FE
DANISH DEFENCE INTELLIGENCE SERVICE

Intelligence
Risk Assessment 2019

An assessment of developments abroad impacting on Danish security

Danish Defence Intelligence Service

Intelligence Risk Assessment
2019

Introduction

The world order that for decades has provided the overall framework for how we address Denmark's and Europe's geopolitical and security interests is being redefined. It is no longer given that general consensus and convergence will prevail within the traditional alliances and cooperation patterns. Pursuit of national interest will increasingly complicate this cooperation. At the same time, the rule-based world order is being tested.

Europe may find itself increasingly alone in defending its values and interests, including security interests, and in addressing issues such as migration.

The global shifts in economic, political and military power will to a greater extent put small and medium-sized states under pressure from global and regional actors in and outside of Europe.

China's growing economic strength and declared ambition to adopt an even more influential role in global issues will affect the global position of the United States and the geopolitical balance. Although the United States is trying to counter this development, the US domestic and foreign policy to increasingly withdraw from the international scene will enable Russia and China to gain more influence in the Middle East, Africa and other regions that are now less of a priority to the United States.

At the same time, an increasing number of states dedicate their efforts to weakening the cohesion of other states through influence campaigns using a wide array of influence tools – a tactic that has been accelerated by technological development.

Technological development has also changed the general threat landscape. The increasing concentration inside the tech industry and of commercial actors that base their business models on transnational digital IT and communication platforms is well-suited to changing the traditional power structures. The technological race related to quantum computing, robotics, facial recognition algorithms and artificial intelligence, etc. combined with several states' indiscriminate use of these technologies to control their populations makes it difficult to separate technology and values. These factors may become key elements of a future geopolitical struggle and, in this way, affect the threat picture.

The United States and the transatlantic relationship will continue to be the most important guarantor of Denmark's basic security policy interests.

However, the threat picture has not only grown more complex, it has also become more volatile and thus increasingly unpredictable.

One of the DDIS' core missions is to contribute independent national intelligence assessments, thereby enabling Denmark to address these challenges in the best possible way as a sovereign state.

We strongly believe that in an open, democratic society, we as a modern intelligence service should strive to inspire confidence and to be accessible and ready for real dialogue, while always following the overriding principle of adhering to the central, traditional intelligence practices of protecting capabilities, sources and our ability to fulfil our purpose.

This DDIS annual risk assessment collates the key threats and a number of other issues abroad that have an impact on Denmark's security and strategic interests.

This year, the Risk Assessment starts out with a chapter on the Arctic, where the interests of the great powers have direct impact on, and growing significance for, the Kingdom of Denmark. In addition, just as in recent years, the main points of emphasis are on Russia, the cyber threat and the threat of terrorism. Also, China's growing global influence is dealt with in this year's Risk Assessment.

In addition, the Middle East, parts of Africa, and Afghanistan, all of which will continue to pose foreign and security policy challenges to Denmark, will be examined in separate chapters.

Editing was finalised on 20 November 2019.

Enjoy your reading.

Lars Findsen
Director of the Danish Defence Intelligence Service

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Main conclusions

The Arctic states still cooperate on regional issues. Despite the Arctic nations' shared ambition to keep the region free of security policy disagreements, the military focus on the Arctic is growing. A great power game unfolding among Russia, the United States and China deepens tensions in the region. The Arctic is a top priority for Russia, which has vital security and economic interests in the region. Though Russia's military build-up in the Arctic thus has a defensive focus, it increasingly contains elements that could also be utilized for offensive operations. In addition, the Arctic is an essential part of Russia's national identity. China's interests in the Arctic revolve around access to Arctic resources and sea routes as well as increased influence on Arctic issues. China is thus working to strengthen its Arctic research, to set up infrastructure and capabilities in the Arctic and to strengthen cooperative relations with the Arctic nations. China's Arctic interests are long-term and persistent and will likely grow in the future. This is also true of China's interests in Greenland.

Russia is challenging the dominant global position of the United States but will also have to maintain the dialogue with the United States. In recent years, Russia has carried out a significant military build-up in the western part of the country. Russia bases its military build-up and military planning on the assumption that a war with NATO close to or in the post-Soviet space cannot be ruled out. However, it is highly unlikely that Russia would deliberately launch initiatives that would entail a high risk of military conflict with the United States and NATO. It is still likely that Denmark may, with little or no warning, become target of

a Russian influence operation. The Baltic Sea region is still characterized by the tensions between NATO and Russia. Russia will likely attempt to improve its relations with Denmark, but conditions for cooperation between Russia and Denmark will continue to be difficult. Overall, Russia will remain a major security policy challenge to the West.

China continues to increase its international influence through active involvement in existing international institutions, formation of new bilateral partnerships, multilateral cooperation forums and global economic initiatives. China's economic agreements and investments abroad reflect the country's economic, diplomatic and strategic interests. The United States perceives China as its main strategic rival and is increasingly seeking to hamper China's development. China is modernizing its military and will continue to assert its territorial claims in the South China Sea. China is expanding cooperation with Russia, but mutual bilateral scepticism persists.

The very high threat of cyber attacks against Denmark has become an everyday reality. Attacks launched by criminal or state actors are particularly threatening to Danish interests. Different types of actors launch attacks on the infrastructure of the Internet, potentially undermining the trust in the ability of traditional IT security measures to protect Danish private companies and public authorities sufficiently. Cyber espionage may affect Danish national security and Danish competitiveness. Cyber crime may, at worst, prevent private companies and public authorities from delivering critical services. Also, it is possible that

Danish private companies and public authorities could become collateral victims of destructive cyber attacks against targets outside of Denmark.

Militant Islamists still pose a serious threat to the West, but the threat picture has changed, mainly as a result of strong military and counter-terrorism efforts against ISIL and al-Qaida. The number of terrorist attacks in the West conducted by militant Islamists reached an unprecedented high level during the years when ISIL controlled large swathes of territory in Syria. Today, attacks have fallen to a level which is comparable to the one seen in the period leading up to ISIL's proclamation of a caliphate in 2014. However, militant Islamists remain intent on attacking the West. The most serious threat emanates from lone wolf terrorists or small cells launching relatively simple attacks that require little planning and limited resources. Foreign fighter returnees will continue to pose a threat for years to come.

For years to come, the Middle East and North Africa will remain an arena for regional and international power struggles. Instability, terrorism and refugees stemming from the region will pose a security threat to the EU. The United States will reduce its commitments in the region, and being the region's closest neighbour, Europe will increasingly be forced to tackle these challenges alone. State actors such as Russia, Iran and Turkey will continue to exert great influence, and their priorities will often differ from those of Europe. The conflict between the United States and Iran has escalated. As long as the United States

upholds its pressure on Iran and prevents the country from exporting oil, Iran will continue its calculated opposition towards the United States and its allies militarily as well as by challenging elements of the nuclear deal. Despite the sanctions, the Iranian regime will stand united in the short term and Iran will consolidate its regional influence.

Ethnic tensions and growing population rates in the western Sahel region will cause an increase in the number of displaced people and contribute to aggravating the security situation in the region. The national security forces in Mali and Burkina Faso are unable to uphold security and fight militant groups. Militant Islamists will continue to threaten Western targets in the region.

The Gulf of Guinea will remain an area characterized by pirate attacks conducted by organized criminal networks in Nigeria.

The security situation in Afghanistan remains precarious. Collapsed US-Taliban negotiations have halted a potential Afghan peace process. The Taliban is becoming more powerful, while the Afghan government's power is weakening. The regional great powers are increasing their involvement, increasing the fragmentation of the country and raising the risk of civil war.

The Danish patrol vessels Vædderen and Knud Rasmussen off Greenland.

THE ARCTIC

The Arctic states still cooperate on regional issues. Despite the Arctic nations' shared ambition to keep the region free of security policy disagreements, the military focus on the Arctic is growing. A great power game unfolding among Russia, the United States and China deepens tensions in the region.

Global warming makes the Arctic increasingly accessible. Generally, development in the Arctic region is characterized by cooperation among the Arctic nations. Just over ten years ago, the coastal states signed the Ilulissat agreement, committing to handle their Arctic interests through negotiations. The agreement remains central to the development in the region, most notably in relation to regional issues such as environment, fishing, search and rescue capabilities, indigenous people and delimitation. The Arctic nations have thus on several occasions declared that the Arctic shall remain a low-tension region characterized by constructive cooperation, and the nations have based the regional cooperation on this founding principle.

The shared ambition among the Arctic nations to keep Arctic cooperation separate from international security policy issues has been a key reason why Arctic cooperation has continued despite increased tensions between the West and Russia.

In recent years, both Arctic and non-Arctic states have increasingly directed their military focus on the Arctic. Russia, in particular, is consolidating its military capabilities in order to protect its northern flank and preserve its strategic deterrence, prompting several other Arctic coastal states to start strengthening their own Arctic military capabilities. In addition, military activities in regions bordering the Arctic could potentially have a spillover effect on developments in the Arctic.

Clear signs of increased security policy positioning are emerging between, in particular, Russia and the United
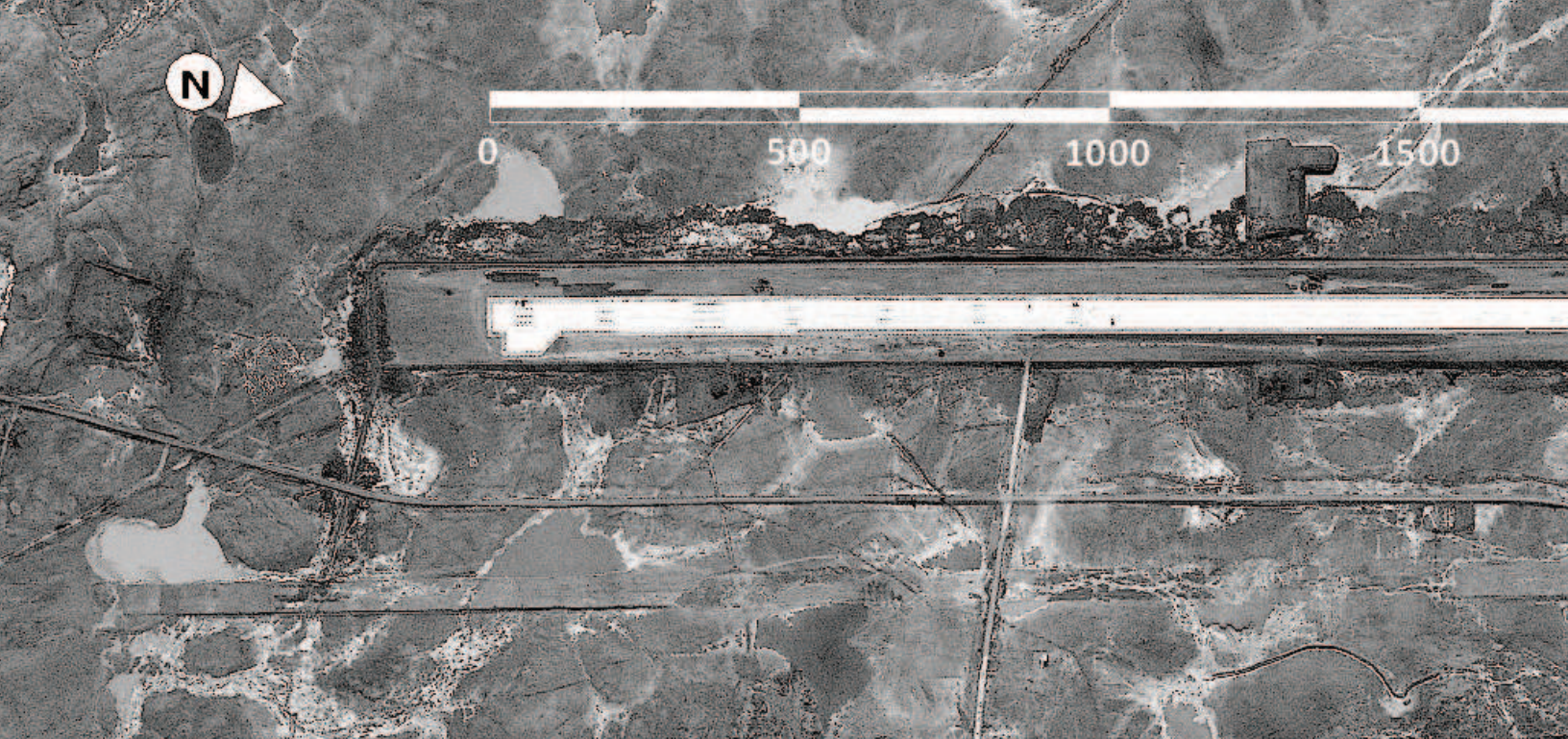
Commercial satellite imagery of the Nagurskoye fighter aircraft base. The image is from 3 August 2019 and shows the 2,500 m of the airstrip that have already been completed. Work on extending the runway length to approx. 3,500 m has started.

