

FOREWORD



DEAR READER,

To begin our ninth annual report with a positive message: there is no doubt that Ukraine’s continued steadfastness and resilience in the face of Russian aggression are truly remarkable. However, Russia will likely continue its war of attrition against Ukraine in 2024. While the likelihood of a direct military attack against Estonia remains low in the coming year, the security situation in Europe and along Estonia’s borders in the near future depends on whether Ukraine, with the support of its allies, can shatter Russia’s imperialist ambitions.

Even though Russia’s blitzkrieg plans have failed, Vladimir Putin still believes that by continuing the conflict, he can force the opposing parties to come to the negotiating table. I refer to the opposing parties in plural because, in the Kremlin’s mindset, they are not only fighting Ukrainians, but their chosen path involves a long-term confrontation with the entire “collective West”.

This is exemplified by Russia’s military reform, which is presented as a response to NATO’s expansion. The success of this reform largely depends on the course of the ongoing war, but we can expect that within the next decade, NATO will face a Soviet-style mass army that, while technologically inferior to the allies, poses a significant threat due to its size, firepower and reserves. Although Russia’s massive

human resources – reduced to cannon fodder – have not been able to conduct large-scale offensive operations in Ukraine, the Kremlin’s war machine still has enough fuel.

With the military industry working at full throttle, Russian society is militarising at all levels, and the Putin regime is revealing its increasingly totalitarian face. The prolonged, intense military conflict is causing growing tensions in domestic politics, and a sense of war weariness is spreading in Russian cities and regions. Nevertheless, the Kremlin’s repressive apparatus controls societal morale so tightly that even the pleas of tens of thousands of mothers of soldiers left on the battlefield have not yet created a resonance that would seriously threaten the regime’s stability.

In addition to domestic propaganda efforts, the Kremlin continues to use nuclear rhetoric to intimidate the Western public and disseminate poisonous false narratives, even though its opportunities to do so have become quite limited. Russia, relegated to pariah status in the eyes of the Western world, seeks to compensate for its loss of influence by keeping former Soviet countries, the global South and Arab states in its orbit. However, potential partners are more interested in pragmatic negotiating than developing strategic relationships.

In this annual report, we also focus on China and Russia’s relationship and their common opposition to the West, even though China’s plans are much more global and longer term than those of Russia, which is preoccupied with its war. China’s ambitions to reshape the rule-based world order are exemplified by its efforts to build a technological ecosystem on Chinese terms, aiming to create deliberate dependencies.

The foundation of any viable security and defence policy is an informed society. I believe that this annual report will help provide clarity amid the turbulent times and reiterate that our security and safety can only be ensured by Ukraine’s victory, Russia’s defeat and the end of Putin’s regime.

Let’s keep pushing forward! *Slava Ukraini!*

Kaupo Rosin
Director General, Estonian Foreign Intelligence Service
Tallinn, 31 January 2024