



NORWEGIAN
INTELLIGENCE SERVICE

FOCUS 2021

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



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

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

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

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

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INTRODUCTION

The most striking aspect of the threat environment Norway faces at the beginning of 2021 is the sheer scope of it. Traditional security challenges have changed, while new ones emerge. The combination of different means – civilian and military, open and covert, in the physical and digital domain – have given rise to a challenging and complex threat environment.

As you will see when you read Focus, the superpowers use a variety of means, and the security challenges span across many sectors, blurring the distinction between state security and public safety. Especially in the cyber domain, the means are used continuously, adapted to the situation and the level of tension. This emphasises the need for close cooperation between Norway's secret services, police, defence and other authorities.

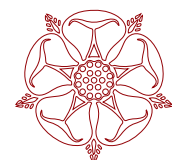
In the autumn of 2021, elections will be held for the Norwegian Parliament and the Sami Parliament. In recent years, we have seen foreign states trying to influence democratic processes in several countries. It is crucial that we manage to detect any attempts to interfere in the elections.

In 2020, for the first time since 2017, we saw an increase in the number of Islamist terrorist attacks against targets in the West. This is worrying. In addition, tension is increasing between the east and the west, while international cooperation has diminished. This is the situation Norway currently faces as a non-permanent member of the UN Security Council.

Focus 2021 is the eleventh annual assessment published by the Norwegian Intelligence Service (NIS). NIS's mission is to warn against external threats. It is not our mandate to assess all the positive aspects and opportunities of international cooperation. As in previous years, the purpose of this report is primarily to describe the threats to Norway and Norwegian interests. This means that NIS sheds light on the development and situation in countries and regions inasmuch as they are relevant to the threat situation.

Vice Admiral Nils Andreas Stensønes
Director Norwegian Intelligence Service

Editing concluded on 26 January 2021

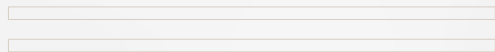




SUMMARY

Foreign intelligence and influence activities remain a major threat to Norway and Norwegian interests. Particularly the parliamentary elections in the autumn of 2021 could be subject to influencing attempts.

Russia has carried out influence operations during elections in both Europe and the United States, by means such as network operations, provocations and the coordinated spreading of disinformation. The disclosure of these tactics has not led to any change in behaviour. There are attempts also from China to influence political decision-making processes in Western countries. The use of economic instruments of power, such as incentives, pressure and punitive actions, is extensive, and the use of disinformation has increased during the covid-19 pandemic.



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Norwegian Intelligence Service
SUMMARY
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- SUPERPOWER RIVALRY
There is less international arms control, and military activity in the near areas of Norway is increasing.



- DIGITAL THREATS
Intelligence operations and influence activities are some of the greatest threats to Norway in 2021.



- TERRORISM
ISIL and al-Qaeda are expanding outside their traditional core areas. The terrorist threat from right-wing extremists is rising.



Key arms agreements are expiring, and an arms race is on the horizon.



Both Russia and China are increasing their presence in the High North.



Several regional conflicts with international implications will persist in 2021.

In 2020, the number of Islamist attacks in the West increased for the first time since 2017, largely due to the caricature controversy, which flared up again in September last year. Superpower rivalry has resulted in less coordinated efforts against international terrorism. At the same time, both ISIL and al-Qaeda are expanding outside their traditional core areas. The short-term terrorist threat in Europe will mainly stem from individuals and loose-knit networks with a varying degree of ISIL-affiliation. The terrorist threat will increasingly emanate from individuals who have been released after serving sentences for terrorist acts, or persons who have been radicalised in prison.

The threat from right-wing extremists is on the rise, and the current violent right-wing extremism is increasingly transnational. While right-wing extremists have previously been driven by nationalism, a growing number wants to unite right-wing extremists across country borders to defend 'the white race'. Jointly, these trends could create a more complex threat environment of international terrorism in the years to come.

The rivalry between the superpowers has resulted in a setback for arms control and for international

cooperation in general. Technological advances have made it possible to develop weapons that are not covered by current agreements. A new and effective arms control regime relies on the superpowers' ability to make agreements that reflect the new realities of security policy, military and technology. For Norway and its allies, it has become more difficult to protect knowledge that can be used to produce weapons of mass destruction and to regulate the export of technology for military use.

« The current geopolitical situation leads to increased military activity in the near areas of Norway. »

The current geopolitical situation leads to increased military activity in the near areas of Norway. Russia considers Western activity in the High North as a threat to its military bases on the Kola Peninsula and to its national security. Russia's relations with the West show no signs of improvement, and Russian criticism has sharpened over the past year. The criticism is directed at the United States and NATO in



The FSB headquarters at Lubyanka Square, Moscow.



ISIL no longer has the same level of territorial control or access to Western foreign fighters. This photo is from the al-Hol refugee camp in north-eastern Syria, which shelters families of ISIL-affiliated foreign fighters.



President Vladimir Putin at a teleconference during the opening of the covid-19 clinics of the Russian Ministry of Defence, 15 September 2020.



China bolsters its capability to operate in the Arctic. Xuelong 2 ('Snow Dragon 2') is the first Chinese-made icebreaker.



particular. In this picture, Norway is perceived more as a NATO country than a neighbour.

Russia is accelerating the development of military bases around the Barents Sea, on the Arctic islands and at the coastline along the Northeast Passage. Russia's extensive weapons testing in the High North will continue, and the risk of serious accidents remains considerable.

The development of Russia's military force since 2000 is remarkable. The Russian military forces have been substantially modernised and now constitute a flexible and effective tool for Moscow. The armed forces will remain a high priority. Despite its economic difficulties, Russia spends huge resources on developing new and advanced weapon systems for the next generation of defence. Russia also develops its military power in space, on the seafloor and in the digital domain. Its targets are not just military; they also include civilian functions and structures.

At the start of 2021, Russia faces great domestic challenges as well. Both the general population and the establishment feel the economic consequences of the covid-19 pandemic and the drop in oil revenues, but there is little will to make any structural changes. The government will seek to avoid any loss of influence in what it defines as the near abroad and continue to watch over the political development in Belarus, South Caucasus and Ukraine.

Furthermore, Russia will continue to spend considerable resources on maintaining its established position in the Middle East. Russia has acquired a position of considerable influence in both Syria and Libya and is showing its ability to balance relations with the rival powers of the Middle East.

China prepares for a more conflictual coexistence with the outside world. The government in Beijing is pointing out that there are great changes in the

balance of power in the world, and this presents opportunities as well as challenges. For China, it is important to strengthen its position in the economic, political and military rivalry with the United States. China wants to reduce its own vulnerability by becoming less reliant on global markets.

China is becoming a global power in terms of high technology. Chinese companies are already a world leader in surveillance technology, and they export smart city systems and smart policing systems based on artificial intelligence. In the race to control and influence the global digital infrastructure, China is playing an increasingly important role in the development of technological standards.

« Beijing is emphasising that the balance of power in the world is shifting, and even though a more unstable international situation poses challenges, it also offers strategic opportunities. »

Chinese direct foreign investments have become fewer but more targeted in recent years. Investments are increasingly following China's strategic priorities, above all the ambition of technological self-reliance. Many Western companies are in a difficult economic situation because of covid-19, and China still has considerable opportunity to acquire shares and debt.

Xi Jinping's position of power within the Communist Party of China is unchallenged. China remains an authoritarian state and steps up the process of military modernisation. A stronger military force is able to support China's global interests and its ability to project power.





North Korea parades a new intercontinental ballistic missile during the celebration of the ruling party's 75th anniversary on October 10 2020.



President of Afghanistan, Ashraf Ghani (centre), former president Hamid Karzai (right) and current Chairman of the High Council for Reconciliation, Abdullah Abdullah (left) at the live broadcast of the signing of the Intra-Afghan Peace Agreement, 29 September 2020.



In the Middle East, the rivalry will continue. The development of the situation in the region clearly illustrates the consequences of superpower rivalry for international stability. Three blocks of interest have formed in the region: Turkey is one, the United Arab Emirates, Egypt and Saudi Arabia is another, and Iran and its allies is a third. Especially the rivalry between Turkey and the Arab States is increasing.

Iran has gradually stepped up its nuclear programme. For Tehran, negotiating with the new presidential administration of the United States is the only realistic solution to the country's economic crisis. Without a diplomatic breakthrough, the conflict between the two countries could have even greater consequences for the stability of the region in 2021 than in previous years.

The conflicts in Syria, Libya, Yemen and Mali will not be solved in 2021. In the Sahel and West Africa, state structures are weakening and militant Islamism is spreading, resulting in a growing destabilisation of the region. The covid-19 pandemic exacerbates the economic challenges.

The United States is scaling down its engagement in the Middle East and Africa, which gives Russia and China more scope for action. Russia is emerging as a reliable partner to authoritarian regimes in the region. China's involvement has primarily been driven by the need for energy and new markets, but its rivalry with Washington could make China position itself more visibly in the region.

North Korea remains a nuclear power and maintains its expertise, research and production in the missile programme and the nuclear programmes. Pyongyang sees no reason to slow down the programmes, and the regime could have around ten simple nuclear weapons.

In Afghanistan, an agreement between the Taliban and the United States stipulates the withdrawal of international forces by May 2021. In parallel, there are ongoing inter-Afghan peace negotiations, but the gap between the factions is wide. Should the international forces pull out before a political agreement is in place, there is a risk of the peace process collapsing – and of civil war.

The tendencies described above illustrate the complexity of the international threat environment. The use of military force as a tool is not outdated, but it is changing. Our near areas are testing grounds for new weapon systems, but also where NATO forces and Russian military forces meet. The significance of the digital domain continues to increase. More applicable forms of military power and the combined use of means make the distinction between state security and public safety less obvious. As international cooperation seems to lose ground, the threat environment Norway faces grows even more complex. □

« More applicable forms of military power and the combined use of means make the distinction between state security and public safety less obvious. »



INTELLIGENCE, INFLUENCE AND THREATS IN THE CYBER DOMAIN

Digital solutions have transformed daily life and become an intrinsic part of our lives. This fundamental change has also made us more vulnerable.

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Norwegian Intelligence Service
INTELLIGENCE, INFLUENCE AND THREATS IN
THE CYBER DOMAIN
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RUSSIA

MOCKBA
★



- DIGITAL THREATS

Network operations are used for intelligence purposes, but also for destructive operations of sabotage and deterrence.

BEIJING
★

CHINA



- FOREIGN INFLUENCE ON ELECTIONS

In several countries, elections have been subject to network operations and disinformation campaigns.



- DISINFORMATION

Russia and China use disinformation to exert influence, and to generate discord and uncertainty.

Foreign intelligence and influence activities aimed at both the public and the private sector remain a considerable threat to Norway and Norwegian interests. Russia and China pose the greatest threat. Both countries have political systems with strong links between political and economic processes, the state and the private sector, and the civilian and military spheres. In all of these sectors, the interference from intelligence and security services is significant. In recent years, their expertise and technological scope for action have grown, and the branches of government are more capable of applying several measures in a coordinated way. During the covid-19 pandemic, network operations have become an increasingly important method for collecting information.

« Elections in other countries have been subject to influence activities in the form of network operations, provocations and coordinated spreading of disinformation. »

The intelligence threat is affecting a growing number of sectors. Information regarding Norwegian policy formulations, particularly relating to defence, foreign affairs and security, is of continued interest. There is similar interest in the High North, Svalbard, the sectors of healthcare and energy, and in knowledge that could support civilian and military development of technology. Information on contact networks and internal disagreements in Norwegian politics and Norwegian companies has intelligence value, as this can be exploited in future operations.

In addition to overt attempts to influence other states' political decision-making processes by means

of diplomacy and negotiations, certain states are seeking to sway decision-making processes via covert influence operations. Russia has carried out influence operations during elections in both Europe and the United States. Spreading disinformation is an established operation method of Russian influence actors. China also attempts to influence political outcomes and decisions in Western countries.

Focus 2021 is published in an election year. The Norwegian parliamentary election and the Sami parliamentary election scheduled for 13 September 2021 could be subject to influencing attempts. Elections in other countries have been subject to influence activities in the form of network operations, provocations and coordinated spreading of disinformation. More limited initiatives could include biased news stories and the spreading of disinformation in social media.

Non-permanent members of the UN Security Council are of special interest to the superpowers. Norway's membership in 2021–2022 is likely to increase intelligence activities that seek to acquire knowledge on various Norwegian political stands.

The significance of the cyber domain

Russian and Chinese intelligence and security services are especially active against Norway and its allies in the cyber domain. The actors have an advanced set of tools and methods at their disposal, and the way they operate indicates that the cyber domain has economic priority. Both countries carry out network operations for intelligence purposes, and they likely have the ability to carry out destructive operations of sabotage and deterrence.

The network operation against the Norwegian Parliament in 2020 clearly showed that the intelligence →



Gathering in support of the US President at the time, Donald Trump, at Marienplatz in Munich, 29 May 2020.