States, and to some extent also China. All three states have significant strategic and economic interests in the region. This development will likely result in sharpened political rhetoric and increased military build-up in the Arctic.

The United States has enhanced its military focus on the Arctic and aims for a stronger role for itself in the region, citing a threat from Russia and China. The United States wants to prevent the two countries from increasing their influence in the Arctic, and has sought backing from its allies for this approach in Arctic forums. The United States also wants to bolster its military presence in the region to ensure early warning and be able to ward off a potential military threat from the north. The new US Arctic strategy and public statements by senior US administration and defence representatives have, to some extent, veered from the principle of shielding cooperation on Arctic issues from other international issues and discord, for instance by referring to the region as an arena for geostrategic rivalry between the West, Russia and China.

The stronger US focus on the Arctic is a source of concern for Russia, which likely regards it as a US attempt at containing Russia in the Arctic and thus as an attempt at threatening Russia's strategic interests in the region. Consequently, it is also likely that Russia will partly respond to the new US approach by introducing further military initiatives aimed at bolstering its own military capabilities in the region.

China is also a source of increasing concern for both Russia and the United States. China's interests and involvement in the Arctic are growing with China trying to establish itself as an economic player in the Arctic and to increase its influence on Arctic matters. The Chinese military is also starting to show an interest in the region. The United States in particular perceives China not only as an economic competitor but also as a geopolitical rival. China itself is also highly conscious of the great power game of which the country is part.

Security policy developments in the Arctic will also affect the Kingdom of Denmark's freedom to manoeuvre in the Arctic. In the future, it is likely that balancing considerations for the Kingdom's allies and the defence of the Kingdom's strategic interests against the ambition to maintain the Arctic as a low-tension region will prove increasingly challenging.

The geopolitical shift in the Arctic could also have a spillover effect on cooperation on regional matters between the Arctic nations, which may not be able to keep Arctic cooperation separate from other international issues. If Russia and the United States were to entrench themselves in more uncompromising positions, this would particularly reduce the scope for Arctic cooperation.

Despite this development, cooperation among the Arctic coastal states will likely withstand a limited degree of military positioning and tension. Cooperation may thus continue within areas where the Arctic states feel that their interests are best served through joint solutions. This is particularly the case in the Arctic Council and in the negotiations on the delimitation of the extended continental shelf following the principles of the UN Convention of the Law of the Sea.

2000   2500   3000   3500 m
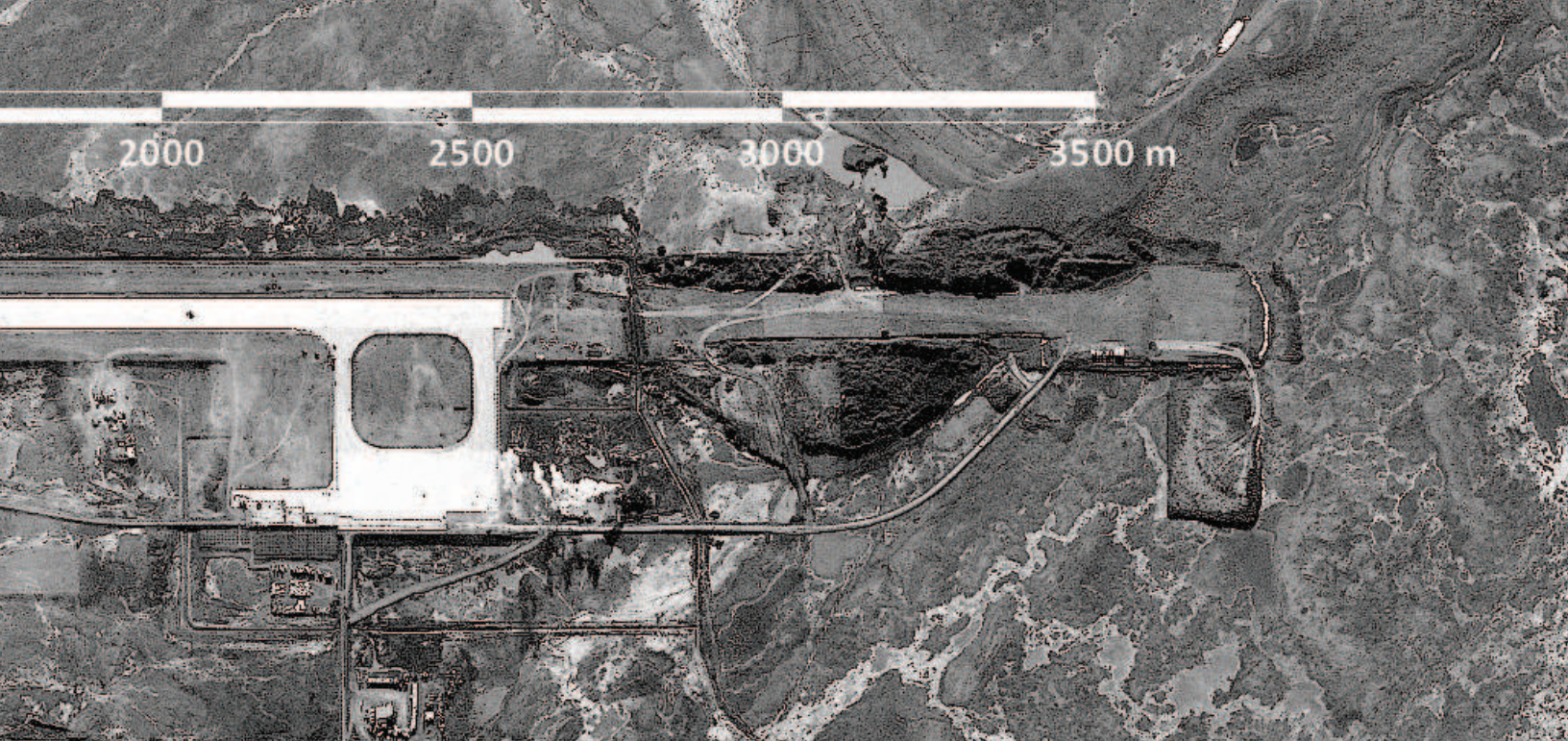
Russia in the Arctic

The Arctic is a top priority for Russia, which has vital security and economic interests in the region. Russia thus gives priority to strengthening its defence and control of the Russian Arctic and to developing and exploiting the region's economic potential. In addition, the Arctic is an essential part of Russia's national identity, which is a key driver for its ambitions to secure a maritime delimitation that aligns with Russian interests.

Russia sees itself as the leading Arctic nation and aims to consolidate this position through regional control and expansion of its military strength in the Arctic. At the same time, though, Russia has an interest in preserving a stable and peaceful development in the Arctic, as this benefits its regional security and economic interests and creates the best starting point for the negotiations on maritime delimitation.

To Russia, Arctic cooperation is highly likely a vehicle for keeping the level of tensions down, and thus to curb Western military build-up, attract investments, and ensure that the delimitation of the extended continental shelf aligns with Russian interests. Accordingly, Russia has proved to be constructive in its efforts to solve shared regional challenges and is, as are several other coastal states, generally inclined to keep Arctic issues separate from other international and bilateral disputes.

Russia firmly supports cooperation in the Arctic Council and among the five Arctic coastal states. These forums ensure

that the Western Arctic states cannot bypass Russia in decisions regarding the Arctic. In the years to come, Russia will highly likely give even more priority to cooperation in the Arctic Council in preparation for its own 2021-2023 chairmanship.

Russia continues to prioritize military build-up in the Arctic
The Arctic region plays a key role in Russian security policy, and the region's strategic importance has strongly motivated Russia towards consolidating its military position in the Arctic. Russia perceives its extensive Arctic coastline as its most vulnerable flank in terms of surprise precision attacks from US cruise missiles. Such attacks would, in particular, pose a threat to the Russian strategic nuclear capabilities, as much of Russia's strategic second strike capability lies with the Northern Fleet's ballistic missile submarines based at the Kola Peninsula.

In addition to strengthening the defence of Russia's Arctic flank, the military build-up is intended to underpin Russia's legitimacy and self-image as an Arctic great power. Finally, the build-up ensures control of the infrastructure along the Northern Sea Route, thus supporting Russian efforts to realize the region's economic potential.

Russia's military build-up is particularly focused on the Nagurskoye fighter aircraft base in the Franz Josefs Land archipelago, located some 1,000 km from the North Pole. The base will likely become operational in 2020, making it the world's northernmost combat aircraft base and giving Russian airpower a presence in the very High

North. The base will thus become a cornerstone of a forward line of defence in the Arctic Ocean.

Russia started constructing the Nagurskoye runway in 2017 and continues to expand the base's capacity. Once construction is completed, the base will be able to accommodate even the largest transport, bomber and anti-submarine aircraft.

With the build-up at Nagurskoye, Russia is moving part of its defence far into the Arctic Ocean, enabling it to warn of and counter threats from US precision attacks before they reach the Russian mainland. In the event of a crisis, the base would contribute to Russia's control of the air and sea domains beyond Russia's territorial borders.

Though Russia's military build-up in the Arctic thus has a defensive focus, it increasingly contains elements that could also be utilized for offensive operations. Russian combat aircraft deployed at the base could quickly reach the north-easternmost parts of Greenland and, using long-range missiles or air-to-air refuelling, they would have the ability to attack the United States' Thule Air Base.

