Annual Report 2024

MUST

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MUST IN BRIEF

→ MUST engages in defence intelligence and military intelligence and security services.

→ MUST's defence intelligence supports Swedish foreign, defence and security policy, and helps in the identification of external threats to Sweden.

→ MUST prevents, detects and counteracts security threats to the Armed Forces and its interests in Sweden and abroad.

→ MUST is part of the Armed Forces and is directed by the Government and the Chief of Defence.

→ The Director of MUST is directly subordinate to the Chief of Defence.

→ National and international cooperation are essential to address current and future challenges in all levels of conflict.

→ MUST's activities are governed by laws and regulations and are regularly scrutinised through independent audits.

FOREWORD BY THE DIRECTOR OF THE MILITARY INTELLIGENCE AND SECURITY SERVICE (MUST)

Our security situation has seen a serious deterioration during the last years. Several major events have adversely affected the situation.

After a year of escalating conflict in Gaza, Lebanon and intense attacks between Iran and Israel, developments in the Middle East are very dynamic. Developments in Syria have been dramatic and will have implications far beyond the region, notably for Russia and Iran.

In recent years, the dynamics between the major powers have been marked by increasing competition in a growing number of political, military and economic arenas. The global struggle for technological leadership has intensified. Competitiveness and innovation are of crucial strategic importance, and countries such as China, Iran and Russia have a strong interest in acquiring valuable information for use in military and civilian technology, including from Sweden.

The single most decisive factor in the deterioration of the security situation in recent years is Russia's aggression and its war in Ukraine. The Russian leadership sees the war as part of a larger conflict with the West that is currently being waged by military means in Ukraine. Russia is also acting with hybrid warfare against NATO and EU countries.

Even though Russia's conventional military capabilities in our vicinity are currently limited, there are still capabilities such as naval and air forces, cyber capabilities, special forces and nuclear weapons. The day the war in Ukraine comes to a standstill or decreases in intensity, Russia will redistribute resources to our vicinity, as the area is of great military strategic importance in the event of a military confrontation between Russia and NATO. The Russian military threat is thus a central aspect, despite Sweden's NATO membership providing increased security and a reduced threat of an armed attack specifically directed at Sweden.

In addition to the military threat, which requires a continued rapid increase in military defence capabilities, Sweden must be prepared to deal with an increased threat from hybrid. Our adversaries' objectives are to acquire information, influence, harm or weaken us and our communities.

The states that challenge our security through these methods can use the combined resources and toolkits of their countries, including military resources, to influence us. They look for vulnerabilities in the defences of Sweden and its allies. Hybrid warfare is tailored to circumvent countermeasures and maximise the impact on the targeted society. It is characterised by both preparation and opportunism.

The hybrid threat is not new, but important changes have taken place over the past year. These include increased risk-taking by Russia, and new methods such as the use of unqualified proxies for attacks in several European countries.

We live in a dangerous time – and will continue to do so for the foreseeable future. The threats to Sweden are broad and complex. We must draw conclusions from this and act accordingly.

In order to increase the capability of our total defence, it is of great importance that Sweden addresses the threats to our society with a coordinated approach. Action needs to be taken by different actors at different levels, both public and private.

MUST is working hard to strengthen the Armed Forces' capabilities, while at the same time fulfilling our vital mission. The recent Defence Resolution will strengthen the intelligence and security

capabilities of the Armed Forces as a whole and within MUST. During 2024, we continued to work to capitalise on the potential offered by our increasing digital capability, which will be central to the intelligence and security services of the future.

Our aim is to ensure that our stakeholders, the Government and the Chief of Defence, have the best possible information concerning threats to Sweden. We are developing our already close and operational cooperation with the National Defence Radio Establishment and the Swedish Security Service to jointly counter serious threats to our society.

MUST also strives to disseminate information to a wider audience about developments and the threats and threat actors that our total defence needs to protect us against. This annual report is part of this dissemination of information. I hope that you, will find this information useful.

I would like to underscore that, although Sweden faces serious threats, the future is not set in stone. We must take action and focus these actions on what is most important, based on our knowledge of the threat. We must act quickly, but with perseverance.

Important steps are being taken within the Armed Forces and in our society to strengthen our defence capabilities and the capacity and resilience of the total defence. This affects our adversary's calculations and increases our security and that of our allies.

Lieutenant General Thomas Nilsson
Director of the Military Intelligence and Security Service

GLOBAL DEVELOPMENTS

Security policy developments in Sweden's vicinity are largely determined by developments in Russia's war in Ukraine. The security situation is very serious and the threats to Sweden are broad and complex. The Russian military threat remains substantial, as are the effects of hybrid warfare.

Sweden's adversaries are searching for vulnerabilities in the defences of Sweden and its allies. Countries such as Iran, China and Russia will act against Sweden and our allies with the means at their disposal. It is likely that the hybrid warfare capabilities of these countries will become increasingly important. Hybrid warfare will be adapted to achieve greater effectiveness or circumvent countermeasures, and will be characterised by both preparation and opportunism. State actors can act against multiple levels of society – national, regional and local – as well as against multiple sectors of society, even those that we do not define as strategically important.

SYSTEMIC CONFRONTATION

Sweden and its allies face actors who use the collective resources of their state and exert a far-reaching influence over their industries and citizens. Centralised distribution of power, authoritarianism and adapted legislation are some of the factors enabling these countries to act without internal restrictions.

Countries whose societal model is based on democracy, the rule of law, civil society and the market economy are thus facing systemic confrontation. This requires society as a whole to have the capacity to coordinate across administrative boundaries in order to address a wide range of threats without compromising fundamental values.

In recent years, the dynamics between the major powers have been increasingly characterised by growing competition between China and the United States, much of which appears to centre around global technological leadership.

This dynamic has taken on both a clear ideological dimension relating to the future of the global order and a strategic jockeying for power in Asia. The competition between China and the United States is particularly evident in the struggle for global technological leadership.

HYBRID WARFARE

STRATEGY
Hybrid warfare (or non-linear warfare) is a strategy of using military and civilian means to achieve objectives, but without escalating the situation to direct military confrontation or large-scale warfare.