Fact Box #01
Terminology

■ Intelligence and influence

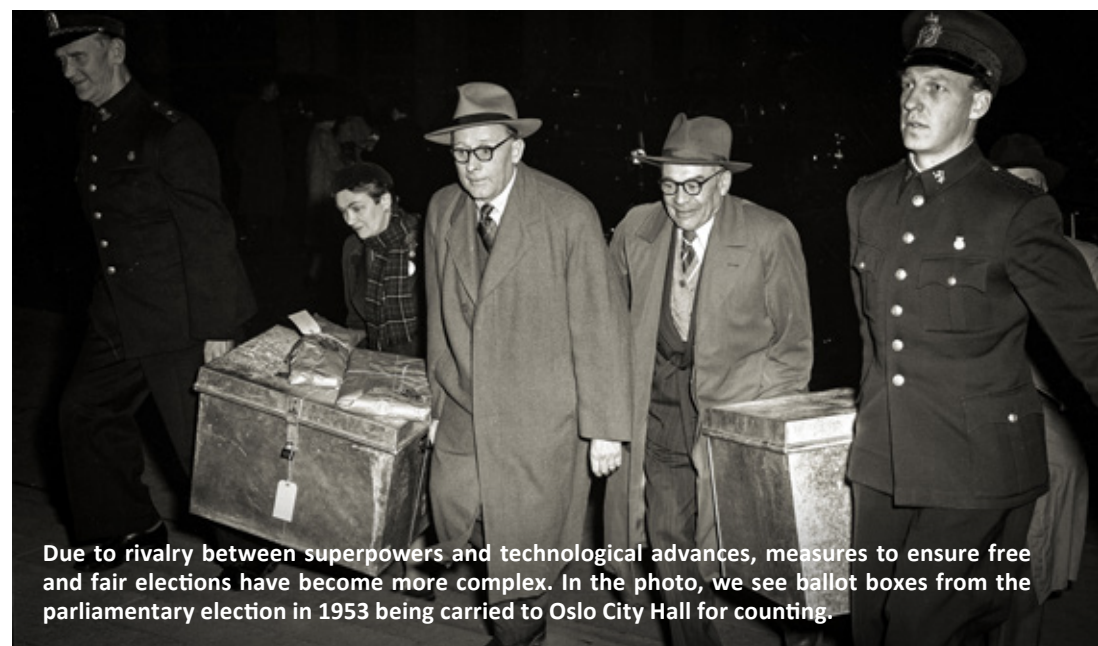
In NIS's threat assessments, 'intelligence' is defined as the result of state-sanctioned collection, analysis and assessment of data and information, obtained overtly or covertly and compiled to provide an advantage in decision-making processes.

'Influence' is defined as overt or covert campaigns, operations and activities, often without the use of military force, in order to change attitudes, decisions or outcomes in another country. States also carry out intelligence operations to facilitate influencing in the future.



« The use of disinformation has increased during the covid-19 pandemic. »

Image: The anti-lockdown protest in London on 5 November 2020 was held at the same time as the annual 'Million Mask March'.



Due to rivalry between superpowers and technological advances, measures to ensure free and fair elections have become more complex. In the photo, we see ballot boxes from the parliamentary election in 1953 being carried to Oslo City Hall for counting.

Fact Box #02
Terminology

■ Spearphishing

Spearphishing is targeted emails containing attachments or links that plant malware via compromised websites or by taking advantage of technical vulnerabilities. Such emails are adapted to relevant topics. Thus, they seem credible to the recipient.



The intelligence threat is affecting a growing number of sectors.



Spreading disinformation and conspiracy theories are established methods of operation.



Influencing often focuses on social media and news headlines.

threat to democratic institutions is indeed real. A threat actor gained access to the emails of several employees, but exactly what the actor was seeking is hard to determine. Such operations do not necessarily have immediate consequences, but the information could be used in future campaigns. In addition, they could undermine the population's trust in central institutions' management and protection of information.

« The network operation against the Norwegian Parliament in 2020 clearly showed that the intelligence threat to democratic institutions is indeed real. »

This operation illustrates that democratic institutions are vulnerable targets of intelligence operations. After this incident, the Norwegian authorities identified Russia as the actor responsible for the attack. This was the first time the Norwegian authorities made a political attribution.

In the cyber domain, espionage is the main threat to Norway and Norwegian interests from state actors.

In order to collect information, state actors are continuously trying to gain access to systems used by Norwegian authorities and companies. Sometimes they seek specific information, but in many cases, they only want to test which systems and what information they are able to access. Although this information and access might not be useful right now, it could be in the future.

A network operation consists of several stages. First, the actor identifies systems it wants access to. Access may be established by taking advantage of vulnerabilities, for instance by *spearphishing* with emails that contain malware, or by guessing passwords. When access is established, the actor will secure it by installing a backdoor in the system. Then, the actor seeks broader access, such as administrator rights, in order to operate freely within the system. The malware installed establishes contact with an external command and control server. The server enables the actor to communicate with the malware and receive information from the compromised system. State actors are continuously attempting to compromise Norwegian servers in order to incorporate them into their digital infrastructure.

It is challenging to uncover and trace the activity of state actors in the cyber domain. Having gained →



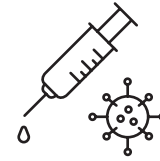
The elections for Norwegian Parliament and Sami parliament in the autumn of 2021 could be subject to influencing attempts. The photo is from the Parliament's reconstruction of the old national coat of arms.



In the cyber domain, espionage is the main threat to Norway and Norwegian interests.



State actors, amateurs and criminals are using tools and malware that are widely available.



The covid-19 pandemic has made network operations more important for collecting information.

experience and expertise from operations, the actors have become highly advanced. In addition, state actors, competent amateurs and criminals are all largely using tools and malware that are openly accessible. This makes it challenging to separate state and non-state actors. Moreover, the use of encryption, end-to-end encryption in particular, has enabled communication to be far more anonymous.

Russian and Chinese actors seek information to support government needs. Russian actors are continuously on the lookout for targets that manage information relevant to Norwegian policy formulation, especially with regard to defence, foreign affairs and security, the High North, Svalbard and the sectors of energy, oil and gas. Chinese actors seek information that can support China's own technology development, for both military and industrial purposes, as well as information on health and personal data. They also seek information on Norwegian policy-making relevant to Chinese interests. Information on contact networks and internal disagreements in Norwegian politics or in Norwegian companies has intelligence value, as it could expose vulnerabilities that an intelligence service could utilise.

During the covid-19 pandemic, network operations have become an increasingly important method for

collecting information. Attempts to steal information on vaccine development have been reported by authorities in several countries. Health-related information is already of high intelligence value. The crisis has affected human mobility, how working life is organised and how we interact. A major part of what goes on in society takes place online, and the possibility of collecting great amounts of information has increased. The actors use current events to try to lure their targets, for instance by using covid-19 as the topic in spearphishing emails.

The cyber domain is also important in Beijing's efforts to save China's reputation in relation to the covid-19 crisis. Beijing seeks recognition for its handling of covid-19 and for its international engagement, and attempts to sow doubt about the origin of the virus. Chinese actors use social media more systematically, both for influence and disinformation purposes. Via the influencing network the United Front, the Communist Party of China seeks to establish closer ties with social networks outside China. [↗](#)

Background Info
Interference in political processes
Sources

Interference in political processes

Ensuring free and fair democratic processes has become a complex undertaking. Russia and China both seek to influence election processes, using social media platforms to spread disinformation and raise the level of conflict in society.



Social Media @JustSOME2021

Facebook has attributed several posts, profiles and pages to the Russian military intelligence service GRU. Fake profiles were used to produce content for websites and to spread this content in social media. Russian troll factories were among those who produced and distributed posts on social media in order to influence the US election campaign in 2016. The posts reached 126 million users on Facebook, 20 million on Instagram and 1.4 million on Twitter.

In addition, Russian influence actors use 'whitewashing channels', where they produce or place content in different media channels, which are subsequently spread through social media such as Twitter and Facebook.

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Influence activities during the coronavirus pandemic @Antivaxer1349

Russian media have amplified existing conspiracy theories relating to biological warfare and vaccines, and spread fake news both domestically and abroad. Chinese state authorities have attempted to cast doubt on the origin of the virus, while seeking recognition for its domestic handling of the pandemic and its international involvement. Tools that are used include the spreading of fake news and harassment of critical voices on social media.

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Intelligence, influence and threats in the cyber domain
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Chinese influence activities in political processes @ElectionHighlights

China uses a variety of tools to influence democratic election processes, but until now, the most aggressive methods have been used in China's near areas. An important priority is to ensure that candidates with a favourable view of China acquire prominent positions.

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Forgeries @unReal1984

'Secondary Infektion' is an ongoing influence operation, which has caught the attention of several private security companies and research communities. The main activity consists in publishing fake and provocative stories, in many cases based on forged documents that appear to have been leaked. Then, these documents are spread in different languages to a variety of platforms. Recurring topics are Ukraine as a failed state, the United States and NATO as aggressors, a divided Europe, and elections.

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Provocations @Sticks&stones

In May 2019, two Russian nationals were found guilty of planning a coup in Montenegro in 2016. According to the sentence, the two Russians, in collusion with 11 other offenders, planned to take over parliament on Election Day, carry out an assassination of the prime minister and appoint a pro-Russian leadership in the country. Allegedly, the objective was to prevent Montenegrin membership of NATO.

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Economic measures @moneytalks2

As a result of political confrontations with other countries, Chinese state authorities have imposed import and export duties and quarantine regulations to prevent market access to China. These unofficial sanctions were used against several Western countries in 2020. The implementation of a new security law in Hong Kong and the social credit system for companies have given China more sanction authority vis-à-vis foreign companies than before.

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INTERNATIONAL TERRORISM

In 2020, the number of Islamist terrorist attacks in the West increased for the first time since 2017. One of the reasons was the caricature controversy, which flared up again in September 2020. ISIL, al-Qaeda and their supporters claim that Islam is under attack from the West, and encourage revenge against anyone who offends Islam.

The terrorist attacks in France in the autumn of 2020 and the revival of the caricature controversy will continue to inspire extremist Islamists in Europe to plan terror.



ISIL GLOBALLY

The loss of the caliphate has prompted a strategic shift within ISIL. The organisation is expanding its global presence.



RIGHT-WING EXTREMISM

Right-wing extremists exploit increased level of uncertainty in the population to radicalise people.



CARICATURES AND TERROR

Extremists use the caricature controversy as a pretext for terrorist attacks in the West.

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INTERNATIONAL TERRORISM
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The decrease in the number of Islamist terrorist attacks in the West prior to 2020 had to do with ISIL's reduced appeal and loss of propaganda tools. Nevertheless, there are still strong extremist Islamist networks in European countries. In 2021, the terrorist threat in Europe will primarily stem from European individuals inspired by international terrorist organisations and loose-knit networks with varying degrees of affiliation to ISIL. Any attack will likely aim for targets of symbolic value or places where many people gather. The terrorist threat will increasingly emanate from individuals who have been released after serving sentences for terrorist acts, or persons who have been radicalised in prison. Attacks organised by the core organisations of ISIL and al-Qaeda are less likely to happen.

Normally, Norway is not a prominent target for international terrorist organisations. Nevertheless, actions perceived as offensive to Islam and associated with Norway could amplify the threat to Norway and Norwegian interests. Acts perceived as offensive to Islam have historically been a central issue for militant Islamists and have previously motivated terrorist attacks in Europe.

ISIL intends to rebuild its ability to carry out major and more complex attacks in Europe. The affiliates in the near areas of Europe will play a key role. However, over the next years, it is unlikely that ISIL will carry out a campaign of attacks in Europe of a scale similar to that of 2015 and 2016. Currently, ISIL does not prioritise attacks against the West as much as it used to, and the situation has changed since then. ISIL no longer has extensive control over territories to plan and train for attacks and lacks the freedom of movement and access to Western foreign fighters it used to have.

In the past year, leading figures of both ISIL and al-Qaeda have been killed in counter-terrorism operations. Both of these organisations have robust

leadership structures and manage to replace the leaders they lose, at least for the time being. However, the pool of leaders is narrowing, especially in al-Qaeda, and if they continue to lose leaders at this rate, the ability to govern will diminish.

« Although militant Islamism still represents the most important terrorist threat to Norway and Norwegian interests, the threat from right-wing extremists is increasing. »

The loss of the so-called caliphate has compelled a strategic shift within ISIL. Syria and Iraq will remain the core areas of the organisation and are still part of the long-term ambition to restore the caliphate. At the same time, ISIL has strengthened the affiliates outside Syria and Iraq and is expanding its global presence. Al-Qaeda is also trying to strengthen its position in other parts of the world. Attacking targets of authority, such as security forces, infrastructure and local leaders is a key element in the strategies of both ISIL and al-Qaeda. The aim is to undermine the power of the authorities and people's trust in them. ISIL also strikes against Shia Muslims and Christians in order to amplify sectarian conflicts.