Western military measures in the Arctic fuel distrust

Partly as a result of Russia's enhanced military presence and potential offensive capabilities in the Arctic, a number of Western countries have started gearing up their own military presence in the region. The number of military exercises in the North Atlantic Ocean held under NATO auspices is on the rise as well.

Notwithstanding Russia's own military build-up in the region, the Russian leadership will be deeply concerned about an increase in US or other Western military presence in the Arctic, as such a presence would, in Russia's view, threaten its ability to operate freely in the region and to defend its northern flank.

Russia's concerns in particular revolve around NATO. Russia likely believes that the United States and other NATO states are trying to use the alliance as a tool to contain Russia in the Arctic and to threaten its ability to defend its northern flank.

Keeping NATO from playing an active role in the region, for instance through military presence and exercises or by taking part in enforcement of sovereignty, is thus essential to Russia. Russia likely fears that such a role for NATO in the Arctic may pose a threat to Russian military

Map of Russia's six forward military bases. Circle indicates approximate range of fighter aircraft from Nagurskoye without air-to-air refuelling. With air-to-air refuelling, range and operation time would be markedly extended. The white line along the Russian coast is the North-East Passage.

capabilities in the region and undermine the country's possibilities of cooperating with the other Arctic coastal states. Russia is thus working to counter any steps by the United States or other Arctic NATO members to give NATO such a role.

A stronger Western military presence in the Arctic would likely bolster Russian interest in further expanding its own capabilities in the region to protect its strategic submarines and its defence of its Arctic seaboard. Moreover, Russia will likely try to legitimize its military activities and build-up in the Arctic by casting NATO and the United States as the aggressors in the region, including through media campaigns. Russia will likely combine this approach with continued prioritization of cooperation and dialogue between the Arctic countries. Such an approach would advance the Russian narrative that Russia is the responsible and sensible partner, while the West in general and the United States in particular are ruining constructive cooperation and jeopardizing peace and stability in the Arctic.

Military activities in the North Atlantic impact the Arctic

Russia also keeps a focus on NATO activities in the North Atlantic Ocean, including the waters between Greenland, Iceland, the Faroe Islands and Great Britain, also known as the GIUK gap. The increased tensions between Russia and the West have renewed the focus of the United States and NATO on military power and presence in the North Atlantic Ocean with the purpose of securing the maritime lines of communication between North America and Europe in the event of an escalating crisis with Russia. In this context, securing reinforcements to Norway would be particularly relevant as they would have to pass through the GIUK gap.

To Russia, the GIUK gap is pivotal in blocking or at least delaying reinforcements from being sent from the United States to Northern Norway and close to Russia's Arctic borders. Also, Russian attack submarines would have to pass through the GIUK gap if they were to be deployed against the more southerly supply lines over the Atlantic Ocean or in their search for Western ballistic missile submarines.

Western naval activities through the GIUK gap and in the direction of Norway could quickly challenge Russia's local military superiority in the Arctic and threaten Russia's strategic capabilities in the Kola Peninsula. To Russia, it is thus vital to prevent or at least limit NATO from playing an even greater role in the North Atlantic Ocean and, by extension, to also curb the increasing combat potential of NATO in the Arctic region.

Delimitation negotiations are central in Danish-Russian Arctic relations

Danish-Russian relations differ considerably depending on whether they relate to the Arctic or to general issues. While the bilateral relationship in general has deteriorated markedly since the Ukraine crisis, relations on the Arctic are characterized by pragmatism and dialogue, not least on the issue of delimitation in the Arctic Ocean and in the regional multilateral cooperation forums.

Russia and Denmark have both separated their relations concerning the Arctic from other international issues. Nevertheless, Russia believes that Denmark is simultaneously strengthening its military presence in the Arctic and cooperating with the other Arctic countries at the expense of Russian interests. Separating cooperation on the Arctic from more general bilateral relations may thus grow increasingly difficult.

Russia contemplates new set of navigation rules for the Northern Sea Route

In 2019, the Russian Ministry of Defence proposed a new set of rules for foreign naval vessels and state-owned ships that wish to sail in Russia's internal and territorial waters.

Under the new rules, which are yet to be adopted, foreign naval vessels and state-owned ships are obliged to give notice of their voyages 45 days in advance and take on board Russian pilots when navigating the Northern Sea Route.

Russia defines several straits in the Northern Sea Route as part of its internal or territorial waters. The proposed rules regime would thus, in effect, apply to all state-owned ships sailing along the Northern Sea Route.

The key issue in Danish-Russian Arctic relations is the delimitation of the extended continental shelf in the Arctic Ocean. Russia, Denmark and, in 2019, Canada have submitted partially overlapping claims to the UN Commission on the Limits of the Continental Shelf, and the countries are to negotiate a preliminary border demarcation in the areas where the claims overlap, a process that is expected to last for years.

Despite its ambitions to cast itself as a constructive negotiation partner, Russia would likely find it difficult to accept a demarcation line close to its own maritime borders. This is in large part due to the great symbolic value the issue of the continental shelf holds to Russia and to the country's identity as an Arctic great power. It is likely that this symbolic value by far exceeds the potential value of the seabed resources in the extended continental shelf, which is formally at the heart of the delimitation issue. Moreover, Russia likely fears that NATO countries would start patrolling in waters close to Russia should a NATO country be awarded the right to extract resources in the continental shelf close to the Russian seaboard.

Exploitation of the economic potential of the Arctic is essential to Russia

The Russian Arctic areas are rich in natural resources, especially oil and gas, both on land and in the continental

shelf. Utilizing the region's economic potential is an overarching objective for Russia. As a means to this end, Russia is also focusing on establishing the necessary infrastructure for the production of oil and gas. This is exemplified not least by the Northern Sea Route, which is the Russian part of the North-East Passage that runs between Asia and Europe.

Control of the Northern Sea Route is a core objective for Russia, which wants to limit foreign military presence close to its seaboard and to ensure revenue, for instance through navigation and ice-breaking fees. Russia is thus considering the introduction of rules to regulate and control navigation by foreign military and other state-owned vessels along the Northern Sea Route.

A number of Western countries have adopted a critical stance towards the rules regime, citing that it contradicts the rules of the UN Convention on the Law of the Sea. The issue of the legitimacy of the Russian rules and control of the waters will likely become another bone of contention between the United States and Russia.

Despite deepening Russia-China cooperation, Russia remains wary of China's growing presence in the Arctic
China's role in the Arctic is growing. To Russia, China is both a partner and a competitor and, ultimately, even a strategic opponent. However, the Western sanctions have forced Russia to turn its attention to non-Western partners to join its economic projects in the Arctic. In the short and medium term, China will likely be the most attractive and realistic partner. Still, it is important to Russia to avoid economic dependence on China.

In addition, Russia highly likely aims to prevent China from gaining influence over Arctic infrastructure which Russia regards as strategically important. Russia is likely concerned that, in the long term, the Chinese plans for a Polar Silk Road have the potential to undermine Russian control over the Northern Sea Route.

Finally, Russia wants to avoid the possibility that the Chinese Arctic initiatives and economic involvement will translate into Chinese political influence in the Arctic. Russia is keen that only Arctic countries participate in the formulation of rules pertaining to the Arctic, fearing that the special role of the Arctic states, especially the role of the Arctic coastal states, will become diluted if non-Arctic actors gain influence in the Arctic. Russia is thus highly likely concerned that China's efforts to enhance its role and influence in the Arctic will be at the expense of Russia's own role and influence.

China's strategy in the Arctic

China's interests in the Arctic revolve around access to Arctic resources and sea routes as well as increased influence on Arctic issues. China is thus working to strengthen its Arctic research, to set up infrastructure and capabilities in the Arctic and to strengthen cooperative relations with the Arctic nations. China's Arctic interests are long-term and persistent and will likely grow in the future. This is also true of China's interests in Greenland.

During the past two to three years, the Arctic has moved up on China's political agenda as China has linked its specific interests in the Arctic to the country's overall, long-term strategic interests.

In June 2017, China officially included the Arctic sea routes in its grand development strategy, the Belt & Road Initiative (BRI), which seeks to promote relations between China and the rest of Asia, Africa and Europe through a mixed strategy that includes investments in infrastructure, economic agreements and increased international trade. When, in January 2018, China published its white paper on China's Arctic Policy, the Arctic sea routes were emphasized as being part of the BRI.

China's specific interests in the Arctic thus become officially linked to the country's overall and long-term strategic interests. The effect is already evident in the increased focus of Chinese state companies and investment funds on the Arctic region, which will likely result in increased investments in Arctic infrastructure.

Over a number of years, China has officially expressed its ambition to gain influence on the management of Arctic matters. For China, this would align with the country's perception of itself as a great power. Consequently, China wants to make its influence felt on a par with other great powers. In China's perception, the framework for the inter-state cooperation in the Arctic is in a developmental phase, and 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 cooperation in the Arctic region.

Since 1999, Chinese polar authorities have conducted ten scientific expeditions in the Arctic.

China is increasing its bilateral cooperation with Arctic nations in the realms of trade, research and culture. It is likely that China regards strengthened bilateral relations on matters such as polar research as a platform for increased influence in the Arctic. China regards polar research and monitoring of the Arctic environment as a platform for a legitimate presence in the Arctic but also as a key part of China's efforts to become a recognized polar nation and maritime great power. China often cites climate research when casting itself as a state with legitimate interests in the Arctic.

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 area. China's interest in the Arctic sea routes is part of its strategy to diversify its access to energy and raw materials without relying exclusively on one country or region. Increased use of the Arctic sea routes would reduce China's strategic dependence on shipping through the Strait of Malacca and the Suez Canal and shorten transport time for goods to and from Europe.

Access to the Arctic also has military strategic importance for China mainly due to the Arctic's importance to Russia and the United States as an operation area for ballistic missile submarines, strategic air transport and ballistic missile attack warning capabilities. So far, Chinese military activity in the Arctic has been very limited. Until a few years ago, the Chinese military likely did not pay much attention to the Arctic. However, this is changing, and the Chinese military has now begun to strengthen its knowledge of the Arctic. It is likely that some of China's efforts to build up Arctic knowledge and capabilities will be a concerted effort between civilian and military actors.

China's activities in the Arctic are evolving, and in addition to initiatives on resource extraction and Arctic sea routes, knowledge and capabilities are also being established within different sectors such as climate research, space research and research on satellite communication and Arctic navigation. Overall, Chinese interests in the Arctic, including in Greenland, will likely grow in the future.

Chinese interests in Greenland
China's ambition to strengthen bilateral cooperative relations with Arctic nations also includes Denmark and Greenland, where, as in the other parts of the Arctic, China is using increased cooperation on research and trade as entry points for influence. A number of Chinese state and non-state actors thus show persistent interest in commercial and research-related cooperation in Greenland. However, the interest is still narrow and has yet to translate into larger investments or extensive research cooperation in Greenland.