DIFFERENT MEANS
Hybrid warfare can range from conventional military means and cyber warfare to disinformation, sabotage, diplomatic and economic pressure, and other means of influence.

PROXIES
Hybrid warfare may be carried out by proxies who knowingly or unknowingly act in the interests of the attacking power.

THE SITUATION IN RUSSIA

Russia's war in Ukraine defines the security policy developments in Sweden's vicinity. The country considers itself to be in a strategic conflict with the West, and the Russian leadership's world view and threat perception characterise Russia's behaviour towards the outside world. To support its ongoing war efforts and to cope with the strategic conflict with the West, the Russian leadership is forcing an extensive reorientation of Russian society.

The developments in the war in Ukraine are fraught with uncertainty. War is inherently unpredictable and can therefore give rise to unforeseen events with far-reaching consequences. Nevertheless, developments inside Russia will determine the war and conflict with the West.

CONFRONTATION WITH THE WEST

The Russian leadership regards itself to be in a strategic conflict with the West and NATO, which is currently being played out through the war in Ukraine. Russia believes that the world order is changing, and it wants to shape the new order to align with its interests. Russia sees its future in cooperation with China in particular, but also with other countries in Southeast Asia, Africa and Latin America. With the West, it has chosen confrontation.

Russia is using all its means of power in the conflict, i.e. military, political, diplomatic, information measures, cyberattacks, sabotage, etc., to influence developments. With much of its military capability tied up in the war in Ukraine, Russia will largely use other means of power against the West.

RUSSIAN STRATEGIC OBJECTIVES

Russian leaders have been clearly stating their strategic objectives for a long time. The objectives are a new European security order, the right to a Russian sphere of interest in which Russia defines which countries are included, and the stability of its own regime. The Russian view of a new security order is that it will consist of a number of defined world powers: Russia, the United States, China, India, Brazil and others.

> Russia will continue to orient itself towards China and countries with similar world views, and seek to reduce its economic and technological dependence on the West.

The dynamics between internal repression and external aggression have been clear for over a decade. The drive to change the European security order and establish a Russian sphere of interest was already pronounced in the mid-1990s, but resources were scarce then. It was not until higher energy prices in the early 2000s that the policy became feasible. The increasingly aggressive foreign policy of the mid-2000s has consistently scored high in popular opinion polls – including the illegal annexation of Crimea in 2014. This means that the Russian nationalist ideological roadmap and the strategic conflict with the West will persist for a long time.

Russia will continue to orient itself towards China and countries with similar world views, seeking to

reduce its economic and technological dependence on the West and to overthrow the world order that has prevailed since the end of World War II.

Currently, all available resources in Russia are oriented towards supporting the war. The war has become the legitimisation of the political leadership, and the country continues to move in a neo-Stalinist direction: censorship prevails, denunciation is back, as are deportations, political assassinations and long prison sentences.

Politically, Russia plays on the assumption that it is more resilient than the West. President Vladimir Putin has made clear that he sees the Chechen Wars (1994–1996 and 1999–2009) as a model for the war to come. For Ukraine, this has meant Russian military intervention aimed at overthrowing the country's government. Russia's actions in Crimea and then Donbas over eight years are a clear illustration of how armed groups can act on territory and turn parts of it into a lawless land. Russia can continue this in Ukraine for a long time (even after any ceasefire has been declared) until Kiev falls. Russia then intends to install a loyal regime and recognise Russian sovereignty.

SECURING DOMESTIC POLITICAL SUPPORT

The outcome of the 2024 presidential election quickly reinforced Vladimir Putin's view of broad support for the war among the Russian population. At the same time, the Russian leadership wants to avoid further mobilisation (the one proclaimed in September 2022 has not yet ended), as this would be very unpopular with its own population.

The elections being held in Russia are similar to those of the Soviet era, i.e. they aim at mobilising the greatest possible support for the incumbent regime. They have nothing to do with democratic elections.

The regime has taken several measures to continue securing recruitment into the armed forces. The age range for military service has been extended by three years, the age for calling up reservists has been raised (for senior officers, from 65 to 70 years), and the federal compensation for volunteers has been doubled.

EDUCATING FUTURE GENERATIONS

Compulsory military training has been introduced in schools, like in Soviet times. Compulsory ideology courses have also been introduced in schools ("Conversations about what matters") and universities ("Foundations of the Russian State"). Furthermore, a number of "Russian spiritual and moral values" have been laid down in a decree by President Putin. The most important of these values, which are said to characterise Russia's citizens, are: life, dignity, serving the fatherland and taking responsibility for its destiny, high moral ideals, prioritising the spiritual over the material, collectivism and historical memory and continuity between generations, and the unity of the people in Russia. At the same time, the decree defines what is called "destructive ideology", which is said to include violence, selfishness, licentiousness, and immorality. It is said that this ideology, with its immorality and unpatriotic attitude, is alien to Russian society and constitutes an "objective threat" to Russia's national interests.

These measures by the Russian regime, coupled with revised history textbooks, are intended to educate future generations in the Russian nationalist agenda. Whether this will succeed is unclear, but it clearly illustrates that the conflict with the West is deep and long-lasting. In line with its national security strategy, Russia will seek to reduce its political, economic and technological dependence on the West.

SOVIETISATION OF THE RUSSIAN ECONOMY

The Russian economy is geared for war and is in the process of being sovietised, i.e. centralised from Moscow. At the same time, Russia is engaging in macroeconomic misdirection and trying to project the image that the economy is resilient and that Western sanctions are ineffective. The aim of the misdirection is to undermine Western unity behind the sanctions and to counter the Russian people's widespread mistrust of the Russian economy. For example, criticism of economic decisions by Russian authorities is censored.

The economic model chosen by Russia involves state expansion at the expense of the private sector and the reallocation of resources from productive sectors to activities that do not generate significant future economic returns. Vast resources are allocated to the defence industry. The longer this reallocation continues, the more dependent the Russian

THE RUSSIAN ECONOMY

The war waged by the Russian leadership in Ukraine has had very serious consequences for the country's economy and population.