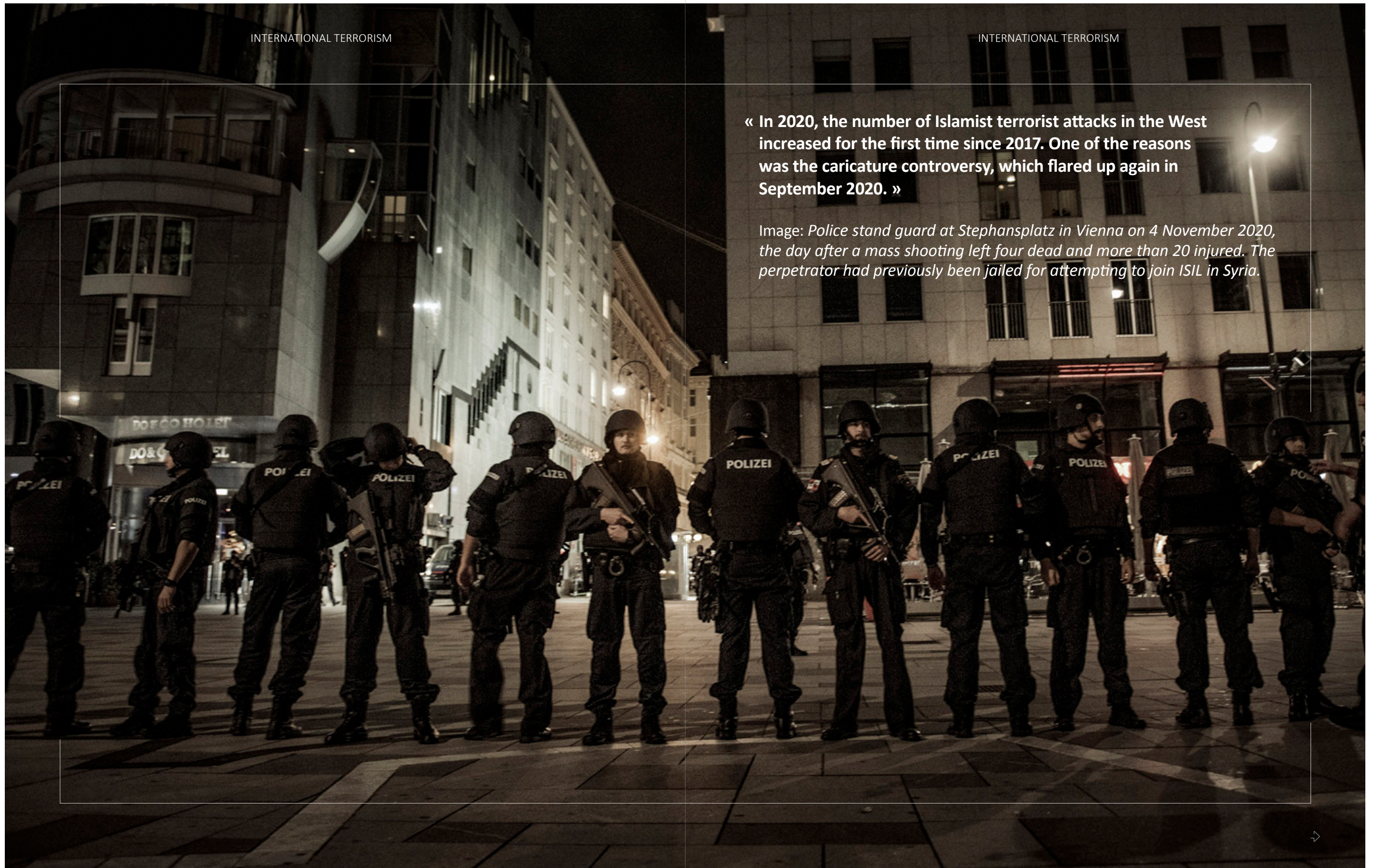
Both ISIL and al-Qaeda see considerable growth opportunities in Africa. In terms of military capabilities, both organisations already have their strongest affiliates in Africa: al-Qaeda has JNIM in the Sahel and al-Shabaab in East Africa, while ISIL has ISWA in West Africa. Poor governmental control combined with economic and political marginalisation of population groups provide ample conditions for recruitment and operational freedom for the groups. →



Mourners commemorate history teacher Samuel Paty, who was killed in a terrorist attack outside Paris on 19 October 2020, after he had showed caricatures of the prophet Mohammed.

« In 2020, the number of Islamist terrorist attacks in the West increased for the first time since 2017. One of the reasons was the caricature controversy, which flared up again in September 2020. »

Image: Police stand guard at Stephansplatz in Vienna on 4 November 2020, the day after a mass shooting left four dead and more than 20 injured. The perpetrator had previously been jailed for attempting to join ISIL in Syria.





Right-wing extremism is increasingly transnational, amplified by international networking and combat training. The photo is from a so-called 'White Man March' in Newcastle in the spring of 2015.



Although militant Islamism still represents the most important terrorist threat to Norway and Norwegian interests, the threat from right-wing extremists is increasing. Similarly, this terrorist threat is largely tied to individuals and loose-knit networks. Right-wing extremist subcultures online contribute to lowering the threshold for committing violence. The clearest example is the Christchurch mosque shootings in New Zealand in 2019. This attack was praised in right-wing extremist online forums and inspired several similar attacks. The offender did not belong to any organisation, but was loosely connected to digital right-wing extremist platforms, where the use of violence is encouraged.

During the covid-19 pandemic, calls for violence and propaganda praising right-wing extremist terrorists and attacks on civilians have spread to a growing audience. Right-wing extremist actors exploit the general feeling of uncertainty in order to promote conspiracy theories and alternative narratives. This radicalisation is likely to continue in 2021.

Right-wing extremists bolster their networks through international networking and combat training. Over the last years, violent right-wing extremism has become more transnational, with ideas that seek to unite across country borders. Recurring themes in

their descriptions of reality are that 'the white race' is threatened by massive immigration and systematic replacement of white people in Europe and the West, due to low birth rates among whites and high immigration from 'non-white nations'. While right-wing extremists previously were driven by nationalism, a growing number wants to join right-wing extremists beyond the realm of the nation-state, to defend 'the white race' as a whole.

« International right-wing extremists online have largely cheered the January storming of the United States Capitol in Washington. »

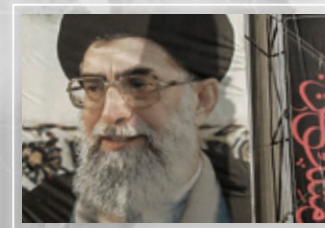
International right-wing extremists online have largely cheered the January storming of the United States Capitol in Washington. The incident will be used actively for recruitment purposes. The events in the United States are considered by several right-wing extremists in Europe as a prelude to a coming racial war in the West. Considering the transnationalisation of right-wing extremism, these events could inspire and mobilise groups and individuals across Europe. □



SUPERPOWER RIVALRY AND ARMAMENT

A technological arms race is on the horizon. Both the United States and Russia have signalled a desire to extend New START, the last remaining arms agreement regulating nuclear weapons. Nevertheless, there is less arms control and international cooperation in general due to the superpower rivalry.

Several countries have access to the technology that enables them to produce weapons of mass destruction. Moreover, certain countries choose to act unilaterally. For North Korea, nuclear weapons are the regime's guarantee of survival, while Iran has both the ability and the capability to produce nuclear weapons if the authorities so choose.



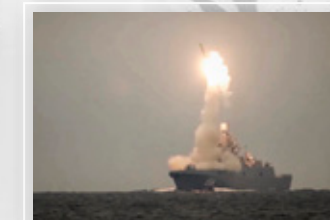
- BARGAINING CHIPS

Iran will threaten to produce nuclear weapons in order to push for negotiations.



- LIMITED AGREEMENTS

Arms control agreements that limit military capabilities are at odds with China's objectives.



- IMBALANCED CAPABILITIES

The United States, Russia and China are developing very different capabilities.

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Norwegian Intelligence Service
SUPERPOWER RIVALRY AND ARMAMENT
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Unlike during the Cold War, when the parties largely mirrored each other's capabilities, the United States, Russia and China currently have weapons with very different properties. Technological advances have enabled countries to develop weapons with properties tailored to their needs. Objectives could be to more easily penetrate missile defences, or to compensate for conventional inferiority. In addition, several of the new weapons are outside the scope of the traditional framework of arms control agreements. This is a trend that will continue.

« Although the number of nuclear weapons in the world has decreased, the situation is far more complex than during the Cold War. »

Although the number of nuclear weapons in the world has decreased, the situation is far more complex than during the Cold War. The nine countries that currently possess nuclear weapons have different doctrines and different types of weapons. China is reluctant to participate in negotiations on nuclear weapons. The country still only has around 300 nuclear warheads, a much smaller arsenal than the United States and Russia, who have several thousand each. At the same time, China is bolstering its position with new strategic capabilities, such as submarine-launched and land-based intercontinental missiles. If China is to be part of the nuclear weapons negotiations, Russia has demanded that

nuclear-weapon states the United Kingdom and France must partake as well.

The United States wants non-strategic nuclear weapons to be included in a future framework. The regulation of such weapons will be complicated, as the United States and Russia hold very different capabilities. Unlike the United States, which disposed of the majority of its non-strategic nuclear weapons after the Cold War, Russia kept a large part of its arsenal. Today, Russia has over a thousand non-strategic nuclear warheads, distributed on land, sea and air capabilities. These weapons are paramount to Russia's deterrence capabilities, and an agreement that sets limitations would be difficult for Russia to accept, unless the West's missile defences and the United States' nuclear weapons in Europe are also included in the agreement.

For Beijing, agreements on nuclear weapons that limit China's military capabilities regionally will be at odds with the country's objectives. China was never bound by the INF agreement,¹ and the country has acquired a large arsenal of advanced medium-range ballistic missiles, some of which are armed with nuclear warheads. Their function is regional deterrence. In 2019, China also deployed a new type of long-range precision weapon that can be armed with either a conventional or a nuclear warhead.

The superpowers are also developing a series of new weapon categories, and several of these are not covered by the current agreements. In 2019, Russia armed two intercontinental missiles with a new type of advanced warhead, so-called hypersonic glide vehicles (HGV), for the first time. In addition, the country is currently developing air-launched ballistic

1 INF: Intermediate-Range Nuclear Forces. The United States withdrew from the INF agreement in August 2019.



Iran's emphasis on military power is evident in the streets of Tehran. On the photo, we see a roundabout during the annual 'Holy Defence Week'.

Fact Box #03
Definition

■ Strategic and non-strategic nuclear weapons

Range, explosive force and area of application can be used to explain the difference between strategic and non-strategic nuclear weapons. However, it is easier to define non-strategic nuclear weapons as the weapons not covered by the strategic arms reduction treaty New START. This agreement only covers intercontinental ballistic missiles from land and sea, and strategic bombers with long-range cruise missiles.

« Technological advances have enabled countries to develop weapons with properties tailored to their needs. »

Image: The Russian Ministry of Defence declared the hypersonic glide vehicle Avangard operational at the end of 2019.





Activists masked as Vladimir Putin and Donald Trump protest against nuclear weapons at the Brandenburg gate in Berlin, 30 July 2020.



Several new weapon types are not covered by current arms control treaties.



The weapon systems of superpowers do not match each other and have different properties.



Protecting knowledge that can be used to produce weapons of mass destruction is more difficult.

missiles as well as underwater drones (Poseidon) and cruise missiles (Burevestnik) with nuclear propulsion. Russia is willing to discuss certain new nuclear weapon types within the scope of strategic stability, but only on the condition that missile defences are part of the negotiations as well. China also has several development programmes for HGVs and is developing air-launched ballistic missiles for heavy bombers.

A new and effective arms control regime relies on the superpowers' ability to establish a constructive dialogue, which in the longer term enables them to make agreements that reflect the new realities of security policy, military and technology. When several of the new weapon types continue to fall outside the framework of the arms control agreements, conditions are apt for an accelerating technological arms race.

Meanwhile, for Norway and its allies, it has become more difficult to protect knowledge that can be used to produce weapons of mass destruction and to regulate technology export for military use. More and more, we see an integrated development of civilian and military technology. This means that in many cases, the technology is not regulated by export control laws. The identity of the actual end user can also be difficult to establish. Foreign acquisitions

of Norwegian technology companies and the use of shell companies and intermediaries in western countries also complicate the situation.

In addition, technological development is becoming increasingly globalised, with close cooperation between industry and civilian research. Norwegian universities and research institutes are systematically being used by countries that want to acquire knowledge on weapons of mass destruction. Both researchers and students affiliated with foreign universities that have ties to military research and development are involved in this activity. [Q&A](#)

« More and more, we see an integrated development of civilian and military technology. This means that in many cases, the technology is not regulated by export control laws. »

Arms control and disarmament

Nation-states sign arms control treaties in order to limit the number of weapons and regulate the use and testing of them. On the other hand, the intention of disarmament agreements is to ensure the reduction or abolition of certain types of weapons.

Although the technical content of arms control treaties is important, it is equally important that they build trust between the parties and compel them to be open about their capabilities. A well-functioning verification regime enables the parties to exchange data on localisation and to carry out inspections of military bases, while communication channels and meeting places ensure dialogue and reduce the risk of misunderstandings. Hence, agreements have a stabilising effect and considerable impact on global security.

