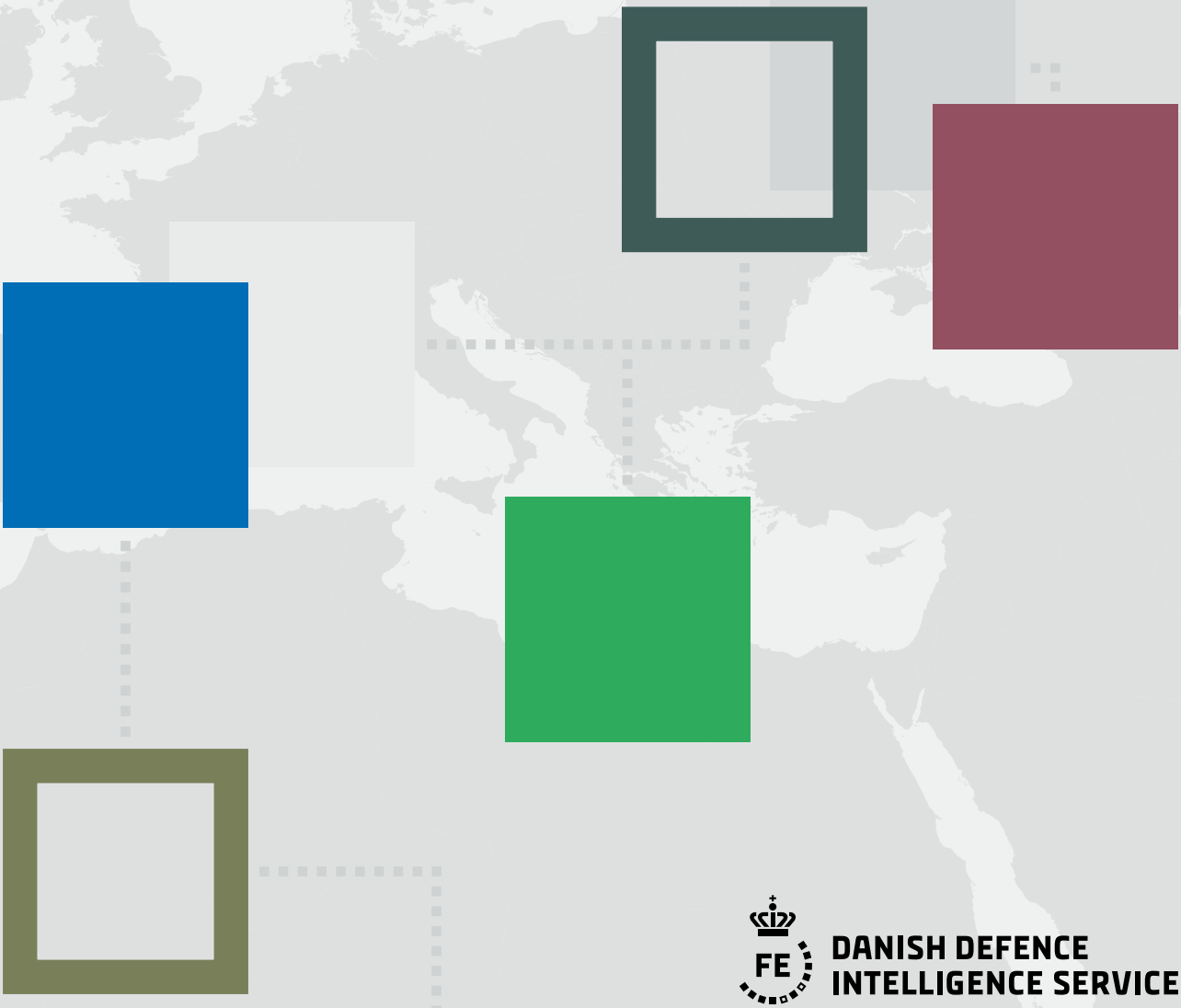
INTELLIGENCE RISK ASSESSMENT 2020

An assessment of developments abroad impacting on Danish security



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INTRODUCTION

In the Intelligence Risk Assessment 2020, we at the Danish Defence Intelligence Service have compiled an overview of the threats and other developments abroad that have an impact on Danish security and strategic interests.

In our 2019 Intelligence Risk Assessment, we emphasized how the world order that has prevailed for decades is under pressure and is being redefined. This development has continued during 2020. Moreover, the balance of power between the great powers – the United States, China and Russia – is shifting, and this is challenging Western alliances and ideals. The COVID-19 pandemic and the resulting economic crisis have exacerbated these trends during the course of the year. Overall, these developments will make it more difficult for Denmark to pursue its national interests.

The shift in the world order that we have grown accustomed to – combined with a general feeling of increasing insecurity – is amplified by the deliberate spread of disinformation and misinformation, including via the social media. Certain foreign states are systematically, skilfully, and successfully conducting influence activities with the aim of promoting national agendas and weakening cohesion in other countries. 2020 has seen examples of targeted influence campaigns using the COVID-19 crisis as a theme to reduce support for the Western sanctions against Russia.

In a constantly changing world, it is our central mission to focus our intelligence efforts on monitoring and assessing the developments and areas that have particular impact on Denmark's security situation and interests.

The 2020 Intelligence Risk Assessment is unclassified and intended for a broad audience; this is reflected in its wording and extent of details. However, all underlying analyses are based on extensive intelligence work conducted by our service as part of national intelligence gathering efforts as well as collaborative intelligence gathering with our partner services abroad.

The main focus of the 2020 Intelligence Risk Assessment is on our top-priority areas, as they are the ones that currently have the most impact on Denmark's security and strategic situation. Once again, the focal areas include the situation in the Arctic, Russia and China as well as the cyber threat and the terrorist threat.

In recent years, the great powers have intensified their focus on the Arctic, and developments in the region are characterized by increasingly tense relations between the United States, China and Russia. In years to come, we expect that military activities will increase in the Arctic, and both the EU and NATO will likely wish to play a greater role in the area.

Russia will remain a major security policy challenge to the West and to Denmark, while China is increasing its influence, and thus its importance, both regionally and globally. The cyber threat is real and tangible – it poses a danger every single day, and cyber attacks carried out by foreign states and cyber criminals are among the most serious security concerns for Denmark. Finally, the terrorist attacks in Europe in the autumn of 2020 clearly showed that the terrorist threat continues to be serious.

In addition to these main issues, certain areas of the world remain as foreign and security policy challenges for Denmark. These are the Middle East, North Africa, West Africa and Afghanistan, all of which are dealt with in separate chapters.

Editing was finalized on 26 November 2020.

Enjoy your reading.

Svend Larsen
Acting Director of
the Danish Defence Intelligence Service

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MAIN CONCLUSIONS

The balance between the great powers – the United States, China and Russia – is shifting, challenging Western alliances and ideals. The COVID-19 pandemic has made these trends more apparent. At the same time, the pandemic has plunged the world into serious economic crisis.

Tense relations between the great powers will characterize future developments in the Arctic. All three states focus increasingly on the region. Military-strategic developments in the Arctic are also linked to the global balance of power between Russia and the United States. Russia is strengthening its military capabilities and control over the region. Western states are responding by increasing their military presence in the region, challenging Russia. At the same time, Russia needs stability to attract investors, leaving it with difficult choices between military control and economic interests. China's interests in the Arctic revolve around access to resources and sea routes as well as greater influence on Arctic matters. China is thus strengthening its Arctic research and building infrastructure in the Arctic. China's regional interests, including its interests in Greenland, are sustained and long-term.

Russia will remain a major security challenge to the West and to Denmark. The country is trying to re-establish itself as a global power, and the Russian armed forces remain the key instrument in its rivalry with the United States. Russia will also secure its global position through its strategic relationship with China and through influence in the Middle East, North Africa and, in particular, the post-Soviet states. Russia also uses influence campaigns, thus attempting to, among other objectives, facilitate the dismantling of the Western sanctions regime. In addition, Russia's closed decision-making processes and deep-seated distrust of the United States and NATO carry the risk of mistakes and unintended military escalation. This is also the case in the Baltic Sea region, where Russia has significantly bolstered its military capabilities.

China continues to increase its regional and global influence through multilateral cooperation and through investments and partnerships abroad. China also extensively uses cyber operations to further its strategic interests and objectives. China increasingly takes an uncompromising and assertive stance when countering criticism and wields its economic clout to put pressure on other countries. In addition, the Chinese leadership pursues a tough line against what it perceives as attempts at weakening Chinese sovereignty and cohesion. China continues its military build-up and asserts its claims in the South China Sea. The United States regards China as its main strategic rival and is trying to counter China's further development as a global power.

Cyber attacks launched by foreign states and criminals are still among the most serious threats to Danish national security. The threat of cyber crime and cyber espionage is directed at both Danish private companies and public authorities, both of which continuously experience cyber attacks. The threat is reflected in the use of different attack techniques with very different objectives, including, in particular, espionage and crime. Despite its advantages, the continued digitalization of Danish society could potentially provide hackers with new avenues to spy, carry out criminal activities and ultimately launch destructive cyber attacks on Denmark. This is all made possible by the fact that any piece of digital equipment is vulnerable to attacks.

Al-Qaida and Islamic State have stepped up their calls for attacks in connection with the republication of caricatures of the Prophet Muhammad. Though Islamic State and al-Qaida are weakened in terms of leadership, their intentions have not changed and they are still engaged in attack planning against the West. The autumn 2020 terrorist attacks in Europe were a clear indication that the terrorist threat remains serious. The root causes of militant Islamism have not changed and still mobilize to terrorist acts. In recent years, the threat from right-wing extremists has increased, and it will continue to have an impact on the threat landscape in future.

The Middle East and North Africa will continue to pose a security policy challenge to Europe in the short to long term, in part because the Middle East and North Africa will be hit particularly hard by the economic crisis caused by the COVID-19 pandemic. The crisis will deepen the national, regional, and international tensions that already exist in the region. A number of states, including Russia, Iran and Turkey, in particular, have positioned themselves as crucial actors in the region and the regional conflicts. Iran will look into under what conditions the new US administration would be willing to re-enter the nuclear deal. However, the fundamental tensions between the United States and Iran will persist and continue to affect the security situation in the region.

The western Sahel region is characterized by many complex problems, including poor governance, economic crisis and militant Islamism. Piracy continues in the Gulf of Guinea, with pirates now mainly focusing on kidnapping for ransom.

The Afghan national government is weakened by strong military pressure from the Taliban, inner division, and the withdrawal of the international forces. Among the most likely developments in the next few years are civil war or a regime headed by the Taliban. This development will likely trigger a humanitarian crisis, a swell in refugees, and a strengthening of the militant Islamists.

THE NEW SECURITY DYNAMICS

The balance between the great powers – the United States, China and Russia – is shifting, challenging Western alliances and ideals. The COVID-19 pandemic has made these trends more apparent. At the same time, the pandemic has plunged the world into serious economic crisis. Parts of Africa, the Middle East and Asia have been hit particularly hard, creating a breeding ground for conflicts and extremist groups.

Russian President Vladimir Putin and Chinese President Xi Jinping in Moscow in connection with the 70th anniversary of the establishment of diplomatic relations between Russia and China. PHOTO: SERGEI ILNITSKY/AP/RITZAU SCANPIX

The international security dynamics are changing. The COVID-19 pandemic has made it all clearer that the balance between the great powers of China, the United States and Russia is shifting. Under the Trump administration, the United States has focused more on national interests at the expense of international cooperation, putting traditional alliances under pressure and creating room for other great powers. China is gradually assuming a more prominent role in the world, while Russia is trying to challenge the unity of the international community.

In addition, the pandemic has fuelled a shift towards letting national interests and internal conflicts override international norms and institutions. International organizations such as NATO, the EU and the UN and the norms and rules these organizations represent have enabled small states to better address their security interests. However, these organizations also face internal disagreement over the framework of cooperation between member states and how specific crises should be managed.

States generally have a lower threshold for using cyber attacks than military action to achieve security objectives.

At the same time, external actors are trying to intensify these disagreements. Russia attempts to undermine cohesion within the EU and NATO by exploiting internal conflicts in Europe and the United States' enhanced focus on its own national interests. Russia has in particular exploited crises that could expose Western disagreement, and the COVID-19 crisis is a case in point.

China attempts to assume a more active role in the world through economic investments and a propensity to use political-diplomatic pressure. Western countries have adopted different responses to China's ascension and may as a result find it difficult to agree on a common approach.

Weakened support for leading international institutions will highly likely make it increasingly difficult for these institutions to respond to new international crises, not least to those caused by the economic fallout of the pandemic. The risk of civil war and greater refugee flows is growing in a number of already fragile states in Africa and the Middle East. As a result of economic crises, several countries are teetering on the brink of state collapse. These developments will likely also provide insurgent and terrorist groups with more latitude to operate and heighten the terrorist threat inside and outside of these regions.

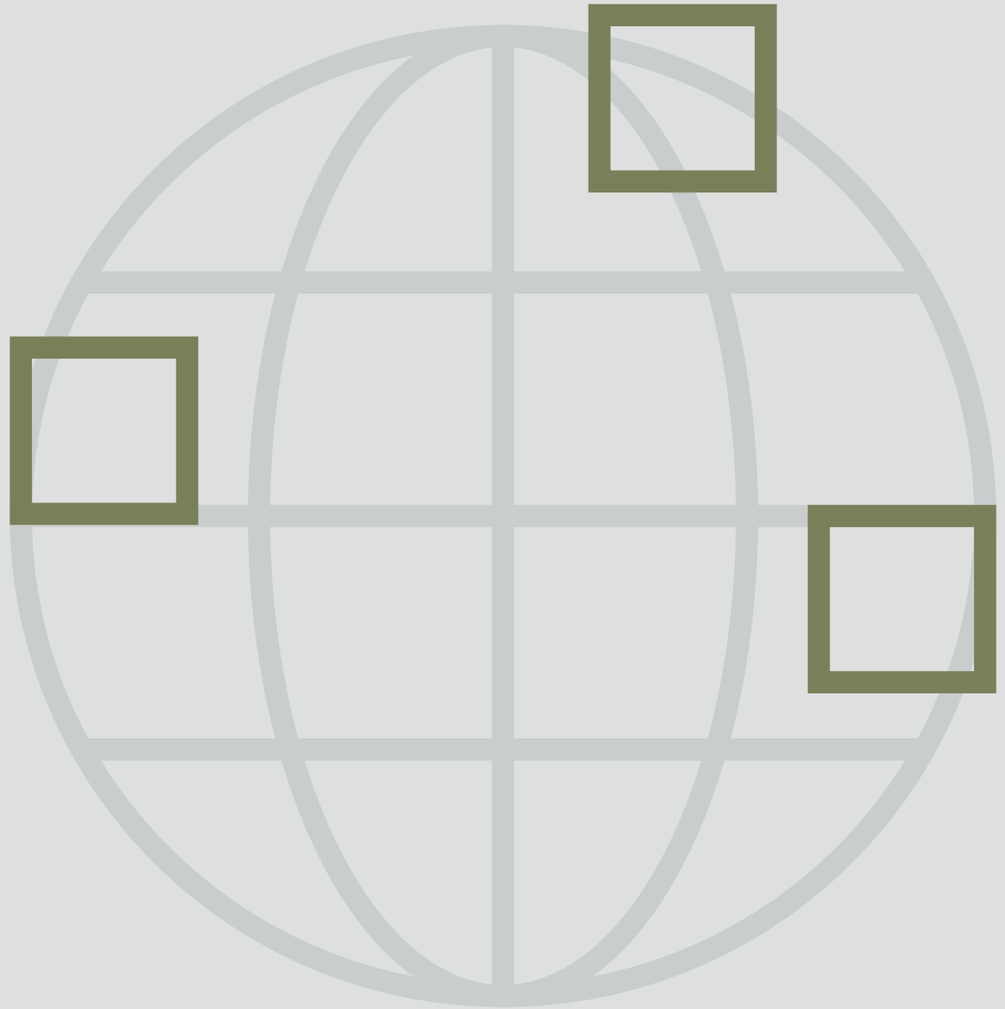
Western countries have less influence on global affairs

China's ascension over the past decades has significantly shifted the global balance of power. China seeks to play a larger role in the international order and is defending its national interest vis-à-vis Western countries more aggressively and assertively. China is thus acting as a great power trying to cast itself as an alternative to Western liberal ideals in regions across the world.

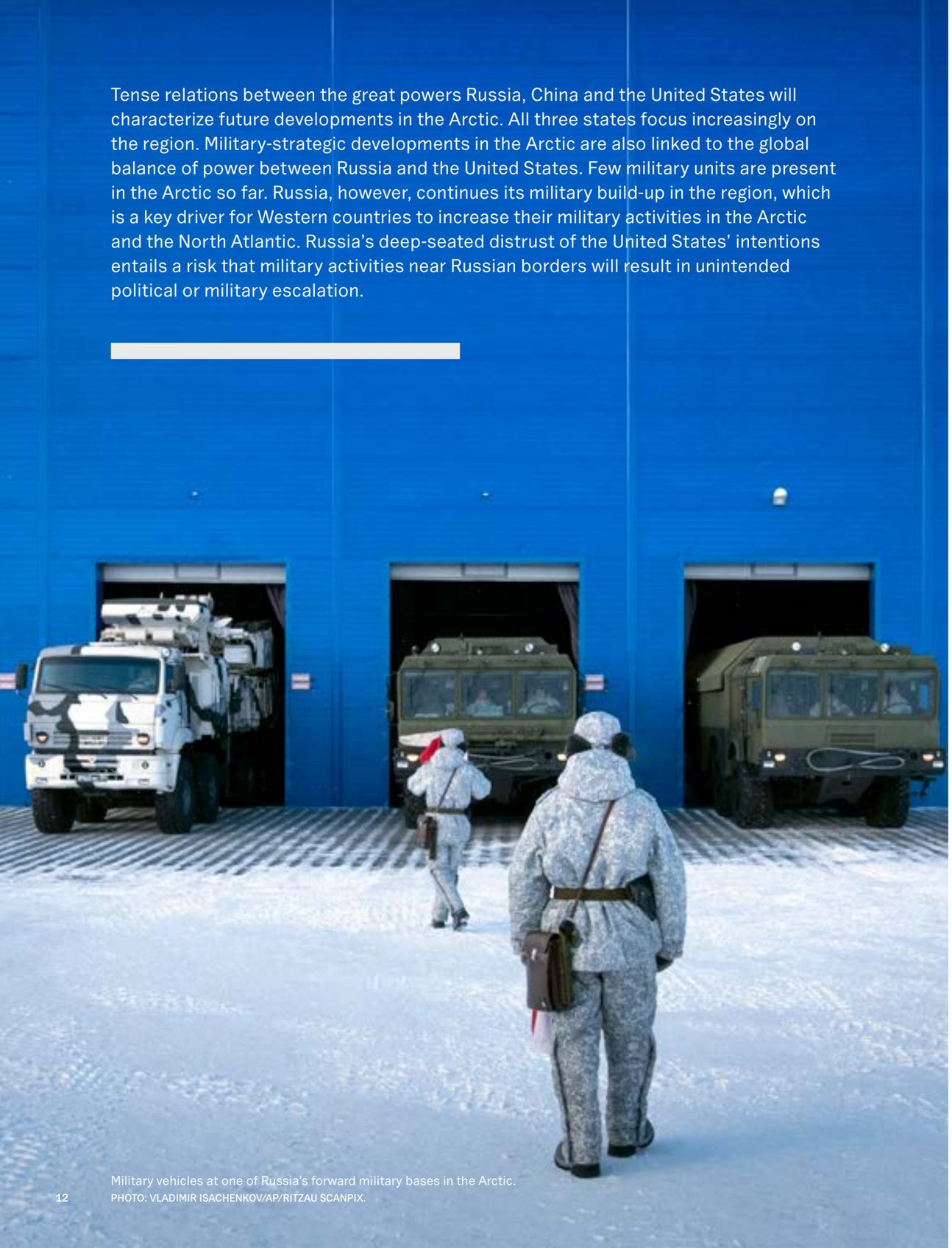
Russia is exploiting the fact that the United States has reduced its involvement in the Middle East and North Africa in recent years to bolster its own influence close to Europe's southern borders. Russia and other regional powers will gain greater influence in the Middle East as well as other regions where the United States has previously provided some degree of stability – despite Russia's economic power failing to measure up to that of the United States.