Western sanctions have forced a transformation of the Russian economy, with the war consuming enormous resources that the Russian leadership is diverting from other parts of the state budget. The consequences are felt by many Russians. At the same time, the Russian leadership and its propaganda agencies are working hard to maintain the image that the economy is not affected by the war. This is aimed at both the Russian population and at undermining Western military support for Ukraine. Russia wants the world to believe that the Russian military and economy are "too big to fail" to increase pressure on Kiev to agree to the ceasefire negotiations.

economy will become on the defence industry. In the long run, the Russian leadership will have to choose between military investment, social spending and investment that stimulates the economy. This is a political choice, and so far the Russian leadership has prioritised war. At the same time, it is also clear that the Russian leadership considers the question of Russia's greatness and place in the world to be far more important than the welfare of its people.

The top-down, increasingly totalitarian Russian political system is inherently unstable, precisely because it is top-down. The indifference and fear that have characterised Russian public opinion can quickly change to the contrary. Such a development may be swift and is always unpredictable, but at present there is no indication of such a development. The world therefore needs to prepare for a protracted conflict.

THE SITUATION IN SWEDEN'S VICINITY

Sweden's geographical location is of great military strategic importance in a military confrontation between Russia and NATO. However, MUST assesses that Sweden's security has been strengthened and that the threat of an armed attack specifically directed at Sweden has decreased since Sweden joined NATO.

From a Russian perspective, developments following Russia's illegal invasion of Ukraine have led to several negative consequences. The Russian leadership and the leadership of the Russian armed forces view the regional security policy and military strategic developments in the Swedish vicinity as negative. Russia observes that NATO and its member states increasing their military presence in the area through more extensive training and activities. The accession of Finland and Sweden to NATO has been noted with discontent. NATO countries are increasing their defence spending and NATO's joint defence plans are being noted.

Russian officials have expressed their dissatisfaction with the developments in the region. A recurring message from Russia has been that the risks to its own security will increase as a result of NATO enlargement and the integration of Finland and Sweden into NATO. The same message is also repeatedly given to the Russian domestic audience, primarily to increase public support for the Russian war policy. Given the sharp deterioration in diplomatic relations with NATO countries, the opportunities for confidence-building dialogue and forward-looking diplomacy remain very small. Russia has labelled several NATO members, including Sweden, as unfriendly countries.

Russia's main objectives in the vicinity of Sweden are to mitigate the consequences of perceived negative security policy and military strategic developments and to undermine the unity of support for Ukraine among the countries providing military support.

Russia has announced that a number of measures will be taken to counter the perceived deterioration of the security policy situation experienced in the Swedish vicinity. The measures are mainly long-term and aim to strengthen conventional military capabilities by reorganising the military zones in western Russia and the building up new bases and military units. Most of these measures have been known for some time, but have now been relaunched as new measures following the invasion of Ukraine.

LIMITED CONVENTIONAL MILITARY CAPABILITIES

The Russian armed forces throughout Russia are affected by the war in Ukraine, albeit to varying degrees. The Russian forces are preparing to counter NATO's increased activities in the region and protect themselves from the attacks that, according to open media, are being carried out by Ukraine. This means that activities by Russian forces in the vicinity of Sweden, in particular in the Baltic Sea region, could increase the risk of mistakes leading to incidents and security crises that could involve NATO, including Swedish military units and civilian vessels. However, experience has shown that the Russian leadership chooses to wage war against its neighbours under conditions it perceives as favourable.

Russia's conventional military capabilities in the vicinity of Sweden will be limited as long as the war in Ukraine continues. The Russian ground forces in northern and western Russia have largely been deployed to the war in Ukraine. Many Russian bases in the vicinity have a reduced presence of officers, soldiers and equipment. The main activities appear to be basic military unit operations and the training of both recruits destined for Ukraine and conscripts. In general, after the illegal invasion of Ukraine, Russian military exercises have taken place on a smaller scale than normal and with less advanced training objectives.

Russia's naval capabilities in the Baltic Sea are not as affected by the warfare in Ukraine, and the Russian Baltic Fleet carries out extensive defence and security measures to protect supplies to and from Kaliningrad and to protect Russian exports from Ukrainian special forces. The Northern Fleet is also less affected by the war in Ukraine and continues its activities to protect Russian nuclear submarine capability. The Russian air forces are moderately affected by the war, with the exception of the redeployments following drone strikes on Russian air bases.

At present, there appears to be very limited scope for Russia to conduct successful landings or large-scale airdrops in the Baltic Sea region.

Consequently, Russia will not be able to conduct another large-scale and comprehensive military operation in the vicinity of Sweden for as long as the war in Ukraine continues on its current scale. A substantial supply of personnel and supplies will only be possible after the war in Ukraine has become less intense. Given Russia's investment in its domestic defence industry and its preparations to rapidly train new soldiers for its armed forces, there are conditions for a quantitative increase in military capability over the course of a few years. Increasing military capability qualitatively will take longer.

EFFECTIVE LOGISTICS CAPABILITY

Despite the current limitations of conventional military capability since the illegal invasion of Ukraine, Russia has demonstrated a military logistics capability that spans the entire country. Russia can thus redeploy military resources from other parts of the country and transport imported

material entering the country via eastern Russia. This means that the Russian leadership is able to concentrate combat forces in the vicinity of Sweden in a short term perspective, but the conditions for carrying out comprehensive and qualified military operations are severely limited at present. The chances of a surprise large military operation in our vicinity are therefore very small. However, it is possible that the Russian leadership could carry out a limited armed attack against any of the Baltic states or against military or civilian state vessels. Such action could seem disadvantageous from a Swedish perspective, but it is important to emphasise that the Russian leadership makes decisions based on its own logic and assessment of the situation.

UNAFFECTED RUSSIAN NUCLEAR CAPABILITY

Russia maintains its ability to carry out long-range military operations. Russia can arm several of its conventional long-range weapons systems with nuclear warheads if necessary. The non-conventional nuclear capability has been maintained, but the previously announced modernisation has been prone to delays. The Russian government regards nuclear capability as essential to compensate for the limited conventional military capability in Sweden's vicinity. There is good control over Russia's nuclear capability, and a militaryoperation with nuclear arms requires a decision by the highest level of government.

