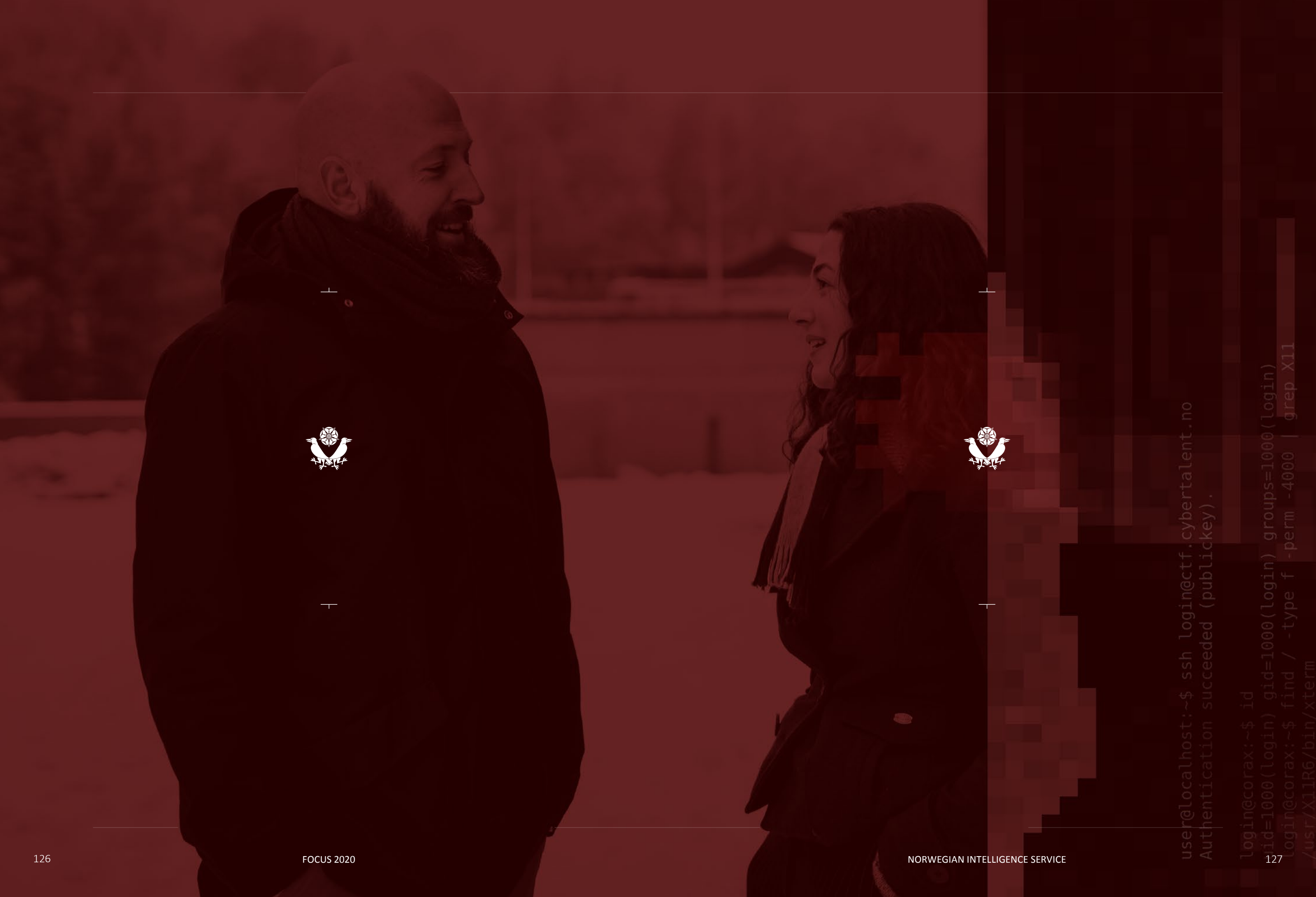
«Kim will also be preparing the ground by promoting a foreign policy agenda which serves Chinese and Russian interests.»

nuclear weapons. Quite the opposite: he will want to consolidate North Korea as a nuclear power and secure sanction relief in the process. To this end, he employed a more confrontational rhetoric throughout 2019, resumed flight testing of missiles and publicly inspected and referred to North Korea's strategic capabilities.

The most prominent aspect of this process has been North Korea's flight testing of a double-digit number of ballistic missiles from a range of new short- and intermediate-range systems. The tests show that, in parallel with its diplomatic approaches, North Korea has invested in missile technology advances. By limiting the military testing activity to regional capabilities, Pyongyang has put pressure on

Washington via the latter's regional alliances, whilst simultaneously minimising the risk of negative U.S. responses and keeping the door open to talks. Kim will likely be closing that door in 2020, in order to prioritise cooperation with China in particular, but also with Russia, in an effort to mitigate the impact of the sanctions. He will also be preparing the ground by promoting a foreign policy agenda which serves Chinese and Russian interests. At the top of this agenda will be efforts to reduce U.S. presence and influence in East Asia.

In parallel, North Korea will be consolidating its nuclear deterrent by evolving its arsenal of warheads, delivery systems and associated technology. Much of this activity will be covert, yet the more high-profile military activity that was resumed in 2019 is likely to be stepped up as well. Possible escalating measures include coordinated firing exercises involving regional missile systems, attempts at putting satellites into orbit and flight testing ballistic missiles capable of hitting targets on American soil. There is also a chance of a North Korean nuclear test.



```
user@localhost:~$ ssh login@ctf.cybertalent.no  
Authentication succeeded (publickey).
```

```
login@corax:~$ id
```

```
uid=1000(login) gid=1000(login) groups=1000(login)
```

```
login@corax:~$ find / -type f -perm -4000 | grep X11  
/usr/X11R6/bin/xterm
```




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