The strained relations between the United States, China and Russia have increasingly expanded into the digital realm. States generally have a lower threshold for using cyber attacks than military action to achieve security objectives. New dynamics arise, which allow both great powers and other countries to launch attacks at relatively low costs, as cyber warfare is cheaper than traditional warfare and results in fewer losses and lower risk of strong international retaliation.

At the same time, the absence of internationally recognized norms on the use of cyber capabilities means that smaller states may be more vulnerable in the conflicts between the great powers. While the laws of war and international organizations define norms for use of military means, there is less governance of the cyber domain. States have thus not been able to agree on the rules of engagement regarding cyber attacks to the same extent.



Tense relations between the great powers Russia, China and the United States will characterize future developments in the Arctic. All three states focus increasingly on the region. Military-strategic developments in the Arctic are also linked to the global balance of power between Russia and the United States. Few military units are present in the Arctic so far. Russia, however, continues its military build-up in the region, which is a key driver for Western countries to increase their military activities in the Arctic and the North Atlantic. Russia's deep-seated distrust of the United States' intentions entails a risk that military activities near Russian borders will result in unintended political or military escalation.



Military vehicles at one of Russia's forward military bases in the Arctic.
PHOTO: VLADIMIR ISACHENKOV/AP/RITZAU SCANPIX.

THE ARCTIC

The Arctic states still seek to negotiate and cooperate when solving disagreements, including in regional questions under the aegis of the Arctic Council and in negotiations on delimitation of the continental shelf. A key reason behind the successful preservation of this cooperation amid increased tensions between the West and Russia has been the shared ambition to shield Arctic cooperation from other international disagreements. This ambition, however, is now being challenged by tensions between the great powers.

The United States focuses increasingly on Russia's long-standing military build-up in the region and on China's economic interests in the Arctic. The United States is thus pushing for its allies to strengthen their Arctic military capabilities and align their interests in the region to act as a counterweight to Russia and China. This is also the case in the Arctic forums, in which the United States is trying to strengthen coordination and unity among the Western countries. However, Western Arctic military capabilities, including those of the United States, come from a low starting point compared to Russia's.

The EU and NATO also wish to have a greater say in Arctic issues. Several non-Arctic NATO states would like for the alliance to assume a more active role in the Arctic region. Great Britain in particular has increased its Arctic presence through expanded military exercises.

Russia used to be able to simultaneously pursue military build-up and international cooperation to reach its strategic objectives of economic development and increased military control over the region. However, Western reactions to Russia's military build-up in the Arctic are increasingly forcing Russia to prioritize between economic interests and military presence.

China's interests and involvement in the Arctic are growing. The country is also concerned about the development in the region and the tense relations between the Arctic powers. China's main interests revolve around access to the Arctic region's economic potential, including natural resources and reduced transport time for goods through the Arctic sea routes. China also aims for more influence on Arctic matters and seeks to promote the notion of China as a legitimate Arctic actor, including through research cooperation.

The United States, Russia and China thus have major strategic and economic interests vested in the region. Although the development in the Arctic region is based on continued cooperation between the coastal states, stronger military presence has created the preconditions for unintended clashes and escalation. Russia's distrust of US intentions, in particular, contributes to a situation where military activities near Russia's border carry a risk of miscalculations.

The emergence of a security game involving, in particular, Russia and the United States, but also China, is now clear. Shifts in the military strategic balance and increased military activity in the region will likely challenge the cooperation between Russia and the other Arctic coastal states. Military activities in areas bordering the Arctic will also affect this dynamic. This development will highly likely result in sharpened political rhetoric and continued military build-up.

It is likely that the new security policy situation in the Arctic will also affect cooperation on regional Arctic matters. The Arctic states will, however, do much to ensure that cooperation continues. In the areas in which the Arctic states maintain an interest in joint solutions, cooperation will thus likely carry on. That applies, in particular, to negotiations on delimitation of the continental shelf within the framework of the UN Commission on the Limits of the Continental Shelf.

RUSSIA IN THE ARCTIC

The Arctic is of key security and economic importance to Russia and Russia is strengthening its military capabilities and control over the region. Western states are responding by increasing their military presence in the region, challenging Russia. At the same time, Russia needs stability to attract investors, leaving it with difficult choices between military control and economic interests.

The Arctic is a very high priority for Russia. Russia is concerned about military and political developments in the Arctic and developments between Russia and the West in general, which may make it hard for Russia to reach its own regional strategic objectives. This is also apparent from Russia's updated Arctic strategy for the period through 2035. The strategy generally maintains Russia's previous priorities, such as economic development and infrastructure build-up, but has an increased focus on national sovereignty and territorial integrity. Russia is unequivocally blaming Western countries for the regional development, pointing to issues such as the military build-up by foreign states as a challenge to Russian interests.

Russia perceives itself as a special Arctic nation with a historical right to play a key role in the Arctic. Russia aims to secure this position through international cooperation, regional development, and expansion of the country's regional military strength. Russia's ambition to preserve its Arctic military superiority is now being challenged by the increased military presence of the United States and other Western countries in the region. Russia perceives this as a threat to its northern flank and a challenge to its control over the Northern Sea Route – the Russian part of the North-East Passage between the Atlantic and Pacific oceans north of Russia.

Russia consistently refers to the Arctic as a peaceful and stable region, emphasizing the importance of cooperation between the Arctic nations. To Russia, cooperation is a means to keep down tensions, attract investments, ensure an advantageous delimitation, and, in particular, prevent Western military build-up. Cooperation is also intended to help Russia avoid further Western sanctions against Russian projects in the Arctic. So far, Russia has thus adopted a constructive approach in the Arctic cooperation, a course it will highly likely keep.

The Arctic Council is a key forum for Russia, not least because Council decisions are reached through consensus, giving Russia a right of veto in Arctic matters that it does not have in other international matters. Russia will hold the chairmanship of the Council in 2021-23 and will highly likely use this role to position itself as a guarantor of continued cooperation. It is imperative to Russia that Arctic development is defined by Arctic nations. Russia is thus sceptical of the attempts by the EU and a number of non-Arctic countries at seeking access to and influence in the Arctic, fearing that the special role of the Arctic states in general and the Arctic coastal states in particular will be diluted.

THE ARCTIC STATES

The Arctic states comprise the eight countries whose territories extend north of the Arctic Circle: The Kingdom of Denmark, Canada, the United States, Iceland, Norway, Sweden, Finland and Russia.

Five of the Arctic nations – the Kingdom of Denmark, Canada, the United States, Norway and Russia – have coastlines bordering the Arctic Ocean. These five nations are often referred to as coastal states or A-5 countries. At a 2008 conference in Ilulissat, Greenland, the coastal states agreed to cooperate on regional issues and to solve any disputes and overlapping Arctic continental shelf claims through negotiations.

In 1996, the eight Arctic states founded the Arctic Council, in which a number of non-Arctic countries and organizations have observer status, including China, India, France and Germany.

RUSSIAN FORWARD BASES IN THE ARCTIC

The bases allow Russia to establish a forward line of defence in the Arctic Ocean. The combination of permanent bases as key points for flight operations improves Russia's ability to detect and counter Western military activities from the north.

Operational range of fighter aircraft without air-to-air refuelling (approx. 1,000 km)

Radar coverage from the Arctic bases (approx. 400 km)

The fighter aircraft indicate how air assets are used to cover surveillance gaps between the bases

Russia gives priority to military build-up in the Arctic

Russia's military dispositions in the Arctic not only address the Arctic region itself but also extend to the global military strategic balance with the United States. Russia perceives its Arctic coastline as vulnerable and open to attacks. Russia is particularly concerned about the capability of the United States to launch surprise attacks over the North Pole, including against Russia's ballistic missile submarines off the Kola Peninsula. Russia perceives this capability as a threat to its own ability to retaliate against a nuclear attack, undermining its position as an equal nuclear power.

Acting on this threat perception, Russia has in recent years established a string of forward military bases north of the Russian mainland to ensure a forward line of defence and increased control over the air and sea domains. Russia highly likely plans a further expansion of its Arctic military capabilities.

NAGURSKOYE BASE OPERATIONAL

In April 2020, Russia conducted an exercise using the new runway at the Nagurskoye forward base. The base thus has an operational capacity despite the planned expansion not having been completed yet.

This changes the threat to the Kingdom of Denmark, as Danish naval surveillance aircraft may encounter Russian combat aircraft in international airspace over Greenland. In the event of a crisis, Russian combat aircraft will be able to operate out of the Nagurskoye base against Greenland airspace and territory with little or no warning.

Though Russia's military build-up in the Arctic has a defensive focus, it increasingly contains elements that can be utilized for offensive operations. Operating out of the forward bases, Russian combat aircraft will thus be able to enforce Russian air superiority far into the Arctic Ocean. In the event of a crisis, the combat aircraft will constitute a threat to Western naval vessels in the waters between Greenland and Norway and to military targets in Greenland, including the Thule Air Base.

The northernmost forward Arctic base, Nagurskoye, is already operational. Russia will highly likely prioritize an expansion of the Kotelnyy base further east in the Arctic Ocean. In addition to the forward bases, Russia also focuses on building up military infrastructure and capabilities along Russia's Arctic coast. Russia has constructed new icebreakers, new Arctic missile-armed patrol boats, radar stations, coastal and air defence systems, etc.

Russia fears increased Western military presence in the Arctic and the North Atlantic Ocean

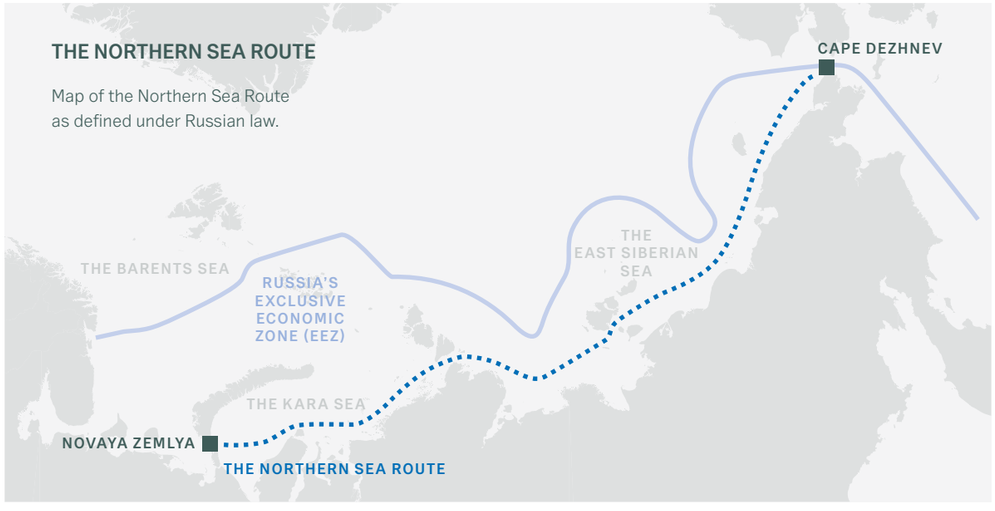
Russia is strongly focused on Western exercises in or near Russian Arctic territory that hold the potential to challenge Russian control of the area. Russia also expects climate change to result in increased competition for access to Arctic natural resources and navigation routes.

In Russia's view, only Arctic states should be allowed a military presence in the Arctic. Russia is particularly focused on precluding NATO from carving out a role in the region that could potentially limit Russia's freedom of manoeuvre and ability to defend its northern flank. Russia will try to prevent or, as a minimum, to limit NATO participation in the enforcement of sovereignty or in exercises in or near the Arctic. This also applies to NATO exercises in the North Atlantic Ocean.

Russia generally perceives the military dispositions of the NATO countries as supportive of the United States' strategic containment of Russia, making it highly likely that Russia will see NATO member activities in the Arctic as an extension of the United States' interests. By way of example, the reintroduction of the US 2nd Fleet and NATO's Atlantic Command in the United States, Norfolk will likely be viewed through this lens. The two commands are tasked with the planning and execution of exercise activities, emergency plans and patrol activities in the North Atlantic Ocean. The reintroduction of the two commands is the result of an increased focus by the United States and NATO on securing lines of communication between the United States and Europe across the Atlantic Ocean.

THE NORTHERN SEA ROUTE

Map of the Northern Sea Route as defined under Russian law.



The increased military focus by the United States and NATO on the North Atlantic Ocean has resulted in more military activities, including submarine hunts in the pivotal waters between Greenland, Iceland, the Faroe Islands and Great Britain. This will highly likely prompt a shift in the military balance of power in the Arctic, as such activities will increase the frequency as well as the effect of Western military combat power near the Arctic Ocean and waters in which Russia has held a military position of strength since the Cold War.

Despite of its own military build-up in the Arctic, Russia will, both internally and externally, try to cast the West as an aggressor and itself as a peaceful actor in the Arctic. Consequently, Russia will also try to shift responsibility for the increasing political and military tensions in the Arctic onto the United States and NATO.

Russia and the Kingdom of Denmark

Both Russia and the Kingdom of Denmark have tried to keep Arctic relations separate from the general tensions that have erupted in the wake of the Ukraine crisis. Russia thus shields the Danish-Russian relationship in the Arctic from the general Danish-Russian relationship. Even though Russia finds that the policies pursued by Denmark are generally anti-Russian, Russia is positive about Denmark's will to cooperate on Arctic issues.

However, there is a risk that the deterioration in bilateral relations will spread to the Arctic cooperation. In addition, it is highly likely that the increased great power rivalry will cause Russia to regard the Kingdom of Denmark's military and security policy dispositions in the Arctic as part of what Russia perceives as US and NATO containment of Russia.

Combined with increasing US interest in Greenland, this may enhance Russia's perception of the Kingdom of Denmark as an Arctic competitor. Russia may use potential internal disagreements in the Kingdom of Denmark as leverage to sow division and strengthen its position in the Arctic.

Russia will seek to exploit the economic potential in the Arctic

Realizing the Arctic region's economic potential is a key objective for Russia, whose Arctic zone holds major deposits of natural resources, in particular oil and gas, on land and in the continental shelf. Russia's Arctic zone already accounts for 10 percent of the country's overall gross domestic product and 20 percent of the country's aggregate exports.

The Northern Sea Route is central to the realization of Russia's Arctic potential, as it will be used for transport of natural resources from the Arctic to Europe and Asia. Russia will also try to establish the Northern Sea Route as an international transit route for goods between Asia and Europe.

NEW SEA ROUTE RULES TO LIMIT NAVIGATION BY NAVAL VESSELS

The right to free navigation for naval vessels is a key priority for the United States and several Western countries. Russia's control of the Russian part of the North-East Passage, the Northern Sea Route, is thus the main bone of contention between Russia and the West that may lead to unintended escalation.

In 2018, the French warship Rhône made an unannounced passage along the Northern Sea Route. In January 2019, the US Secretary of the Navy referred to plans to demonstrate the right to freedom of navigation in the Arctic through a so-called Freedom of Navigation Operation (FONOP). During the course of 2020, the United States, acting in collaboration with Great Britain and others, has conducted naval exercises in the Barents Sea near the Russian Northern Fleet headquarters on the Kola Peninsula.

Since 2019, Russia has been working to update the legislation governing innocent passage of foreign military vessels along the Northern Sea Route. The legislation aims to ensure that Russia has control over the navigation of foreign state vessels near Russian borders, likely in response to the risk of a FONOP.

MARITIME DELIMITATION IN THE ARCTIC – A PROLONGED AND COMPLEX PROCESS

The five Arctic coastal states agree that delimitation and administration of the Arctic area must be based on international maritime law and submission of claims to the UN Commission on the Limits of the Continental Shelf. The claims address the right to resources on and in the seabed outside the 200 nautical mile limit that delimits a state's maximum exclusive economic zone, fisheries and airspace excepted.

Russia submitted its Arctic claims in 2001 but was asked to provide further documentation. This was submitted in 2015. The Kingdom of Denmark submitted its claim to the area north of Greenland in 2014, and major overlaps exist between the Danish and Russian claims. Canada has yet to submit its full claim, having most recently submitted data for parts of its claim in May 2019.

As Russia's additional documentation was an update of its earlier claim, the processing of the Russian claim started years before the processing of the claims submitted by the other Arctic coastal states. Russia expects its claim to be established in the course of 2021. It will likely be an additional 8 to 10 years before the UN Commission on the Limits of the Continental Shelf starts its processing of the Danish claim, and then an additional few years before the Commission can start processing the Canadian claim.

The Commission only delivers recommendations on the delimitation of a country's continental shelf limit on the basis of submitted data. In addition, the Commission may provide overlapping recommendations. The recommendations thus do not determine the delimitation of the Arctic coastal states' extended continental shelves. Rather, the limits are to be established through negotiations between the countries whose claims overlap and whose claims have been recognized by the Commission. Such negotiations can commence before the Commission has finished processing all claims.

In addition to the overall military strategic objectives, Russia's military build-up in the Arctic is aimed at securing control of the Northern Sea Route. Russia is setting up civilian infrastructure along the route, including harbour facilities, airports, railways, and radar and communication facilities, just as Russia is expanding its fleet of icebreakers for both civilian and military purposes. These initiatives are aimed at strengthening Russia's defence and at creating economic growth in the region. In addition, the expansion of the region's infrastructure and the economic development also aim at underpinning the image of Russia as the leading Arctic nation.

Russia needs private and foreign investments to realize the economic projects and to build the necessary infrastructure in the Arctic. To this end, Russia has tried to create a fertile climate for investments in the Arctic, introducing such measures as a number of new substantial tax advantages.

Russia still needs China in the Arctic

The Western sanctions against Russia have forced the country to look to non-Western partners for investments, for instance Asia. In the short to medium term, China will highly likely stand as the most attractive and realistic investor for Russia.

However, in an Arctic context, in addition to being a cooperative partner to Russia, China is also a rival. Russia is thus aware of China's ambitions and growing interests in the Arctic. As Russia does not want to grow economically dependent on China in the Arctic region or for China to gain control over the region's strategic infrastructure, Russia will highly likely work behind the scenes to discreetly thwart attempts by China and other non-Arctic states to obtain political influence in the Arctic.

Russia may extend its continental shelf claim

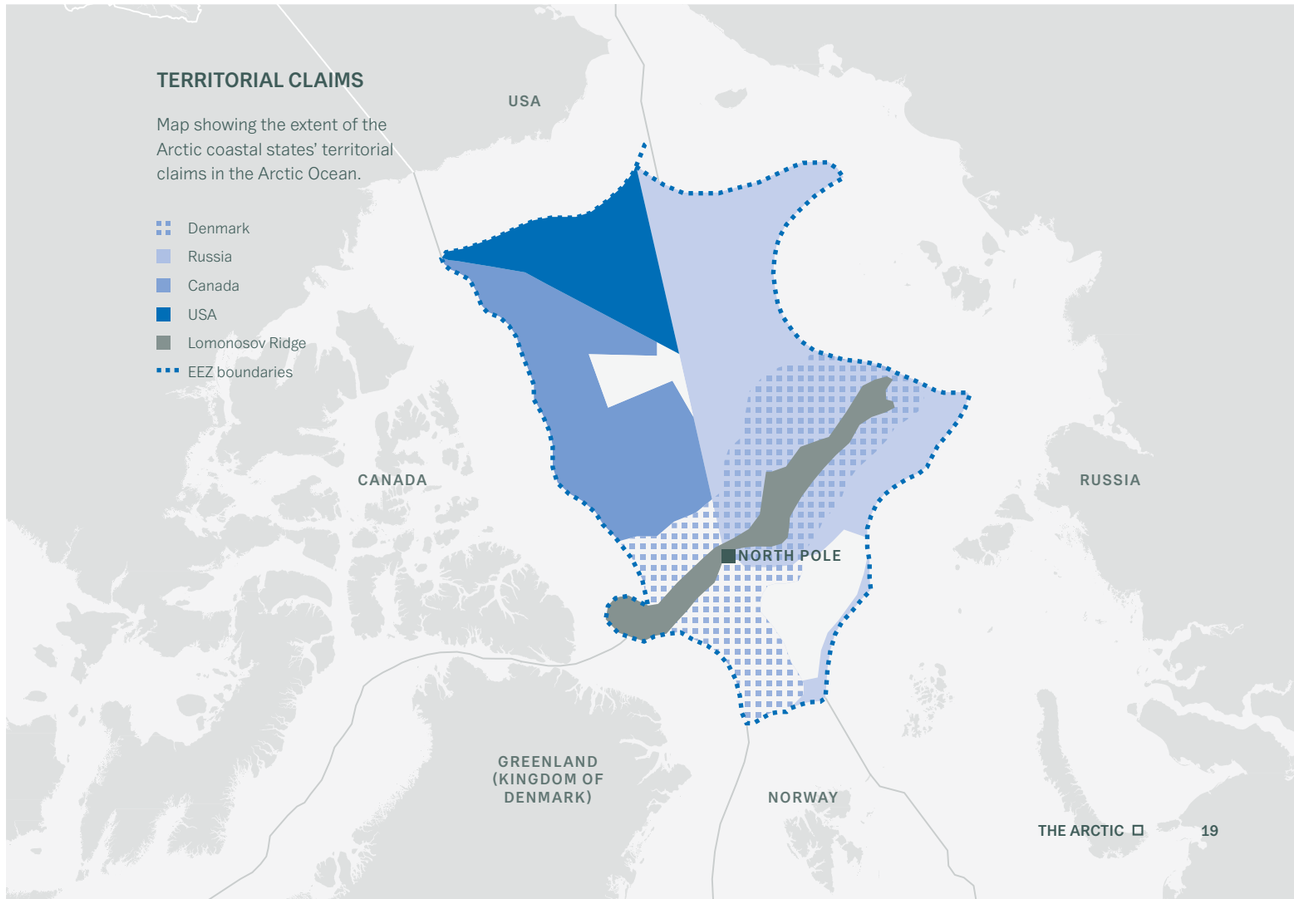
The delimitation of the Arctic Ocean continental shelf remains a core issue between Russia and the Kingdom of Denmark. The continental shelf issue is extremely important to Russia, which would have a hard time accepting a delimitation too close to the Russian exclusive economic zone, not least due to the strong symbolic value of the continental shelf issue to Russia and its self-perception as the leading Arctic great power.