As long as the war continues, Russia's weapons of mass destruction, in particular its nuclear capability, appear to be of greater importance for deterring NATO and provide an opportunity to try to influence European policy and public opinion through threats. Escalated nuclear rhetoric and strategic communication of its nuclear capability is an instrument of power that the Russian leadership is prepared to use to exert pressure on NATO and its member states.

RUSSIAN INFLUENCE IN BELARUS STRENGTHENED

Following the mass protests following the Belarusian presidential election in August 2020, in which President Aljaksandr Lukashenka, backed by the Kremlin, declared himself the winner after an election result that was heavily criticised internationally, Russia has strengthened its influence over the regime in Minsk. In the years before 2020, there were some opportunities for Lukashenka to balance Moscow's relations with Western countries. That possibility came to an end in 2020. Following Russia's illegal invasion of Ukraine, Belarus' independence from Moscow has been further curtailed and the Belarusian economy is now more dependent on Russian support than ever before. Belarus, through its armed forces, has clearly supported Russian warfare in Ukraine. Belarus and Russia are to be regarded as a single political and military strategic entity, even though Belarus still has formal independence.

THE ARCTIC INCREASINGLY IMPORTANT

The significance of the Arctic will increase for Russia. The area is vital to Russia's strategic nuclear capabilities and to the economic opportunities resulting from climate change, with melting sea ice opening trade routes and enabling raw material extraction in the Arctic Ocean. The war in Ukraine has led Russia to increasingly allow Chinese interests to operate in the Arctic as part of closer cooperation between the countries.

RUSSIA'S RELATIONS WITH THE WEST

Russia's warfare in Ukraine is tying up large military resources, and the world's response to the illegal invasion, as a whole, means that Russia's ability to influence Europe is limited. By all accounts, Russia's current strategy is to avoid escalation and direct military confrontation with NATO. There are a number of signs that the focus is primarily on

hybrid warfare, also known as non-linear warfare in the Russian context, in order to avoid escalation that would trigger NATO defence guarantees under Article 5 of the NATO Charter. Russia seeks to counteract the political unity of the countries supporting Ukraine and the perceived deterioration of security policy in Sweden's vicinity.

Following the launch of the illegal invasion of Ukraine, Russia has seen several of its earlier means of power against European countries severely weakened. Political, diplomatic and people-to-people relations with Russia have largely ceased. Trade and business relations with Russia have been severed, and most European countries have discontinued or are seeking to reduce their energy imports from Russia. Fewer and fewer actors in the information environment want to be associated with Russia. European security services have coordinated the expulsion of Russian intelligence officers on an unprecedented scale. Several Russian intelligence operations in Europe have been exposed.

Recently, a number of incidents have been detected in Europe that have been linked to Russian authorities and special services. These include preparations and attempts at sabotage, increased intelligence gathering, cyber intrusions and the creation of new networks and platforms for influence operations and information campaigns. While the objectives of these activities have been largely linked to Western governments' decision-making and implementation of aid to Ukraine, they have also targeted public opinion and policies in countries that Russia perceives as receptive or central to political cohesion in Europe. The overall picture is that Russia has adapted its actions and is compensating for the loss of the effect of other means of power following the illegal invasion. Recent activities appear to be more offensive than previously observed.

THE GLOBAL CONTEXT

The situation in the Middle East has deteriorated following the large-scale terrorist attack by Hamas on 7 October 2023. A war has raged in Gaza, resulting in wide-spread human suffering and material loss. The overthrow of the regime in Syria has added to the uncertainties that define the regional dynamics. Developments in the region remain uncertain.

MIDDLE EAST AND IRAN

The regional dynamics have further deteriorated with escalated attacks on Israel by the Iranian-backed Hezbollah militia in Lebanon, to which Israel has responded by, among other things, blowing up communications equipment and conducting ground operations in Lebanon. The Iranian-backed Houthi militia in Yemen has increased attacks on civilian shipping in the Red Sea, to which Israel has responded with missile strikes on targets in Yemen. In addition, Iran and Israel have carried out extensive attacks on each other since the outbreak of the war in Gaza. The overthrow of Bashar al-Assad in Syria raises uncertainties for the future stability of the country, circumstances that may also have an impact in the region.

Even before the Hamas attacks in 2023, the Middle East as a region was already characterised by risks of socio-economic and political instability. Developments in the region will be shaped by the repercussions of Israel's actions since the Hamas attacks. Israel, Iran and the Iranian-backed groups in the region have been the most prominent actors in security policy developments. There is a risk that developments will escalate regional security dynamics into a major regional war involving several major states in the region. However, both Iran and Israel seem to have sought to avoid an escalation of the situation into regional war, and their operations appear to have been well-balanced under the circumstances. Several of the major powers and the EU have acted diplomatically to mitigate potentially escalating developments.

Iran's overarching strategy aims to ensure the regime's survival and regional status. One of the tools for this is to use political and armed groups in the region. The Iranian regime recently made a clear contribution to regional escalation through its support for the Hezbollah and Houthi militias. The Houthi militia's attacks on civilian shipping have direct implications for global trade and European and Swedish economic interests. However, recent developments have seen Israel putting the Iranian-backed groups under increasing pressure, and it remains to be seen how Tehran will act regionally to try to regain its room for manoeuvre.

The Iranian regime is also acting outside the region through hybrid warfare. The regime uses the Iranian Revolutionary Guard Corps, its special forces and its foreign service, among others, for intelligence gathering, refugee espionage, cyberattacks, influence operations, disinformation campaigns, and incitement to or the realisation of attacks. Countries like Sweden have not been spared from Iranian hybrid warfare, as exemplified by attempted attack on the Israeli embassy in Stockholm in May 2024 by Swedish organised crime actors at Iran's request.