THE INTERMEDIATE-RANGE NUCLEAR FORCES TREATY (INF)

In force from June 1988 to August 2019

The INF Treaty signed by US President Ronald Reagan and Soviet Union leader Mikhail Gorbachev, banned all ground-launched intermediate-range missiles with ranges of 500 to 5,500 kilometres. By prohibiting an entire weapons class, the treaty halted the arms race between the superpowers at a time when the Soviet Union had achieved nuclear parity with the United States. Over time, the significance of the treaty diminished as the situation of security policy, military and technology changed. Other countries have acquired ground-launched missiles with ranges regulated by the INF Treaty, and several countries in the Middle East and Asia have developed advanced weapon systems, making the treaty less relevant.

THE NEW STRATEGIC ARMS REDUCTION TREATY (NEW START)

In force from February 2011 to February 2021

New START regulates the number of operational strategic nuclear weapons that the United States and Russia may possess. It is the last remaining nuclear arms control treaty. The treaty does not include testing and development. It can be extended by five years. Both the United States and Russia have signalled that they wish to extend the treaty.

THE COMPREHENSIVE TEST-BAN TREATY (CTBT)

Signed in 1996, but has not entered into force

The Comprehensive Test-Ban Treaty prohibits any form of nuclear weapon test explosion. The treaty cannot enter into force until it has been signed and ratified by all countries possessing nuclear weapons, nuclear power stations or other nuclear installations. It still needs to be ratified by Egypt, India, Iran, Israel, China, North Korea, Pakistan and the United States. The Comprehensive Nuclear Test-Ban Treaty Organization (CTBTO) is responsible for surveillance and inspections to ensure the implementation of the treaty.

THE NUCLEAR NON-PROLIFERATION TREATY (NPT)

In force since March 1970

The Nuclear Non-Proliferation Treaty has three main goals: non-proliferation, arms reduction and peaceful use of nuclear technology. For a long time, the agreement has been the only multilateral agreement with the final goal of global nuclear disarmament. Its intention is to facilitate international cooperation on peaceful use of nuclear technology and prevent the spreading of nuclear weapons and nuclear weapons technology. More states have ratified this agreement than any other agreement on arms control or disarmament. The International Atomic Energy Agency verifies that the parties comply with the agreement.

THE TREATY ON OPEN SKIES (OS)

In force since January 2002

The Treaty on Open Skies does not regulate weapons inventories, but it is central in the context of arms control. OS enables nation-states to conduct observation sorties over the countries that have signed the agreement. The arrangement promotes openness regarding military activity, which makes the treaty one of the most important means of promoting trust among the parties. The opportunity to gather images prevents misunderstandings that could lead to escalations. It also assists in holding authorities responsible for implementing measures in keeping with other arms control and arms reduction agreements. The United States withdrew from OS in November 2020, and the treaty now has 33 remaining signatories.



RUSSIA

Entering 2021, Russia faces great challenges. Domestically, both the general population and the establishment feel the economic consequences of the covid-19 pandemic and the drop in oil revenues. Henceforth, Moscow will have to make some tough decisions in their economic priorities.



ARMAMENT IN THE NORTH
Russian armament in the High North continues.

○ FRANZ JOSEF LAND



ECONOMIC CRISIS IN RUSSIA
The covid-19 pandemic and plummeting oil prices have sent Russia into the deepest recession since the financial crisis.



RUSSIA AS MEDIATOR
Russia demonstrates its ability to balance relations with the rival powers of the Middle East.

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Norwegian Intelligence Service
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The Russian government will spend considerable resources on preparing and organising the general elections in September, in order to ensure that the outcome grants legitimacy to the incumbent leadership. The Russian establishment will strive to consolidate its position, and any structural changes that could improve the economic situation and living conditions of ordinary Russians seem unlikely.

« Russia considers Western activity in the High North as a threat to its military bases on the Kola Peninsula and to its national security. »

The 2020 referendum on constitutional amendments showed that Putin's political project has considerable popular support. Nevertheless, uncertainty within the regime seems to be growing. Several incidents in the past year indicate that the authorities have raised the pressure on political dissidents, journalists and other independent voices. New legislation that further lowers the threshold determining who the authorities may label as a 'foreign agent' follows the same pattern. This trend is expected to continue in 2021.

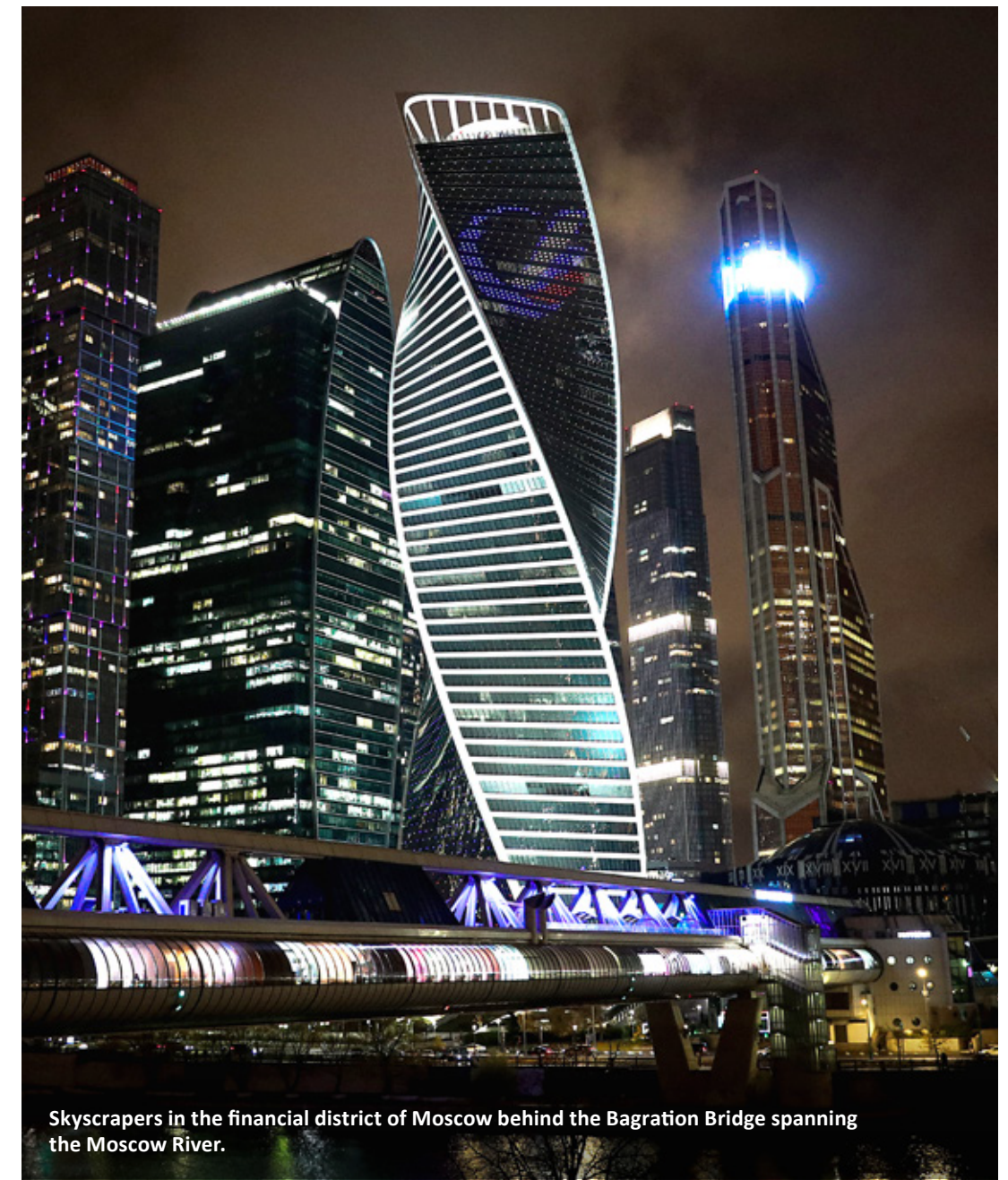
2021 will be an important year for Russian Arctic policies, as Russia chairs the Arctic Council and hosts the Arctic conference 'Territory of Dialogue Forum'. Russia focuses on national control in the region. The new Arctic strategy launched in 2020 accuses Western countries of seeking to militarise the Arctic and restrict Russian development in the area. The criticism is also directed at Norway.

Russia also faces challenges in what the authorities define as the near abroad. Losing influence in these strategically important areas is out of the question. Political turbulence in the former Soviet republics is of strategic importance to Putin, and the authorities will continue to monitor the political development in Belarus, South Caucasus and Ukraine in 2021.

Through its engagement in Syria and Libya, Russia has gained a military and political foothold on the southern flank of NATO. In the time ahead, Moscow will spend considerable resources on maintaining its position in the Middle East and balancing relations with the regional powers.

Moscow continues to express dissatisfaction with the Western sanctions regime. The relationship with the United States and NATO shows no signs of improvement, and there is a growing distrust in Western initiatives and motives. The intensity of the public rhetoric has grown over the past year. The criticism is directed at the United States and NATO in particular, but also at Norway. Norway is perceived more as a NATO ally than as a neighbour.

The Russian authorities accuse the United States and NATO of trying to restrict Russia's scope for action in the North. Russia regards Western military activity in the High North as a threat to the military bases on the Kola Peninsula and to Russian security. In order to protect its interests in the Arctic, Russia is strengthening the Northern Fleet's capability to carry out military operations specifically and to engage in combat under Arctic conditions in particular. Russia is speeding up the development of military bases around the Barents Sea, on the Arctic islands and the coastline along the Northeast Passage. The Northern Fleet is the flotilla with the highest priority, and in 2021, it will take receipt of some of the most capable vessels.



Skyscrapers in the financial district of Moscow behind the Bagration Bridge spanning the Moscow River.





The pressure on the federal budget will require tough decisions on political priorities.



The Russian authorities believe the strategic balance is at risk.



Russia is assuming the role as mediator in regional conflicts.

Russia's extensive weapons testing in the High North will continue. The risk of accidents during testing or with the nuclear-powered vessels of the Northern Fleet remains considerable.

Over the past ten years, Russia has developed a flexible military force, which can be applied to the entire spectre of conflicts, from peace to crisis and war. The Russian military forces now constitute an efficient political tool. The armed forces will remain a high priority. The Russian military industry spends huge resources on developing new and advanced weapon systems for the next generation of defence.

Weak economy and popular discontent challenge regime legitimacy

Russia's economic challenges became considerably worse in 2020. The covid-19 pandemic and the drop in the oil prices sent Russia into the deepest recession since the financial crisis in 2008. Russia's GDP will drop by approximately five per cent this year, and it may take several years before the economy is back at the 2019 level.

The pressure on the federal budget will require tough decisions on political priorities in the years to come. The government has abandoned the national development plan for 2018–2024 and instead worked out a new plan towards 2030. The political establishment does not favour any changes, and it is unlikely that the government will introduce any major economic reforms.

For the Russian regime, 2021 will present some challenges to its legitimacy. The pandemic and the economic situation will worsen people's living conditions. Low support for the ruling party, United Russia, is a challenge for the government as the 2021 general elections are approaching. There are several signs of voter fatigue. Since 2018, the support for Putin has dwindled. The majority of the people lack trust in the State Duma and the political parties, and there are few real alternatives to United Russia.

In the short term, any major mobilisation on the part of the opposition is unlikely, but in the longer term, if there are no prospects of economic growth, the stability of the regime will be challenged. Young Russians in particular are critical of the regime. They are less prone to use state-controlled media for information, and are therefore more difficult for the authorities to reach.



Protestors outside the embassy of Belarus in Kiev, holding a banner with a picture of Putin and Lukashenko, during a commemoration of Roman Bondarenko on 13 November 2020. A teacher and artist, Bondarenko died after he was beaten by Belarusian police during a protest in Minsk.

Distrust will mark Russian Arctic policy

2021 will be an important year for Russian Arctic policies, as Russia takes the chair of the Arctic Council and hosts the Arctic conference 'Territory of Dialogue'. In 2020, Russia has been preparing for the chairmanship, notably by developing an updated Arctic strategy, which will apply until 2035. It has also established a new Arctic Commission under the Russian Security Council.

« In the context of last year's centennial of the Svalbard Treaty, Russia publicly raised the question of Russian rights on the archipelago more explicitly than before. »

Russia gives priority to national control. The new Arctic strategy from October 2020 is harsher in its rhetoric, accusing Western countries of seeking to militarise the Arctic and restrict Russian development in the region. The government expresses concern that the United States and other NATO countries continuously try to limit Russian activity in the region. According to Dmitry Medvedev, the leader of the new Arctic Commission, this represents a direct threat to the security of Russia.

The criticism is also directed at Norway, and the amount of attention Norway receives in the Russian public discourse has increased since 2017. Moscow claims that the Norwegian authorities are justifying an increased level of military activity in the North and closer integration with the United States by construing an exaggerated Russian threat. Russia also accuses Norway of pulling Sweden and Finland closer to NATO.

Furthermore, the Norwegian authorities are being accused of promoting anti-Russian sentiment in the Norwegian population. Norway's endorsement of the Western sanctions regime against Russia is still being criticised. In the context of last year's centennial of the Svalbard Treaty, Russia publicly raised the question of Russian rights on the archipelago more explicitly than before. Last year, the Russian Ministry of Foreign Affairs commented Norway's cooperation with Ukrainian authorities and defence for the first time.