Russia is thus highly likely unhappy with the extent of the Kingdom's claim, as it covers the Lomonosov Ridge all the way to the Russian exclusive economic zone. Following the submission of its original claim to the UN Commission on the Limits of the Continental Shelf, Russia has collected and submitted additional data. Russia has also announced that the Commission has confirmed that the entire Lomonosov Ridge is an extension of the Russian continental shelf.

On this basis, it is likely that Russia will extend its claim to include the entire Lomonosov Ridge, which borders on the Kingdom's exclusive economic zone near Greenland. Such a claim would significantly overlap with the Danish continental shelf claim.

Ultimately, the issue of delimitation is to be negotiated between all Arctic nations with overlapping claims. By extending its claim, Russia may try to strengthen its negotiating position vis-a-vis Denmark and Canada. Russia will likely want to initiate direct negotiations on delimitation with Denmark as soon as the Commission has approved the Russian claim. It is likely that Russia believes that it will negotiate from a position of strength, being the only country to have had its claim approved.

So far, Russia has adopted a constructive approach to the continental shelf issue. In future, Russia will likely want to preserve its image as a constructive negotiation partner that adheres to the UN process, likely on the assumption that this approach will serve Russian interests best, at least for now. Russia may, however, choose another approach at a later stage, should the UN process fail to result in an outcome acceptable to Russia.



CHINA IN THE ARCTIC

China's interests in the Arctic revolve around access to resources and sea routes as well as greater influence on Arctic matters. China is thus strengthening its Arctic research and building infrastructure in the Arctic. In addition, China prioritizes cooperative relations with the Arctic nations. China's regional interests, including its interests in Greenland, are sustained and long-term.

China has a long-term approach to pursuing its interests in the Arctic. Over the past three to four years, China has linked its interests in the Arctic closer to its overall strategic priorities.

China is concerned about the impact of the tense relations between the great powers over developments in the Arctic, as it curbs China's scope for building cooperative relationships in the Arctic and bolstering its influence in the region.

China is also aware that the United States does not want China to carve out a stronger role for itself in the Arctic and that Russia is also sceptical of an extended Chinese role in the region. China is thus trying to make itself relevant as a cooperative partner in the Arctic by investing in research and infrastructure, which, in time, is to turn China into an Arctic actor with both relevant capabilities and experience.

China has linked the Arctic sea routes to the maritime part of its development project, the Belt & Road Initiative, thus officially linking its specific interest in the Arctic to the country's overall and long-term strategic interests. The effect is already evident in the increased focus of Chinese state enterprises and investment funds on the Arctic region. This focus will likely result in increased investments in Arctic infrastructure.

China wants to gain influence over the management of Arctic issues. To China, this is a natural consequence of its role as a great power, and China wants to carry the same weight as other great powers. In China's view, the framework for interstate cooperation that is to regulate international cooperation in the Arctic is in a developmental phase. Consequently, China wants to carve out a role for itself as a legitimate actor in different Arctic cooperation forums. This would give China a say in the formulation of international rules for Arctic cooperation.

China wants to strengthen its bilateral cooperation with Arctic nations within trade, research and culture. The Chinese Arctic authorities likely regard strengthened bilateral cooperation on issues such as polar research and monitoring of the Arctic environment as a platform for more influence in the Arctic. Polar research, including climatic research, is thus a key component of China's efforts to cast itself as a maritime great power and a recognized polar nation.

China has a strong demand for energy and raw materials to feed its manufacturing industry, prompting it to focus on obtaining access to resources without becoming reliant on one single country or specific transport routes. China's interest in the Arctic sea routes is thus rooted in the ambition to strengthen its access to energy and raw materials. Increased use of Arctic sea routes would reduce China's dependence on existing transport routes, for instance through the Strait of Malacca and the Suez Canal, just as it would shorten shipping time for Chinese goods to and from Europe.

China's military aims at bolstering its Arctic knowledge. China has an ambition to be a global great power and to be able to protect Chinese interests worldwide. It is likely that this ambition extends to building up military capabilities that can be operational in the Arctic.

As a result of the interconnection between Chinese companies and China's political system, there are certain risks related to large-scale Chinese investments in Greenland.

However, specific Chinese military activity in the Arctic is still very limited. It is likely that some of China's efforts to build up Arctic knowledge and capabilities for Arctic operations will be a concerted effort between civilian and military actors, where civilian research results can also be used by the military.

China's activities in the Arctic are growing, not only in the realms of resource extraction and Arctic sea routes but also in terms of knowledge and capability build-up within fields such as climate research, space research, research on satellite communication, and Arctic navigation.

China's interests in Greenland

China's ambition to strengthen bilateral cooperative relations with the Arctic nations includes Denmark and Greenland, where China is trying to improve its scope for influence through increased cooperation on research and trade as entry points. China sees research cooperation as a legitimate channel for influence in the Arctic. This perception likely also extends to China's research initiatives in Greenland.

China likely wants to establish and maintain a commercial commitment in Greenland, even though this may not be financially viable in the short term. This is a tried and tested method used by China in other raw material exporting countries, just as it features in China's overall resource security strategy.

A few Chinese state and non-state actors are thus displaying an interest in commercial and research-related collaboration in Greenland. However, the interest is still narrow and has not yet translated into major investments or extensive research cooperation in Greenland.

As a result of the interconnection between Chinese companies and China's political system, there are certain risks related to large-scale Chinese investments in Greenland due to the effect that such investments would have on an economy the size of Greenland's. In addition, the risk of potential political interference and pressure increases when investments in strategic resources are involved.

The United States perceives China's interests in the Arctic and Greenland in the light of the strategic rivalry that is unfolding between the two countries. The United States regards China's growing interests in the Arctic and Greenland as a threat to the US room for manoeuvre and position in an area that it holds as strategically important.

Due to its location close to the North American continent, Greenland is regarded by the United States as being part of the US sphere of interest. As a result, the United States aims to curb China's general scope of action in the Arctic, including in Greenland.

The growing security policy focus on Greenland on the part of the United States will likely impact on China's scope for action in Greenland, including its potential for investing in larger projects.

Russia will remain a major security challenge to the West and to Denmark. The country is trying to re-establish itself as a global power, and the Russian armed forces remain the key instrument in its rivalry with the United States. Russia also uses influence campaigns, thus attempting to, among other objectives, facilitate the dismantling of the Western sanctions regime. In addition, Russia's closed decision-making processes and deep-seated distrust of the United States and NATO carry the risk of mistakes and unintended military escalation. This is also the case in the Baltic Sea region, where Russia has significantly bolstered its military capabilities.

RUSSIA

Russian law enforcement officers at the Red Square in Moscow, June 2020.
PHOTO: SHAMIL ZHUMATOV/REUTERS/RITZAU SCANPIX

- The 2024 presidential election will highly likely have no major influence on Russia's leadership, since, inter alia, the Russian constitutional amendments enacted in 2020 have enabled Putin to run for office again after the expiry of his current tenure.

Nevertheless, in the years to come, Russia's leadership will face difficulties dealing with the consequences of the COVID-19 crisis. The economic and social repercussions of the crisis will likely entail growing dissatisfaction and declining support for the country's leaders.

However, it is less likely that political opposition groups will evolve into a real threat to the regime. Nevertheless, Russia's leadership will use political manipulation and suppression to counter dissatisfaction and independent political activity, including heavy-handed methods and even assassination attempts on opposition leaders as well as new digital surveillance and control measures adopted by Russia in order to contain COVID-19.

Russia's leadership will also try to bolster its popular support by portraying the country's foreign and security policy as a necessary defence against a threat from the United States and the West. It is still unclear for how long Russia's economy will be negatively affected by the repercussions of the COVID-19 crisis. However, Russia is able to draw on large economic reserves, which help alleviate the immediate consequences of the crisis. Russia's leadership will continue to prioritize the expenses that underpin the basis for a strong state apparatus, even if it means reneging on the promises of increased welfare given to the Russian people in recent years.

Therefore, despite the economic challenges brought by the COVID-19 crisis, Russia's leadership will continue to give defence spending high priority, though it is less likely that defence spending will increase in the next couple of years. Consequently, Russia will have to make even more explicit priorities when allocating funding for its defence. In the future, Russia will likely give priority to the country's strategic deterrence and capabilities supporting the mobility of forces.

Unpredictability provides Russia with greater room for manoeuvre

The international repercussions of the COVID-19 crisis have not changed Russia's strategic objectives. Russia will continue its efforts to become a global power capable of challenging the dominance of the United States. Russia will also seek to maintain its dominant role in the Arctic and try to secure decisive influence in the post-Soviet space.

The unpredictability of international developments widens Russia's scope for manoeuvring on the international stage. Russia will exploit this situation to strengthen its relations with countries that, to varying degrees and due to different motivations, oppose the United States. Russia will likely also strengthen its attempts to drive a wedge into transatlantic and European cooperation and to position itself as an essential mediator in international conflicts and crises.

Russia's leadership makes decision in closed and narrow circles, which may in some situations give Russia an advantage over Western countries when it comes to making quick, bold decisions. However, it also entails the risk that Russia may misinterpret the intentions and reactions of Western countries. Russia's willingness to accept risks and the country's deep-seated distrust of the United States and NATO further increase the risk of miscalculations and unintended escalation in crisis situations involving the West. These factors taken together create uncertainty as to how Russia would react in the event of escalating crises.

Russia will continue to use offensive instruments in its foreign and security policy that Western decision-makers are more reluctant or simply unwilling to use. Russia will thus continue to use cyber operations and offensive intelligence operations to reach its strategic objectives. From the very onset of the COVID-19 crisis, Russia has also used the pandemic in its influence activities aimed at the EU countries. Russia will continue to use its offensive instruments in close combination with traditional diplomatic, political and economic means.

Russia's armed forces will remain the country's most important instrument in terms of reaching its strategic objectives, especially in regions that are the objects of increasing great power rivalry. The COVID-19 crisis has not decisively damaged Russia's capability to maintain its current level of military preparedness and activity. Russia's armed forces have resumed the military training and exercise activities postponed in the spring of 2020 due to COVID-19.

Also in the long term, Russia will remain a major security challenge to the West and to Denmark. Russia's foreign and security policy interests and behaviour will deviate from that of Western countries in several ways. This is also the case in regions that are of special security interest to Denmark. Firstly, Denmark's neighbouring region, the Baltic Sea, is characterized by tensions between Russia and NATO. Secondly, the Kingdom of Denmark has a central position in the great powers' strategic competition in the Arctic. In addition, Russia has positioned itself in a central role in a number of crises that are of major importance to European security, not least along the southern borders of Europe.

Russia uses influence operations against EU sanctions

In the years to come, Russia will likely continue to try to exploit the COVID-19 crisis and its repercussions for the Western populations in order to cultivate confusion and distrust. Outwardly, Russia will cooperate with the EU countries to overcome the consequences of the COVID-19 crisis, but, behind the scenes, it will try to undermine the measures introduced by the EU countries to lessen the impact of the crisis. In the future, it is highly likely that Russia will continue to exploit international crises to deepen disagreements among Western countries. In this way, Russia tries to achieve its own foreign policy goals.

The EU sanctions will remain a key target for Russia's influence campaigns. Russia feels the impact of the sanctions during the economic crisis brought about by COVID-19. Russia's leadership has likely concluded that the US sanctions will remain, and that Russia is unable to make the United States ease or lift the sanctions regime, making it increasingly important for Russia to have the EU sanctions eased or lifted.

Russia's room for manoeuvre in relation to the EU countries will remain very limited. The EU's sanctions will remain an obstacle to Russia's attempt to improve its political and economic relations with the EU countries. It remains highly unlikely that Russia will make significant adjustments to its foreign policy or behaviour in order to have the EU sanctions eased or lifted, despite the fact that the sanctions are a severe obstacle to Russia's post-COVID economic recovery. Russia's primary countermeasure against the US and EU sanctions will thus remain national initiatives aimed at mitigating the effect of the sanctions.

Russia will try to influence Western decision-makers

For years, Russia has tried to influence Western decision-makers and experts across the political spectrum. Russia's contacts with Western parliamentarians are different from those of other countries in that the Russian intelligence services are deeply involved in the contacts. Russia also uses a variety of state-controlled NGOs, think tanks, and political parties to establish and develop the contacts.

Russia's intention is to cultivate circles of friendly actors sympathetic to Russia's views with the aim of obtaining Western legitimization of Russia's policies and making it possible for Russia to influence Western decisions so that they become compatible with Russian interests.

However, Russia's efforts at influencing selected individuals were hampered in 2019 by the disclosure of its activities in Austria and Italy. In addition to putting a focus on sanctions, the intention behind Russia's assistance to the fight against COVID-19 in Italy was highly likely also to improve Russia's image in Italy and more generally in Europe. Russia likely wanted to use this as an entry point for reviving personal contacts between Russian and Western parliamentarians.

INITIAL STAGE OF COVID-19 CRISIS WAS SUITED FOR INFLUENCE CAMPAIGNS

In the early stages of the COVID-19 crisis, Russia initiated a broad influence campaign, whose aims included undermining Western consensus on the sanctions against Russia. Russia tried to use influence operations to convince some EU countries that the sanctions were harmful to the international effort to cushion the repercussions of the COVID-19 crisis and its impact on the world economy.

Russian state-controlled media and social media actors intensified their criticism of the sanctions, dubbing them inhumane and detrimental to economic development. At the same time, Russia contributed to the efforts to combat COVID-19 in two EU member states, Italy and Bulgaria. Central Russian actors, including the influential Chairman of the Duma Foreign Relations Committee, Leonid Slutskiy, openly linked Russia's help to Italy with calls for Italy to work on facilitating a lifting of the EU sanctions.

Russia also provided extensive help to Iran, citing the West's so-called inhumane sanctions that precluded help from reaching Iran.

Russia also used the initial stage of the crisis to fabricate deliberately false information (disinformation) and to disseminate a number of conspiracy theories that had emerged in Western environments (misinformation), both with the aim of sowing confusion about the disease, its origin, and the efforts of Western governments to halt contagion.

RUSSIA'S RELATIONSHIP WITH THE UNITED STATES

Russia's relationship with the United States is central for Russia's foreign and security policy. Though Russia will use its strategic relationship with China to counterbalance the dominance of the United States, Russia will remain the weakest of the three great powers. Russia will also secure its global position through strategic influence in the Middle East, North Africa and, in particular, the post-Soviet states.

Russia perceives that the United States constitutes the most serious threat to Russia on the international scene. The strategic tensions between the two powers will thus remain central to Russia's foreign and security policy. It is highly likely that relations between Russia and the United States will be characterized by distrust and deep division on strategic issues, regional crises and conflicts also under the new US administration.

Despite their difficult relationship, Russia and the United States have a pragmatic dialogue on some key foreign and security policy issues, including the Arctic, arms control and counter-terrorism.

Particularly disagreements between Russia and the United States regarding the arms control treaties have soured relations even further. The United States terminated the Intermediate-Range Nuclear Forces (INF) Treaty on ground-based shorter- and intermediate-range missiles in 2019, referring to Russia's development of a new missile. With an estimated range of 2,000 km, this missile highly likely violates the terms of the now terminated INF Treaty. Russia suspects that the United States also wants to withdraw from other arms control treaties with Russia. Consequently, Russia has highly likely prepared for a US withdrawal in early 2021 from the NEW START Treaty regulating the two powers' strategic nuclear weapons.

So far, the arms control treaties between Russia and the United States have been the main control mechanism regulating a number of strategically important weapons. Abolishment of this mechanism would likely deepen the distrust between Russia and the United States. This, in turn, would increase the risk that the two powers deploy strategic or other long-range weapons systems in or close to Europe. The deepening distrust also provides an incentive for Russia and the United States to develop new weapons and defence systems that would be very difficult to include in new arms control treaties.

Thus, there is a risk of a new arms race in which Russia is developing new strategic weapons systems such as hypersonic guided warheads, nuclear-propelled cruise missiles, and self-guided torpedoes. Such systems will be capable of penetrating missile defence systems and be able to hit targets in the United States with nuclear weapons from long distances. The United States, for its part, is developing an increasingly effective missile defence system and new ground-based missile systems with ranges exceeding 500 km, which would have been in violation of the INF Treaty had it still been in force.

No progress in NEW START negotiations

Russia and the United States have not yet started substantial negotiations on the future of the NEW START Treaty. Russia wants the Treaty to be extended until 2026, as Russia could otherwise become embroiled in an arms race with the United States that would be very expensive for Russia. The expenses entailed in such a race would go beyond what Russia is already spending on modernizing and expanding its ageing nuclear arsenal and developing new strategic weapons systems.

It is possible that the new US administration will be more responsive to Russia's request for an extension of the NEW START Treaty, though it is likely that the United States' view on the treaty will not change significantly.

The United States fundamentally finds the treaty obsolete, particularly since it does not include China's strategic nuclear weapons. However, it is less likely that Russia will support Chinese participation in a new treaty due to the special status Russia holds by virtue of its bilateral strategic arms control treaties with the United States, a status that Russia wants to maintain.

NEW DECREE EMPHASIZES RUSSIA'S STRATEGIC DETERRENCE CAPABILITIES

President Putin signed a new decree in June 2020 on Russia's use of nuclear weapons. The decree should likely be viewed in light of the deadlocked dialogue on the NEW START Treaty. The new decree is likely intended as a signal to the United States that Russia has a nuclear arsenal that can be deployed in its defence, including if the United States chooses to withdraw from the NEW START Treaty.

The new decree does not contain significant changes to Russia's nuclear deterrence posture. Russia may still deploy nuclear weapons in response to nuclear attacks against Russia, or if it perceives that a conventional attack constitutes an existential threat to the country.

However, the new decree sharpens Russia's attitude towards states that, in Russia's view, pursue a policy unfriendly to Russia and that allow deployment of nuclear weapons, missile defence systems and short- and intermediate-range missiles on their territory. The decree categorizes such activities as a danger that may evolve into a threat.

The basis of the NEW START Treaty is that the Russian and the United States' strategic nuclear arsenals are roughly comparable and of similar size. However, the two great powers are developing new technologically sophisticated weapons systems and strategic defence systems, which will make it harder to compare their respective strategic weapons arsenals. This will complicate any new bilateral arms control treaties.