Iran's rapprochement with Russia has continued since the illegal invasion of Ukraine. Political, economic and military cooperation between the countries now covers a wider range of areas than before, including Iranian supplies of military equipment to the Russian warfare in Ukraine. Iranian supplies are used by the Russian armed forces

both on the battlefield and in attacks on targets in Ukrainian cities and infrastructure. Iranian military equipment thus prolongs the war in Ukraine and directly contributes to the deteriorating security situation in Sweden's vicinity.

CHINA

China's partnership with Russia has grown broader and deeper following the illegal invasion of Ukraine. The Chinese leadership has expressed its agreement with some of Russia's stated reasons for the invasion, while maintaining a rhetoric of neutrality between Russia and Ukraine. China does not seem to have supplied any significant amount of military equipment to Russia, but its importance to the sustainability of Russia's warfare and defence industry cannot be underestimated. Chinese exports to Russia have seen a substantial increase, with a large share of Russian imports of sanctioned goods going through China. Overall, China's relationship with Russia appears to be one of the most significant factors in allowing the war in Ukraine to continue.

In recent years, the dynamics between the major powers have been shaped by increasing competition between China and the United States. This dynamic has taken on both a clear ideological dimension about the future of the global order and a strategic jockeying for power in Asia. Asia is predicted to become the economic centre of the world, which means that great interests are at stake in this part of the world and that developments there will also affect other parts of the world.

From a Chinese perspective, the time has been judged to be ripe to realise a global and regional repositioning that is considered to be more in line with China's political and economic position. China seeks to promote a world order based on Chinese values, stronger political independence and global freedom of action to promote its interests. Changing the norms and institutions that have formed the basis of the post-World War II international system is an important part of this endeavour. China is using its economic clout to forge pacts with like-minded or economically dependent states in international contexts, such as the United Nations to influence the international system.

There are many indications that the competition between China and the United States will primarily take the form of a struggle for global technological

leadership. This involves being at the forefront of the technologies of the future, including research, industrial production, standard-setting and international norm-setting. In this respect, China seeks to be a leader in the technologies which, from a Chinese perspective, will be crucial for the future. In particular, this includes technology areas in the context of the green transition. The Chinese strategy in these areas is to dominate the entire production chain of raw materials, components and production in the same way as previously with solar power.

China also seeks to influence European countries to promote its interests and undermine the consensus on EU-wide positions by translating its economic weight into political influence. The EU's common trade policy is an example of an area of interest for China to try to influence. By influencing both state-owned and private Chinese companies, China in trying to gain access to influence at several levels – national, regional, local – and in several different sectors of society and business in countries like Sweden.

China has a network of organisations for citizens living abroad under the "United Front" political strategy that China uses to promote its interests abroad. There are reports of an increase in Chinese intelligence gathering, refugee espionage and cyber intrusions. Sweden is a country of interest because of its role and expertise in research and technology.

THE GEOPOLITICS OF TECHNOLOGICAL DEVELOPMENT

Rapid technological developments are considered to be an important part of the transformation of the global economy. The future standard of living in all countries will depend on a number of technological fields that will dominate economic growth. One such area is the transition to global climate change with so-called green technology, including electrification with renewable energy instead of emissions-intensive fossil energy. China has an outspoken policy to dominate and control green technology, which has become increasingly clear in terms of battery technology, electric vehicles and solar power.

HYBRID THREATS AT MULTIPLE LEVELS

For the past several years, MUST has assessed that the threats to Sweden are becoming broader and more complex. The trend towards hybrid threats against a growing number of levels and sectors of society has continued, despite efforts to counter this threat scenario. At the same time, there is a risk that escalation or instability in more regions of the world will have repercussions for security in Sweden or Swedish interests. There are also signs that state actors and non-state actors, such as violent extremists and members of organised crime, are forging more contacts. This requires a broad and active approach from a country like Sweden..

By all accounts, actors who may be linked to China appear to be more active in influence operations and disinformation campaigns against Europe and the United States.

THE DISTINCTION BETWEEN INTERNAL AND EXTERNAL THREATS

The threat of terrorist attacks against Sweden is assessed by the National Centre for Terrorist Threat Assessment (NCT), which consists of staff from the National Defence Radio Establishment, MUST and the Swedish Security Service. The threat of terrorism against the Swedish Armed Forces is assessed by MUST.

The terrorist threat against Sweden and Swedish interests has increasingly come to challenge the traditional distinction between internal and external threats. In this respect, the terrorist threat can be affected by events both in Sweden and abroad. In addition, domestic and foreign events can amplify each other when different actors spread messages and disinformation about Sweden. The events surrounding the so-called LVU [Swedish Care of Young Persons (Special Provisions) Act] campaign and the Qur'an burnings in Sweden are examples of how actors in the information environment can portray Sweden negatively to target groups both in Sweden and abroad. Both state actors and representatives of violent extremism are behind this behaviour.

In Sweden, these actions may be aimed at spreading political and social unrest by undermining the ability of opponents and participants in the public discourse to get their message across, fuelling domestic political divisions, inciting violent demonstrations or, ultimately, providing guidance to lone wolf terrorists to carry out attacks. The image of Sweden as a partner, trading nation and country to live in has also become a target for disinformation. In conjunction with the Qur'an burnings, state actors spread messages to target groups in third countries that portrayed Sweden as Islamophobic. Although in some cases the portrayal may be intended for a domestic audience, Swedish presence abroad and Swedish interests may be subject to negative attention and violence.

State actors could opportunistically seize opportunities to promote their security or domestic interests through non-state actors as proxies for violence. State actors can then act within the framework of hybrid threats with more advanced tools than those available to violent extremists. Such behaviour is deniable and has a lower risk of leading to escalation. For example, the Swedish Security Service has found that actors linked to Iran have attempted to incite violent attacks in connection with the Qur'an burnings in Sweden through cyber intrusions and mass distribution of messages calling for violence.

SECURITY AS A NATO ALLY

When Sweden became a NATO ally, Swedish security and safety for our citizens increased. At the same time, Sweden opened up in an unprecedented way. Sweden will remain Swedish, but our rights and obligations to preserve and protect the country and our NATO allies have changed.