Russia sets the terms in Belarus, Ukraine and Caucasus

Belarus is of strategic importance to Moscow, and the Russian authorities will seek to increase their influence in the country. A genuine democratisation of Belarus is not in Moscow's interest, as Belarus could then become more inclined towards the West and because a democratisation brought on by a popular protest movement could inspire protests in Russia. Until Russia finds a successor who can safeguard Russian interests, it serves Russia to have Lukashenko remain as president. As Belarus increasingly relies on Russia's political and economic support, it has become more difficult for Lukashenko to postpone a closer integration between the two countries, and Moscow's opportunity to control Minsk is strengthened.

Russia has wanted to increase its military presence in Belarus for a long time. Russia used the 2020 crisis to remind Belarus of its obligations within the bilateral defence cooperation, including the further development of a joint military doctrine and a joint regional force. This will likely entail an increase in →

« Moscow continues to express dissatisfaction with the Western sanctions regime. The relationship with the United States and NATO shows no signs of improvement, and there is a growing distrust in Western initiatives and motives. »

Image: Putin delivering a speech on 17 December 2020. In the speech, he denied any Russian interference in the US presidential election and said he hoped for a closer relationship with the US under the Biden administration.





A soldier in the Russian peacekeeping force stands guard near Shusha in Nagorno-Karabakh.

the number of joint military exercises in 2021 prior to the Russian strategic exercise Zapad ('West'), which is to be held this autumn.

The situation in Ukraine will remain deadlocked in 2021. Negotiations between Moscow and Kiev have ceased once again. In the eastern parts of the country, the situation is deadlocked. Kiev maintains that it is out of the question to grant special status to Donbass in the constitution and that the Minsk protocol must be changed before any progress can be made. The Russian optimism from 2019 has given way to scepticism, and any negotiated solution in 2021 seems unlikely.

The conflict in Nagorno-Karabakh is once again on the foreign policy agenda of Moscow. The military confrontations between Armenia and Azerbaijan in the autumn of 2020 along the line of contact were the gravest since the ceasefire in 1994. By assuming a role as power broker in the conflict and sending military troops to Nagorno-Karabakh, Russia consolidated its position in South Caucasus.

In order to maintain its status as the dominant actor, Russia will continue to balance relations with the countries in South Caucasus. The flare-up of the conflict in Nagorno-Karabakh has turned the region into a new scene of rivalry between Russia and Turkey. Hence, South Caucasus is the third theatre, in addition to Libya and Syria, where Russia and Turkey stand against each other.

Russia's balancing act in the Middle East

Russia has gained a military and political foothold on the southern flank of NATO, through its engagement in Syria and Libya. Over the last year, Russia has gained considerable influence in Libya and

strengthened the dialogue with all parties involved in the conflict.

In Syria, Russia is trying to facilitate a political solution that would put an end to the armed conflict and ensure the survival of the Assad regime. Hence, Moscow will maintain its political influence and military footprint, at the same time as it could reap a profit in the reconstruction phase. Under the auspices of the UN, the Syrian regime is negotiating a new constitution with the opposition, but the unwillingness of the regime to discuss any sharing of power remains a considerable challenge for Russia. The option of holding back military or economic support remains the most effective instrument Moscow has to pressure Damascus, and Russia has to continue to balance support and diplomatic efforts in order to push for political compromises.

« Russia is showing its ability to balance relations with the rivaling powers of the Middle East and to avoid being too closely tied to one of the parties. »

Adding to the fact that the United States presence on the ground in Syria sets limits to Russia's level of involvement, the cooperation with Turkey has become more challenging over the past year. Moscow and Ankara stand on opposite sides of the conflicts in Syria and Libya, and the flare-up of the conflict in and around Nagorno-Karabakh in 2020 has further embittered the relationship. Nevertheless, Moscow will strive to improve relations with Ankara. Russia already uses the Astana cooperation with Turkey and Iran to discuss specific security issues in the Syria conflict, and similar formats could be established as



The frigate Admiral Gorshkov fires the hypersonic cruise missile Zirkon, according to Russian authorities.

arenas for discussion on the development in South Caucasus.

In Libya, the terms for further development are set by Russia and Turkey. Over the past year, Russia has helped re-establish the military balance of power by increasing the level of military support to the eastern Libyan militia leader Khalifa Haftar and his Libyan National Army (LNA). Russia is cooperating with Egypt, the United Arab Emirates and Saudi Arabia, and will strengthen the coordination with these countries in 2021.

Russia is showing its ability to balance relations with the rivaling powers of the Middle East and to avoid being too closely tied to one of the parties. Moscow will utilise this position in order to strengthen its influence in the Middle East and North Africa in 2021.

Superpower rivalry and military development worry the Russian authorities

- **Russia considers the strategic balance to be at risk**

For Russia, nuclear weapons are the fundamental deterrent against the West. According to the Russian authorities, the strategic balance is at risk. They refer to this as an existential threat.

Russia perceives three factors as particularly threatening. First, Russia claims there is a shift in NATO's activity, from normal assertion of sovereignty and intelligence activity to simulated attacks on Russian targets, also with the use of strategic bombers. According to Russia, the United States and NATO

are advancing closer to the borders and near areas of Russia with more training activity, new infrastructure and deployment of troops.

Second, Russia is worried about new areas of warfare. This includes NATO's use of the digital domain and outer space. Russia is particularly worried that NATO might attack Russian strategic missiles from space, before they can be fired.

Third, Russia alleges that Russia and the United States are undermining the global security architecture and thereby central agreements for arms control. The Russian government claims this pushes the world towards a state of global nuclear destabilisation and a new arms race.

- **Russia's response is stronger strategic deterrence and active defence**

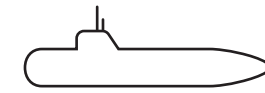
In order to secure the military-strategic balance, Russia now operates with a widened deterrence concept, which they call 'strategic deterrence'. The concept comprises traditional nuclear deterrence, non-nuclear weapons, weapon systems in outer space and non-military means.

On the military side, the concept is conceived as defensive, but it presupposes that Russia could use a pre-emptive strike against NATO if the country faces an existential threat. Russia's military defence emphasises high level of readiness, mobility and fighting power. The ability to strike against a potential adversary with massive firepower is central, and it is of utmost importance to be able to neutralise critical adversary targets, including economic ones.

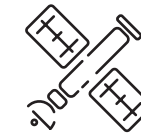
Russia has gone from being a military power almost exclusively dimensioned for full-scale war between the East and the West to becoming a flexible military power, with the capabilities to use power →



Russian paratroopers train on Franz Josef Land, 21 April 2020. The soldiers completed the world's first Arctic parachute jump from an altitude of 10,000 metres.



The Northern Fleet will take receipt of advanced vessels in 2021.



Strategic deterrence also includes weapon systems in outer space and non-military means.



The new airstrip at Nagurskoye on Franz Josef Land is ready for use.

tailored to any situation across the entire spectre of conflicts. Strategic deterrence applies to the entire spectre of conflicts – peace, crisis and war. It includes not only traditional military means, but also network attacks, influence operations and information confrontation. The aim is to strike early against the adversary's capabilities and will to make decisions that undermine Russian interests or could lead to aggression against Russia.

■ **Russia revealed its nuclear deterrence guidelines**

Nuclear weapons are still the pillar of the Russian defence. The gravity of the current security policy situation was emphasised in June 2020, when the Russian presidential administration released the country's Nuclear Deterrence Policy Guidelines.

The document specifies Russia's 'red lines' for using nuclear weapons. It emphasises that any attack on critical infrastructure that undermines Russia's nuclear capabilities could be met with an overwhelming nuclear attack. Russia has not committed to a no-first-use nuclear policy.

The Russian authorities are prepared to defend

the country through offensive action. States that deploy missile defence systems, including radar installations that may be included in the system, attack drones and long-range precision weapons are listed as targets of Russian nuclear deterrence. On several occasions, the Russian authorities have claimed that the Globus 2 radar in Vardø is a part of NATO's missile defence.

Russia continues build-up in the north

Russia places great emphasis on strengthening national control of Arctic resources and the strategically important Northeast Passage. Defending the strategic submarines of the Northern Fleet and the access to the Atlantic Ocean therefore remains crucial. The aim of the military facilities on the Kola Peninsula and the Northern Fleet's use of the Barents Sea as a training and exercise area is to protect Russia against threats from the west and the north. Moreover, the bases in the north are the foundation of the Russian warning chain. In order to support the fighting capabilities of the Northern Fleet, Russia continues to develop the infrastructure in the Arctic.

■ **The Northern Fleet will receive new and modernised vessels**

In 2021, several new vessels will be added to the Northern Fleet. Several of these will have multirole capabilities, which means that they will be equipped with long-range precision weapons. Hence, they can not only attack submarines, surface vessels and combat aircraft, but also strike against distant targets onshore.

The Northern Fleet will likely receive its second ultramodern multirole submarine of the Severodvinsk class and a new multirole frigate of the Gorshkov class in 2021. Furthermore, the delivery of a new strategic submarine of the Dolgorukyi class is expected, as well as the return of vessels that have been modernised and repaired at the shipyards on the Kola Peninsula and around the White Sea.

The new vessels will add significant fighting power to the Northern Fleet. They will be capable of establishing seagoing combat groups with long-range precision weapons against sea and land targets, and they will be able to operate in the Northern Fleet's entire area of responsibility, from the Arctic to the North Atlantic.

■ **The Zapad exercise will take place in 2021**

In 2021, the Russian armed forces will spend a lot of time preparing for the strategic exercise Zapad ('west'). Scheduled for the autumn, the exercise is to simulate a regional war against an adversary in the west. The last Zapad exercise, in 2017, involved an extensive reinforcement of the Kola Peninsula. Reinforcement troops ensure that the Russian military power can achieve local superiority relatively fast, for a shorter period. Since 2013, the deployment of

airborne forces to exercises has become part of the normal picture in the north. These units are considered part of an elite force. They can deploy very quickly and operate under Arctic conditions, in cooperation with local units. A similar reinforcement is expected also in 2021.

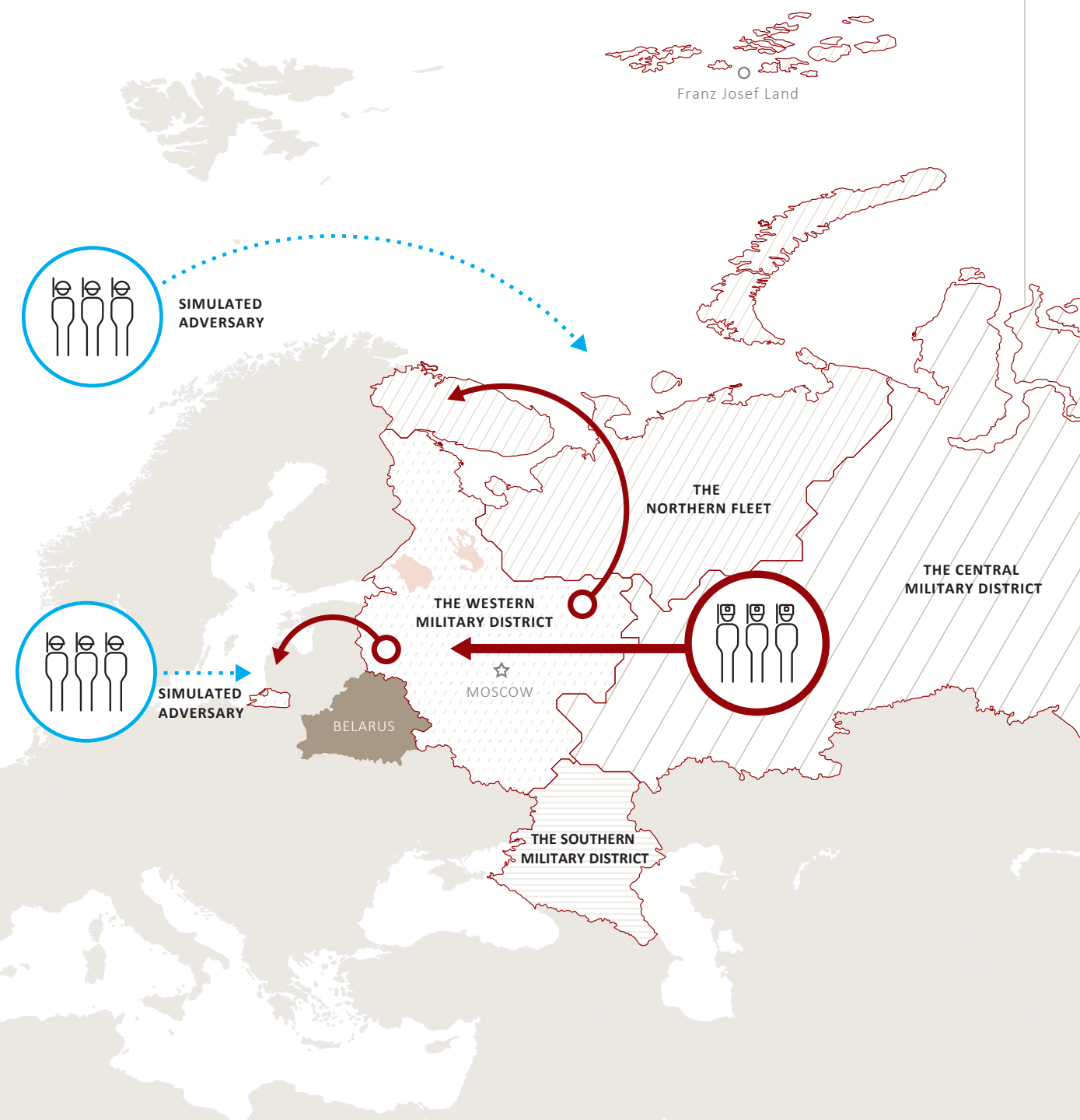
■ **New airbase on Franz Josef Land inaugurated**