Russia is also concerned about an increasing militarization of space, since it may, in Russia's view, threaten its ability to ensure its strategic deterrence in the long term. Russia itself has an extensive space programme focused on increased military as well as civilian exploitation of space and on development of capabilities that will prevent other great powers from using space.

The primary objective of Russia's space programme is to ensure the effectiveness of its strategic nuclear deterrence. Russia is concerned that the United States will increasingly exploit space in connection with the establishment of a missile defence system capable of threatening Russia's nuclear deterrence. Russia is developing weapons systems that use electronic energy, such as jamming or laser, to interrupt or even destroy satellites. It is possible that Russia is also developing satellites capable of destroying other satellites in orbit.

China is Russia's main strategic partner in its efforts to balance the global dominance of the United States, and the two powers coordinate their efforts in international forums. Russia will continue to be the weaker party in its relations with the United States and with China, which fuels Russian concerns that the United States will attach greater importance to the more resourceful China. Such concerns highly likely motivate Russia's efforts to place itself as an essential actor in international issues.

Russia challenges the United States in the Middle East and North Africa

Russia has managed to secure significant influence in parts of the Middle East and North Africa. It is Russia's intention to exploit this position to establish itself as a power that can rival the global power of the United States. In addition, the Middle East and North Africa are strategically important to Russia, in particular due to the region's proximity to key Russian interests in the Black Sea, the Caucasus and Central Asia.

Russia has become a decisive actor in the conflict in Libya and has long had a central role in Syria. Based on its presence in Syria and Libya, Russia will likely try to expand its strategic position in the Middle East and North Africa, in the Eastern Mediterranean, and along NATO's southern flank.

The declining engagement of the United States in parts of the Middle East and North Africa leaves a political and military vacuum. Russia is trying to fill this void by strengthening its ties with traditional US partners in the region, in particular Egypt, Israel and Saudi Arabia. However, Russia's key partners in the Middle East and North Africa remain Turkey and Iran.

RUSSIA IS TRYING TO RE-ESTABLISH ITSELF AS A GLOBAL GREAT POWER

Russia and Turkey both seek to increase their regional influence in the Middle East and North Africa. Though their respective interests in the region sometimes clash, Russia and Turkey have established a pragmatic cooperative relationship in which they, to a certain extent, support each other's shared interest in reducing the role of the United States and the EU in the Middle East and North Africa.

In Syria, Russia cooperates with both Turkey and Iran on establishing the overall framework for conflict resolution, despite their lack of shared interests. In Libya, Russia and Turkey support different sides in the conflict but try to keep this fact separate from other areas of cooperation.

Russia also uses its cooperation with Turkey to draw the country away from its NATO partners, for instance through the sale of the S-400 air defence system.

Russia has strengthened its relationship with Iran following the US withdrawal from the nuclear agreement with Iran. In Syria and in the Middle East in general, Russia and Iran have different interests. It is, however, the intention of both powers to counter US influence in the region. Russia attempts to use its relationship with Iran to insert itself as an essential mediator between the parties behind the nuclear agreement as well as between Iran and its adversaries in the Middle East.

Belarus is crucial to Russia's security

The countries in the post-Soviet space constitute a cornerstone in Russia's foreign policy. Russia will remain focused on securing decisive influence on the foreign and security policy of the countries in the area, in particular Belarus, Ukraine and Moldova.

Russia views the post-Soviet space as a strategic buffer zone in case of a conflict with NATO. It is therefore important for Russia to prevent Belarus, Ukraine and Moldova from cooperating more closely with NATO and the EU. At the same time, Russia is concerned that so-called colour revolutions backed by the West in the three countries may spread to Russia itself.

Belarus has a central strategic location for Russia, which regards the country as the last buffer in a potential conflict between Russia and NATO. Russia works for closer political and economic integration of the two countries within the framework of the Union State set up between Russia and Belarus in 1999. Belarus also acts as a transit country for Russian energy and is vital as a gateway for Russia into the Kaliningrad region.

Russia is thus deeply concerned about the protests in Belarus that threaten to destabilize the country. Russia likely wants the Belarusian President Lukashenko to be ousted from power, not least because he has previously hindered closer political integration between Russia and Belarus. However, Russia will continue its support for Lukashenko as long as the protests are ongoing to avoid that Lukashenko is ousted in a colour revolution, as happened to the former president in Ukraine.

However, Russia's leadership highly likely sees the protests as a possibility to exert political pressure on Lukashenko that may translate into increased Russian influence in Belarus. At the same time, Russia is careful not to be too obvious in its efforts to influence developments in Belarus, likely because of a fear that too evident Russian involvement may push the protests in an anti-Russian direction.

Belarus has a central strategic location for Russia, which regards the country as the last buffer in a potential conflict between Russia and NATO.

THE BALTIC SEA REGION

The Baltic Sea region will continue to be characterized by the tensions between Russia and NATO. Russia has increased its combat effectiveness and its ability to use the elements of speed and surprise to its advantage – including in the Baltic Sea region. However, it remains highly unlikely that Russia would deliberately risk a military conflict with the United States and NATO.

The tensions between Russia and NATO in the Baltic Sea region have a heavy influence on Russia's relationship with Denmark. Russia basically regards Denmark as a small state that follows the foreign and security policy of the United States.

Russia's perception of Denmark's foreign and security policy is thus characterized by distrust, due, in part, to Denmark's role in NATO. Russia believes that Denmark pursues an anti-Russian course in the alliance, not least due to Denmark's participation in NATO's enhanced Forward Presence (eFP) as part of the multinational battalion in Estonia and Denmark's strong support for EU's sanctions.

Still, Russia likely would like to improve its relationship with Denmark and not let it be dominated by the tensions in the Baltic Sea. Russia, for example, regards Denmark as an attractive partner within trade and investments. Also, Russia likely regards improved relations with Denmark as a means to preserve the bilateral cooperation on regional Arctic issues.

Finally, it is likely that Russia, overall, wishes to improve its relations with the Scandinavian countries, likely in the hope that this may help soften the EU's sanctions on Russia and contribute to lowering tensions in the Baltic Sea region.

Russia uses military activity to send strategic messaging to NATO

The tensions between Russia and NATO in the Baltic Sea region manifested themselves in August 2020, when a Russian fighter aircraft violated Danish airspace off the island of Bornholm.

The Russian fighter aircraft pursued a US B-52 bomber flying over the Baltic Sea. The violation was likely Russia's way of sending a signal to NATO in general and the United States in particular following a period with an increased number of US strategic bomber flights near Russian territory. Russia highly likely intended to signal that Russia perceives such flights as threatening and thus unacceptable.

Russian fighter aircraft regularly fly close to Western military aircraft and vessels in the central part of the Baltic Sea. Usually, such activities are focused on surveillance and intelligence collection against the Western capabilities in the area. Russia highly likely intends to keep such more routine flights from violating Danish airspace.

Russia's military and security policy behaviour in the Baltic Sea region reflect the region's decisive importance to Russian national security. Despite Estonia, Latvia and Lithuania all being both NATO and EU members, Russia considers them to be part of a larger area that provide strategic depth to the defence of central parts of Russia. Russia perceives NATO's enhanced Forward Presence in the Baltic countries and Poland as military preparations against Russia. Russia is also deeply suspicious of Sweden's and Finland's military cooperation with NATO.

Russia is also calling for conflict prevention measures

In its political dialogue with NATO, Russia has called for arrangements that can prevent military incidents in, for instance, the Baltic Sea region from escalating. Russia uses this as an argument for NATO to resume the direct military contacts that were cut following Russia's annexation of Crimea. In this way, Russia likely attempts to deepen the division among NATO countries on how to handle the alliance's relations with Russia. Russia likely also hopes that agreements of this kind will result in NATO reducing its military activities in the eastern part of the Baltic Sea.

At the same time, Russia highly likely genuinely wishes to avoid that military incidents between Russia and NATO members escalate unnecessarily. However, Russia would ultimately be ready to disregard set rules if Russia deems that it is important to send a concrete and clear strategic signal to an individual NATO country or to the alliance as a whole.

Russia wants to be able to isolate parts of the Baltic Sea region

The Russian armed forces are tasked with securing the defence of the Kaliningrad region and its supply lines in the Baltic Sea – both by sea and by air. In the event of a serious crisis in the Baltic Region, the Russian forces must be able to prevent NATO forces' room for manoeuvre in the central and eastern part of the Baltic Sea.

Russian military exercises focus on isolating and seizing control of the access to the Baltic Sea region. In the summer of 2020, Russia conducted its third Ocean Shield comprehensive naval exercise. The previous two years, the Russian Ocean Shield exercises, among other things, focused on how Russia could isolate the Baltic Sea region in the event of an aggravated crisis or conflict. In 2020, the Ocean Shield exercise was held in the North Sea, including inside the Danish exclusive economic zone, and in the North Atlantic Sea. Russian units thus also trained how to block navigation between Greenland, Iceland and Great Britain.

In a crisis, Russia will be able to quickly assemble a superior ground force close to the borders with the three Baltic countries. In addition, Russia's long-range missile systems would complicate NATO reinforcements.

Russia will highly likely refrain from military initiatives against the Baltic countries or other countries in the Baltic Sea region if, in Russia's view, such initiatives would carry a high risk of a direct military conflict with a unified NATO. However, Russia's quick and closed decision-making processes as well as its deep-seated distrust of the United States entail a risk that Russia, in a crisis, would misinterpret NATO's intentions and military dispositions in the Baltic Sea region. This could create a risk of an unintentional escalation between Russia and the West.

Russia concentrates its military build-up on the Kaliningrad region

In recent years, Russia has significantly built up its military forces in the western part of the country, and equipped them with state-of-the-art and up-to-date equipment, strongly improving Russian military capabilities.

Russia previously needed extensive preparation time ahead of conducting military operations. This preparation time has now been significantly reduced compared to just a few years ago, increasing Russia's military scope and capability to conduct military operations at both the tactical and strategic levels, including the capability to employ the elements of speed and surprise to its advantage. This change also applies to the Baltic Sea region.

Russia has, in particular, built up its forces deployed close to Ukraine. Now focus is on building up its forces in the Kaliningrad region. Russia's military combat power near the Baltic countries has also been significantly strengthened in terms of both quality and quantity. This is especially the case with the airborne troops deployed near Estonia.

Over the past two years, Russia has deployed additional combat equipment to the Kaliningrad region, including more tanks and self-propelled artillery with longer ranges, modern anti-tank missile systems, and long-range rocket launchers.

Russia will likely accelerate the build-up of the ground military units in the Kaliningrad region due to the decision by the United States to relocate forces from Germany to Poland, as it will highly likely perceive the US forces in Poland as a potential threat to, in particular, the Kaliningrad region.

The Russian Baltic Sea Fleet will also be strengthened. In the short to medium term, the Fleet will be reinforced with additional missile corvettes, taking its inventory to a total of around eight missile corvettes, all capable of firing long-range cruise missiles. The corvettes will also, to varying degrees, be equipped with air-defence systems, drones and electronic warfare equipment.

China continues to increase its regional and global influence through multilateral cooperation and through investments and partnerships abroad. China also extensively uses cyber operations to further its strategic interests and objectives. China increasingly takes an uncompromising and assertive stance when countering criticism and wields its economic clout to put pressure on other countries. In addition, the Chinese leadership pursues a tough line against what it perceives as attempts at weakening Chinese sovereignty and cohesion. China continues its military build-up and asserts its claims in the South China Sea. The United States regards China as its main strategic rival and is trying to counter China's further development as a global power.

Delegates applaud as President Xi Jinping arrives for the opening session of China's National People's Congress at the Great Hall of the People in Beijing in May 2020. PHOTO: NG HAN GUAN/EPA/RITZAU SCANPIX

CHINA

The COVID-19 crisis hit China hard. China was the cradle of the outbreak and the worst hit country in the initial phase of the pandemic. However, China has managed to pull through its first shutdown relatively quickly, not least in comparison with the United States and Europe. Even so, the economic reconstruction process following the COVID-19 crisis is still frail and mainly driven by public investments.

China's multilateral influence is growing

China continues to increase its influence on Asian and global affairs through bilateral and multilateral cooperation. China participates more actively in international institutions and organizations. This opens the scope for more Chinese influence on institutions as well as on individual member countries on specific issues. At the same time as China has increased its role, regionally and globally, the United States has decreased its engagement in multilateral institutions and forums.

In recent years, China has become a central player in the build-up of new institutions, promoting them as supplements to existing global forums. Such institutions include the Asian Infrastructure and Investment Bank and the Shanghai Cooperation Organization. In addition, China is attempting to bolster its regional influence through initiatives such as its bilateral cooperation with 17 Central and East European countries, the so-called 17+1-cooperation.

China is promoting its own development experience as a model for other countries to emulate and thus as an alternative to the Western liberal and market-based development model. China insists that there is no necessary correlation between democratization and economic development. China thus touts its economic development model as an opportunity for countries to pursue modernization and economic growth without fundamentally reforming their political systems.

China's growing influence in international forums and the promotion of its national development model could make it increasingly difficult for Western countries to promote liberal values and the necessity of introducing democratic reforms.

China's economic influence is growing

China's economic influence continues to grow – regionally as well as globally. Through the Belt & Road Initiative (BRI), China exerts influence on the regional economic structures and interrelationships in Asia, the Pacific Area, and Europe. China is using the BRI as an entry point for strengthening bilateral cooperation with the participating countries. Besides acting as a platform for enhanced commercial cooperation, the BRI also serves a strategic purpose. China thus regards the participation of other countries in the BRI as a sign of international backing for the country's strategic objectives.

China's long-term objective is to secure its continued economic growth and development. However, China is facing major domestic economic problems related in particular to the uneven demographic development due to the rapidly ageing population, as well as high debt levels and low productivity. Regardless of the precise path China chooses to pursue to address its domestic economic challenges, it will have a significant impact on the global economic system.

Chinese economic agreements and investments abroad reflect a mixed strategy of economic, diplomatic, and strategic initiatives designed to underpin China's foreign policy objectives. This strategy also gives Chinese companies a global competitive edge due, in part, to the fact that they are often capable of outbidding other investors, drawing on their access to economic support from Chinese state policy banks, whose purpose is to further the internationalization of Chinese companies and China's strategic interests.

China also extensively uses cyber operations as an instrument to support strategic, security political and economic interests and objectives – regionally as well as globally.

China's economic development and influence impact regional as well as global economic development. China's significant economic clout may also impact China's trade partners politically, as China has demonstrated both the will and the ability to impose economic punishment related to what it perceives as political interference in Chinese internal affairs. Looking ahead, it is likely that more countries will prioritize commercial and economic collaboration with China over criticism of sensitive political issues.

China focuses on developing advanced technology

The Chinese leadership views technological progress as decisive for the country's ability to solve its domestic economic challenges and increase the productivity of the society in order to reach the goal of becoming an economically advanced country and major power.

China's plans for its technological development imply substantial domestic investments. China is also making targeted efforts to secure foreign technology through economic agreements, strategic corporate acquisitions, targeted direct investments in foreign tech companies and joint venture setups. In addition, China is still using industrial espionage to gain access to foreign technology.

China's targeted prioritization of advanced technologies will likely improve its ability to set international standards, including in relation to quantum technology and artificial intelligence. This would boost Chinese influence in technological fields that used to be dominated by other actors, and Western countries in particular.

China's focus on developing advanced technologies, including quantum technology and artificial intelligence, has become an element in the strategic competition between the United States and China. The United States regards China's prioritization of advanced technologies as a threat to its national strategic interests and security.

China continues to develop in a more repressive direction, increasing its already extensive use of high-tech and digital solutions to monitor and control the behaviour of the Chinese population.

China aims to control the narrative about China and quell criticism

China is increasing its efforts to control foreign perceptions of China and its conduct, with the purpose of promoting a positive narrative about China and securing backing for its global initiatives. At the same time, China is adopting increasingly hard-handed and assertive measures to quell criticism of the Chinese Communist Party's policies and China's political system.

However, the primary purpose of China's influence operations is likely not to destabilize other countries or to deepen existing political divides.

China's attempt at controlling the narrative about the country has manifested itself clearly during the COVID-19 crisis. China has used the crisis in various ways, e.g. to showcase its political system and its handling of the crisis as superior to that of Western countries, particularly the United States.

China mainly uses traditional diplomacy and lobbying to control the narrative without trying to disguise that Chinese authorities are the originators of the messages.

However, China is also capable of conducting campaigns corresponding to Russian influence campaigns, with deliberate use of disinformation, false profiles, and attempts at concealing the origin of the messages. China conducted such campaigns in relation to unrest in Hong Kong in the autumn of 2019 and ahead of the January 2020 election in Taiwan. Such activities have also been launched in connection with attempts to control the narrative regarding the origin of the COVID-19 pandemic and China's handling of the outbreak.

Chinese influence activities are likely also intended for a Chinese audience and the Chinese diaspora.

China tightens its approach to Hong Kong, Taiwan and Xinjiang

China continues to develop in a more repressive direction, increasing its already extensive use of high-tech and digital solutions to monitor and control the behaviour of the Chinese population. China's effective and heavy-handed handling of the COVID-19 crisis was facilitated by this extensive surveillance and control of the Chinese population.

China has tightened its policy in areas that are perceived as threats to China's unity and cohesion. The country's leadership has cracked down on what it sees as anti-Chinese trends and groupings in Hong Kong. China has also intensified the pressure on Taiwan, and it has increased control, surveillance and internment of ethnic and religious minorities in Xinjiang in north-western China. The central government in Beijing regards all three areas as inseparable parts of China.

In the wake of the large 2019 protests in Hong Kong, China has adopted new security legislation giving Beijing increased control over Hong Kong as well as authority and instruments to prevent similar situations in the future. Adoption of the Hong Kong security legislation underscores that China places higher priority on social and political stability than it does on the country's international reputation and on avoiding criticism from the outside world.

Under Xi Jinping, China has increased the pressure on Taiwan as regards the island's international status and its relations with China. This has prompted a number of countries that formerly recognized Taiwan to rescind their recognition of the island in favour of the People's Republic of China. The Chinese leadership has worked determinedly to bring about such a shift. China will likely exert similar pressure on the remaining countries that still recognize Taiwan. China continues its attempts at preventing Taiwan from gaining foothold and influence in international organizations.

In Xinjiang, the degree and extent of control, surveillance, and internment of ethnic and religious minorities, mainly Muslim Uighurs, continue. This practice has been common in recent years, with large parts of the Uighur community being forcibly interned in camps over extended periods of time. China prioritizes full control over the development and population in Xinjiang higher than consideration for the Uighurs' living conditions and freedom of religion as well as China's international reputation.

China continues its military build-up and steps up sovereignty enforcement in the South China Sea

China continues its extensive military build-up comprising the navy, army and air force, as well as military cyber capabilities. Existing military units and weapons systems are undergoing extensive modernization and expansion, and additional units are being added. Even though China is bolstering its capability to launch military operations on a global scale, the balance of power in the western Pacific Ocean remains China's key military priority.

The Chinese navy has a comprehensive shipbuilding programme comprising aircraft carriers, amphibious carriers, cruisers, destroyers, frigates, corvettes, and supply vessels. The shipbuilding programme has been accelerated over the past 10 to 15 years. As a result of the expansion and modernization of the Chinese navy, it now has more modern units than even the US Navy. Combined with the other steps taken to modernize the Chinese military, this will cause the balance of power in the western Pacific Ocean to tip in China's favour over the next 10 to 20 years, unless other countries in the Pacific region start expanding their shipbuilding programmes too. Drawing on its arsenal of aircraft carriers, large amphibious vessels, cruisers and a reinforced marine infantry, China will, in the long term, obtain global power projection capabilities second only to those of the United States.

The South China Sea will remain among China's top foreign policy priorities, and China will increase its presence in the area. China will likely expand the military use of its bases on the artificial islands in the South China Sea, for instance by deploying combat aircraft to the bases. China's conduct in the South China Sea meets with opposition from other countries in the region, including, in particular, the countries that also have territorial claims in the area. China is trying to mend its relations with the countries in the region through diplomatic initiatives, enhanced economic cooperation, and investment offers. However, such initiatives will not keep China from continuing to assert its territorial claims in the area and expanding its presence.

The United States will continue to challenge China's claims and conduct in the South China Sea with routine operations that will not in themselves cause a deterioration in US-Chinese bilateral relations, as such reactions will be recognizable and expected.