Sweden's defence is now part of NATO's collective defence and, as an ally, this gives the Swedish Armed Forces access to new capabilities, information and forums for cooperation. At the same time, it brings with it new types of vulnerabilities, protective values and points of contact that can be exploited by an adversary. Russia is trying in various ways to influence Sweden's NATO membership, for example by influencing information.

Sweden's NATO membership is also creating new Russian intelligence needs. Russia's intelligence activities are directed, inter alia, at NATO's operational planning, where Sweden is one of many actors. In 2024, the Swedish Armed Forces planned for a Swedish contribution to the NATO Forward Land Forces (FLF) in Latvia. The personnel and activities of these forces will also be of interest to the Russian intelligence and security services.

The Defence Cooperation Agreement (DCA) between Sweden and the United States, adopted by Parliament in 2023, also strengthens cooperation within NATO. When the agreement was signed, it created the conditions for the United States to be able to quickly assist Sweden in the event of a serious security situation. The agreement is initially bilateral with the United States, but relates to needs within NATO, including those of Sweden's neighbouring countries, and provides flexibility based on a changing global situation and the possibility of military action in different geographical directions.

CRYPTO DEVELOPMENT AND COOPERATION

The Swedish NATO membership imposes other requirements on protected information between Sweden and other allies. As a nation, Sweden has leading crypto-technical expertise that can be expanded and contribute to NATO's development in the field of crypto.

The membership has also meant that Sweden receives a larger number of crypto keys from NATO. As the National Distribution Agency (NDA), MUST is responsible for managing and distributing crypto keys and the crypto devices purchased or provided from NATO. MUST is also working to build its own supply of crypto keys for foreign NATO crypto.

INTEGRATION OF INFORMATION FLOWS

The NATO Joint Information Security Regulations will be gradually integrated into the daily work of the Armed Forces. It is essential that the flow of information between Sweden and other NATO countries can take place securely and that the different information security requirements of the countries do not impede the flow of information.

Cooperation within the defence alliance places increasing demands on the type of information that can be shared within the Alliance and how the joint defence planning affects the evaluation of information.

This requires new regulations and well-developed systematic security protection work, which also takes into account the growing threat scenario and the growth of the Swedish Armed Forces. In 2024, the Armed Forces worked in partnership with the Swedish Security Service and the Government Offices to implement NATO's security protection requirements in existing regulations. It is important that the authorities handling documents that fall under NATO regulations have the right conditions and support to maintain security protection.

THE IMPACT OF THE UKRAINE WAR ON SECURITY

Russia's war of aggression against Ukraine is now in its third year. Russia's political leadership believes that the outside world is threatening the Russian political system and that Western countries, led by the United States and NATO, are trying to destabilise the country.

The main priority of the Russian intelligence and security services is likely to be the success of the war in Ukraine, countering Western support to Ukraine and limiting the negative political, military and economic consequences of the war for Russia.

THREATS OF SABOTAGE AGAINST SUPPORT TO UKRAINE

Russia has operational military planning that includes Sweden and its vicinity. This means that Russian intelligence activities are directed against large parts of the Armed Forces, the total defence and the defence industry. This mainly involves gathering information to support military operations, but also focuses on intelligence on the operational planning of the Armed Forces and NATO. In addition, intelligence activities are directed at civilian capabilities and civilian infrastructure on which the Armed Forces depend. Military and civilian support to Ukraine are also prioritised intelligence targets.

Several recent events have indicated an increasingly offensive approach to planning and carrying out sabotage in the EU and NATO countries. The threat of sabotage is most pronounced in the area of military and civilian support to Ukraine, with infrastructure, communications and power supply being the most likely targets. Sabotage carried out through proxies or agents increases Russia's ability to act covertly.

Russia's new aggressive stance and the need for alternative intelligence gathering methods following the expulsion of intelligence officers and the increased use of signals intelligence and cyberattacks have increased the need for communications security (COMSEC) and good IT security. Sweden needs modern COMSEC that provides protection against both current and future crypto-breaking methods and capabilities.

The war in Ukraine is driving the pace of development of technology, methods and countermeasures. MUST is closely monitoring this development together with other actors in the field of COMSEC, for example, by equipping military platforms with different types of protection against jamming and interception.

A CIVIL SOCIETY THAT STANDS STRONG

The experience of the war in Ukraine has shown how the war has affected total defence in different ways. Physical security is not only important in military terms, but also in ensuring that civil society can function in the event of war. Sweden needs to ensure that areas such as electricity supply, road and rail transport, and healthcare can continue to function regardless of the level of conflict.

It is also important that security and continuity planning is long term in order for society to stand strong. One lesson to be learned from Ukraine is how the country creatively made security planning a prerequisite for sustainable total defence.

NEW TECHNOLOGY CREATES RISKS AND OPPORTUNITIES

Technology is developing rapidly in several areas related to the work of intelligence and security services. Artificial intelligence (AI), the development of unmanned aerial vehicles, and research to create quantum computers can result in both new opportunities and new security threats. MUST continuously monitors whether new avenues of attack emerge that could pose risks to Swedish security and Swedish COMSEC systems.

In addition to intelligence gathering relating to military capabilities and planning, Russia focuses on intelligence gathering in science and technology. The need for Western technology is critical, both to develop new capabilities and to maintain existing ones. Western components are essential for advanced Russian weapons systems. The Russian security and intelligence services have a variety of approaches to acquiring technology for their own industry, including using front companies and agents to covertly purchase and import technology to Russian end users.

China, too, has multifaceted and sophisticated intelligence operations against Swedish interests, with activities both in China and abroad. China's interests in Sweden are primarily economic and technological. Swedish know-how and innovation, for example in the energy transition, are of interest to China. It is mainly through research collaborations, investments, corporate acquisitions and intelligence activities that China is acquiring the knowledge it needs. Technological areas in which Sweden is at the forefront, such as the defence industry, are areas where China has a clear objective.

China is increasingly using its economic, political and military power to exert strong pressure. Unlike Russia, China has extensive economic ties to Sweden that can be used for leverage purposes.