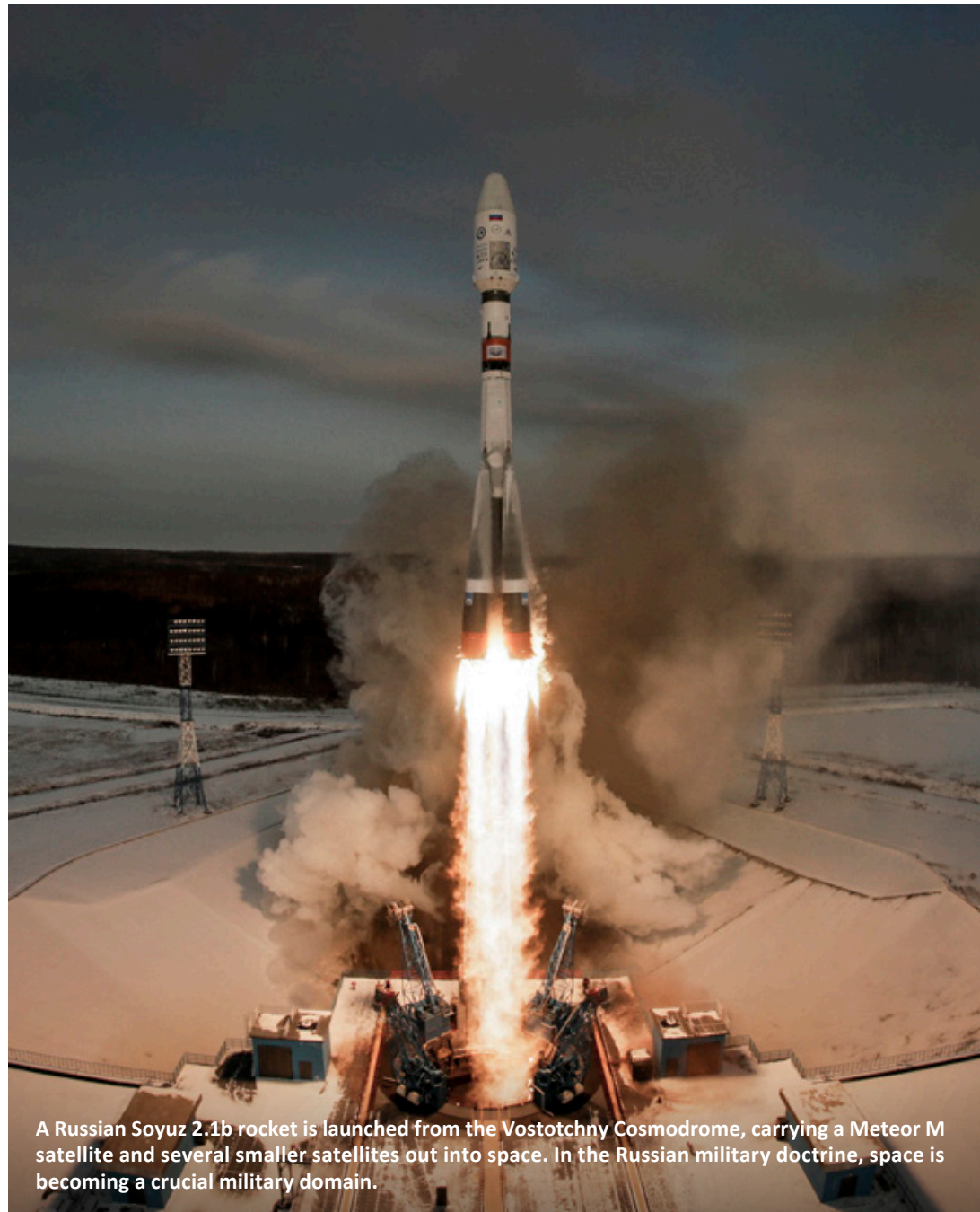
The new airstrip at Nagurskoye on Franz Josef Land is ready for use. Nagurskoye is Russia's northernmost and westernmost Arctic airbase. The airstrip has a hard-surface runway and is able to handle military aircraft of considerable size. When the entire infrastructure is ready, it will be possible to operate combat aircraft also under extreme weather conditions. Departing from the base, combat aircraft will be able to carry out air operations across huge swaths of the Arctic and Barents Sea.

■ **Nuclear activity in Norway's near areas is a significant risk**

The development of new nuclear weapon systems and reduced arms control have an impact on the Russian nuclear activity in the near areas of Norway. The Northern Fleet has a great number of nuclear-powered vessels, and testing of nuclear-related weapons is taking place on Novaya Zemlya. In recent years, Russia has also tested Burevestnik, a nuclear-powered cruise missile, close to Norway. Russia has also carried out tests in connection with the development of Poseidon, an underwater drone powered by a small nuclear reactor. The risk of grave accidents became evident in the summer of 2019, →

Zapad Exercise 2021





A Russian Soyuz 2.1b rocket is launched from the Vostotchny Cosmodrome, carrying a Meteor M satellite and several smaller satellites out into space. In the Russian military doctrine, space is becoming a crucial military domain.



when two major incidents occurred, one with Burevestnik and one with the nuclear-powered special submarine Losharik. The level of activity and testing in the High North will remain high, and accidents could happen again.

On the Kola Peninsula, nuclear weapons are stored in a large central depot as well as in several smaller storage facilities. The depots contain a great number of nuclear charges for both non-strategic and strategic nuclear weapons. The depots are well secured, but the transport of nuclear charges by rail and road involves a risk of incidents, which could lead to radioactive emissions. The risk of a nuclear discharge with massive damaging effect is nevertheless low, as the weapons have a number of safety mechanisms.

Normally, in times of peace, only strategic forces are equipped with nuclear weapons. The majority of the nuclear weapons on the Kola Peninsula are stored in the depots and will only be transferred to military units in the event of a conflict.

At the nuclear test site on Novaya Zemlya, Russia continues to carry out subcritical tests in order to make sure that the nuclear weapons are safe and reliable, and to support the development of new nuclear weapons.² The tests are carried out deep into the mountain, and the risk of nuclear material spreading is low.

The Northern Fleet's structure includes both nuclear-powered submarines and cruisers. Although the nuclear-powered fleet will gradually be renewed,

the risk of nuclear accidents is expected to remain at approximately the same level over the next years. The older nuclear-powered attack and multirole submarines pose the greatest risk. [Q>](#)

« The majority of the nuclear weapons on the Kola Peninsula are stored in the depots and will only be transferred to military units in the event of a conflict. »

² In subcritical tests, there is no full nuclear detonation. These types of tests are compatible with the Comprehensive Nuclear Test-Ban Treaty (CTBT).

Increased threat against underwater installations

More than 97 per cent of all traffic on the internet runs through subsea cables. Practically all Western countries today rely on infrastructure on the ocean floor for communications and for maintaining economic activity.

It is extremely difficult to protect cables and other vital underwater installations, which are crucial to the oil and gas sector, for instance, against sabotage. The global network of subsea cables has a built-in surplus capacity and back-up solutions, but in the event of major damages and breakdowns, these solutions will not be able to handle the amount of information. A major breakdown of the subsea cable network would affect functions that are vital to society and complicate any form of international cooperation.

The Russian underwater reconnaissance programme is part of the Russian Ministry of Defence. In Russian, the organisation is referred to as GUGI, the Main Directorate of Deep-Sea Research (Glavnoye Upravleniye Glubokovodnykh Issledovaniya) and NATO refers to it as RURP.

According to the Russian authorities, GUGI carries out underwater research and deep-sea reconnaissance across huge geographical areas, with a main focus on the Atlantic. However, NATO believes that Russia is developing offensive capabilities against underwater installations as part of its strategic deterrence. Russia's build-up of underwater capabilities is becoming a serious threat to subsea cables and underwater systems.

Threats against satellites in outer space

According to the Russian military doctrine, space is becoming a military area of major importance, especially when facing an adversary that is superior in terms of conventional weaponry. Russia is therefore developing anti-satellite weapons. A substantial part of the military power of the United States and NATO relies on extensive space capabilities. This ensures the alliance's superiority in space-based intelligence, command and control and navigation. At the same time, it makes the alliance dependent on satellites.

Anti-satellite weapons can take out satellites temporarily or permanently, i.e. with missiles fired from land or with weapons placed in outer space. The weapons could give Russia an advantage in the run-up to a potential conflict, by preventing the adversary from accessing its own satellites. The main purpose of the weapons is to contribute to strategic deterrence.

Increased threat from hypersonic missiles

Russia continues to develop the new anti-ship hypersonic cruise missile Zircon. In October 2020, Russia released images of what they claim to be the first launch of such a weapon from a sea vessel, the Northern Fleet's new frigate 'Admiral Gorshkov'. The missile is designed for new generations of surface vessels and submarines, and travels nearly eight times faster than the speed of sound. The development of hypersonic missiles is a breakthrough for the Russian military industry. Russia is also in the process of developing an airborne hypersonic ballistic missile.

Russia seeks to neutralise NATO's technological superiority

Modern wars will not be limited to the domains of land, sea and air. They will also be fought in the digital sphere, in outer space and the underwater domain. In the field of weapon technology, there is ground-breaking development.



CHINA

China is preparing for a more conflictual coexistence with the outside world. In 2020, the covid-19 crisis and the mounting criticism of China from other countries put China under pressure, and this will mark the country's foreign policy going forward. At a Communist Party of China summit in October 2020, Xi Jinping launched the guidelines of the new five-year plan and accelerated certain strategic priorities towards 2035.

Beijing is emphasising that the balance of power in the world is shifting, and even though a more unstable international situation poses challenges, it also offers strategic opportunities. China is bolstering its position in the economic, political and military rivalry with the United States. China seeks to reduce its vulnerabilities and become less dependent on global markets. The way in which the Chinese authorities seek to secure and use its super-power status could affect other states' scope for action, including Norway.



LOOKING TO THE NORTH
Over the past years, the Arctic has risen on the foreign policy agenda.

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Norwegian Intelligence Service
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ON ITS OWN TWO FEET
China seeks to guard itself from global economic uncertainty and trade restrictions.



MILITARY EFFORTS
The People's Liberation Army shall be able to defend Chinese interests, also outside China's near areas.



2021 marks the 100th anniversary of the foundation of the Communist Party of China. Consequently, the time has come to realise the first of the two centennial goals, which according to Xi Jinping will secure ‘the Chinese dream’ of being a prosperous superpower. This year, China is to become a ‘moderately prosperous society’. However, China is facing a new and more challenging economic and political situation. Its growth is slowing down, and the Communist Party of China needs a new foundation for the regime’s legitimacy. Ideology, nationalism and international prestige are being emphasised much more now than just five years ago.

« **Growth is slowing down, and the Communist Party of China needs a new foundation for the regime’s legitimacy.** »

The modernisation of the military is also accelerating. The Communist Party of China has given the People’s Liberation Army (PLA) clear tasks: First, the PLA is to secure the Chinese Communist Party’s monopoly of power and China’s territorial sovereignty, including in China’s periphery. In addition, the PLA should be capable of defending China’s growing global interests. Extensive development and modernisation of the military power will gradually improve its ability to carry out these tasks. China’s ability for power projection will therefore increase significantly, also outside of its immediate near areas.

China is becoming more authoritarian. The aforementioned summit in 2020 confirmed that Xi Jinping has assumed an undisputed position of power within the Communist Party of China. Xi has made constitutional amendments to enable the president to serve for more than two terms. His consolidation of power

is reflected in an increasing level of personal worship, in society as a whole as well as within the party.

China accelerates the modernisation of the military power

The Chinese Communist Party has repeatedly said that the PLA must become more combat ready and able to defend Chinese interests, also outside China’s near areas. This includes protecting strategic trade and transport routes. The expressed goal is complete technological modernisation within 2035, and in order to achieve this goal, China’s military budget continues to increase, despite economic challenges.

The PLA should be able to take advantage of high technology in all areas of warfare. China’s programme for military-civilian fusion is an important measure. This programme makes civilian research and technology development available to the defence industry.

The PLA is building its capabilities within command and control, communications, surveillance, intelligence and targeting. The PLA also focuses on electronic warfare and operations in space and the cyber domain. New sensors and systems are installed on new types of aircraft, drones and satellites. China’s space programme is extensive and serves military as well as civilian purposes.

China’s focus on long-range cruise missiles and high-precision ballistic missiles have increased the country’s capabilities to strike against and deter opponents in the western Pacific Ocean. In cooperation with the Russian defence industry, China is introducing modern long-range air defence systems, which provide China with robust capabilities against aircraft and missiles.