The increased activities by the Chinese coast guard and military likely have the scope of facilitating Chinese control and surveillance of the entire South Chinese Sea in the medium to long term.

Cooperation with Russia remains a priority despite mutual scepticism

China cooperates with Russia in the realms of politics, economy, technology, and military affairs. The two countries furthermore often coordinate their foreign policy positions, including in relation to their participation in international organizations.

In 2019, Russia and China entered into an official strategic partnership. Chinese-Russian cooperation has particularly been strengthened with regards to energy, where their interests clearly align.

Strengthening the bilateral relationship benefits both Russia and China, as it acts as a counterweight to political pressure, particularly from the United States. But a full-fledged alliance between the two countries remains highly unlikely. This is notably due to their clashing interests in Central Asia which are a cause for significant tensions. Russia regards the region as part of its sphere of influence, and thus perceives increased Chinese collaboration with countries in the region as a challenge.

Still, the two countries likely have a mutual understanding of each other's regional engagement and try to avoid challenging each other's strategic interests. The economic cooperation between China and Russia is also limited by the fact that China ultimately prioritizes its relations with the far stronger United States over its cooperation with Russia.

United States increases pressure on China and on its allies' cooperation with China

The United States regards China as its main strategic rival and works to counter its influence. This is reflected in the US policy regarding its allies' relations with China and in the US efforts to limit China's role in international organizations and forums.

Tensions in the bilateral relations between the United States and China fundamentally testify to the shifting balance of power between the two countries. The US administration is increasingly regarding US-Chinese relations as a zero-sum game, one in which China's growing influence in the international arena, particularly in Asia, comes at the expense of the traditional role and influence of the United States.

The United States views Chinese development through a strategic and security policy lens and as a threat to US security. The COVID-19 crisis has contributed to exacerbating the already strong tensions between China and the United States, pulling the two countries even further apart.

At the same time, the United States criticizes China for illegal conduct within areas such as trade, intellectual property rights and technology transfer.

The growing confrontation between the United States and China will increasingly confront smaller countries that seek close cooperation with both parties with difficult dilemmas on issues such as trade, technology development, investments, and the climate agenda.

THE CYBER THREAT

Cyber attacks launched by foreign states and criminals are still among the most serious threats to Danish national security. The threat of cyber crime and cyber espionage is directed at both Danish private companies and public authorities, both of which continuously experience cyber attacks.

The threat of cyber espionage and cyber crime is still very high but manifested in very different ways. Secrecy is often a defining feature of cyber espionage, and the consequences are thus difficult to detect. Cyber criminals, on the other hand, often exploit the pressure that the threat of public exposure puts on victims, for instance of targeted ransomware attacks.

The continued digitization of Danish infrastructure may affect the cyber threat and pose strategic challenges to Denmark. When physical systems become more connected to the Internet and digital control interfaces, the risk of a cyber attack causing physical damage increases. Dependence on non-allied states that could potentially disrupt operations, exploit digital equipment to conduct espionage via backdoors or prevent delivery of critical spare parts poses a risk to Danish interests and Danish national security.

The COVID-19 crisis illustrates the dynamic nature of cyber threats

Hackers are on a constant lookout for weaknesses, and new vulnerabilities are quickly exploited to carry out cyber attacks, affecting the choice of targets and attack techniques alike.

Hackers will always exploit current crises, events or developments to their own benefit, and the COVID-19 pandemic is no exception. Hackers have leveraged the pandemic to stage different cyber attacks, for example by using it as a theme in phishing emails and by registering fake and malicious domains. The exploitation of COVID-19 adds a new element to the overall cyber threat landscape, though the threats in general have not changed much. COVID-19 has primarily affected the cyber threat landscape in terms of the tactics used by cyber criminals to target their victims.

The pandemic has changed the working conditions of numerous public authorities and private companies, resulting in a rise in the use of virtual meetings and home offices. The IT security of many public authorities and private companies is under pressure, because system accessibility to users is given high priority. The new working conditions may make it easier for hackers to access systems and make it more difficult to detect these intrusions, raising the risk of hackers launching successful cyber attacks.

Even though the threat from foreign states and criminals has not changed fundamentally, public authorities and private companies may be faced with new vulnerabilities and thus a changed risk landscape.

THE CYBER THREAT AGAINST DENMARK AND DANISH INTERESTS

Foreign states and criminal hackers launch frequent, persistent and serious cyber attacks that damage Danish interests, private companies and public authorities. The threat is reflected in the use of different attack techniques with very different objectives, including, in particular, espionage and crime.

The very high threat from both foreign states and criminals will continue to result in frequent, persistent and serious attacks. Destructive cyber attacks and cyber activism, on the other hand, are rare and only pose a potential threat to Denmark. The effect of destructive cyber attacks covers a wide spectrum, ranging from destruction and manipulation of data or software to personal injury and death. Cyber activism refers to the use of cyber attacks to draw the largest possible attention to a specific cause.

State-sponsored hackers still have a particular interest in knowledge with relevance to the Danish Ministry of Foreign Affairs' and the Danish Ministry of Defence's areas of authority. It is highly likley that this interest will result in persistent attacks against employees working within the two areas of authority.

In addition, research and research institutions are at risk of cyber espionage, as foreign states have been known to use cyber espionage as a tool to improve national research and competitiveness. For instance, in July 2020, US, UK and Canadian authorities issued a joint statement accusing the Russian hacker group known as APT29 of targeting various organizations involved in COVID-19 vaccine development.

The six sectors of societal importance: transport, healthcare, telecom, energy, finance and shipping are also exposed to the significant threats of cyber crime and cyber espionage.

Undetected cyber attacks damage Danish interests

Danish public authorities and private companies regularly fall victim to cyber attacks. Still, the consequences of certain types of cyber attacks are not always visible to the public, and, in some instances, even the victims themselves are not aware that they have been compromised. Even if the attacks are detected, it may prove difficult to determine the extent of the damage caused by the attacks, for example in case of insufficient logging.

It is particularly difficult to detect and uncover the consequences of cyber espionage attacks, at worst preventing Denmark from realizing that it is under an attack that might directly affect Danish strategic interests.

Undetected cyber attacks may continue for a long time. As long as their attacks go unnoticed, hackers may keep on stealing information or expanding their control of the targeted network. A case in point is the 2014 incident in which the US government's Office of Personnel Management (OPM) was compromised by the same actor from June 2014 until April 2015. The authorities' inadequate cyber security meant that the hackers were able to steal sensitive information, fingerprint data for instance, without being detected. There are also Danish examples of hacker attacks that have gone on for some time without being detected.

CYBER ESPIONAGE IS USED IN CONNECTION WITH NEGOTIATIONS

Several foreign states use cyber espionage as leverage in political and financial negotiations. In July 2020, The New York Times described how a Chinese state-sponsored hacker group conducted cyber espionage against the Vatican and the Catholic Diocese of Hong Kong from May to July 2020. The hackers launched their attack prior to the autumn 2020 discussions on a renewal of an agreement between China and the Vatican.

Hackers conduct cyber espionage in order to gain access to many different types of knowledge, including intellectual property such as defence technology. Often hackers also spy in order to gain access to sensitive political and financial information. Cyber espionage damages Danish interests, for example, when opposing parties in negotiations gain advantage for their business or security policy position based on stolen information. Private companies and public authorities are not always able to make the connection that the reason they are being undercut by rivals or outmanoeuvred at the negotiating table is because they have been targeted by cyber espionage, especially if they are not aware that sensitive information has been stolen.

Danish private companies and public authorities may become collateral victims of the consequences of cyber attacks if a supplier or partner has been compromised without them knowing or disclosing that this is the case. There is, for instance, a risk that foreign partners or local authorities which Danish public authorities have been in contact with in connection with negotiations or meetings have been compromised, potentially giving unauthorized individuals access to sensitive information or allowing them to monitor communication.

If a foreign state compromises Danish private companies or public authorities to conduct cyber espionage against them, it is possible that these organizations will be more vulnerable to other types of threats as well. Cyber espionage is thus used prior to destructive cyber attacks, especially if it will provide hackers with access to critical systems or information of a special nature.

Foreign states have the capability to launch destructive cyber attacks against Denmark

Several foreign states have significant destructive cyber attack capabilities that are continually developed. The use of cyber espionage to leverage destructive cyber attacks also takes place during peacetime. At present, it is less likely that foreign states are intent on launching destructive cyber attacks against Denmark. However, their intention may change, for example in connection with a tensed political situation. In such case, the threat may quickly increase, as the capability to conduct destructive cyber attack is already present.

CIVILIAN INFRASTRUCTURE IS TARGET OF DESTRUCTIVE CYBER ATTACKS

Iranian hackers likely targeted several water facilities in Israel in late April 2020 in an attempt to cripple the computers controlling the water purification system and the chlorine levels in the country's drinking water. However, the attack was thwarted before it caused any real damage. Some two weeks later, Israeli hackers likely hit back by disrupting operations at one of Iran's biggest ports, causing chaos and delays.

Destructive cyber attacks fall in the grey zone between conflict, war and peace. Some states use destructive cyber attacks to send political messages or to punish other states or companies. NATO has issued a joint statement that, if a NATO ally is the victim of a cyber attack, the alliance's collective defence commitment under Article 5, the so-called musketeer oath, could be invoked.

It is likely that the large majority of known destructive cyber attacks have been carried out by states. Almost all of these attacks have been conducted in connection with conflicts or geopolitical tensions between states.

However, there have also been examples of cyber criminal attacks that have had destructive consequences. In connection with digital bank heists, hackers have deleted or encrypted the data of financial companies. The purpose has likely been to delete their tracks or prevent the companies from responding to the theft. So far, data deletion or encryption in connection with digital bank heists is a relatively rare phenomenon but may carry large consequences for the targeted financial institution.

CYBER CAPABILITIES OF SELECT FOREIGN COUNTRIES

RUSSIA

Russia, including the Russian intelligence services, has extensive cyber espionage and destructive cyber attack capabilities to support the country's strategic and security policy interests and military operations. Russia is still a leading and highly active actor in the cyber realm.

NORTH KOREA

North Korea has developed a significant capability to launch different types of cyber attacks, including destructive cyber attacks. Though South Korea has been the main target of such attacks, North Korea is likely also willing and able to launch large-scale cyber attacks against targets in other countries. In addition, it is likely that North Korea conducts financially motivated cyber crime.

IRAN

Iran has improved its cyber attack capabilities for several years. In addition to cyber espionage campaigns, Iranian hacker groups have likely been responsible for destructive cyber attacks that resulted in the deletion of data. Iran's destructive cyber attacks have primarily hit targets in its neighbouring countries.

CHINA

China is an active and advanced cyber actor that has extensive cyber espionage and destructive cyber attack capabilities. China's cyber capabilities primarily fall under the country's intelligence services and the Chinese military, which have strengthened the cyber area over the past few years.

TECHNIQUES AND COLLABORATION IN THE CYBER CRIMINAL WORLD

Unlike cyber espionage, the impact of cyber crime is often visible to the victims. Cyber criminals use the threat of public exposure to add extra pressure on targeted companies and public authorities. Also, cyber criminals have come up with new ways to collaborate that will likely increase the number of attacks and their damaging effects.

CYBER CRIMINALS TURN THE DIGITAL THUMBSCREW

In May 2020, a large US law firm was hit with REvil ransomware. Initially, the group behind the attack claimed it had stolen 756 gigabytes of personal data from the firm's clients, including several international celebrities. The group demanded USD 21 million in ransom and threatened to gradually leak information if the ransom was not paid.

Less than a week later, the group upped the ransom demand to USD 42 million, shared 169 emails from the law firm's accounts, and threatened to put stolen information on US President Donald Trump up for auction.

No information has since been released that ransom has been paid, but this form of public auction is designed to put massive pressure on the victims. They not only have to worry about their own data being leaked but also their clients' data. Also, the victims have no guarantees that the cyber criminals will not leak data after the ransom has been paid.

A number of targeted ransomware attacks on Danish private companies over the past year have demonstrated that cyber criminals have the capability and intent to cause substantial financial and reputational damage to their victims.

Over the past year, cyber criminals have used the threat of public exposure of sensitive information as an additional extortion tactic. Previously, the typical impact of a ransomware attack was data encryption. However, at the end of 2019, a new trend emerged that saw criminal groups stealing, selling and publicising sensitive information about their victims online if they failed to pay ransom. The trend demonstrates that cyber criminals continuously develop, adapt, and employ new techniques to increase their earnings.

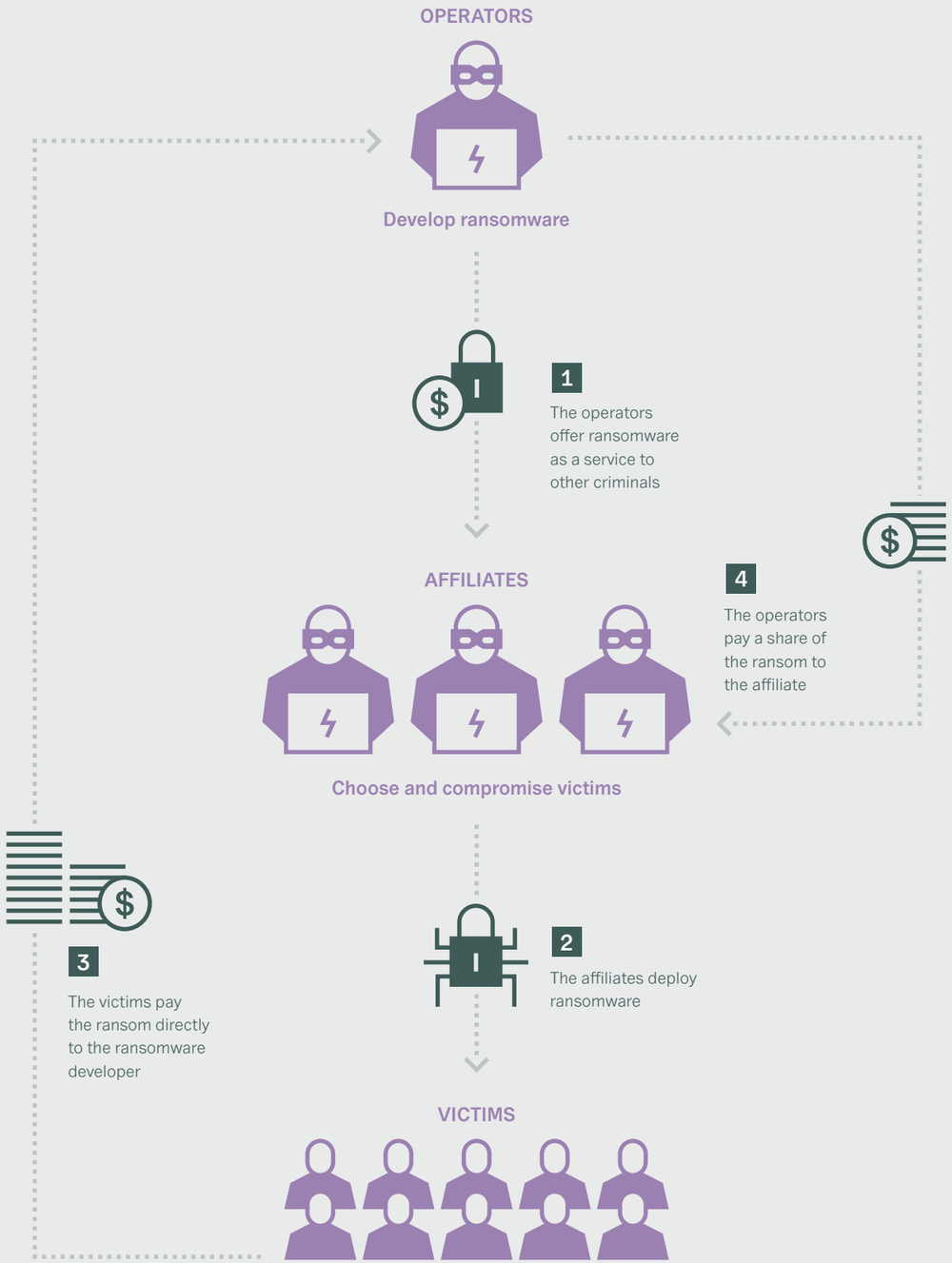
The trend also highlights the fact that different criminal networks collaborate and exchange services across the different groupings.

Collaboration between criminals will likely increase the number of attacks and their damaging effects

Under the collective term of Crime-as-a-Service (CaaS), criminals collaborate on exchange and sale of access, data, services, malware and infrastructure. It is likely that this collaboration contributes significantly to the very high threat of cyber crime. This collaboration, for instance, manifests itself in two business models.

One model is based on the collaboration that exists between criminals conducting targeted ransomware attacks and criminals targeting thousands of victims at once via phishing, for instance. Targeted ransomware attacks are often delivered through large-scale phishing campaigns launched by one single group selling its access to other groups, which carry out the ransomware attack itself on the compromised organization network.

RANSOMWARE-AS-A-SERVICE BUSINESS MODEL



The other model is called Ransomware-as-a-Service (RaaS). The business model behind RaaS is based on ransomware developers making different types of malware available under an affiliate programme to other cyber criminals on a digital platform. The ransomware developers have a network of affiliates who use the platform to launch targeted ransomware attacks. RaaS enables even low-level hackers to launch cyber attacks. At the same time, the model allows the ransomware creator to maintain a steady revenue stream at a relatively low risk.

The development in CaaS and RaaS platforms has contributed to increasing the threat of targeted ransomware attacks, among others, against Danish private companies and public authorities. Several RaaS platforms have specialized in targeted ransomware attacks that yield a high return. The REvil ransomware which was used in the attack on the US law firm was a RaaS malware.

In general, as a result of the new extortion techniques and collaboration patterns, Danish public authorities and private companies will likely face even more harmful and costly attacks in the future.

US PUBLIC AUTHORITIES AND PRIVATE COMPANIES ATTACK CYBER CRIMINAL INFRASTRUCTURE

In collaboration with a number of private companies, the U.S. Cyber Command (USCC) launched a campaign against the TrickBot botnet in September 2020. The campaign was one of the measures adopted under what the USCC calls “persistent engagement”, which is part of the US authorities’ strategy to combat cyber threats. This strategy takes a more offensive approach to fighting the cyber threat, including the threat posed by criminal online groups.

The impact of the campaign against TrickBot is likely only temporary, but one of the objectives was to diminish the possibility for cyber criminals to interfere with the US presidential election through this malware.

Attacks on suppliers and partners are used as an initial point of entry to gain access to the intended targets

Foreign states and criminals use suppliers and partners as stepping stones to gain access to public authorities and private companies. The sub-suppliers or partners themselves may not hold knowledge of interest to the hackers, but may, however, have access or credibility that hackers can leverage to compromise their intended targets.

Partners are abused, among other things, to launch so-called email thread hijacking campaigns. Email thread hijacking is when hackers compromise a partner’s email account and send responses to ongoing email correspondence with the victim’s contacts. The infected emails appear to come from a trusted sender and are sent as a response to existing email conversations.

A phenomenon like email thread hijacking illustrates that even though the consequences of a compromise might not seem serious to the infected organization, they may cause serious damage to the victim’s customers and partners. Ultimately, this form of compromise may also damage the credibility of and trust in the individual supplier or partner.

Email thread hijacking is but one technique used by hackers to prey on the trust between organizations and their partners or suppliers. The DDIS knows of an example in which a Danish private company received several spear phishing emails, i.e. highly targeted phishing emails, from suppliers who were not part of an ongoing email conversation. In any case, it is harder to detect a malicious email if it comes from a trusted sender.

CYBER THREATS AND TECHNOLOGICAL ADVANCES

Despite its advantages, the continued digitalization of Danish society could potentially provide hackers with new avenues to spy, carry out criminal activities and ultimately launch destructive cyber attacks on Denmark. This is all made possible by the fact that any piece of digital equipment is vulnerable to attacks.

Denmark continues to utilize the advantages offered by the digitalization of critical infrastructure and society as a whole. However, the continued digital transformation may also create strategic challenges to Denmark.