NEED FOR ADEQUATE COMMUNICATIONS SECURITY

Technological developments create a need to adapt the Swedish COMSEC system. As attackers acquire new and more powerful tools to use against Swedish COMSEC systems, MUST is constantly adapting the requirements of the COMSEC systems to achieve adequate security – not only against today's threats, but also against those of the future. MUST is constantly monitoring the emergence of new means of attack that could pose risks to Swedish crypto products. MUST further develops the COMSEC systems already in operation to maintain an adequate level of security over time and evaluates whether older systems need to be phased out. In the coming years, new COMSEC systems will be introduced to replace older ones to meet new needs. One example is the ongoing introduction of new and better-protected crypto phones in the Armed Forces and the total defence.

The Swedish Civil Contingencies Agency (MSB) is continuously working with civil organisations to address the COMSEC needs they foresee in the future. These are compiled and, together with the needs of the defence authorities, constitute the overall COMSEC needs. Within the Armed Forces, additional funding has been provided to meet the growing needs, and all agencies responsible for COMSEC are adapting their activities to meet the growing needs.

ARTIFICIAL INTELLIGENCE

Rapid technological development in artificial intelligence (AI) and the cyber domain presents both opportunities and challenges for the offensive and defensive capabilities of the Armed Forces. It also has an impact on the robustness and resilience of the total defence.

As AI is increasingly integrated into society, the ability of AI models to learn more about IT environments and security capabilities is growing; knowledge that can be used for antagonistic purposes.

Generative AI produces texts and images based on the data it is trained on. Such generative AI is used, for example, by threat actors to create better-designed phishing attacks adapted to multiple languages or to generate malware. Deepfakes continue to be used to spread disinformation in new ways or to carry out sophisticated extortion attempts. Security tools aimed at protecting against antagonists can also be exploited by exploiting vulnerabilities in the technology.

UNMANNED AERIAL VEHICLES

The development of unmanned aerial vehicles (UAVs) has intensified during the year, using relatively inexpensive technology and a wide range of applications, not least military. Among other things, this has been seen in the war in Ukraine. UAVs have evolved into advanced technical IT systems capable of carrying a wide range of cargo – from defibrillators and supplies to explosives. These crafts do not need to be controlled by a human on the ground, but can be made autonomous with decisions made by AI. The ability to use UAVs effectively, and to detect and combat UAVs, is becoming increasingly important, both militarily and in civil society.

The development has created new tactical conditions in war, but also new vulnerabilities that have impacted both the capabilities of the Armed Forces and society at large. By continuously monitoring technological advances as well as the management of IT systems, MUST works preventively to address security threats to Sweden and Swedish interests.

QUANTUM COMPUTERS

Another example of a technological development that is already affecting how COMSEC systems need to be designed is the development of quantum computing, something that MUST has been taking into account and will continue to monitor.

If the ongoing efforts to build large-scale and fault-tolerant quantum computers succeed, it will make it possible to break the majority of the asymmetric cryptology currently used in various commercial contexts. MUST estimates that large-scale fault-tolerant quantum computers might become available sometime after 2030 at the earliest.

MUST is taking ongoing measures to ensure that the Armed Forces and other authorities in the total defence remain well equipped if large-scale fault-tolerant quantum computers become available. Among other things, MUST conducts research in the field and participates in international processes aimed at standardising alternatives to today's commercial asymmetric cryptology.

ASYMMETRIC CRYPTOLOGY AND FAULT-TOLERANT QUANTUM COMPUTERS

Asymmetric cryptology is based on the use of a pair of keys consisting of a public key and a private key to, for example, encrypt and decrypt messages. Data encrypted with the public key can only be decrypted with the private key. In order for this to work, the two keys in the pair must have a special mathematical relationship to each other.

LARGE-SCALE FAULT-TOLERANT QUANTUM COMPUTERS

Quantum computers use quantum mechanical phenomena to perform calculations. This distinguishes them from today's computers, which are instead based on phenomena in classical physics. Small quantum computers already exist, but they are very sensitive to various forms of interference. Research is underway to develop large-scale fault-tolerant quantum computers that are less sensitive to interference.

MISSION AND ACTIVITIES

MUST's activities provide a basis for supporting Swedish foreign, defence and security policy. MUST's mission is to conduct defence intelligence and military intelligence and security services by identifying and analysing external threats to Sweden and Swedish interests and by preventing, detecting and countering security threats to the Armed Forces and their interests in Sweden and abroad.

The Military Intelligence and Security Service (MUST) is part of the Swedish Armed Forces Headquarters, and manages and develops the intelligence and security services within the Armed Forces. MUST supports the Government and the Chief of Defence by

→ gathering intelligence to support knowledge-building and decision-making

→ warning of changes in the threat scenario

→ operating security services within the Armed Forces and supervising other authorities in the field of security and communications security

→ coordinating defence attaché activities

→ organising and leading the National Intelligence Unit (NUE) task force.

The Director of MUST is in charge of intelligence and security services and serves as Head of Security and Communications Security for the Swedish Armed Forces.

INTELLIGENCE SERVICE

The intelligence service monitors security policy and military developments in the vicinity of Sweden and in other parts of the world that are of significance to Swedish foreign, security and defence policy. The work consists of collecting, processing, analysing and disseminating information and assessments of the intentions and capabilities of various actors.

The majority of the intelligence service's analyses and assessments are carried out in support of the Government, in accordance with the Government's annual guidelines. The information is intended to support decision-making and strengthen situational awareness, primarily in the Ministry for Foreign Affairs and Ministry of Defence.

In addition to the Ministries of Foreign Affairs and Defence, increasingly broad and complex threats have resulted in more stakeholders in the Government Offices, directly or indirectly, needing access to MUST's analyses and assessments. MUST also contributes knowledge and personnel to the international military operations of the Armed Forces.

MILITARY SECURITY SERVICE

The main task of the Military Security Service is to prevent, detect and counteract security threats to the Armed Forces and its interests, both in Sweden and abroad. The activities focus on security threats from foreign intelligence services and other actors.