China likely wants to establish and maintain its commitment in Greenland, even though this may not be commercially viable in the short term. This strategy is also employed towards other raw material exporting countries and is a component of China's overall resource security strategy. Also, this approach is part of China's ambition for influence in the Arctic. China regards research cooperation, including its research initiatives in Greenland, as a legitimate channel for influence on Arctic matters.

As a result of the inter-connection 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.

China's ambitions for influence and access in the Arctic are under pressure from the United States, which perceives China's interests in the Arctic in the light of the strategic rivalry that is unfolding between the United States and China.

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

The enhanced US focus on Greenland will likely have an impact on China's room of manoeuvre and actions in Greenland.

President Putin surrounded by generals at the Akhtubinsk aviation test centre on 14 May 2019. Russia gives priority to developing high-tech weapons.

RUSSIA

Russia is challenging the dominant global position of the United States but will also have to maintain the dialogue with the United States. In recent years, Russia has carried out a significant military build-up in the western part of the country. Russia bases its military build-up and military planning on the assumption that a war with NATO close to or in the post-Soviet space cannot be ruled out. It is still likely that Denmark may, with little or no warning, become target of a Russian influence operation. However, it is highly unlikely that Russia would deliberately launch initiatives that would entail a high risk of military conflict with the United States and NATO. Overall, Russia will remain a major security policy challenge to the West.

Russia's primary strategic objectives are to re-establish itself as a great power on equal terms with the United States and to regain its dominant influence in the post-Soviet space. In addition, one of Russia's top strategic objectives is to maintain its position as the dominant regional power in the Arctic.

These objectives will remain constant, and Russia will patiently pursue these long-term strategic objectives. There are no significant actors in Russia who openly question the country's strategic objectives or criticise

its foreign and security policy. Russia's weak economic foundation will not significantly affect its strategic ambitions or its foreign policy behaviour.

Russia will continue to pose a significant security policy challenge to the West and Denmark. Russia's closed decision-making processes and its willingness to accept risks, including its readiness to use military means, and deep-seated distrust of the United States and NATO increase the risk of Russian miscalculations in crisis situations involving NATO and the West. These factors will

contribute to uncertainty about Russia's military actions in escalating crises.

Russia's leadership will highly likely keep a firm grip on power despite the reduced public support for President Putin and the leadership following its peak in 2014 in connection with the annexation of Crimea. Russia's leadership will likely try to bolster its waning domestic support by portraying its foreign and security policy as a necessary defence against the United States and the West.

The lower public support translated into protests in Moscow ahead of the September 2019 regional elections. Russia's leadership is deeply involved in dealing with the protests, as it considers them a potential threat and as it generally does not tolerate independent political opposition.

In Russia's view, the United States and the West are pursuing a strategic containment of Russia by political, economic and, in particular, military means. Russia also perceives its relations with the United States and the West as characterized by a clash between Russia's traditional and conservative values and Western liberalism and modernism. This serves to fuel Russia's historically conditioned distrust of the West, most notably in the intentions of the United States, NATO and the EU.

Russia increases cooperation with countries challenging the United States
Russia is with some success challenging the dominant position of the United States in international politics. This is especially the case in the Middle East where Russia is exploiting the vacuum left by the partial withdrawal of the US troops from Syria. In order to challenge the United States, Russia is increasing its cooperation with other great and large regional powers which, from a variety of reasons and interests, are attempting to challenge the United States.

Russia's and China's growing tensions with the United States over strategic issues and trade issues have increased their incentives to deepen bilateral relations. Russia's and China's close bilateral cooperation will likely also include increased military cooperation. Though relations between Russia and China will likely not develop into a full-fledged alliance, Russia and China will develop their cooperation as long as their respective relations with the United States remain contentious.

Through its military and political support for the Assad regime and its cooperation with Turkey, Russia has created conditions for turning Syria into its area of influence. The

US military withdrawal from northern Syria constitutes a de facto acceptance of this situation. Russia will likely manage to maintain pragmatic cooperation with both Turkey and Iran on how to handle the conflict in Syria despite their diverging interests in the Syrian conflict.

Russia's presence in Syria will enable Russia to increase its influence in the Mediterranean, the Middle East and North Africa. Russia will thus further develop its relations with the central regional powers. Russia will likely from the position it has on the east coast of the Mediterranean in Syria seek to expand its strategic position to also include positions on the south coast of the Mediterranean, i.a. in Libya. Russia's military and political involvement in the Libyan conflict has increased in 2019.

Following the US withdrawal from the nuclear agreement with Iran and the subsequent US pressure on Iran, Russia has strengthened its already close relations with Iran. Russia will likely try to exploit this to position itself as a central mediator between Iran and Iran's adversaries in the Middle East as a way of eroding US influence among these countries.

Turkey's strained relations with the United States and other NATO and EU countries give Russia opportunities to draw Turkey further away from its Western partners. With the sale of the S-400 air defence missile system to Turkey, Russia highly likely wants to drive a wedge between the NATO countries and challenge Turkey's military integration with the alliance.

Russian-US relations will remain difficult
It is highly likely that the relations between Russia and the United States will be characterized by strategic competition and tension also in the long term. Relations between the two great powers are dominated by serious disagreements over regional crises and conflicts and numerous contentious bilateral issues. It is highly unlikely that Russia will significantly adjust its policy in order to accommodate the United States, and Russia will avoid situations which the United States could interpret as signs of Russian weakness.

Nevertheless, Russia and the United States will have to maintain a pragmatic dialogue on a long range of important foreign policy and security issues, although conditions for the dialogue will remain difficult.

Relations between Russia and the United States may further deteriorate in the coming years as a result of

disagreements over the future for the arms control treaties. Russia's development of the SSC-8 Screwdriver missile caused the United States to withdraw from the INF treaty on ground-based intermediate-range and shorter-range missiles. It is highly likely that the SSC-8 Screwdriver missile, with an estimated range of approx. 2,000 km, was violating the INF treaty. Russia subsequently withdrew from the treaty too. However, it is likely that both Russia and the United States assess that the INF treaty was not in accordance with contemporary strategic challenges where

In January 2019, Russia exhibited the SSC-8 Screwdriver intermediate missile canister.

Arms control treaties between Russia and the United States

The INF treaty came into force in 1988, prohibiting Russia and the United States from developing and deploying ground-based missiles with ranges between 500 and 5,500 km. Other states, including China, have not been party to the treaty and have thus been allowed to develop and deploy a large number of ground-based missiles with similar ranges capable of threatening both Russian and US targets.

The NEW START treaty entered into force in 2011. The treaty limits the strategic nuclear weapons of Russia and the United States to a maximum of 1,550 warheads, 700 operational strategic missiles and bombers, and 800 non-operational means of delivery, bombers and launch platforms. The NEW START treaty expires in 2021, but an extension until 2025 can be negotiated.

states not party to the treaty, in particular China, have developed and deployed ground-based intermediate-range and shorter-range missiles.

The termination of the INF treaty has further contributed to the distrust between Russia and the United States.

It is in Russia's interests to preserve the NEW START treaty which limits the strategic nuclear weapons of Russia and the United States. A termination of the treaty could start a strategic arms race with the United States that would increase Russia's economic burden far beyond what Russia is already spending on the development of new strategic weapons systems and on the modernisation and expansion of Russia's existing nuclear arsenal.

It is possible that the high degree of distrust between Russia and the United States and disagreements over the provisions of the NEW START treaty and its future relevance could lead to the termination of this arms control treaty too.

Russia sees NATO as a potential military threat
Russia sees NATO as a tool for US security interests and as a potential military threat. Russia bases its build-up of military forces and military planning in the country's western part on the assumption that a war with NATO close to or in the post-Soviet space cannot be ruled out. However, it is highly unlikely that Russia would deliberately take steps that would hold a high risk of military conflict with NATO.

Russia has an interest in maintaining the political dialogue with NATO, and Russia wants a resumption of direct military contacts with NATO. NATO terminated these contacts in 2014 in reaction to Russia's annexation of Crimea and Russia's support to the separatists in south-eastern Ukraine.

Russia likely sees confidence-building and conflict-prevention measures with NATO as useful instruments to prevent situations in which military activities, in particular naval and air activities, might cause escalation of minor incidents. Russia is also trying to exploiting diverging views among NATO member states on how to handle the alliance's policy towards Russia.

However, it is a challenge for NATO to establish a mutual understanding with Russia about effective confidence-building and conflict-prevention measures because of Russia's distrust of NATO and Russia's unwillingness to engage in deep and extensive transparency in military

issues. Russia thus regularly evades the principles of the Vienna document under which the OSCE countries, including Russia, have committed to transparency in connection with larger military exercises.

Russia unwilling to exchange major concessions for easement of Western sanctions

Russia's economic prospects are becoming more critical as a result of the combined impact of the relatively low oil prices and the sanctions introduced by the EU and, in particular, the United States against parts of the Russian economy. Nevertheless, it is highly unlikely that Russia will make major political concessions to the EU and the United States or change its foreign policy behaviour significantly in order to get the sanctions eased or lifted.

Russia is portraying China as an alternative cooperation partner in its efforts to neutralize the effects of Western sanctions. Even though the Western sanctions have underscored the need for Russia to strengthen its cooperation with non-Western trade partners, it is less likely that the Western sanctions as such have had a decisive effect on the closer Russian-Chinese cooperation.

Russia is launching national initiatives in order to reduce the impact of the US and EU sanctions on Russia's economy. Russia has likely reached the conclusion that the US sanctions will remain in the long-term. Instead, Russia will give priority to undermining the consensus among the EU countries on the sanctions. Russia likely views the Parliamentary Assembly of the Council of Europe's acceptance of the country's return to the Assembly as a sign that the EU countries' solidarity against Russia is fragile.

Russia's foreign policy instruments

Russia's closed decision-making processes give Russia tactical advantages, which Russia may convert into relative strategic strength vis-à-vis the West. Russia uses diplomacy and cooperation in its foreign policy combined with offensive instruments that Western countries are reluctant to use. This may contribute to uncertainty about Russia's political course and intentions and thus make it complicated for Western countries to find effective responses.

Russia is working to increase its strategic clout and latitude by exploiting signs of weakness and internal discord and conflicts in the West. Russia is thus nourishing political disputes in Western countries and in the Western countries' organizations for cooperation. In Europe, Russia is disseminating carefully controlled information with the intention to fuel support for political movements which, for different reasons, are critical of Russia's main strategic opponents: the United States, NATO and the EU. In an attempt to appeal to right-wing sympathizers, Russia is focusing on themes such as migration and the EU, while criticism of the United States and NATO is used as a tool to appeal to left-winger sympathizers. It is Russia's overall intention to weaken the ability of NATO and the EU to conduct a coherent policy towards Russia.

Russia has a number of tactical advantages in foreign and security policy which Russia may convert into relative strategic strength vis-à-vis the West. Russia's leadership is thus able to make quick and risky decisions due to a top-down and closed political decision-making process. In addition, Russia's leadership can take decisions in foreign and security policy without the interference of an influential public opinion, and Russia's leadership does not have to accommodate the views and interests of allied nations.