DANISH VICTIMS OF TARGETED RANSOMWARE ATTACKS ARE COMPROMISED THROUGH EMAIL THREAD HIJACKING

In one email thread hijacking incident, several employees within a Danish organization received an email from a compromised partner containing a malicious attachment hidden in a response to an ongoing email thread. When one of the employees clicked the link, a malicious file was downloaded. The file contained malware that gave the hackers access to the employee's computer, from which they were able to spread to the rest of the network.

In a ransomware attack on Danish Agro in April 2020, malware was also distributed via email thread hijacking. Danish Agro's CEO stated after the attack that the hackers took over the IT system of one of its suppliers and sent a phishing email directly from the supplier's account in response to specific ongoing email correspondence.

Hackers continuously scan the Internet for vulnerable units that can be used as an entry point to gain access to relevant targets. Hackers leverage the vulnerabilities in digital equipment from the time of acquisition until its deployment.

New digital infrastructure will thus expand the cyber attack surface. All types of digital equipment – from hardware and software to IoT units such as refrigerators and cars connected to the Internet – contain vulnerabilities. In addition, the risk of a cyber attack causing physical damage increases when the connected units to a larger degree control physical systems.

Some suppliers of digital products may pose a threat to Denmark's strategic interests. The threat from suppliers of high-tech products such as 5G mobile networks or surveillance equipment, among other things, stems from the issue that certain nations, to varying degrees, are able to require private companies to cooperate with national intelligence services. This is the case in several countries, where legislation exists that facilitates this practice.

It could prove to be a strategic challenge for Denmark if it were to establish dependence on a supplier from a non-allied country capable of exploiting equipment to conduct espionage via backdoors, disrupt delivery of services or prevent delivery of critical spare parts. Some countries' attempts to gain access to and control of other countries' critical infrastructure are part of a global technology race fuelled by security policy and economic interests.

GOLDENSPY

In June 2020, the IT security firm Trustwave published a report on a backdoor malware called GoldenSpy. According to Trustwave's report, GoldenSpy provides full access to victim systems, allowing attackers to install additional malware or run malicious programmes. GoldenSpy had been hidden and installed with a legitimate and mandatory tax payment software required for companies conducting business in China.

THE BATTLE FOR TECHNOLOGICAL TERRITORY

The rollout of 5G networks across the world has created significant geopolitical tensions, in particular between China and the United States. The conflict between the two countries prompted US Secretary of State Mike Pompeo to present the "Clean Networks" initiative in August 2020. According to Pompeo, the objective of the initiative is to protect US critical telecom infrastructure against intrusions from China's Communist Party, among others. Several countries have blocked Chinese suppliers from their 5G rollout. Danish private companies and public authorities may be challenged as a result of the political battle for technological territory.

The autumn 2020 terrorist attacks in Europe were a clear indication that the terrorist threat remains serious. Al-Qaida and Islamic State have stepped up their calls for attacks in connection with the republication of caricatures of the Prophet Muhammad. In addition, they have used COVID-19 for propaganda purposes. The root causes of militant Islamism have not changed and still mobilize to terrorist acts.

TERRORISM

Photo taken outside the former offices of the French satirical magazine Charlie Hebdo in Paris following the September 2020 terrorist attack.
PHOTO: ALAIN JOCARD/AFP/RITZAU Scanpix

In the autumn of 2020, France and Austria were hit by a number of terrorist attacks, emphasizing that militant Islamists still pose a serious threat to the West and that their intentions have not changed. This applies to al-Qaida and Islamic State as groups, as well as to supporters of their ideologies across the world. The attacks took place after the French satirical magazine Charlie Hebdo republished a number of caricatures of the Prophet Muhammad.

Al-Qaida and Islamic State and their supporters have used the republication and renewed focus on the caricatures as a pretext to step up their calls for attacks on the West in retaliation for the insults to Islam. In addition, both groups have used the COVID-19 pandemic in their propaganda, asserting that the pandemic is Allah's punishment of the infidels. For instance, al-Qaida has claimed that the pandemic is the Invisible Soldier of God sent to help the group defeat the West. Islamic State has called on its followers to launch attacks in the West while the "enemy" is weakened and preoccupied fighting COVID-19.

The main drivers of militant Islamism have not changed. Militant Islamists typically bring political, religious and historical events together in a single narrative of global oppression of Muslims and the need to rise up against the oppressors. In this narrative, the secular West occupies a central role as the primary enemy of Islam. Any perceived insult could thus be used for propaganda purposes to confirm the narrative and to incite violence and terrorism. Militant Islamists have widely applauded the attacks in France and Austria.

THE TERRORIST THREAT TO THE WEST

Though Islamic State and al-Qaida are weakened in terms of leadership, their intentions have not changed and they are still engaged in attack planning against the West. Islamic State is developing new organizational structures to facilitate attacks while at the same time encouraging its sympathizers to act on their own. The same is the case for al-Qaida, which otherwise typically pursues long-term objectives and operates in a geographically dispersed manner. Foreign fighters affiliated with both groups still pose a threat. In recent years, the threat from right-wing extremists has increased, and it will continue to have an impact on the threat landscape in future.

Islamic State still has ambitions to be the global beacon for jihadists across the world and recapture large swaths of territory. Those ambitions remain intact even though the organization is under military pressure in its old core areas in Syria and Iraq and has lost several prominent leaders.

Both Islamic State's leader and spokesman were killed in October 2019. A new senior leader was soon appointed, but the killing of a number of other prominent members of Islamic State in 2020 has weakened the leadership of the group. So far, Islamic State has managed to replace these losses, which to some degree has enabled the leadership to hold the organization together. Overall, the leadership's strategic command has been weakened owing to the significant loss of leadership and experience.

Individuals who have fought alongside militant Islamist groups pose a long-term threat to the West.

Islamic State has official subgroups, so-called provinces, in the Middle East, Africa and Asia. These subgroups are vital to the group's global strategy and are often mentioned in its propaganda. The use of propaganda is essential to Islamic State as it signals strength and presence and has significant importance to the group's appeal. Much of the propaganda from its subgroups is still published through Islamic State's key media platforms, enabling the leadership to keep some control of what is published and at the same time allowing the group to pitch itself as a group with global reach.

Islamic State is developing new organizational structures to facilitate attacks against the West

The threat from Islamic State is complex. Islamic State still poses a threat as a local terrorist and insurgent group in Syria and Iraq. In addition, its subgroups across the world have been strengthened in line with its intention to remain a potent terrorist group. It is likely that Islamic State is using its subgroups to build organizational structures to strike Western targets in the region and in the West.

In addition, it is highly likely that Islamic State is continuously planning to launch attacks on the West. 2019 and 2020 saw a number of attacks and attempted attacks in Europe and its vicinity. Also, the authorities in several European countries have thwarted attacks and arrested individuals from militant Islamist circles affiliated with the group, emphasizing that active Islamic State networks still exist inside and outside of Europe.

It is highly likely that there will continue to be individuals and small groups in Europe and beyond who have contact to the leadership of Islamic State and who have an intent to attack targets in the West. Also, it is likely that Islamic State in Syria and Iraq is recruiting and training its own operatives to be able to launch attacks regionally as well as in the West.

Moreover, Islamic State is still a vital source of inspiration for militant Islamists who sympathize with the group's ideology and propaganda without being directly linked to the group. Islamic State's media organization has praised the recent attacks in France and Austria which align well with the group's calls to its followers.

Foreign fighters still pose a threat

Individuals who have fought alongside militant Islamist groups pose a long-term threat to the West, especially those who have gained experience from the conflict in Syria and who are still connected to their Western home countries. They may have returned to their home countries, fled to third countries or stayed put in Syria. Common to many foreign fighters are their ideological convictions, combat experience, militant networks and a propensity for violence.

Some foreign fighters in Syria, including fighters from Europe, remain at large, mainly in Idlib province in north-western Syria. However, a large number of foreign fighters have been detained in camps or detention centres. It is likely that Islamic State is smuggling people out of the camps, and an increasing number of detainees have escaped from the camps. It is likely that Islamic State is exerting radicalizing influence and social control over detainees in the camps, for example through self-appointed control units that also include foreign Islamic State sympathizers.

Similarly, it is likely that foreign fighter returnees will play a role as radicalizers during incarceration as well as through their usual social networks. In addition, it is possible that among the foreign fighter returnees there will be individuals willing to use their combat experience to launch terrorist attacks.

Al-Qaida is decentralized and geographically dispersed

Al-Qaida's regional subgroups play a key role in al-Qaida's organization and global presence. Today, al-Qaida subgroups are present in large parts of Africa, the Middle East and Asia. They are primarily focused on local agendas but often follow the overall guidance issued by the senior leadership.

It is likely that the primary threat from al-Qaida against the West stems from small al-Qaida networks operating independently of each other. The members of the individual network are often geographically dispersed and cooperate across borders, including in connection with planning attacks.

These networks are typically affiliated with the senior leadership of al-Qaida or its regional subgroups. They focus their attacks on important symbolic targets and follow a patient and strategic approach in their planning, which typically last several years.

Al-Qaida last claimed responsibility for an attack in the West in December 2019. The attack was launched by a Saudi officer, who was participating in a training programme at the Pensacola base in Florida in the United States. It is likely that the perpetrator had received guidance and support from the leadership of al-Qaida in the Arabian Peninsula (AQAP).

Al-Qaida plans strategically and for the long-term

In recent years, al-Qaida has been weakened by a targeted and global counterterrorism campaign that has resulted in the killings and arrests of several of its leaders, several of whom were part of the senior leadership and thus vital to the group's global cohesion. So far, the regional subgroups have been able to find replacements for most of their losses, and over the years al-Qaida has proven to be a resilient organization. However, it is likely that al-Qaida's cohesion will be challenged if the killings of prominent leaders continue at the same rate. In addition, several al-Qaida members have been killed or arrested while preparing attacks, a factor that will likely primarily delay but not prevent al-Qaida's plans for attacking Western targets in the medium term.

Al-Qaida's leadership still considers the United States and the West in general as its primary enemies. The group's long-term objectives include ridding the Muslim countries of US and Western military and political presence and of the secular and pro-Western governments ruling them as well as defeating Israel.

However, al-Qaida is also focusing on more current and accessible issues, such as what the group considers as insults against the Prophet Muhammad and Islam. The group is actively and opportunistically exploiting these issues in its propaganda, calling on its supporters and sympathizers to launch attacks. This was, for instance, the case in relation to the French magazine Charlie Hebdo's republication of a number of Muhammad caricatures in the autumn of 2020.

Al-Qaida's room for manoeuvre in Afghanistan will likely expand

Al-Qaida has been using Afghanistan as a base for more than 30 years despite targeted and strong Western counterterrorism efforts since 2001. The Taliban has provided sanctuary for al-Qaida and has thus been the primary reason why the group has been able to maintain its presence in Afghanistan. Over the last ten years, al-Qaida has primarily dedicated its focus to its own survival in the region and its capabilities for launching attacks in the West have been limited.

If the Western forces withdraw from Afghanistan in 2021 as planned, al-Qaida and its allies in the region will highly likely come out strengthened. A withdrawal will be seen as a propaganda victory for al-Qaida. It is likely that, following a withdrawal, al-Qaida in Afghanistan will grow in numbers and re-establish training camps to bolster its capabilities to attack targets in the region and in the West.

Right-wing extremist terrorism in the West is on the rise

In recent years, the number of right-wing extremist terrorist attacks has been on the rise. Most of the attacks have been carried out by lone actors in their home countries. At the time of the attacks, the perpetrators typically did not have any affiliations with established right-wing extremist groups. However, that does not mean that they acted in a vacuum without inspiration from fellow extremists. There are strong ideological communities among right-wing extremists on the Internet, and the sense of being part of a global movement united against a common enemy is important for many right-wing extremists. Their image of the enemy differs, but it is often based on conspiracy theories of being critically threatened by an invasion of foreigners.

Thus, there is a high degree of internationalization in the online right-wing extremist milieus, where inspiration and radicalization take place across international borders. The more established right-wing extremist groups are also making international connections virtually as well as physically. It is likely that Western right-wing extremists have gained increased opportunities to receive weapons training through networks in Eastern Europe. Ukraine and Russia, in particular, have long been hotspots for right-wing extremists from the West.

The biggest right-wing extremist terrorist threat in the West likely still stems from individuals and small groups who are inspired and radicalized online but carry out their attacks independently.

THE REGIONAL TERRORIST THREAT

The terrorist threat from regional terrorist groups is growing in several places across the world, and Africa, the Middle East and Asia have seen a rise in local insurgent and terrorist groups joining al-Qaida and Islamic State. Many of the groups are still engaged in local fights, focusing less on the fight against the West. However, it is likely that the affiliation the groups have with al-Qaida and Islamic State will increase their global focus in the longer term. At the same time, insurgent and terrorist groups are exploiting the political power struggles to gain greater room for manoeuvre and promote their own agendas.

In recent years, insurgent and terrorist groups have increasingly been able to exploit inter-state conflicts, weak state structures and great power rivalries that exist in large parts of Africa, the Middle East and Asia. As the involvement of the United States and the West in conflicts and crises across the world has diminished, new actors have emerged that often have conflicting interests and agendas.

In addition to the West, Russia and regional actors such as Saudi Arabia, Iran and Turkey, among others, have engaged in the conflicts in Syria, Yemen, and Libya by providing support to local insurgent groups that have been involved in terrorist attacks or affiliated with terrorist groups. On one hand, such support may strengthen the local insurgent and terrorist groups by increasing their legitimacy and access to funds and equipment. On the other hand, such cooperation to some extent forces the insurgent and terrorist groups to tone down their radical rhetoric while not necessarily requiring them to change their actual ideology or reject terrorism as a means to an end.

It is likely that this tendency for regional powers to engage in conflict areas through the forging of alliances with local insurgent and terrorist groups will continue and perhaps even grow. This will likely be the case following a Western withdrawal from Afghanistan, for example. Here, several countries, including countries which have previously only played a peripheral role, will likely become involved by forging alliances with insurgent and terrorist groups in order to promote their own interests in the region.

In addition, it is likely that the consequences of the COVID-19 crisis will contribute to increasing the terrorist threat in several parts of the world in the longer term. This applies to parts of Africa, the Middle East, and Asia where negative economic and social consequences, such as increased unemployment and poverty, will provide a breeding ground for radicalization and recruitment for terrorist and insurgent groups.

Eastern and southern Africa

Militant Islamist groups are present in large parts of eastern and southern Africa. While the terrorist threat has been at a constant high in countries such as Somalia and Kenya for a number of years, Islamic State is now also establishing a presence in other parts of eastern and southern Africa, often based on already existing insurgent groups.

The terrorist and insurgent group al-Shabaab, which is affiliated with al-Qaida, has been a destabilizing factor in Somalia and parts of eastern Africa for a number of years. It is highly likely that al-Shabaab will continue to attack both military and civilian targets in Somalia. Also, it is highly likely that al-Shabaab will attack both local and Western interests in Somalia's neighbouring countries, including Kenya, in particular. In 2019, al-Shabaab attacked the Dusit complex in Nairobi, and, in 2020, the group attacked a military base in north-eastern Kenya used by US and Kenyan military personnel. The attacks demonstrate al-Shabaab's capabilities to target both local and Western interests throughout Kenya.

Islamic State is also present in Somalia. The group is much smaller than al-Shabaab and thus also poses a lesser threat. However, it is likely that the group plays a key role in terms of contributing to the spread of Islamic State in eastern and southern Africa.

In addition, it is likely that the consequences of the COVID-19 crisis will contribute to increasing the terrorist threat in several parts of the world in the longer term.

The most active Islamic State network in southern Africa is located in the northern part of Mozambique. In 2020 alone, this network has launched at least 70 attacks in Mozambique and has quickly become one of Islamic State's most profiled networks in Africa. It is likely that northern Mozambique will remain fraught with conflict and that local authorities will lack the capabilities to defeat Islamic State in the area.

West Africa

Militant Islamist groups are gaining ground in all of West Africa. Al-Qaida affiliates have merged into Jamaat Nusrat al-Islam wal-Muslimin (JNIM), and Islamic State has a subgroup in Sahel, Islamic State in Greater Sahel (ISGS). Both JNIM and ISGS have been strengthened during the course of 2019 and 2020, particularly in Mali, Burkina Faso, and Niger. It is likely that JNIM and ISGS will continue to attack local and Western targets in the three countries. In addition, the two groups will expand their presence to the south, to the Ivory Coast and Benin, for example. It is likely that ISGS and JNIM will continue to make efforts to maintain pragmatic cooperation despite several local disagreements between the two groups.

It is highly likely that militant Islamist groups will continue their attacks in northern Mali and expand to central parts of the country. In Burkina Faso, militant Islamists are behind an increasing number of attacks on civilian and military targets. In addition, they have expanded their presence in the northern, eastern and south-eastern parts of Burkina Faso. In Niger, militant Islamists have launched several large-scale attacks over the past year, including attacks on military targets. The south-western part of the country bordering Mali and Burkina Faso has been hit by numerous attacks. The very unstable situation in Mali, Burkina Faso, and south-western Niger will have a negative impact on the security situation in all of Sahel.

In Nigeria, the two militant Islamist groups Boko Haram and Islamic State in West Africa (ISWA) operate. In 2019 and 2020, both groups have attacked military and civilian targets. ISWA still has a strong foothold in the north-eastern part of Nigeria and south-eastern Niger. Here, the group has close ties to the civilian population and has managed to dislodge the Nigerian security forces from several areas. It is likely that ISWA will continue its attacks in Niger and Nigeria.

Boko Haram is also located in north-eastern Nigeria, northern Cameroun and in south-western Chad. Boko Haram is under pressure from Nigerian security forces, but will likely continue to attack targets in the area. In March 2020, the group was responsible for a large-scale attack on a military base in Chad, which, in addition to other attacks, demonstrates its significant attack capabilities. Both Boko Haram and ISWA will continue to pose a serious threat in northern and north-eastern Nigeria.

North Africa

The terrorist threat in North Africa primarily emanates from groups affiliated with Islamic State and secondarily al-Qaida. The groups enjoy relatively large freedom of movement in the region's desert and peripheral areas, where the terrorist threat is especially high.

In Morocco, Algeria and Tunisia, the terrorist threat has decreased over the past few years, first and foremost as a result of the efforts of local authorities that have helped restrict the groups' freedom of movement and operation. In Morocco, the authorities have effectively

prevented Islamic State and al-Qaida in the Islamic Maghreb (AQIM) from gaining a foothold. However, both groups still enjoy safe havens in the peripheral areas of Algeria and Tunisia from where they plan and execute attacks on security forces in particular. In Tunisia, small cells and individuals have managed to launch small-scale attacks in the large cities, first and foremost against local authorities. In Algeria, AQIM is under constant pressure from the local security authorities and primarily poses a threat in the north-western part of the country.

The situation in Libya is different from the situation in the other countries in North Africa, mainly due to the civil war raging in the country. The terrorist threat is high due to the authorities' lack of control of large parts of the country. The warring parties and effective US counter-terrorism efforts, however, have weakened Islamic State in Libya, and pushed it back to Libya's south-western desert. It is likely that the group will seek to attack local targets in south-western Libya. However, it is less likely that it will have the capacity to launch large-scale attacks on the coastal cities, including Tripoli. AQIM has limited capabilities in Libya and primarily uses the country to smuggle people, arms and other equipment.

Militant Islamist groups in Egypt are still primarily focused on targeting local authorities. Minor, internally affiliated groups with a possible connection to al-Qaida pose the greatest terrorist threat in mainland Egypt, including against Western targets. In recent years, they have been responsible for several attacks. Since 2015, Islamic State in Sinai has been one of Islamic State's most active subgroups, and, since the spring of 2020, it has expanded its area of operation from the northern part of Sinai to include the north-western part of the peninsula. This expansion may be part of an overall strategy to strengthen Islamic State's capabilities to attack targets in mainland Egypt.

The Middle East

Numerous places in the Middle East are fraught with political unrest and armed conflicts, something that local militant Islamist groups, which are often directly involved in the conflicts, are quick to exploit. Islamic State is the most dominant group, but al-Qaida also has active networks in the region.

Islamic State has posed a terrorist threat in the Middle East for a number of years, especially following the establishment of its caliphate in Syria and Iraq in 2014. Following the caliphate's physical collapse in 2019, the group has transformed back into a more traditional insurgent and terrorist group. Islamic State relatively rarely attacks Western interests in the region, which also reflects that it does not see many Western visitors such as tourists or business travellers. In Syria and Yemen, al-Qaida affiliated groups are predominantly engaged in local insurgencies, but remain intent on striking Western targets locally.