The military security service monitors the security of the Swedish Armed Forces and works preventively to ensure that information relating to Sweden's security is not disclosed, altered or destroyed. It also ensures that only persons who are trust-worthy from a security perspective are allowed to access information or participate in activities that are important for Sweden's security. The security service carries out security oversight in the defence sector and monitors security protection at the various organisational units of the Armed Forces.

The Military Security Service protects the communications and IT systems of the total defence against intrusion, by means of communications security and cryptographic methods.

DEFENCE ATTACHÉ ACTIVITIES

MUST's mission also includes leading and coordinating Sweden's defence attachés.

The defence attachés are an important asset for Sweden's foreign, security and defence policy and are important actors in maintaining and developing Armed Forces' international cooperation and good relations with other countries' defence forces.

The tasks of the defence attachés include, among other things, open information gathering, which involves following and assessing defence-related developments in the country in which they are accredited. The defence attachés' knowledge of the countries in which they work and the open infor-

Members of the National Intelligence Unit (NUE) task force.

mation gathering they carry out also strengthens MUST's ability to make assessments and contribute to early warning.

A defence attaché also provides support, for example, in bilateral meetings and preparations for joint operations and exercises. The role also includes assisting Swedish authorities and companies in matters relating to cooperation regarding defence equipment and export aid. The attaché also assists representatives of Swedish total defence in connection with visits.

The defence departments are part of the Swedish embassies in their respective countries. Close cooperation with the ambassador and the other parts of the Swedish embassy is of great importance for the attachés' work. The attaché is also an adviser to the ambassador on military matters.

The Defence Attaché Organisation comprises 26 defence departments with 37 defence attachés, including four deputy and four travelling defence attachés. A defence department may have one or more countries co-accredited in its mission. The Armed Forces are thus represented in a total of 64 countries.

The defence attachés are under the command of the Chief of Defence and the Director of MUST.

MUST'S SUPPORT TO INTERNATIONAL OPERATIONS

MUST's National Intelligence Unit (NUE) is responsible for MUST's support to the Swedish Armed Forces' international operations. Before, during and after a military operation, the NUE provides intelligence and security threat assessments at all levels   from the battlefield to the political level.

MUST deploys NUE staff to the operational areas to support Swedish and multinational commanders.

MUST carries out threat assessments of the Swedish Armed Forces' protection values and assessments of the development of conflicts as support for the implementation of the Swedish security policy and for the Armed Forces' planning.

COOPERATION FOR INCREASED SECURITY

Cooperation between authorities and other actors in society is necessary to effectively counter threats to Sweden.

MUST continuously provides information to the Government and the Chief of Defence. MUST also works to disseminate information about threats against Sweden to a wider audience. In the serious security policy situation Sweden finds itself in, it is crucial to be able to address threats to Swedish society with a united Swedish approach. This requires that threats to Sweden are taken seriously, and that public and private actors act to strengthen security protection and resilience – as parts of the total defence and in society at large.

NATIONAL COOPERATION

MUST's closest partners are the National Defence Radio Establishment (FRA) and the Swedish Security Service. Cooperation has been strengthened in recent years. It has become more operational and is carried out in various forums such as the

Tomas Nilsson, Director of MUST with Director-General Björn Lyrvall of the National Defence Radio Establishment and Director-General Charlotte von Essen of the Swedish Security Service.

National Centre for Terrorist Threat Assessment (NCT) and the National Cyber Security Centre (NCSC), as well as in close exchanges at various levels between organisations regarding common intelligence and security issues.

The information that MUST and its partners can provide enable prioritisation of civil society's actions to protect Sweden's freedom and democracy – both in the long and short term as well as in several areas of society.

National cooperation and information sharing is not limited to security and defence authorities. MUST disseminates information on threats against Sweden to a wider circle of private and public re-

cipients, in particular to the actors involved in the total defence, thereby contributing to the overall deterrence of Sweden's adversaries and to the creation of adequate capacity at the national level.

INTERNATIONAL COOPERATION

International cooperation is important for Sweden and for its intelligence and security work. Cooperation with international partners takes place both bilaterally in specific areas of intelligence and multilaterally through, for example, the exchange of intelligence with Sweden's NATO allies. This increases capacity and reach and provides other perspectives and assessments on issues of interest to our stakeholders.

THE DIGITAL DEFENCE

Information management through increased technological capabilities is continuously changing our society. Digital capability will form the basis for a large part of capability development within the Armed Forces and the entire total defence system.

MUST already has a goal of having a relative information advantage in the intelligence and security services over the actors that threaten Sweden. The ambition to further develop the digital capabilities is also in line with NATO's digital transformation and vision for 2030.

NATO membership, the growth of the Armed Forces, the war in Ukraine and rapid developments in artificial intelligence place great demands on the ability of Sweden and the Armed Forces to keep pace with developments and to improve efficiency by digitalising operational processes and methods.

A STRONGER SOCIETY

In addition to increased integration from a military perspective, other elements of the total defence and Swedish society as a whole need to increase robustness and digital resilience. For civil society, it is a matter of ensuring that Sweden can be governed without interference and that essential societal services function for citizens.

MUST's experiences from the Ukrainian war have also clearly shown how important digital capability is for command and control in defence and for support from other nations. It has also been a prerequisite for the ability of Ukrainian society to secure national data access and to continue to function despite Russian attacks on the country's physical infrastructure.

COOPERATION WITH ALLIES – IN ALL DOMAINS

For the Armed Forces, the ability to carry out operations in multiple domains simultaneous is key. By domains we mean land, air, sea, cyber and space. To achieve this, information superiority and data-driven decision-making will be crucial. An increasingly digitalised environment is becoming a prerequisite for managing the capacity in demand.

Digitalisation improves the capabilities of the Armed Forces to cooperate with Allied member states and is a prerequisite for such operations to be carried out at a sufficiently high tempo. This means being able to collect, analyse and process large amounts of data more quickly than the adversary in order to provide information to decision-makers in the Armed Forces and in the national leadership.

Digitalisation also enables the Armed Forces, together with other authorities, to manage large amounts of information in a coherent digital environment. Improved digital capability within the Armed Forces contributes to more effective support for operations.

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