Xi Jinping has consolidated his position of power within the Communist Party of China. This is from the National People’s Congress, 22 May 2020.



Soldiers from the Navy of the PLA march during the celebration of the 70th anniversary of the Communist Party of China in Beijing, 1 October 2019.



China is constructing its third aircraft carrier and producing vessels at a high pace.



Lacking bases abroad, China is establishing its own naval infantry.



In cooperation with Russia, China is introducing modern long-range air defence systems.

China's Army focuses on the ability to carry out more complex operations, on its own but also with other service branches. The intention of joint exercises with other countries is to compensate for the lack of combat experience. The Army also gains experience by participating in peacekeeping operations, as well as from low-intensity conflicts in China's periphery.

years. Today, this force is responsible for China's only military base abroad, located in Djibouti. As soon as the Naval Infantry is able to operate from the newest amphibian platforms, this force will become the spearhead of China's power projection and operations outside the country borders. Despite its growing military power, China lacks allies and has limited access to military bases abroad.

« **New surface vessels of all classes are being produced at a high pace, and this significantly increases the combat capabilities of the Chinese Navy.** »

New surface vessels of all classes are being produced at a high pace, and this significantly increases the combat capabilities of the Chinese Navy. The new vessel classes include frigates, destroyers and a small number of cruisers. China's third aircraft carrier is under construction, and the Navy has set afloat two new amphibian attack vessels with helipad, hangar and dock for smaller motor landing craft (MLC). The Naval Infantry has grown considerably over the past

China prioritises technological self-reliance

The trade war with the United States illustrates the vulnerability of relying completely on global markets. Therefore, China seeks to protect itself from global economic uncertainty and trade restrictions by bolstering the national market and securing sufficient self-reliance in strategic sectors. Self-reliance is an important part of the five-year plan that enters into force this year. At the same time, Beijing wants to make China indispensable in international trade chains in order to counter external pressure. By doing this, the country also bolsters its ability to exert economic pressure on others. Both state-owned and

« China's Army focuses on the ability to carry out more complex operations, on its own but also with other service branches. The intention of joint exercises with other countries is to compensate for the lack of combat experience. »

Image: A J-15 combat aircraft on the deck of Shandong, the second aircraft carrier of the Chinese Navy and the first one built in China. China's shipyards produce surface vessels at a high pace.





The Chinese authorities seek to strengthen the national market and ensure a high level of self-reliance in strategic sectors. The photo shows the Port of Yantian in Shenzhen, in the south of China.



China has a goal of becoming a global superpower in science and innovation.



Being indispensable in international trade chains is a means to counter external pressure.



Western restrictions could lead to hidden ownership connections via acquired companies.

private companies are central to this strategy, and the Communist Party of China is reinforcing its control of them.

« Chinese companies will step up their efforts to acquire advanced technology that they are currently incapable of producing themselves. »

Towards the centenary of the People's Republic of China in 2049, China also has a goal of becoming a global superpower in science and innovation, high technology in particular. The state authorities coordinate with the business and industry sector and spend huge resources in order to make rapid progress. The development will add economic, political and military resources to the regime and support the country's geopolitical ambitions. Chinese companies are already world leading in surveillance technology and are major exporters of AI-based smart city and smart policing systems. China is also planning to play a more important part in the development of the standards of new technology, for instance through

organisations like the International Telecommunications Union (ITU).

Chinese companies will step up their efforts to acquire advanced technology that they are currently incapable of producing themselves. This will happen through foreign investments, joint ventures, research cooperation and industrial espionage. In the longer term, it is likely that Chinese businesses will take over market shares from, or outdo, other countries' high technology companies, and that the dependency on Chinese technology providers will increase. This will bolster China's position of power vis-à-vis the West and create vulnerabilities that can be utilised to exert political pressure.

Chinese direct investments abroad are becoming more targeted

Since the peak year of 2016, China has made fewer but more targeted direct investments abroad. These are largely in keeping with China's strategic priorities, especially with the ambition of technological self-reliance. This is why China gives priority to foreign companies and infrastructure relevant to strategic



Chinese soldiers take part in winter training in Heihe in the north-east of China.

planning work, such as 'Made in China 2025', the five-year plan, the Silk Road Initiative and military-civilian fusion plans. The most important reasons for the drop in Chinese direct investments are the restrictions on capital outflow from China and enhanced control mechanisms in the West. During the covid-19 pandemic, foreign investments have dropped even more. However, foreign companies already under Chinese ownership are being used to make new acquisitions, and investments are channelled through funds in third countries. If this becomes a popular trend, it could lead to an increase in hidden ownership connections.

« **Investments aimed at functions vital to society in Norway and its allied countries could enable China to identify vulnerabilities.** »

Chinese economic activity abroad mainly consists of loan-financed infrastructure projects and foreign investments in the technology sector. In 2020, China made investments in European information and communications technology and micro electronics, although less than in previous years.

Many western companies are in a difficult economic situation because of the covid-19 pandemic. Thus, China still has considerable opportunity to acquire shares and debt. Investments aimed at functions vital to society in Norway and its allied countries could enable China to identify vulnerabilities. This could become a tool for future political influence. Similarly, investments that contribute to the transfer of multipurpose technology could bolster China's military striking power.

China bolsters its capability to operate in the Arctic

Over the past years, the Arctic has risen on China's foreign policy agenda. In 2018, China published its first Arctic strategy. The strategy refers to China as a 'near-Arctic state' and explains China's interests and rights in the region. The strategy also mentions ambitions of establishing a 'polar silk road' by developing the Arctic sea routes.

In the years to come, China will maintain its focus on the Arctic, but the number of projects China manages to realise is likely to be limited. One reason is that China's intentions in the region are questioned by other powers, particularly the major infrastructure projects where China's commercial and strategic interests overlap. This also applies to activity that can be used for both civilian and military purposes, such as activities in space and various types of research.

While seeking closer cooperation with the countries in the Arctic, China is bolstering its capability to operate in the region on its own. In 2020, China reached a milestone when its newest and first self-produced icebreaker, Xuelong 2, sailed in the Arctic for the first time. China now has two icebreakers, both capable of conducting research expeditions in the Arctic. China is working to bolster these capabilities further, both with a new conventional icebreaker and its first nuclear-powered icebreaker. □



REGIONAL CONFLICTS, GLOBAL CONSEQUENCES

The rivalry in the Middle East will continue in 2021. In this struggle for influence, three blocks of cooperation have formed: One is Turkey, a second comprises the United Arab Emirates, Egypt and Saudi Arabia, and a third block is made up of Iran and its allies.

Particularly the rivalry between Turkey and the Arab nations is growing and noticeable in Libya and in the eastern Mediterranean. The normalisation agreements that the United Arab Emirates, Bahrain and Sudan made with Israel in the autumn of 2020 represent an important trend. Should other Arab Gulf States follow suit and normalise their relations with Israel, it could strengthen their strategic position vis-à-vis Turkey and Iran.





Iran has gradually stepped up its nuclear programme as a response to the United States pulling out of the nuclear deal. For Tehran, negotiations with the new US administration is the only realistic solution to the country's economic crisis. Over the past years, Iran has increased its ability to strike against adversaries in the region, and without a solution, the conflict between the two countries could have even greater consequences for regional stability in 2021 than in previous years.

The conflicts in Syria, Libya, Yemen and Mali will not be solved in 2021. In the Sahel and West Africa, state structures are weakening and militant Islamism is spreading, resulting in a growing destabilisation of the region. Weak and failing economies in several countries provide a breeding ground for social unrest and popular protests. The covid-19 pandemic exacerbates the economic challenges. Low energy prices and a decline in the global demand for goods and services severely affect the economies of oil-producing and oil-importing countries in the region. In the coming year, several countries in the region will struggle to maintain subsidies on basic goods, such as grain and electricity, with weaker purchasing power and poorer living conditions as a result.

The global superpowers' involvement in the Middle East and Africa is still changing. The United

States is scaling down its engagement, which gives Russia and China more latitude. An increased level of involvement from these superpowers is driven by the ambitions of Moscow and Beijing and by a desire from the countries in the region to diversify their foreign policies and security policies. Russia emerges as a reliable partner to authoritarian regimes in the region and plays an ever more prominent role as a diplomatic facilitator and military supplier.

« Weak and failing economies in several countries provide a breeding ground for social unrest and popular protests. »

China is also becoming more visible in the Middle East and Africa, with a growing economic influence on several countries. China's involvement has primarily been driven by the need for energy and new markets. Beijing has neither wanted nor managed to take over the role played by the United States as a regional guarantor of security. The downscaling of the US involvement, China's self-awareness as a global superpower and cooler relations between Washington and Beijing could move China towards engaging more actively and positioning itself more visibly in the region. ↗



A fighter loyal to the Government of National Accord takes part in combat against Khalifa Haftar's forces outside Tripoli, 21 May 2019.

Background Info
CREATION OF BLOCKS IN THE MIDDLE EAST
Sources: _____

■ Turkey and the Emirates

The rivalry between Turkey and the Arab states is increasing. Since 2019, the United Arab Emirates has lowered the level of conflict with Iran. Meanwhile, Turkey has become the United Arab Emirates' main opponent in the region, in addition to the Muslim Brotherhood. The rivalry between Abu Dhabi and Ankara will continue to influence the conflict in Libya and the battle for maritime borders in the eastern Mediterranean, where the Emirates supports Greece and Cyprus. Because of the rivalry with Turkey and the conflict in Libya, the Emirates has entered into security cooperation that reaches far beyond the traditional partners in the Gulf Cooperation Council and the West. Russia and the Emirates have strong interests that coincide in the Libyan conflict, and it is likely that the two will continue to cooperate on the ground in Libya in 2021.

■ Iran and Iraq


Economically and in terms of security policy, Iraq relies completely on the United States and Iran, and would be in a vulnerable position if the US-Iran conflict were to escalate. Iran will continue to mount the pressure on the United States if Washington does not comply with the demand that sanctions must be eased before any Iranian concessions can be made. Iran-affiliated militias in Iraq, Yemen and Syria give Tehran the opportunity to harm the United States and its allies in the region with some degree of plausible deniability.

■ Saudi Arabia and the Emirates

Separately, Saudi Arabia and the Emirates will continue to diversify their strategic cooperation. Riyadh likely seeks to reduce security policy vulnerabilities by acquiring military materiel from non-Western countries, primarily Russia and China. Saudi Arabia is also establishing closer ties with China by having the Chinese build its 5G network.

■ Normalisation with Israel

In the autumn of 2020, the United Arab Emirates, Bahrain and Sudan signed a normalisation agreement with Israel. The agreement demonstrates that, in terms of security policy, it is useful to have Israel as a counterweight to Turkey and Iran in the region. If more of the Arab Gulf states follow suit and normalise their relations with Israel, it will bolster the Egypt/United Arab Emirates block vis-à-vis Ankara and Tehran.

 Marks areas in which conflicts between two or several of the blocks play out.



Creation of blocks in the Middle East

In the Middle East, three blocks of cooperation have formed: One is Turkey, a second comprises the United Arab Emirates, Egypt and Saudi Arabia, and a third block is made up of Iran and its allies in the region.



Students who belong to Iran's paramilitary troops burn photos of both the previous and current US president outside the Ministry of Foreign Affairs in Tehran on 28 November 2020, as a protest against the assassination of the nuclear physicist Mohsen Fakhrizadeh.

North Korea remains a nuclear weapons power and maintains its expertise, research and production within the missile programme and the nuclear programmes. Pyongyang sees no reason to cut back on these programmes without an agreement in place. The regime could have tens of simpler nuclear weapons ready for use, and utilise this to put alliances under pressure and try to limit US presence in the region.

In Afghanistan, an agreement between the Taliban and the United States stipulates the withdrawal of international forces by May 2021. In parallel, there are ongoing inter-Afghan peace negotiations, but the gap between the factions is wide. In addition, the Afghan government will be ridden by internal conflicts. Should the international forces pull out before a political agreement is in place, there is a risk of the peace process collapsing.

A political solution in Libya seems far away

External actors, chiefly Turkey, Russia, Egypt and the United Arab Emirates (UAE), are setting the tone for the military and political development in Libya. They will maintain their extensive support to the factions of the civil war while seeking to avoid direct conflicts between themselves.

The external actors spend considerable resources on military support to the Government of National Accord (GNA) and Khalifa Haftar's Libyan National Army (LNA), respectively. The support has led to a

more equitable balance of power between the parties and reduced the likelihood of anyone getting the military upper hand in 2021. This gives the GNA and the LNA a stronger incentive to negotiate the future of Libya. In October 2020, the factions agreed to a ceasefire, which is an important step towards reaching a political solution.

However, the prospects of reaching a lasting political solution for Libya in 2021 seem dim. The parties must agree on a number of delicate issues, such as a future constitution, handling the militias, establishing national security structures and distributing oil revenues. The animosity between elements of the GNA and Khalifa Haftar could also derail the negotiations. Moreover, the political legitimacy of the factions will diminish due to rising popular discontent and protests. Both camps struggle with increasing levels of internal division, and a fragmentation of the political alliances cannot be excluded in the year to come.