In Syria, the ongoing conflict and weak state structures in the country's peripheral areas will contribute to providing militant Islamist groups such as Islamic State and al-Qaida with favourable operating conditions. Islamic State uses the country's desert areas to train its members and conduct attacks. The group has launched several attacks in central Syria. However, it is less likely that it will have significant capabilities to recapture large territories in the near future. The al-Qaida-affiliated groups are mainly present in Idlib province in north-western Syria, where they primarily attack the Syrian regime and its allies.

Islamic State is mainly present in the northern, western and central parts of Iraq, where the group is trying to exploit the fact that local and regional tensions are diverting focus from the fight against the group. It is highly likely that Islamic State is behind most of the attacks against security forces, government officials and civilian targets in these areas. Similarly, it is likely that the group will continue to launch this type of attacks. In recent years, the group has not launched terrorist attacks on Western civilian targets in Iraq. Shiite militias are also active and now pose the biggest threat to Western targets in the country. For example, in 2020 Shiite militias were responsible for a number of attacks on Western targets in and around Baghdad.

It is likely that a Western withdrawal will once again turn Afghanistan into an obvious destination for militant Islamists, also from the West.

The security situation in Turkey is generally stable, facilitated by strong efforts by local security authorities. The terrorist threat in Turkey mainly stems from Islamic State, but al-Qaida networks are also present in the country. Both groups will pose a threat in the years to come. In 2020, Turkish authorities have arrested several individuals affiliated with Islamic State on suspicion of planning terrorist attacks in the country, showing that the intent and the capability to launch terrorist attacks in Turkey are present. It is likely that the planning of attacks against Turkish and Western targets in Turkey will continue.

Asia

The terrorist threat in Asia emanates from al-Qaida, Islamic State and a number of local and regional terrorist groups. The terrorist threat in the region is highest in Afghanistan and Pakistan. However, terrorist groups operate in several other places throughout Asia, and the terrorist threat is growing in several countries. In recent years, Islamic State has declared several new official subgroups in Asia, for example in India. Islamic State's official subgroup in South East Asia operates in the southern Philippines and in Indonesia. In addition, al-Qaida-affiliated terrorist group Jemaa al-Islamiyya (JI) is still active in Indonesia. Both al-Qaida and Islamic State have smaller networks in several other countries in Asia. The coordinated attacks on a number of churches and hotels in Sri Lanka back in April 2019 demonstrated that such networks are able to develop significant capabilities without the authorities noticing it.

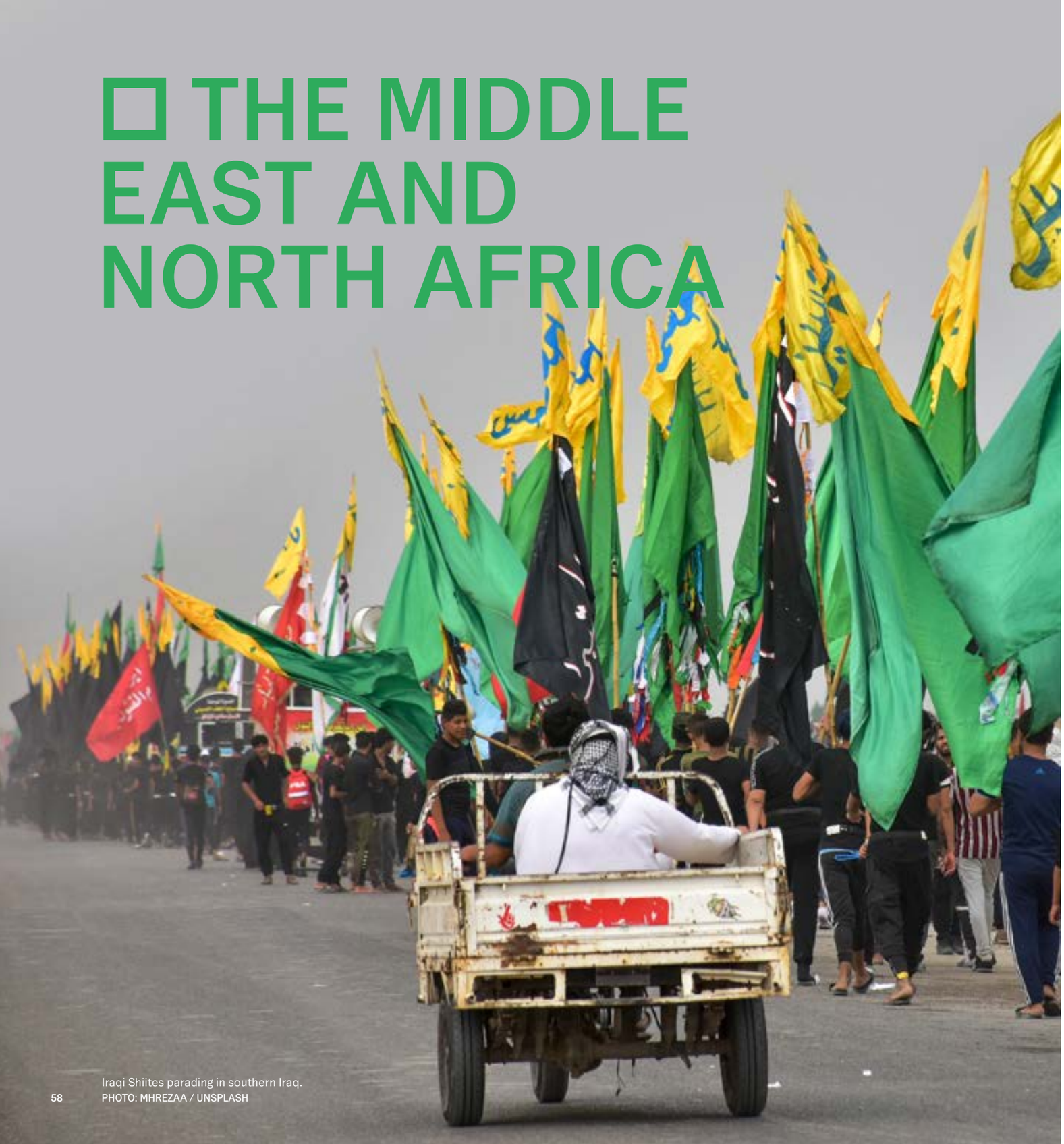
The security situations in Afghanistan and Pakistan are markedly different. Afghanistan is struggling with a prolonged conflict, which has resulted in instability and a lack of government control. Pakistan is relatively stable and exercises a large degree of government control in many parts of the country. However, the same insurgent and terrorist groups operate in the two countries. The most dominant groups include the Taliban, including the Haqqani network, and al-Qaida, the Pakistani Taliban (TTP), and Islamic State in Khorasan province (ISKP).

The Taliban, the Haqqani network, al-Qaida and the TTP have cooperated for years and continue to do so. While the Taliban and the Haqqani network operate in large parts of Afghanistan, al-Qaida and the TTP primarily operate in the border area between Afghanistan and Pakistan. The groups are fighting the authorities in both countries but often also strike civilian targets. Both groups consider foreign interests to be legitimate targets. In Pakistan, al-Qaida and the TTP are under strong pressure from the authorities, which have weakened both groups. The ISKP is in conflict with the other insurgent and terrorist groups in both countries, not least the Taliban, and is under pressure from both Pakistani and Afghan authorities. However, the group still has small cells operating in both countries.

According to the agreement between the United States and the Taliban, the remaining Western forces are slated to leave Afghanistan in 2021. As a result, Afghanistan will face great challenges. It is highly likely that several militant Islamist groups will exploit a withdrawal of Western forces to improve their capabilities and use Afghanistan as a base. Thus, a withdrawal will likely increase the terrorist threat that emanates from Afghanistan both in the short and long term. Some groups will focus their efforts on attacking local targets, while others will aim to attack targets in the region and in the West. In addition, a withdrawal from Afghanistan will affect tensions and conflicts in Pakistan, India, and the post-Soviet republics in Central Asia, among others, which will have an impact on the terrorist threat in these countries.

It is likely that a Western withdrawal will once again turn Afghanistan into an obvious destination for militant Islamists, also from the West. It is highly likely that a Western withdrawal will open up for more training possibilities for militant Islamists travelling to Afghanistan and also the possibility of joining groups such as al-Qaida and the ISKP.

THE MIDDLE EAST AND NORTH AFRICA



Iraqi Shiites parading in southern Iraq.
PHOTO: MHREZAA / UNSPLASH

The Middle East and North Africa will be hit particularly hard by the economic crisis caused by the COVID-19 pandemic. The crisis will deepen the national, regional, and international tensions that already exist in the region. The Middle East and North Africa will continue to pose a security policy challenge to Europe in the short to long term.

■ The fallout of the COVID-19 crisis and low oil prices will deepen the economic crisis in the countries in the Middle East and North Africa. The crisis has slowed down foreign investment and caused a decline in revenue and hard currency from tourist exchanges and from money transfers by people living abroad to their families in the Middle East and North Africa. Social, sectarian, and political tensions already exist in the region and will likely deepen as a result of the economic crisis.

Middle Eastern countries such as Syria, Iraq, Libya and Yemen, which have been devastated by war and conflict, already face immense reconstruction needs. The countries' governments will struggle to deliver even the most basic services and provide security to their citizens. Even the countries that have not been hit by war and conflict face a high risk of economic decline. Some countries, such as Yemen and Syria, will still face the risk of even greater humanitarian crises.

The hardest-hit states in the region may risk actual collapse that could turn them into failed states in the long term or give rise to new conflicts resulting in increased migration and refugee flows. Under such a scenario, transnational terrorist groups such as al-Qaida and Islamic State might be able to rise again.

International division and great power rivalry

Given Europe's geographical proximity to the Middle East and North Africa, European countries will be faced with security policy challenges emanating from the region. At the same time, the United States will continue to limit its direct involvement in the region.

Consequently, the EU will increasingly be left on its own to tackle a host of security policy challenges emanating from the region, including migration and refugee flows, terrorism and new conflicts.

A number of states, including Russia, Iran and Turkey, in particular, have positioned themselves as crucial actors in the region and the regional conflicts. This is due to the absence of a cohesive Middle East policy on the part of both the United States and Europe. It is likely that these states will be able to maintain and possibly increase their influence at the expense of the interests of the European countries, among others.

Russia will continue to play a vital role in the Middle East and North Africa. Over the last five years, in particular, Russia has consolidated its role as a major power player in the future development of the region. This has been facilitated by a military presence in Syria and Libya and close political and economic ties to a number of countries in the region.

China is increasing its influence in the Middle East. China will continue to pursue its economic interests in Saudi Arabia and the Gulf States as well as in Iran, but it will increasingly emerge as a political actor. In relation to Iran, China will likely, to a larger extent than before, be willing to pursue its national interests regardless of the US policy on Iran. Leaked information suggesting the existence of extensive strategic cooperation between China and Iran serves to illustrate this point.

Iran will maintain its influence in the Middle East despite long-standing pressure from the United States and Israel. Iran will thus come to play a role in most of the region's conflicts through its ties to a number of state and non-state actors. It is highly unlikely that the United States, Israel, and the Gulf States will be able to contain Iran's presence and influence in countries such as Iraq, Syria, Lebanon, Yemen and Afghanistan in the short term. Even if Saudi Arabia and Israel make efforts to intensify their containment of Iran, Iran will likely be able to withstand this pressure.

As a regional great power, Turkey will remain key to Europe's efforts to ensure effective management of the refugee and migration issue and to its counterterrorism efforts. However, Turkey is more and more pursuing its own interests in the region, using increasingly militarized means. Turkey will continue its engagement in the conflicts in Syria and Libya, among other things.

Iran will thus come to play a role in most of the region's conflicts through its ties to a number of state and non-state actors.

THE MIDDLE EAST AND NORTH AFRICA

The region will pose a security policy challenge to Europe in the short to long term.

IRAN

The conservative powers in Iran have been strengthened. Iran will look into under what conditions the new US administration would be willing to re-enter the nuclear deal. However, the fundamental tensions between the United States and Iran will persist and continue to affect the security situation in the region. Iran will seek to improve its relations with Russia, China and the country's regional partners.

Iran's nuclear programme, the ballistic missile programme, and the question of Iran's regional influence will continue to give rise to tension and conflict between Iran and the United States and US allies in the region. Despite pressure from the United States and its allies, Iran will highly likely continue to develop its ballistic programme, which is a key element in the country's regional deterrence strategy. Iran will also continue to develop its other military capabilities and work on reducing US presence in the region, in particular in Iraq and in the Strait of Hormuz.

Iran will continue its efforts to keep the nuclear issue and the economic sanctions separate from the issue of the country's ballistic missile programme and regional influence. As a result, Iran will likely look into under what conditions the new US administration would be willing to re-enter the nuclear deal in an attempt to normalize its political and economic relations with the international community. It is highly likely that Iran will seek to avoid renegotiation of the entire nuclear deal.

Even though Iran's relations with the EU are strained, the EU's diplomatic support for the nuclear deal – and, by extension, its resistance to US pressure on Iran – remains a key element in Iran's security and foreign policy.

Iran will strengthen relations with Russia, China and regional partners

Iran will increasingly build on and strengthen its political and trade relations with Russia and China, in particular. Information on a strategic partnership with China cultivating strong economic, political and security ties, which was leaked in the autumn of 2020, serves to illustrate an interest on the part of both countries to strengthen cooperation inside and outside of the region in the longer term. Through its cooperation with China and Russia, Iran will seek to reduce its dependence on the West and thereby limit its political and economic vulnerability if new sanctions were to be imposed.

Iran will not give up its regional influence in Syria, Iraq, Afghanistan and Yemen. In addition to providing military support to regional alliance partners, Iran will also expand and strengthen its security policy interests in the region through forging new economic and political cooperation and agreements with these countries.

The political and economic agreements are aimed at bringing Iran's regional alliance partners closer to the country as part of the power struggle against the United States' regional allies. In the long term, Iran is looking to gain access to several markets and improve its ability to bypass or endure future sanctions regimes.

The conservative powers are strengthened

The conservative powers in Iran have been strengthened, and the Iranian presidential election slated for June 2021 will likely confirm this tendency. Power struggles and militarization are part of the regime's crisis management scheme. Conservatives and the Islamic Revolutionary Guards Corps especially have used the conflict with the United States and the COVID-19 crisis to consolidate their power at the expense of more moderate President Hassan Rouhani.

The government's handling of COVID-19, however, has likely deepened distrust between the population and the regime. This trust crisis and the rising poverty fuelled by the economic sanctions will continue to create a breeding ground for civil protests.

IRAQ

Iraq will remain fraught with instability for years to come. Internal tensions aggravated by international and regional conflicts will contribute to this instability. In addition, the current economic crisis weakens the Iraqi government's possibilities of turning things around in the country.

The current economic crisis and the fallout of the COVID-19 crisis have weakened the Iraqi government's political and economic scope for action, and unrest in large parts of the country will be a recurring feature. In the future, the Iraqi political elite will continue to prioritize their own survival over addressing the fundamental challenges facing Iraq, hampering the country's stability and development in the long term.

Iraq will remain a scene of regional tensions

Iraq will remain a scene of conflicts between international and regional actors. The Iranian influence on political parties, individuals, and the civil service is strong and will continue. In addition, Iraqi Shiite militias will continue to be a tool of Iranian influence and contribute to continued military pressure against Western military presence in Iraq.

It is highly unlikely that Iraq's future governments will be able to bring stability and economic prosperity.

During periods of increased regional and domestic tensions, it is highly likely that rocket attacks on areas in Baghdad that have Western presence will continue and increase in frequency.

Iraq will remain characterized by persistent political instability and deep popular discontent. Internal power struggles within the political elite, corruption, and militias outside government control will prevent concerted and effective efforts at solving Iraq's fundamental problems, including large population growths, unemployment and an ailing economy. These problems have been aggravated by climate change, water shortage, and, most recently, COVID-19.

It is highly likely that unfulfilled expectations and continued discontent with the country's governance will spark protests and occasional riots in Iraq. The outlook for the future of Iraq's growing youth population looks bleak, fuelling strong discontent among this segment of the population. It is highly unlikely that Iraq's future governments will be able to bring stability and economic prosperity.

The Iraqi security forces challenged internally and externally

The Iraqi security forces have a hard time providing security for the Iraqi population, despite their general progress. They will not be able to fight insurgents effectively without parallel social and economic efforts from other parts of the Iraqi state and international assistance.

The Iraqi security architecture is challenged by internal rivalry and autonomous militias. The prospects of real and effective reform of the overall security sector look dim. The security forces will lack critical capacities, such as surveillance systems, and will remain dependent on counterinsurgency assistance from abroad.

The Shiite militias' autonomous conduct challenges the remaining security forces and exposes the Iraqi state's inability to control all parts of the power establishment. The militias' heavy-handed approach against civilian protesters, such as was witnessed in 2019 and 2020, undermines the legitimacy of the security forces and the already fragile public support.

At the same time, the conduct of regional and international actors in Iraq will challenge the country's territorial integrity, including Iranian support and ties to the Iraqi Shiite militias and Turkey's military bases and operations in northern Iraq. The Iraqi security forces are still focusing their efforts to develop conventional military capabilities. Still, they will not be able to enforce their sovereignty and deter other states from conducting operations on Iraqi soil.

Islamic State weakened but lying in wait for resurgence

Islamic State is weakened but will be able to wage low-intensity insurgency in parts of Iraq in the short term. In ethnic and religiously mixed provinces, in particular, the group will threaten and attack civilian targets and security forces.

However, in the short term, Islamic State will primarily focus its efforts on consolidating its leadership in Iraq and expanding the existing underground network in the country. A weakened Islamic State will exploit the fact that national and international communities seem preoccupied with other challenges. The organization will have an interest in keeping a low profile in Iraq and tone down its efforts against Western targets in Iraq in the short term. However, it will remain a threat to security in the country.

SYRIA

The Assad regime will survive, but Syria will struggle to avoid economic collapse. Europe will thus be faced with an unstable neighbour that is in a state of perpetual humanitarian crisis and at risk of renewed conflict. The Assad regime, Russia, and Turkey will likely try to fill the void left by the potential pull-out of US forces from north-eastern Syria. In addition, groups such as Islamic State and al-Qaida could once again rise in Syria.

Following years of progress, the Assad regime has lost its momentum. A very serious economic crisis now poses the greatest challenge to the stability of Syria. The economic, human, infrastructural and political costs of the war are so extensive that the Assad regime will not be able to restore stability in the country in the medium to long term. Moreover, the Assad regime's allies, Russia and Iran, do not possess the resources to finance Syria's reconstruction. Europe will thus be faced with an unstable neighbour that is in a state of perpetual humanitarian crisis and at high risk of renewed conflict.

A number of external factors add to the economic crisis. The financial and political crisis in Lebanon has had a spillover effect on Syria, depriving the country from access to foreign currency. The COVID-19 crisis has decimated Syria's fragile export and service sector, and the pandemic has put Syria's already-depleted healthcare system under serious strain. In addition, the tightened US sanctions have had a dampening effect on foreign investments in the country.

Continued economic and humanitarian crisis, a bleak future outlook, poor security, widespread suppression, and rampant corruption will likely prompt the Syrian people to flee the country in the medium to long term. In the short term, new, large refugee flows from Syria are less likely due to the Turkish presence in north-western Syria.

Europe will thus be faced with an unstable neighbour that is in a state of perpetual humanitarian crisis and at high risk of renewed conflict.

Russia and Turkey poised to move into north-eastern Syria

In early 2020, Turkey stepped up its military presence in the northern Idlib area, where close to two million internally displaced Syrians are located. It is likely that the Turkish forces will remain in the area in the medium term to prevent the advance of the Assad regime and thereby prevent a new wave of refugees fleeing towards Turkey's borders.

If the United States pulls out of north-eastern Syria, the Assad regime, Russia, and Turkey will jump at the chance to move into the predominantly Kurdish-controlled area. The Kurdish-dominated Syrian Democratic Forces will not be able to put up resistance to the Turkish military or Syrian government forces supported by Russia. Consequently, should such a situation arise, the Kurds will likely seek to forge a deal with the Assad regime to prevent new Turkish advances.