Russia considers multifaceted cooperation with other states, bilaterally as well as in the framework of international organizations, as an important instrument in its foreign policy. However, Russia does not see such cooperation as an end in itself but sees it as one of many instruments to assert its great power status. Russia's conduct of its foreign policy is thus strongly influenced by its perception of international politics as a power struggle between great powers.

Thus, Russia does not refrain from using offensive instruments in its foreign policy that Western decision-makers are reluctant or unwilling to use. In addition to military instruments, such instruments include cyber operations, influence operations and offensive intelligence operations. Russia has demonstrated its ability to employ these instruments in a coordinated way against well-defined targets, and Russia has also proven its readiness to attempt to conceal and deny its involvement in such activities.

Russia often uses diplomacy and political and economic cooperation in combination with offensive instruments. This may contribute to uncertainty about Russia's political course and intentions and thus make it complicated for Western countries to find effective responses.

Russian armed forces are the essential instrument in Russia's foreign policy

Russia sees its armed forces as the most important instrument to secure its existence and sovereignty and as the means to establish itself as a global great power. Consequently, defence spending will continue to be given a high priority. Since 2017, Russian defence spending has been at a high and stable level. However, Russia's relatively weak economic foundation forces it to carefully prioritize its defence spending.

Russia will continue to prioritize the development of its strategic nuclear forces. Should Russia become the target of a nuclear attack, the role of the strategic nuclear weapons is strategic retaliation and destruction of the adversary, in particular the United States. Russia perceives the missile defence systems of the United States and NATO as a potential threat to its ability to retaliate a US nuclear attack.

Russia also regards its strategic nuclear weapons as the best means to compensate for its weak economic foundation in its claim to great power status vis-á-vis the United States, other Western countries and China. Russia thus possesses a wide palette of nuclear capabilities ranging from intercontinental ballistic missiles to nuclear artillery shells.

Russia also finds it important to be able to sustain its great power status through strategic force projection over long distances. Key assets to this end include strategic bombers and naval units, including submarines armed with advanced long-range cruise missiles.

Russia's military intervention in Syria shows its willingness and its capability to deploy and maintain military forces in a conflict area far from Russian borders over an extended number of years. Russia also deploys military advisers, special operations forces, paramilitary forces and private security companies in support of regimes and other actors that can be used to achieve Russia's strategic objectives.

Russia focuses on development of high-tech weapons

Drawing on its technological competencies, Russia also gives very high priority to the development of weapons technology which, in certain areas, is more advanced than Western technologies and operational weapons systems. This is especially apparent within missile technology but also within electronic warfare systems, a field in which Russia's efforts are focused on improving its ability to defeat a high-tech adversary, mainly NATO.

To Russia, export of modern weapons systems is also an important instrument for establishing cooperative relations with countries that are useful for Russia's strategic objectives.

Russia lacks the economic and technological resources to enter into a general and broad arms race with the West. Instead, Russia is focusing strongly on developing military technological capabilities within a few prioritized areas, which are highly likely chosen based on where Russia can obtain the maximum effect and best relative advantage in relation to the West.

Russia sees a potential in exploiting the increasing dependence Western military forces have on network-based information exchange and satellite navigation. As a result, Russia focuses massively on the use of electronic warfare both for active jamming – that is, interruption of radio signals – and passive intelligence collection. Russia has experimented with the use of artificial intelligence in autonomous systems for electronic warfare in Ukraine and Syria, and Russia will likely continue to prioritize the use of artificial intelligence and robotics for military purposes.

Russia also prioritizes long-range missile technology as a response to the West's general air and sea superiority, likely on the assumption that it will obtain greater relative combat power by reinforcing its fleet of small missile corvettes and long-range missile submarines than it would through larger warships that are highly vulnerable to attacks from US aircraft carriers on the open sea. Similarly, the expansion of both the strategic and tactical air defence capabilities is prioritized above the continued development and production of the SU-57 fighter aircraft as a competitor to the West's high-tech 5th generation F-35 Joint Strike Fighter aircraft.

Russia has also launched a long-term plan for the development of new strategic weapons systems, which include hypersonic glide vehicles and a nuclear-powered cruise missile. The development of these systems should highly likely be seen as a direct strategic response to the United States' continued development of ballistic missile defence.

Finally, Russia has allocated major resources to maintain and expand its capacity for deep-sea investigations and operations. The Russian Ministry of Defence has access to nuclear-powered special submarines and research vessels carrying mini submarines capable of diving to depths that are only accessible to a very limited number

(1) 11th Army Corps, Kaliningrad Tank Regiment Iskander missile brigade 3 new missile corvettes	**(2) Airborne Troops** Tank battalion and airborne infantry battalion	**(3) 20th Army, Klintsy** Motor Rifle Division	**(4) 20th Army, Kursk** Iskander missile brigade
(5) 20th Army, Voronezh Motor Rifle Division	**(6) 8th Army, Rostov** Motor Rifle Division	**(7) Central Military District** Tank Division	

The map of Russian military force build-up in Denmark's neighbouring region includes a new tank regiment; a new artillery regiment and an Iskander missile brigade in Kaliningrad; six new air defence battalions; approx. eight new modern fighter aircraft; three missile corvettes; and tanks and a new combat regiment for the Russian airborne troops.

of states. Russia also has a state-owned fleet of civilian research vessels, some of which have deep-sea research capabilities that are comparable to those of the military vessels.

Influence operations are a key instrument in Russia's foreign policy

Russia perceives the global information space as an international battle ground. Influence operations have become a key foreign policy instrument, especially following the Ukraine crisis. Influence operations are most notably used to stimulate the political development in Europe, towards weakening the coherence of European and transatlantic cooperation.

The purpose of the operations is to create better conditions for Russia's foreign policy by influencing decision-making processes abroad and undermining the ability of, in particular, the United States, the EU and NATO to conduct a coherent policy towards Russia, not least in countries in Russia's vicinity but also globally.

For several years, Russia has conducted influence operations in support of EU- and NATO- sceptic parties and actors across the political spectrum. Russia is also trying to undermine the credibility of Western politicians, authorities and opinion-makers and to instigate doubt in the Western public about the credibility of scientists and opinion-makers who are critical of Russia.

Russian influence operations are coordinated by the Russian leadership in concert with the Russian intelligence services. Russian influence operations continue to include traditional media, hackers, conferences, social media and so-called troll factories, where employees are tasked with running a vast number of fake online accounts. The influence tools are continuously optimized, the better to disguise their Russian origin and Russia's involvement, and advanced technology is developed to generate fake content and to bypass methods designed to track false accounts.

Russia also uses targeted personal contacts to decision-makers and opinion-makers in the EU. Russia has also in some cases supported its contacts financially. In 2019, public disclosures have shown that politicians in some European countries have been willing to accept Russian donations.

Russian-controlled media also cover EU, NATO and immigration issues with a one-sided editorial line, broadcasting stories that are not necessarily false but at least biased and taken out of context.

Influence operations still a threat to Denmark

The June 2019 parliamentary election in Denmark was not hit by a well-prepared and coordinated Russian influence operation. Russia likely assessed that any potential gains from such a campaign were not worth the associated risks and costs.

Russia has responded to the Western public's increasing awareness of the Russian influence operations by adjusting its campaigns. Consequently, voter influencing is not necessarily confined to spectacular operations during election campaigns; rather, it is a continuous process that takes place over an extended period of time and between election campaigns. Russia has thus, for years, conducted extensive information operations in a number of EU countries, for instance via social media, possibly contributing to the mobilization of voters, in particular on the outer ends of the political spectrum.

During the May 2019 European Parliament elections, comprehensive Russian campaigns were thus observed on social media, which had lasted for years, with the Russian accounts mirroring local accounts and communicating in local languages. The campaigns supported messages that were critical of immigration, the EU and NATO, occasionally disseminating ordinary conspiracy theories as well. However, the European Parliament elections were free of the attempts at Russian voter influencing observed in connection with the US and French presidential elections in 2016 and 2017 respectively, when information from campaign staffs was hacked and leaked.

It is still likely that Denmark may become the target of a Russian influence operation with little or no warning. In 2019, Russia has conducted influence operations on social media in Nordic countries in Nordic languages. Russia highly likely has the capacity to focus and adapt influence operations against Denmark to target political issues that will resonate with the Danish public such as immigration and Denmark's relationship with the EU. Russia also continues its long-term efforts to build up a capacity to influence political decision-making beyond its own political sphere, including in Denmark.

Russia and the post-Soviet space

Russia wants spheres of influence in the post-Soviet space to strengthen its regional security. Russia's military capability for offensive operations has been strongly enhanced in this area, and Russia will likely increase its use of influence operations against the countries in the region.

Russia will continue to give top priority to securing its dominant influence on the foreign and security policy of the countries in the post-Soviet space, not least in Ukraine, Belarus and Moldova, which Russia regards as part of its own historic and cultural identity.

Russia will likely put greater emphasis on the use of influence operations in its policy towards the countries in the post-Soviet space. However, Russia will likely also use other means to prevent Ukraine, Belarus and Moldova from joining NATO and the EU.

Russia wants spheres of influence and security zones in the post-Soviet to provide strategic depth for the defence of Russia in case of a military conflict with NATO. Russia's military build-up has given Russia an improved capability to conduct a conventional war with NATO and has also strengthened Russia's capabilities for offensive operations against its neighbouring countries in the post-Soviet space, not least against Ukraine. Close to Ukraine's borders, Russia has concentrated a significant force which can be deployed at very short notice.

For Russia, Ukraine is the most important country in the post-Soviet space. Russia believes that NATO's and the EU's relations with Ukraine reflect an intention to weaken Russia's strategic position. In addition, Russia regards the Western countries' demands to Ukraine for extensive reforms as a threat to Russia's own political institutions and traditions.

It is less likely that Russia currently has an interest in escalating the conflict and starting an extensive military conflict with Ukraine. Still, the November 2018 incident in which Russia fired upon and captured Ukrainian Navy vessels in the Kerch Strait shows that Russia is willing to use military force to enforce its de facto control of the Crimea Peninsula and the entry to the Sea of Azov.

It is likely that Russia following the Ukrainian presidential election in April, the June parliamentary election and the September prisoner exchange, all in 2019, sees opportunities for an improved dialogue with Ukraine's leadership. However, Russia will continue to stick to its fundamental positions in the negotiation process in order to prevent Ukraine's membership of NATO and EU. Consequently, Russia will also continue its support for the separatists in south-eastern Ukraine.

The Baltic Sea region

The Baltic Sea region is still characterized by the tensions between NATO and Russia. Russia will likely attempt to improve its relations with Denmark, but conditions for cooperation between Russia and Denmark will continue to be difficult. Russia will not deliberately take military steps that include a high risk of military conflict with NATO. Still, Russia's closed decision-making processes and deep-seated distrust of NATO carry a risk of unintended escalation between Russia and the West.

The Baltic Sea region is characterized by the tensions between NATO and Russia. Russia is deeply distrustful of NATO's activities in the Baltic Sea region, not least of NATO's enhanced Forward Presence (eFP) in the three Baltic countries and Poland. Russia perceives NATO's presence as military preparations against Russia. Russia is also deeply concerned of Sweden's and Finland's military cooperation with NATO.