The conflict between Iran and the United States could re-escalate

Since 2019, Iran has gradually stepped up its nuclear programme in response to the United States pulling out of the nuclear agreement and re-imposing sanctions in 2018. Iran has probably maintained its expertise in the military part of the programme and acquired nuclear threshold capabilities.³ Iran also has ballistic missiles with regional range, which could carry nuclear warheads, and it develops missiles that

³ Threshold capability means that Iran has the ability and capability to produce nuclear weapons if the government decides to do so.

« For Iran, negotiations with the new Biden Administration is the only realistic solution to the country's economic crisis. »

Image: President of Iran, Hassan Rouhani, during the 74th General Assembly of the UN, autumn 2019.

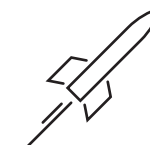




An Iraqi protester outside the US embassy in Baghdad, January 2020.



Iran fears that its negotiating position will weaken as the economic crisis deepens.



Iran's nuclear programme is its most important means of coercion to ease sanctions.



Iran has stepped up its nuclear programme as a response to the US pulling out of the nuclear deal.

can reach the entire Middle East and most of Europe.

With a new presidency in the United States, there is renewed hope of a breakthrough in negotiations. For Iran, negotiations with the new Biden Administration is the only realistic solution to the country's economic crisis. Tehran would likely accept a temporary solution, in which Iran commits to adhering to the nuclear agreement in exchange for a gradual ease of sanctions. In time, such a process could lead to negotiations on limiting Iran's nuclear programme, missile programme and its role in the region.

« Even though it is unlikely that Iran seeks nuclear weapons today, the conflict with the United States could lead to an Iranian decision to become a nuclear power. »

Without a breakthrough in negotiations, the US-Iran conflict will escalate. Tehran fears that its negotiating position will weaken as the economic crisis deepens, and that the United States will let Iran's position weaken further before resuming negotiations. For the authorities it is therefore important to rise quickly on the agenda of the Biden Administration.

Iran will gradually increase the pressure if the United States does not comply with the demand that sanctions must be eased before any Iranian concessions can be made. Iran-affiliated militias in Iraq, Yemen and Syria give Tehran the opportunity to harm the United States and its allies in the region with some degree of plausible deniability.

Iran's nuclear programme is its most important means of coercion to achieve an ease of the sanctions. Should Iran choose to produce nuclear weapons, it must enrich low-enrichment uranium to weapon-grade quality. After Iran stopped complying with the commitments of the nuclear deal, it has increased its enrichment capacity and the storage of low-enriched uranium has grown. Therefore, the time Iran needs to enrich sufficient fissionable material for a nuclear weapon is considerably reduced compared to what it was before the United States pulled out of the deal. Even though it is unlikely that Iran seeks nuclear weapons today, the conflict with the United States could lead to an Iranian decision to become a nuclear power.

Without a solution, the US-Iran conflict could have even greater consequences for regional stability in 2021 than in previous years. Iran has a major arsenal of short and medium range ballistic missiles and continuously develops more advanced cruise missiles →



President of Turkey, Recep Tayyip Erdogan and Fayez al-Sarraj, leader of the internationally recognised Government of National Accord, shake hands prior to a meeting in Istanbul, 12 January 2020.

and armed drones. In recent years, Iran has therefore increased its capabilities to strike against Israel, Saudi Arabia and US bases in the region. Iraq, Syria, Lebanon and Yemen also risk being dragged into an escalating conflict between Iran, the United States, Israel and Saudi Arabia.

Unwillingness to negotiate or reform in Syria, despite economic crisis

The challenges of the Syrian regime are growing, while its dependency on Russia and Iran is increasing. An unprecedented economic crisis is challenging President Assad's control of the Syrian state. The crisis has deepened throughout 2020, with no prospects of improvement in 2021. The US Caesar sanctions, which block international trade with Syria, exacerbate the difficult situation. Russia and Iran will offer some economic aid in order to secure a minimum of stability, but this will increase Damascus' dependence on Moscow and Tehran. The crisis is expected to lead to growing discontent and social unrest, including in Assad's core areas. However, it is unlikely that Damascus will be willing to carry out major reforms to improve the situation, as this could undermine its power.

The problems involved in stabilising reconquered areas will require increased efforts. Idlib is the front of priority, but reconquering the province is difficult. The Syrian military force cannot challenge Turkish forces in the area without Russian military support, which Moscow is unwilling to give as long as it could harm the relations with Ankara. The likelihood of a complete military reconquering of Idlib is therefore considerably reduced, and the deadlock in the province and its surroundings will likely persist in 2021.

Over the past year, ISIL has stepped up the

frequency of attacks against the regime and extended its operation area in central parts of the country. Having attacked oil and gas facilities on several occasions, the group will increasingly be able to threaten important routes of transport. There is growing resistance against Assad also in the south, but any new organised insurgency is unlikely.

Damascus is showing little will to negotiate in the talks on a new constitution. So far, Russia has not pressured the regime to make compromises, but Moscow could use promises of economic and military support as a means to pressure the regime into making political concessions, prior to the Syrian presidential election in the spring of 2021.

The crisis in Iraq will continue

The ongoing regional conflicts in Iraq challenge the country's stability and sovereignty. Economically and in terms of security policy, Baghdad relies completely on the United States and Iran, and would be in a vulnerable position if the US-Iran conflict were to escalate.

« Dwindling oil revenues and a lack of will to reform among the establishment will create social unrest, riots and major protests. »

Dwindling oil revenues and a lack of will to reform among the establishment will create social unrest, riots and major protests. The political level of conflict will be high towards the general election in 2021, but the resistance from the establishment renders it unlikely that the protests will bring about any political change.



Members of the military junta receive praise from huge crowds in Bamako, 21 August 2020.

The Kurdistan Regional Government will become more dependent on Baghdad. A precarious economic situation and a split between the Kurdish parties provide ample opportunity for the national government to limit the autonomy of the region. Fundamental questions regarding territory, budget distribution and oil production will not be solved in 2021. The Kurdistan Regional Government will seek to cooperate with external partners in order to compensate for the shift in power towards Baghdad.

ISIL still has a scope for action in Iraq, and the organisation will remain a significant challenge for Iraq's fragmented security sector in 2021. However, continued operations from the Iraqi Special Operations Forces, supported by western intelligence and air power, could help to maintain the military pressure on ISIL.

Security policy reorientation in the Gulf region

The United Arab Emirates and Saudi Arabia are in the process of making a small but significant adjustment to their security policies. Since 2019, the Emirates has lowered the level of conflict with Iran. Meanwhile, Turkey has become the United Arab Emirates' main opponent in the region, in addition to the Muslim Brotherhood. The rivalry between Abu Dhabi and Ankara will continue to influence the conflict in Libya and the battle for maritime borders in the eastern Mediterranean, where the Emirates supports Greece and Cyprus. In the autumn of 2020, the United Arab Emirates, Bahrain and Sudan signed a normalisation agreement with Israel. The agreement demonstrates that, in terms of security policy, it is useful to have Israel as a counterweight to Turkey and Iran in the region. If more of the Arab Gulf states

follow suit and normalise their relations with Israel, it will bolster the Egypt/United Arab Emirates block vis-à-vis Ankara and Tehran.

Separately, Saudi Arabia and the Emirates will continue to diversify their strategic cooperation. Riyadh likely seeks to reduce security policy vulnerabilities by acquiring military materiel from non-Western countries, primarily Russia and China. Saudi Arabia is also establishing closer ties with China by having the Chinese build its 5G network.

Because of the rivalry with Turkey and the conflict in Libya, the Emirates have entered into a security cooperation that reaches far beyond the traditional partners in the Gulf Cooperation Council and the West. For instance, Russia and the Emirates have strong interests that coincide in the Libyan conflict, and it seems as though the two will continue to cooperate on the ground in Libya in 2021.

Negative development in the Sahel

The military coup and the shift in power in Mali in 2020 demonstrate the lack of political stability in the country. Regardless of who remains in power in Bamako, there will be political and security-related challenges. As long as the political situation in the capital remains unsettled, the state authorities will lose further influence in northern and central Mali in 2021, while non-state actors may continue to consolidate their power in these areas.

Militant Islamist groups are expanding their area of operations in the Sahel. Central Mali and Burkina Faso have become a centre of gravity for militant Islamism, and several areas in Niger are destabilised due to conflict spillover from Mali, Burkina Faso and Nigeria. Several militant groups are active in the

« North Korea maintains its competence, research and production both in the missile programme and the nuclear programme. »

Image: Leader of North Korea, Kim Jong-un, watches the launch of a Hwasong-12 missile. The photo is undated, but was distributed by the state news agency of North Korea on 16 September 2017.





A new intercontinental ballistic missile is paraded in Pyongyang during the celebration of the 75th anniversary of the ruling party, 10 October 2020.

region, most of which are linked to the global terrorist networks al-Qaida and ISIL. A strategy of both organisations is to spread militant Islamism in the Sahel and West Africa. In turn, this means that militant Islamism will be a growing security challenge for West African countries such as Senegal, Côte d'Ivoire, Ghana, Togo and the Republic of Benin in 2021. The weak states in the Sahel will continue to seek support from external actors in the fight against militant Islamism.

North Korea will not concede its nuclear weapons

North Korea remains a nuclear weapons power and continues to develop its military power.⁴ Presumably, the regime will not comply with the United States' demands to abandon its nuclear weapons programme. The nuclear weapons are primarily a guarantee of the regime's survival but also a bargaining chip.

North Korea maintains its competence, research and production both in the missile programme and the nuclear programme. The regime has not tested long-range missiles and nuclear weapons since 2017. This has been necessary in order to maintain a favourable climate in the arms reduction talks. However, Pyongyang sees no reason to limit the development programmes without an agreement. In 2019, the country tested an improved submarine-based missile with regional-range capabilities. North Korea also continued to test short-range missiles until the end of March, when the covid-19 pandemic,

economic challenges and weather conditions put an end to this activity.

Although there have been no tests since 2017, it is likely that the development of new nuclear weapons has not stopped. This applies to the new thermonuclear bomb, which likely needs further testing. However, North Korea has tested more basic nuclear weapons for several years. The regime could have approximately ten weapons of this type, which could be ready for use. North Korea will use its nuclear weapons to put alliances under pressure and attempt to limit US presence in the region. At the same time, Pyongyang will seek to nurture the relationship with Beijing to ensure that the enforcement of the sanc-

« North Korea will use its nuclear weapons to put alliances under pressure and attempt to limit US presence in the region. »

tions against North Korea remains ineffective.

Over the past years, it is likely that North Korea produced more fissionable material and further developed the long-range missile systems. In October 2020, the regime demonstrated its power by parading a new intercontinental ballistic missile (ICBM). The purpose of this missile type is to bolster nuclear deterrence against the United States. North Korea wants ICBMs that can penetrate missile defences and strike against the entire US. More tests are necessary for such a system to become operational. →

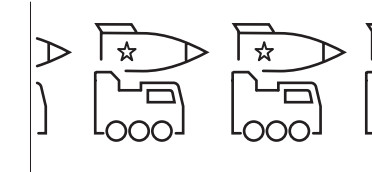
⁴ Only five nations (the United States, Russia, China, France and the United Kingdom) are recognised as nuclear-weapon states according to the Treaty on the Non-Proliferation of Nuclear Weapons. The other four nations in possession of nuclear weapons are Pakistan, India, Israel and North Korea.



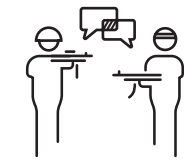
People gather in a mosque in Helmand to pray for peace, 11 October 2020.



The military coup and the shift in power demonstrate the lack of political stability in Mali.



North Korea could have several nuclear weapons ready for use.



Without a political agreement between the parties in Afghanistan, civil war could become reality.

Increased risk of civil war in Afghanistan

The initiation of the intra-Afghan negotiations in Doha on 12 September 2020 marked a new phase in the peace process. For the first time, the Taliban was willing to negotiate directly with the Afghan government. However, the group emphasised that the government is only one of several Afghan parties with whom it seeks a political agreement. The Taliban considers the government a US puppet and an illegitimate representative of the Afghan people. The movement therefore wants President Ghani and other authority figures to resign and instead negotiate on behalf of themselves and their groups.

There is a sharp divide between the parties. A political agreement is only possible if the government agrees to key demands from the Taliban. The Taliban wants to establish an independent sovereign state with a strong central power founded on its interpretation of Islam. This would require a new constitution with new institutions and a complete withdrawal of Western forces. The government wants to preserve the constitution and the current form of government as much as possible. There is little will to find solutions, but it is possible that the parties will agree to appoint an interim government in order to give the negotiations a more neutral starting point.

Internal conflicts will continue to mark the Afghan government also in 2021. Considering the lack of consensus within the government's negotiating team, chances are slim that it will be effective. The Taliban's leadership does not face similar challenges but will still spend time on anchoring the process on all levels within the group. In addition, the parties have to secure both regional and international support.

For as long as possible, the Taliban will abide by the agreement with the United States and implement mechanisms to comply with the guarantees they gave not to let Afghanistan become a hotbed for international terrorism. In return, the movement will demand that the United States honours its obligations. The group has demanded that no Western forces remain in the country after 1 May 2021.

If the international forces pull out before a political agreement is on the table, there is a risk of the peace process collapsing – and of civil war. □



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