A potential US pull-out could cause a deterioration of the security situation and control of detention camps and facilities in the area where Islamic State affiliates, including Europeans, are being detained. Irrespective of how control of the area will be distributed between Turkey, Russia and Syria, the Kurds will have to counter the threat from Turkey while settling their future relations with the Assad regime. This will likely happen at the expense of political and physical control of the camps in the area.

The Assad regime and its allies are fighting Islamic State in central Syria but are generally giving less priority to the area than to the conflicts in western Syria. In addition, the escalating economic and humanitarian crisis, continued tensions, and weak state structures in Syria's outer areas will allow terrorist groups such as Islamic State to expand activities in Syria and into Iraq.

TURKEY

Turkey's readiness to use military means to achieve its objectives often affects the conflicts in the Middle East, North Africa and the Eastern Mediterranean. For Europe, Turkey will be a vital, but complicated, partner in relation to the refugee crisis and problematic because of its cooperation with Russia on arms and energy.

It is likely that Turkey will increasingly pursue goals in the Middle East, North Africa, and the Eastern Mediterranean that are not aligned with European and transatlantic interests. Turkey is increasingly willing to achieve these goals by pursuing an aggressive defence and foreign policy.

The conflicts in the Middle East and Afghanistan have resulted in a large number of refugees and migrants, many of whom, in particular from Syria, are travelling to or through Turkey towards Europe. Despite the EU's refugee agreement with Turkey, the country will remain a vital, yet complicated, partner with respect to the refugee issue.

More aggressive foreign policy with rearmament focus

Turkey has been successful in using military means to secure its interests in the region. Even though Turkey has repeatedly pulled back from the brink of conflict, its conduct will likely continue to heighten the risk of increased regional tensions.

Turkey is also making efforts to strengthen its military independence. In recent years, Turkey has significantly expanded its defence budget, and it attaches great weight to strengthening its national arms industry.

At the same time, Turkey's rivals in the Middle East, North Africa, and the Eastern Mediterranean will also significantly increase their defence budgets in the years to come. This will increase the risk of an arms race in the region and the likelihood that conflicts in the region will become increasingly difficult for Europe to handle.

In 2020, Turkey has negotiated the acquisition of additional units of the Russian S-400 air defence missile system, which it purchased from Russia in the summer of 2019. It is likely that cooperation with Russia on the S-400 air defence missile system and other Russian weapons systems will continue in the short to medium term and further exacerbate Turkey's already strained relations with the United States and NATO.

Even though Turkey has toned down its criticism of China in recent years and has shown an interest in China's Belt and Road Initiative, it is less likely that cooperation with China and Russia will lead to the establishment of a Turkish alliance with the two countries. However, Turkey will likely use this cooperation to establish itself as a more independent regional power factor in relation to Europe and the United States and to a number of regional rivals in the Middle East and North Africa.

LIBYA

Russia, Turkey, and several other countries will pursue their own political and economic interests in Libya and play a significant role in developments in the country. Libya's political actors will have a hard time reaching consensus on Libya's future despite the fact that agreement on a ceasefire was reached in October 2020. Crime, corruption, and the lack of government services to the population also contribute to increased division and civil unrest.

It is highly likely that Turkey and Russia will leave a strong mark on future negotiations on a wide-ranging political agreement in Libya. Both countries want to consolidate their position in Libya. Russia will continue to support the rebel militias under the Libyan Arab Armed Forces (LAAF) in eastern Libya, while Turkey will continue to support the government and the militias in the capital of Tripoli. Russia and Turkey want to avoid direct confrontation with each other and will thus make efforts to find a common solution to the conflict.

THE PARTIES TO THE LIBYAN CONFLICT

The conflict in Libya is primarily about control of the country's oil and natural gas, and rivalry between political factions, militias, and tribes. In West Libya, the UN-recognized government controls the capital of Tripoli. The government's power primarily rests on international support and on recognition from the West Libyan militias. Militias under the Libyan Arab Armed Forces (LAAF) control eastern Libya with the support of the Tobruk-based alternative parliament, the House of Representatives. The alliances between the different actors are based on opportunism rather than ideology.

Russia and Turkey provide military support to secure their own influence

Turkey's increased military presence and support have provided the government in Tripoli with much-needed political and military breathing space. In exchange, Turkey has forged long-term military and economic agreements with the government aimed at securing Turkey's continued influence in Libya. Turkey is also using its involvement as a lever to strengthen its position vis-à-vis Egypt and Greece, among others, in the fight over access to raw materials and other resources in the Eastern Mediterranean.

Through its military commitment, Russia has secured the survival of the LAAF in exchange for increased influence in the Mediterranean and North Africa and access to Libya's raw materials. Russia has coordinated its efforts with the United Arab Emirates and Egypt, which primarily support the LAAF to reduce Turkish influence in Libya. Moreover, Egypt wants to secure its western border with Libya.

Disagreement in Europe over a common approach to Libya will likely give Turkey and Russia almost free rein to pursue their interests in the country. The EU is responsible for enforcing the UN arms embargo on Libya, among other things, but its mission will remain constrained by lack of resources in the short term.

UN-brokered deal on ceasefire and its difficult political aftermath

In October 2020, a ceasefire agreement was reached. The country's political actors will subsequently try to reach consensus on a unity government. The political negotiations will be prolonged and characterized by disagreement over the external actors' continued influence in Libya. In addition, the issue of which militias should be disarmed and which should be integrated into a joint security force will play a significant role.

As a result of disagreement over the distribution of oil revenue, the internal political and military actors in Libya will likely fail to transform a ceasefire agreement into a wide political agreement in the short term.

The western Sahel region is characterized by many complex problems, including poor governance, economic crisis and militant Islamism. The national authorities will have a very hard time improving these conditions even in the long term. Piracy continues in the Gulf of Guinea, with pirates now mainly focusing on kidnapping for ransom.

WEST AFRICA

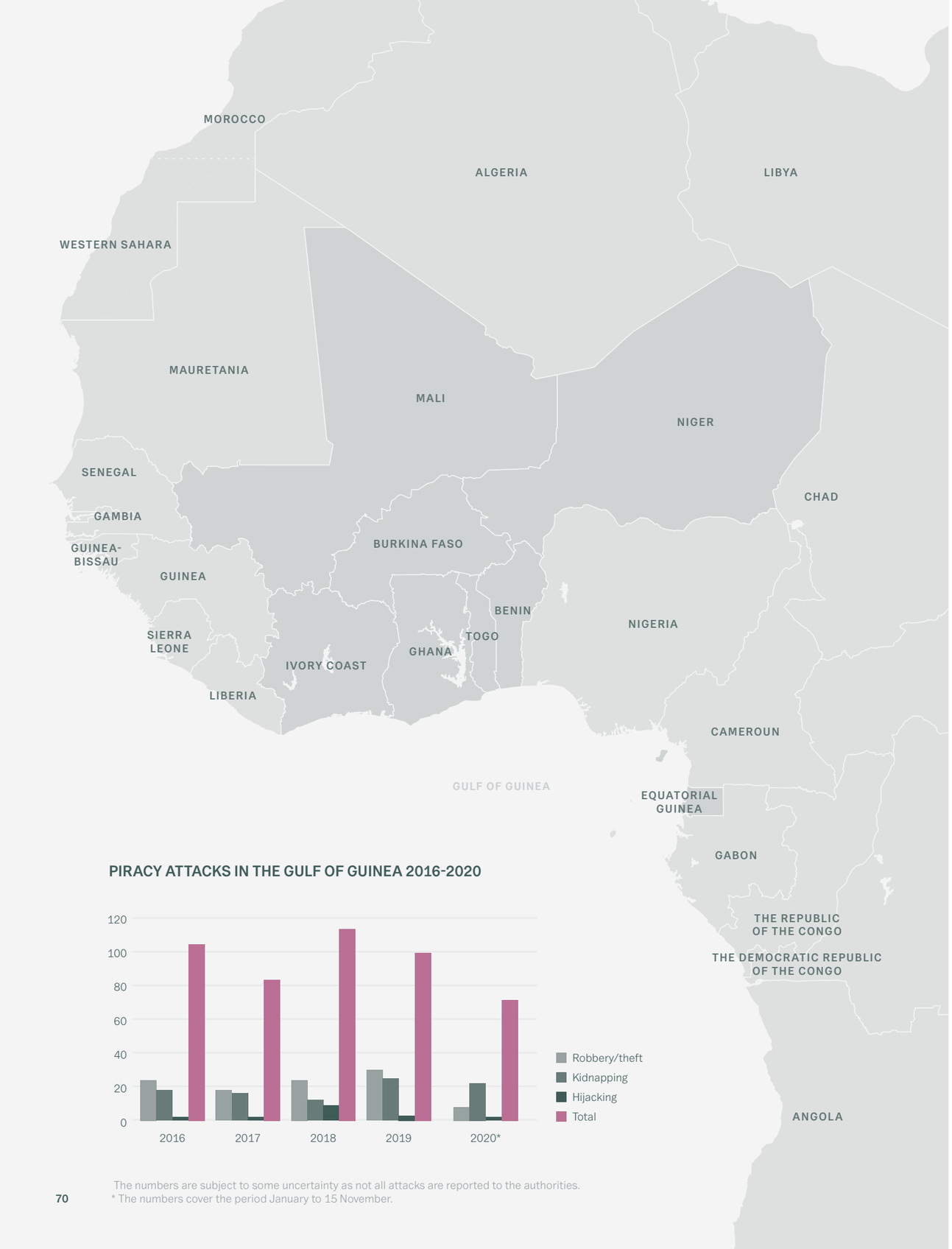
Soldiers who participated in the 18 August 2020 military coup enjoy wide popular support. PHOTO: GETTY IMAGES / STRINGER

The western Sahel region is fraught with a number of complex interrelated problems, including poor governance, extensive corruption, strong population increases, climatic changes, ethnic conflicts, widespread poverty, food scarcity, ineffective security forces, militant Islamists and an increasing volume of migrants inside the region. These are all problems that will be very hard to resolve even in the long term.

It is highly unlikely, even in the long term, that the authorities in Mali, Burkina Faso and Niger will be able to handle the root causes of conflicts. A core reason for the unstable situation in the region is poor governance. The governments are chronically weak, tax bases are narrow due to the informal economies, and corruption is widespread. The economic crisis in western Sahel has been exacerbated by the COVID-19 pandemic, which will increase unemployment and deepen the widespread poverty. The authorities' inability to provide basic social services for their populations could spark social unrest and support for governance alternatives, such as militant Islamist groups. The Mali interim government formed after the August 2020 military coup will face similar challenges despite its popular support.

Conflicts may spill over into neighbouring countries

It is possible that the conflicts and the violence in Mali, Burkina Faso and Niger will spill over into other West African countries, including Ivory Coast, Ghana, Togo and Benin. Militant Islamists have increased their presence in southern and eastern Burkina Faso. There is a risk that conflicts and violence will spread to the countries along the Gulf of Guinea.



PIRACY ATTACKS IN THE GULF OF GUINEA 2016-2020

The numbers are subject to some uncertainty as not all attacks are reported to the authorities.
* The numbers cover the period January to 15 November.

Military efforts confined to one country in the region could unintentionally make the conflicts and violence in that country spill over into neighbouring countries. Militant groups thus leave areas of military intervention, relocating to neighbouring countries where the political and military situations offer a broader scope of action.

The strong growth in population, climatic changes, and increasing unemployment paired with social and economic problems in the western Sahel region will highly likely trigger increasing migration flows. Most migrants are expected to remain in the African continent.

It is highly unlikely that national, regional and international security forces will be able to bring about overall security in major parts of the countries in the medium term. In Mali, the national security forces are focusing on the southern part of the country, including the capital, Bamako. In Burkina Faso, the limited number of security forces are unable to provide security in many parts of the country and focus their spare resources on the capital, Ouagadougou. In Niger, the outnumbered security forces are fighting militant Islamists in both the western and eastern parts of the country. The United Nations Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) will only locally and very narrowly be able to protect the civilian population. In addition, the G5 Sahel security cooperation between Mauretania, Mali, Burkina Faso, Niger and Chad will not be able to improve the security situation in the border areas, even in the long term.

Pirates in the Gulf of Guinea increasingly focus on kidnapping for ransom

Piracy continues in the Gulf of Guinea. Though the overall number of attacks has declined compared with 2019, there are still frequent attacks against all types and sizes of merchant and fishing vessels, resulting in pirates boarding the vessels.

By far, the majority of pirate attacks used to take place near the coast of Nigeria. However, over the past two years, attacks have been launched in the entire Gulf of Guinea and far from the coast, especially outside the rainy season. While robberies at sea used to be the preferred method of piracy, pirates now increasingly focus on kidnapping ship crews mainly from wealthy countries, as they fetch larger ransoms than do crews that are native to the Gulf of Guinea. There is also a trend that more hostages are captured in each attack to increase the income per attack. Kidnapping for ransom involves less risk to the pirates than do robbery at sea and hijacking of vessels. Kidnapping is also more profitable, and pirates have evolved an effective and uniform procedure for the entire process from kidnappings to the ensuing negotiations and release of hostages.

Though the pirates remain well-armed and ready for violence, no increase has been registered in the amount of violence used in kidnapping piracy compared to the piracy attacks in which looting of valuables is the main motive. The pirates aim to keep the hostages alive and well to be able to cash in on ransom at a later stage, making it relatively rare that the attacks result in serious harm to hostages. In addition to the violent piracy attacks, theft from moored vessels is still common. These thefts only rarely develop into violence, though.

The root causes of piracy are highly unlikely to change in a positive direction in the short to medium term. Nigeria and the other coastal states will not be able to introduce effective intervention measures against the pirates, as the states are still struggling with widespread poverty, high youth unemployment rates, crippled economies, and weak and corrupt state institutions. In addition, the maritime security capacities of the coastal states are generally limited, transnational cooperation is weak, and the legal structures are inadequate.

AFGHANISTAN

On 29 February 2020, the United States and the Taliban signed an agreement on the withdrawal of international forces from Afghanistan. PHOTO: STRINGER/EPA/RITZAU SCANPIX

The Afghan national government is weakened by strong military pressure from the Taliban, inner division, and the withdrawal of the international forces. Among the most likely developments in the next few years are civil war or a regime headed by the Taliban. This development will likely trigger a humanitarian crisis, a swell in refugees, and a strengthening of the militant Islamists.

The developments in Afghanistan are characterized by the gradual US withdrawal of its troops from the country. On 29 February 2020, the United States and the Taliban signed the "Agreement for Bringing Peace to Afghanistan", which involves the withdrawal of the US and other NATO state forces from Afghanistan.

While the international forces have observed the timeline for their withdrawal, the Taliban has violated the terms of the agreement by continuing its collaboration with al-Qaida, and it has attacked camps belonging to the international forces. The withdrawal of the international forces continues despite the Taliban's failure to honour the agreement.

If the United States continues its current course, observing its agreement with the Taliban, the international forces will have left Afghanistan by mid-2021. However, it is possible that the new US administration will reconsider the country's Afghanistan strategy.

A full withdrawal of the international forces would leave the already worn-down Afghan security forces to face the Taliban unassisted, a Taliban that has grown stronger in recent years.

It is less likely that the Afghan security forces will be able to surprise militarily and break the Taliban's momentum. If, however, they were to prove successful in doing so, this could shift the dynamics in the negotiations between the Afghan government and the Taliban, possibly prompting some regional great powers to be more unambiguous in supporting the Afghan national government. If, on the other hand, the Taliban were to split into multiple factions and if the Taliban's adversaries manage to establish strong militias as a counterweight to the insurgents, this could mark the start of a civil war.

Tough negotiations between the Taliban and the Afghan national government

In September 2020, the Taliban initiated negotiations with representatives of the Afghan national government and the major political and ethnic groups in Afghanistan. However, the negotiations have come off to a poor start with mutual obstruction and the parties being far apart, providing a difficult setting for the negotiations. The withdrawal of the international forces weakens the government's position, as it reduces the incentive for the Taliban to observe the government's demand that a truce be observed during the negotiations. Rather, the Taliban will likely step up the military pressure and try to sow division among delegates from the government and the Afghan society at the negotiations.

Though the Taliban is made up of diverse factions, the insurgent group has managed to maintain coherence by insisting on an uncompromising stance towards the Afghan national government. Prior to the negotiations, the Taliban demanded that they result in the reintroduction of a Taliban-led emirate. The Taliban has bolstered its delegation to signal that, although it is serious about the negotiations, it intends to pursue a tough and uncompromising line. In addition, the Taliban has reinforced this message by increasing the military pressure on the Afghan security forces.

Government and security forces weakened

The result of the 2019 Afghan presidential election was contested, the supporters of the current Afghan republic stand politically divided, and the political institutions are weak. The government has thus been unable to translate the shared opposition to the Taliban into effective political cooperation. The COVID-19 pandemic has made the government's position even more difficult.

The humanitarian crisis in Afghanistan has likely prompted more Afghans to leave the country, hoping to make it to Europe.

The government has had a hard time introducing effective measures against COVID-19, which has affected large parts of the population. The pandemic has left Afghanistan immersed in a deep economic crisis reflected in higher food prices and rising unemployment. The COVID-19 pandemic has also drained the government's already scarce financial reserves. The humanitarian crisis in Afghanistan has likely prompted more Afghans to leave the country, hoping to make it to Europe.

The withdrawal of the international forces and the political division have also taken their toll on the Afghan security forces, which suffer under great losses, waning recruitment, poor leadership, continuous restructuring, corruption, and poor training. COVID-19 has added to the strain on the security forces; for one thing, as it has weakened NATO guidance and training. The security forces are under intense Taliban pressure that is forcing the security forces on the retreat, mainly in the rural areas. There is a real risk that the Afghan security forces will break down if the international forces withdraw completely from Afghanistan.

Regional great powers concerned but lack common policy course

Regional great powers India, Iran, China, Pakistan and Russia are concerned about the prospect of the Taliban taking over power in Afghanistan. They fear that the threat from militant Islamist groups will increase to the point where it will threaten their interests in the region. However, several of the countries are positive about what they perceive as the defeat of the United States and its allies in Afghanistan. For several years, Pakistan, Russia and Iran have actively supported the Taliban, providing assistance that includes weapons, equipment and money to obtain this objective.

The situation in Afghanistan is a recurring agenda topic at meetings between the regional powers. However, the countries have a hard time reaching consensus on how to stabilize the situation, as bilateral conflicts hamper effective cooperation. The regional powers would likely back different factions if the situation were to cause further rifts in Afghanistan. In this way, they may contribute to the breakout of a civil war in Afghanistan.

Improved scope of action for Islamic State in Khorasan Province

The insurgent and terrorist group Islamic State in Khorasan Province (ISKP) is strongest in the eastern part of Afghanistan, where it has met with fierce attacks from international forces, the Afghan security forces, and the Taliban. This, however, has not eliminated the ISKP, which frequently launches attacks in Kabul, but is also a threat in Jalalabad.

As the coalition is withdrawing its troops from Afghanistan, the ISKP will likely try to bolster its influence by recruiting radical insurgents from the Taliban, the Haqqani network and other militant Islamist groups. Greater latitude will likely be created for the ISKP insurgency once the coalition has withdrawn completely from Afghanistan, which will also increase the terrorist threat posed by the ISKP and other militant Islamist groups.

DEFINITIONS

In order to facilitate the reading of this risk assessment, we have prepared a brief outline of the special terms and definitions used in our assessments.

Intelligence assessments almost always contain elements of doubt. The level of probability in assessments must thus always be made clear. To facilitate this and to ensure that all analysts express levels of probability consistently, we use standardized phrases to indicate probability, in particular when making key assessments.

The DDIS applies the below scale of probability.

The scale does not express precise numeric differences but merely informs the reader whether something is more or less probable than something else. In other words, this scale shows whether we assess the probability to be closer to 25 per cent than to 50 per cent. This is the best way for us to ensure consistency between analyst intention and reader interpretation.

Probability levels are not an exact science but are intended to give the reader an indication of our level of certainty.

TIME FRAMES

Few months:	Very short term
0-2 years:	Short term
2-5 years:	Medium term
5-10 years:	Long term
Over 10 years:	Very long term

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