Though Russia still regards Estonia, Latvia and Lithuania as part of its sphere of influence, their NATO and EU memberships make it impossible for Russia to regain influence on the countries' foreign and security policy. Nevertheless, Russia is still attempting to influence some of the countries' decision-makers and Russian-speaking minorities to promote Russian interests. In addition, Russia will likely seek new opportunities to weaken the three countries' ties to NATO and the EU.

Relations between Russia and Denmark will remain difficult

Russia's relationship with Denmark is affected by the tensions between Russia and NATO in the Baltic Sea Region. Furthermore, Russia is distrustful of Denmark's foreign and security policy. Russia regards Denmark's strong backing for the EU sanctions and Denmark's force contribution to the eFP in Estonia as an expression of its confrontational course towards Russia. The bilateral

relations are also affected by Russia's view of Denmark as a small state that supports the US strategic interests, in particular in the Baltic Sea region.

For years, Russia's plan to construct the Nord Stream 2 gas pipeline in the Baltic Sea has complicated the bilateral relations between Russia and Denmark. With the administrative decision by the Danish Energy Agency to allow the construction of the gas pipeline in Denmark's exclusive economic zone, a major obstacle in the Russian-Danish relations has likely been eliminated.

Russia's interests in Denmark also include trade and investments. Also, Russia likely sees an improved dialogue with Denmark as an instrument to keep relations with Denmark on a cooperative track in Arctic issues. Russia will thus continue to have an interest in pragmatic cooperation with Denmark, though the conditions for the cooperation will be difficult.

Russia will continue its military build-up in the region

The objectives of Russia's military dispositions in the Baltic Sea region are defending the Kaliningrad region, securing lines of communication and the ability to contest NATO's freedom of movement in the central part of the Baltic Sea.

In recent years, Russia has carried out a significant military build-up in the western part of the country and in the Kaliningrad region, a build-up that includes deployment of additional ground forces and new tanks and artillery systems. The Russian Baltic Fleet is also being reinforced, including the addition of smaller missile corvettes armed with long-range Kalibr cruise missiles.

Russia's military build-up is aimed at retaining and expanding its local military superiority and likely also at deterring NATO from further increasing its military presence in the Baltic countries and Poland. In the event of a crisis, Russia could quickly assemble a superior ground force at its border with the Baltic countries. At the same time, Russia's long-range missile systems would make it difficult for NATO to reinforce the Baltic countries. In a serious crisis situation in the Baltic Sea region, Russia could to the widest possible extent use these forces in an attempt to undermine NATO's ability to honour its collective defence commitment.

In the event of a crisis in the Baltic Sea region, Russia's assessment of NATO's cohesion and resolve, including, in particular, the cohesion of the transatlantic relationship,

would likely be the most important element in Russia's strategic deliberations.

There is a risk that Russia would perceive a lack of resolve and the inability to secure the credibility of NATO's collective defence commitment as signs of weakness that Russia would be able to exploit in order to intensify a political and military pressure on the Baltic countries. However, it is highly unlikely that Russia would deliberately take military initiatives against the Baltic countries or other countries in Denmark's vicinity that would, in Russia's view, entail a high risk of direct military conflict with a NATO that stands united.

Still, as a result of its closed decision-making processes and deep-seated distrust of NATO, there is a risk that Russia in the event of an escalating crisis might be inclined to misinterpret NATO's intentions and military dispositions in the Baltic Sea region. This might raise the risk of an accidental escalation between Russia and the West.

Russia will continue to use military activities for strategic messaging

Russia's combat aircraft regularly conduct interception and reconnaissance operations in the central part of the Baltic Sea against Western military aircraft and vessels. Most activities are relatively low-key and routine, focusing on surveillance and intelligence collection against Western capabilities.

Occasionally, though, Russia also conducts activities that can have an aggressive character, such as close flybys or simulated attacks against Western vessels and aircraft. The purpose of such activities is likely to signal disapproval of Western military dispositions and, more generally, to project military strength in Russia's neighbouring region. Still, Russia will likely continue to be careful not to let such flights violate Denmark's airspace and territory.

China's President Xi Jinping speaks at the press briefing of The Second Belt and Road Forum on 27 April 2019. The second Belt and Road Forum was attended by numerous world leaders.

CHINA

China continues to increase its international influence through active involvement in existing international institutions, formation of new bilateral partnerships, multilateral cooperation forums and global economic initiatives. China's economic agreements and investments abroad reflect the country's economic, diplomatic and strategic interests. The United States perceives China as its main strategic rival and is increasingly seeking to hamper China's development. China is modernizing its military and will continue to assert its territorial claims in the South China Sea. China is expanding cooperation with Russia, but mutual bilateral scepticism persists.

Under Xi Jinping's leadership, China has stepped forward as an active and global player determined to have more influence on regional and global affairs. In domestic Chinese media, the country's new role is linked to Xi Jinping and his political leadership. China's long-term strategic objectives are centred both on addressing the country's domestic challenges and needs as well as increasing China's role and influence internationally.

At the same time, President Xi Jinping has further centralized the power in the Communist Party around himself and his closest advisors. The leadership is growing less tolerant of national and international interpretations of China's political development that differ from those of the Party. The centralization of power within China's Communist Party also manifests itself at all administrative levels within the political system,

party units in Chinese companies, in the educational system, and in Chinese media.

In various respects, China is becoming increasingly repressive, focusing on enhanced use of high-tech and digital solutions for surveillance, information collection and control of the population. The leadership has, in this regard, introduced automatic facial recognition and artificial intelligence systems, particularly in the Xinjiang region in north-western China, where high-tech solutions have been implemented as a tool to monitor and control the religious practices of the Muslim Uighur minority and to limit their freedom to travel.

Since the formation of the National Security Council in 2013, China has introduced a series of reforms of the country's national security legislation, among other things a number of amendments to existing legislation as well as new Chinese national security legislation. This includes updated statutes pertaining to China's Counter-Espionage Law (2014), China's National Security Law (2015), China's Counter-Terrorism Law (2016), China's Cyber Security Law (2016), and China's National Intelligence Law (2017). China's National Intelligence Law has formalized Chinese intelligence services' option to instruct private companies, organizations or individuals to disclose information relating to China's national security.

However, overall, China is also facing a series of challenges, especially when it comes to domestic economic issues. These include a growing debt burden, excess capacity, low productivity in sectors dominated by state-owned companies, a rapidly growing elderly population as well as severe environmental challenges. At the same time, China is also transitioning to an economy driven by domestic consumption rather than exports and investments.

Expansion of China's working-age population has long been a powerful engine of China's economy. However, this trend is currently changing as the country's ratio of working-age population to the elderly has begun to shrink. This demographic trend is a challenge to the economy, enhancing the need for increased productivity and transition to higher value-added production.

The transition of the Chinese economy is a major challenge to China, as continuous economic growth is one of the cornerstones of the ruling Communist Party's continued legitimacy.

China's 2049 objectives

It is China's declared long-term ambition that by 2049 — the centenary of the founding of the People's Republic of China — the country will increase its national strength and international influence and establish itself as a global leader.

- By 2025, China's ambition is to have established a modern, prosperous society governed by a strong party and an effective state administration. At the same time, China aims to establish a group of globally competitive multinational high-tech companies.

- By 2035, China aims to strengthen the country's international clout and the Chinese industrial sector in an effort to ensure that Chinese companies become international market leaders in the fields of innovation and high-technology within a number of prioritized sectors.

- In the course of 15 years — from 2035 to 2049 — China aims to achieve a leading role when it comes to political, technological and cultural matters.

These long-term objectives will shape China's political priorities and development strategy in the coming decades.

The crisis in Hong Kong is a challenge to the Beijing leadership. The reasons why the situation escalated the way it did are diverse and complex. The popular dissatisfaction that led to the protests was triggered not only by the tense relations between Hong Kong and mainland China, but also by internal affairs in Hong Kong.

As a special administrative region, Hong Kong remains important to China and Chinese companies operating globally. However, Hong Kong's economic relevance to China is no longer as evident as was the case when Hong Kong was handed over from British to Chinese rule in 1997. It is likely that the Chinese government has adopted a wait-and-see attitude in the hope that the protests will slowly subside and that the government will exercise prudence before introducing extreme measures.

China bolsters its global role and influence
China continues its development to become a more influential player internationally. China seeks to strengthen its economic and political influence both globally and regionally through both bilateral and multilateral cooperation projects and agreements.

In recent years, China has been a major contributor to the build-up of new international institutions, promoting them as a supplement to existing global forums, including the Asian Infrastructure and Investment Bank, the Shanghai Cooperation Organization and China's bilateral cooperation with 17 Central and Eastern European countries, the so-called 17+1 cooperation initiative.

China has also been able to influence the regional economic structures in Asia, the Pacific region and Europe. Today, China's Belt and Road Initiative (BRI) has to a large degree helped advance China's regional and global involvement.

The BRI has developed into an all-encompassing global project that has spread beyond China's neighbouring regions to a number of countries in Africa, South America and Europe as well as the Arctic. China aims to improve ties between China and the rest of Asia, Africa and Europe through infrastructure investments and increased trade. The BRI draws heavily on China's investment capital and the excess capacity of Chinese state-owned and private companies to strengthen relations between China and the other BRI member countries.

In addition to serving as a platform for boosting commercial and trade relations between China and the countries participating in the BRI, the BRI also has a more long-term strategic objective. By linking an increasing number of countries to the BRI project, China is making efforts to garner support for its regional and global economic and strategic priorities. China often takes the initiative to design the bilateral cooperation agreements and projects agreed upon within the framework of the BRI, while the responsibility for funding the projects, as a general rule, rests with the respective BRI members themselves. In recent years, the BRI has expanded, and an increasing number of countries are actively choosing to become part of the BRI.

China has taken active steps to promote the country's development model to other countries, presenting it as an alternative to, in particular, the Western, liberal, market-based development model. The promotion of China's economic development model, in which state and party maintain the fundamental control of the market economy, is aimed at developing countries in Africa, South East Asia and Central Asia, in particular. China's development model is promoted as an opportunity for modernization that will allow countries to successfully implement economic reforms and development measures without having to fundamentally reform their political systems.

China's increasing engagement with other countries is also taking place within the technological domain. An increasing number of countries regard Chinese entities as attractive cooperation partners. Also, numerous countries are looking to adopt Chinese surveillance technology as a tool to monitor their own citizens.

Within a few years, a number of Chinese high-tech companies have succeeded in establishing globally competitive companies. Investments in research and development have, for example, secured Chinese companies a leading position on the international market in the field of 5G, while also attracting global attention. The technological and security challenges of 5G and Chinese technology have so far been handled differently and not coordinated by the individual European countries. In that connection, focus is on issues such as the Chinese intelligence legislation from 2017 and the risk that Chinese intelligence services, under certain circumstances, could be authorized to order Chinese companies to disclose information.

China continues its targeted investment approach
Chinese economic agreements and investments abroad reflect overlapping economic, diplomatic and strategic initiatives that strengthen the country's foreign policy and improve the global competitiveness of Chinese companies.

China's strategic development plan "Made in China 2025" continues to focus on acquiring and developing advanced technologies. Today, China's largest tech giants are key players in the international market and main competitors to US and European companies. In an effort to further promote this development, China is increasingly focusing its foreign investments on acquiring foreign technology in an effort to strengthen the country's domestic economic development.

Some of the means to achieve the objectives outlined in "Made in China 2025" in combination with China's 2049 strategic objectives include economic agreements, focused direct investments in foreign high-tech industries and start-ups, joint venture agreements and equity investments.

China is already launching such initiatives in Europe and North America.

China's development is met with scepticism and opposition from the United States

Based on the United States' 2017 national security strategy, the US administration has adopted a hard and critical stance against China. In the United States, there is a tendency to view Chinese conduct and activity from a strategic and security-related perspective and as part of the narrative that China has an underlying latent strategy.

The United States' criticism is centred on what is perceived as China's illegal conduct within the areas of trade, intellectual property rights, technology transfer and attempts to exercise political influence.

The US administration increasingly regards US-Chinese relations as a zero-sum game, one in which China's growing influence in the international area, particularly in Asia, comes at the expense of the US and thus impairs the role and influence of the United States.

The United States seeks to garner support, directly and indirectly, for its increasingly critical view of China among its allies and other nations.

The tensions in the bilateral relationship between the United States and China reflect an ongoing transition in the power balance between the two countries – particularly in Asia. China's ambition to play a greater role, particularly in the Asian region, has been met with scepticism and resistance from the United States, which appears unwilling to accept China's increasing role as an influential power.

China is modernizing its military and asserts its territorial claims in the South China Sea

China is modernizing its entire military, including the navy, army and air force, as well as the military cyber capabilities. Even though China is improving its global military operational capabilities, upholding the power balance in the western Pacific region remains as its top priority.

The expansion and modernization of the Chinese navy, in particular, mean that the Chinese navy today is equipped with more modern and upgraded units compared to the navies of the United States, Japan, South Korea and Taiwan. As a result, these expansion efforts together with an overall modernization of China's military will tip the power balance in China's favour in the long to very long

term, unless the other countries expand their military modernization programmes. The building of aircraft carriers, larger amphibious carriers, cruisers and expansion of the marine infantry will enable China to project global military power that will only be exceeded by the United States in the long term.

The South China Sea will remain among China's top foreign policy priorities, and China will increase its presence and exercise of authority in the South China Sea. China will likely continue the build-up of military installations on the artificial islands on the South China Sea in a bid to reinforce the coast guard and military control of waters in the contested areas. China is simultaneously using diplomatic initiatives, increased economic cooperation and investment offers to actively improve its relations with the countries in the region. However, despite these initiatives, China will continue to assert its territorial claims.

Even though the United States will continue to launch routine operations to dispute the legitimacy of the Chinese territorial claims, these operations alone will not worsen US-China relations.

China's increased exercise of authority through both the Chinese Coast Guard and the military is likely rooted in an ambition to be able to control and monitor the entire South China Sea area in the medium to long term.

China strengthens cooperation with Russia despite persistent mutual scepticism

China is strengthening its relations with Russia through political, economic and military cooperation as well as increased alignment of their foreign policy views. In June 2019, China and Russia forged a strategic partnership aimed at strengthening their bilateral relations. Even though improvement in Russian-Chinese relations may be used to offset political pressure by the United States, a de facto alliance between China and Russia is highly unlikely. Conflicting interests in Central Asia, in particular, are the cause of tensions between the two countries. However, the two countries have likely come to the mutual understanding of each other's engagement in the region and seek to avoid challenging their respective strategic interests.
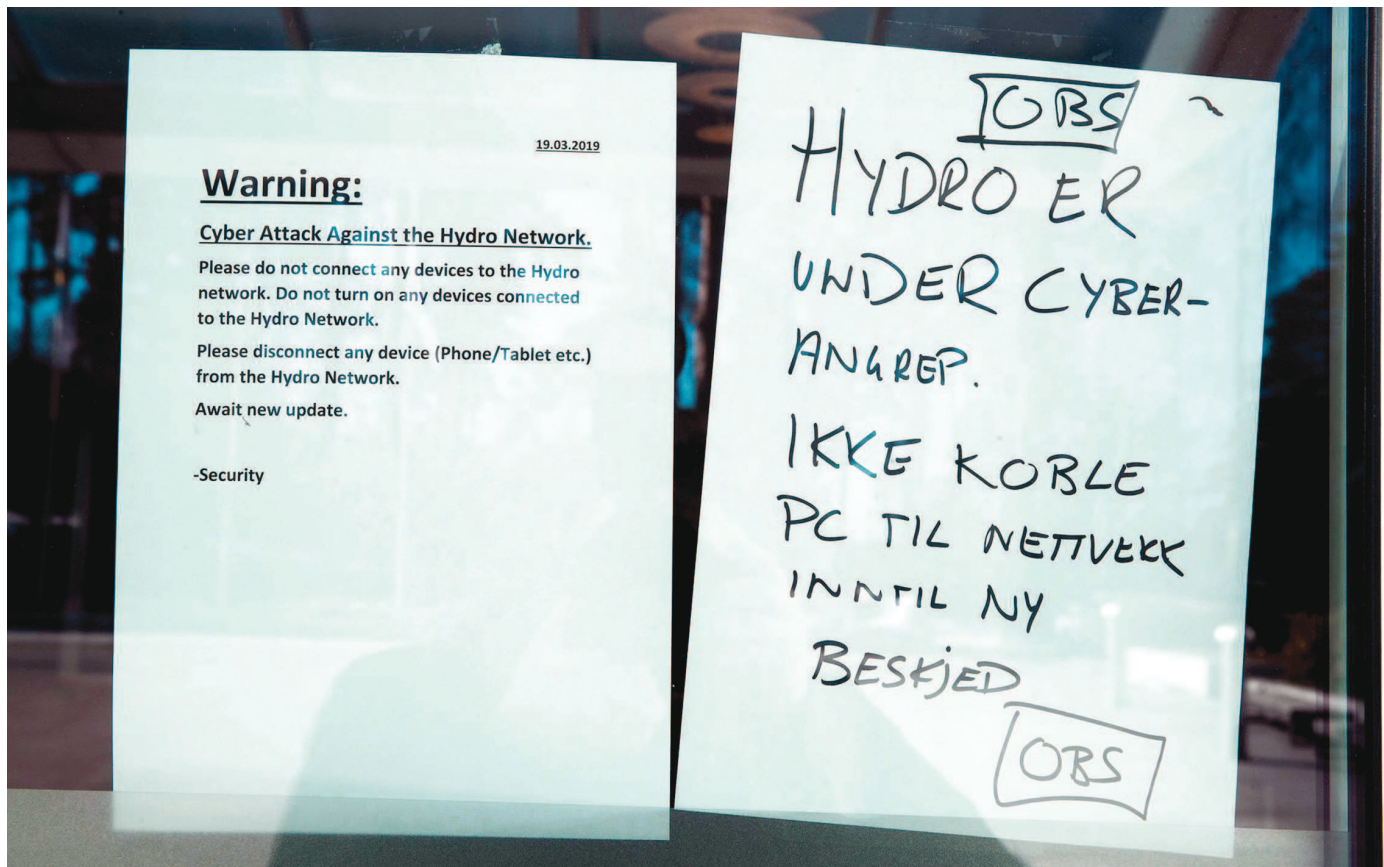
Warning signs posted in connection with the 19 March 2019 cyber attack against Hydro.

THE CYBER THREAT

The very high threat of cyber attacks against Denmark has become an everyday reality. Cyber attacks on Danish private companies and public authorities may carry serious repercussions. Attacks launched by criminal or state actors are particularly threatening to Danish interests. Different types of actors launch attacks on the infrastructure of the Internet, potentially undermining the trust in the ability of traditional IT security measures to protect Danish organizations sufficiently.

The cyber threat is still among the most serious threats against Denmark and Danish interests, in particular the threat of cyber espionage and cyber crime. Criminal hackers and foreign states may, at worst, disturb the availability of critical public services, as many of these services depend on digital systems. The physical world has become highly digitized, with attacks targeting digital systems increasingly having an impact in the physical world.

Cyber attacks may have damaging consequences in the physical world, for instance serious economic losses for Danish private companies or disruption in the availability of critical services, such as electricity. For Danish authorities a cyber attack can, for example, render systems inoperable or result in the theft or destruction of sensitive or valuable data. Destructive cyber attacks whose purpose is to harm or destroy physical objects, data, information or software are less likely to occur but will have serious impact on the physical world if carried out.

Cyber attacks have different purposes

Cyber attacks may have grave consequences for Denmark. Cyber espionage may affect Danish national security and Danish competitiveness. Cyber crime may, at worst, prevent private companies and public authorities from delivering critical services. Also, it is possible that Danish private companies and public authorities could become collateral victims of destructive cyber attacks against targets outside of Denmark.

Foreign states with significant cyber capabilities conduct cyber espionage against Denmark and pose a serious threat to Denmark. Foreign states are actively engaged in systematic and continuous attempts to carry out cyber espionage against Danish targets. Cyber espionage may enable theft of intellectual property and sensitive strategic or security policy information, thereby possibly affecting Danish national security, the Danish economy and Danish competitiveness.

Foreign states' cyber espionage attempts are particularly directed at the Danish Ministry of Foreign Affairs and the Danish Ministry of Defence and their affiliated institutions. Foreign states are particularly interested in information related to NATO, the EU and the Arctic. The threat of state-sponsored cyber espionage directed at foreign policy and defence policy areas will persist in the long term and may affect Danish interests in the short to long term. It is also a common occurrence for foreign states to try to compromise other Danish public authorities.

Danish private companies also remain targets of cyber espionage. Some foreign countries are actively seeking to steal intellectual property or other types of commercial data. Other countries have repeatedly accused China of conducting cyber espionage campaigns against public authorities and private companies worldwide.

We expect that foreign actors will use cyber espionage along with other tools in connection with crises or conflicts. Foreign states use cyber espionage to map other states' critical infrastructure. Subsequently, this knowledge can be used to facilitate destructive cyber attacks in the event of an escalating conflict.

Cyber capabilities of select foreign states

Russia

Russia uses significant resources to promote its interests in the country's neighbouring area and other areas of strategic importance, using tools such as its cyber capabilities to reach its objectives. The Russian state has extensive cyber espionage and destructive cyber attack capabilities to support Russia's strategic and security policy interests and military operations. Russia is still a leading and highly active actor in the cyber realm.

China

China has sophisticated cyber capabilities which are used to promote Chinese interests. It is likely that the ongoing reorganization of the Chinese military will facilitate synergy effects in the cyber capabilities of the Chinese military. We assess that these effects will heighten the level of sophistication of the Chinese military's cyber espionage in the short term (0 – 2 years), making them increasingly difficult to detect and ultimately better at gathering information.

Iran

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

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, there are indications that North Korea is engaged in financially motivated cyber crime.

Ransomware attacks

A ransomware attack is when a victim's computer or data is held hostage, i.e. encrypted, rendering the data unavailable to the victim. The actor behind the attacks demands a ransom in exchange for restoring the victim's access to the data.

Danish company victim of extensive ransomware cyber attack

In September 2019, the Danish company Demant was hit by a ransomware attack, forcing it to shut down IT systems across locations. According to Demant, key business processes throughout the value chain were impacted by the incident, including distribution, production, research and development. Demant estimates the collected financial losses from the incident to run up to between DKK 550 and 650 million in 2019.

Targeted cyber attacks launched by criminals threaten Danish organizations

Cyber criminals continue to launch cyber attacks that may seriously damage the financial position and reputation of Danish private companies and public authorities.

On a global scale, cyber criminals increasingly launch targeted ransomware attacks on public authorities and private companies. Ransomware attacks on Danish private companies and public authorities that are vital to the functioning of Danish society may, at worst, disrupt their operations and deliverance of vital services. There have been examples in the United States in which local law enforcement agencies and emergency dispatch centres have fallen victim to ransomware attacks and been forced to revert to less efficient manual systems to maintain their services.

Targeted ransomware attacks are typically launched by organized and professional criminal hacker networks. These attacks often happen over a longer period of time, where the hackers use time to understand the network they have attacked in order to subsequently hit where it affects the victim the most. Criminals launching targeted ransomware attacks often select their targets based on their expected ability to pay high ransoms. Also, it is possible that hackers who have managed to compromise a company will sell the access to the hacked company's network to other hackers, who then launch the actual attack.

Targeted ransomware attacks are an example of how some cyber criminals and state actors use similar tools and techniques. Cyber criminals have been known to launch cyber attacks allowing them to turn a quick profit, but today a growing number of cyber criminal networks are demonstrating a higher degree of patience and persistence.

An example of this is described in the US Department of Justice's November 2018 indictment of the actors behind the so-called SamSam ransomware. SamSam was used in a series of attacks that targeted a large number of critical public authorities and private companies in the United

Global company Hydro lost NOK 650 million

In March 2019, the global company Hydro was hit by a targeted ransomware attack. The attackers used a variant of the LockerGoga ransomware which had been designed specifically to attack Hydro.

The attack disrupted operations and cost the company NOK 650 million.

States from 2015 until 2018. The SamSam attacks were launched in different stages. Firstly, the actors penetrated the victim's network by exploiting known vulnerabilities in the servers. Then, the hackers used sophisticated tools to map the victim's network in a bid to spread the ransomware to other parts of the network. In some cases, the SamSam actors spent weeks mapping out the network. Hereafter, the hackers encrypted data across the network at once, and finally presented the infected organization with a ransom demand.

Outside Denmark, organizations across multiple sectors have fallen victim to targeted ransomware attacks, including public authorities, schools and the healthcare, maritime and transportation sectors. Cyber criminals are indiscriminate and no organization is thus immune to targeted ransomware attacks, which means that there is no specific victim profile.

Other types of cyber crime also continue to pose a threat

Danish public authorities and private companies also fall victim to other types of cyber crime besides ransomware attacks, including so-called CEO fraud, theft of financial and sensitive personal information, and other types of

extortion in which criminals claim to have gained access to compromising information about the victim.

While some attack techniques are well-known and still used actively, the threat from cyber criminals is constantly changing. With new technologies come new vulnerabilities that hackers will try to exploit, for example when companies and authorities launch new citizen- or customer-focused digital services.

The threat of destructive cyber attacks against Denmark

In the short term, it is less likely that foreign states will launch destructive cyber attacks that destroy or change data and software against critical infrastructure in Denmark. However, the threat can change should Denmark be in a conflict with countries that hold destructive cyber attack capabilities.

A number of countries are developing destructive cyber attack capabilities that can be used in connection with a military or heightened political conflict. One element of this capacity building process is the mapping of critical infrastructure, with hackers targeting companies working with critical infrastructure, among others, and monitoring their network in order to gain access to industrial control systems.

Our definition of a destructive cyber attack covers cyber attacks with very different consequences, ranging from deletion of data to physical destruction. Destructive cyber attacks have most often resulted in the destruction of data which have been deleted or rendered inaccessible by malware or tools also known as wipers. Destruction or manipulation of data in industrial control systems has, in some instances, resulted in disruption of operations or downtime. In a single incident dating back several years, a destructive cyber attack against Iran's nuclear programme caused physical destruction outside IT systems.

Destructive cyber attacks
We define destructive cyber attacks as attacks that could potentially result in death, personal injury, property damage, or destruction or manipulation of information, data or software, rendering them unfit for use unless extensive restoration is undertaken.

Danish private companies and public authorities abroad may become collateral victims of destructive cyber attacks against targets outside of Denmark, resulting in, for example, power cuts or loss of network access. This is especially the case for Danish private companies and public authorities operating in countries such as South Korea, Ukraine and Saudi Arabia, which are among the countries most frequently hit by destructive cyber attacks.

In December 2018, the Italian oil services company Saipem was targeted in a destructive cyber attack, which destroyed data on several hundred of the company's computers worldwide. Saipem is a subcontractor of the state-owned Saudi oil company Saudi Aramco. The attack demonstrated that, in addition to becoming collateral victims, companies may also be singled out as specific cyber attack targets if they operate in conflict zones.

Diplomatic and military crises result in additional cyber attacks

Cyber attacks are used as a political tool, and several foreign states are developing capabilities and using cyber attacks to influence other countries. In connection with conflicts and crises abroad, foreign states have been known to launch different types of cyber attacks. Conflicts may entail an increase in the number of cyber attacks, which again may also affect Danish interests.

A conflict between other states may, for instance, increase cyber espionage attempts against Danish public authorities, as foreign states will often try to focus their efforts to gather information on an adversary or its allies in connection with the conflict. Danish interests may also be affected by destructive cyber attacks targeting Danish companies that are geographically located in conflict zones or that are affiliated with companies operating in these areas.

Some foreign states will also continue to use cyber attack allegations as a strategy in connection with crises. Such allegations may potentially lead to a growing sense of uncertainty among the public and decision-makers alike, as it may prove difficult to confirm or deny that a cyber attack took place as well as identify the actual effect of the attack.

The impact of crises on the digital world was evidenced by the surge in cyber attacks against US companies and critical infrastructure generated by the increased tension between the United States and Iran in the spring of 2019. The situation also prompted the US president to publicly announce that the United States had launched a cyber

attack against targets in Iran in response to Iran's downing of a US drone.

Attack techniques

Cyber attacks against suppliers and via critical Internet infrastructure pose a threat to Danish private companies and public authorities. The public proliferation and theft of cyber attack tools may cause a sudden rise in the threat from certain actors or attack techniques. Cyber attacks remain a popular tool among different types of actors, as hackers can easily conceal their identity and thus avoid sanctions.

Cyber attacks on or via critical Internet infrastructure pose a threat as they affect the integrity of the Internet and the public trust in the ability of regular IT security measures to protect organizations against cyber attacks.

By attacking the Internet infrastructure, such as the Internet's equivalent of a phone book, the so-called Domain Name Servers (DNS), actors may impact multiple targets simultaneously and bypass standard IT security measures. The threat against the Internet infrastructure may affect all systems connected to the Internet.

By compromising the DNS system and performing a so-called DNS hijack, hackers may redirect and steal Internet and e-mail traffic. Both state actors and cyber criminals employ this type of attack technique. Hacker groups will make efforts to conduct cyber espionage, redirect Internet traffic to false websites to intercept passwords to digital services, spread malware or show revenue-generating advertisements.

There have been several attempts at DNS hijacking in 2019. The attacks affected victims in Switzerland, Greece, Sweden, Cyprus, the United States and a number of countries in the Middle East and North Africa. For instance, hackers were able to compromise the organization that manages the top-level domain for Greece ".gr" gaining access to its networks for several days. A top-level domain refers to the last segment of a domain name, or the part that follows immediately after the "dot" symbol such as ".dk" or ".com".

Border Gateway Protocol (BGP) routers – the routing protocol of the Internet used to route traffic across the Internet – have also been exploited by hackers. So-called BGP hijacks can be used to reroute, monitor, change or steal large amounts of Internet traffic. Successful BGP hijacks are complex, and it is likely that only foreign states and a few sophisticated cyber criminals have the skills required to launch a BGP hijack. In April 2018, foreign cyber criminals managed to steal cryptocurrency by means of a BGP hijack.

Due to the structure of the Internet, a BGP hijack may impact Danish Internet users irrespective of the geographic origin of the attack. In addition to rerouting Internet traffic, a BGP hijack may slow down or disrupt parts of the Internet traffic. Without effective monitoring of changes in the BGP routing, a BGP hijack which does not generate traffic disruptions may potentially go undetected for several weeks.

Denial of Service attacks that cause disruption of online services, such as Distributed Denial of Service (DDoS) attacks, also pose a threat to the Internet infrastructure. Most DDoS attacks target websites and only affect the owner and users of the services offered by the website. A DDoS attack against a DNS server may, however, affect all users of that particular DNS server, for example all the customers of an Internet Service Provider. Powerful DDoS attacks may potentially overload key routers or other network components of an Internet Service Provider.

Suppliers fall victim to cyber attacks

Cyber attacks directed against or launched via suppliers also pose a serious threat to Danish private companies or public authorities. This type of attack may be difficult to detect, and a successful attack may affect multiple organizations. In addition to the potentially serious consequences that cyber attacks against suppliers hold for the individual company or authority, the negative impact may extend to the supplier's partners, customers and users.

Suppliers often have unrestricted access to many of their clients' networks and data. By compromising a single supplier, an actor may get the opportunity to move between several clients' networks and data unhindered.

Actors also try to compromise suppliers across borders. The cyber security level within a supplier's branch located in another country may be poor, making it easier for hackers to use this particular branch as an entry point to compromise the rest of the supplier's systems. If the supplier's networks are not segregated from its branches, it

might allow the actor the possibility of moving horizontally in networks across borders.

In recent years, several major international suppliers have been compromised or targets of attempted compromise. Some of these suppliers provide services to authorities and companies in Denmark. In 2018, electronics giant ASUS was hacked. ASUS's official software, ASUS Live Update tool, was infected with malware, causing users who updated the programme to inadvertently download a compromised version of the ASUS software, potentially granting hackers access to their computers.

A cyber attack against a company via a supplier may have serious economic consequences as evidenced by the attack on British Airways which took place from August to September 2018. A security gap in a system belonging to a British Airways subcontractor allowed hackers to install malicious code into British Airways' system that enabled the hackers to store passenger names and e-mails. The hackers also gained access to card numbers, expiration dates and CVV numbers, when customers entered these on the website. British Airways has estimated that as many as 380,000 passengers were affected by the attack. In July 2019, British Airways was fined DKK 1.5 billion for infringement of the EU's General Data Protection Regulation.

Effective attack techniques spread quickly

Hackers employ the techniques that work. Consequently, a popular attack technique may quickly spread from other parts of the world and be used against victims in Denmark. So it is vital for Danish companies and authorities to stay updated continuously on the specific cyber attack methods reported by authorities, IT security companies and other relevant sources.

Today, sophisticated as well as less skilled hackers are able to buy hacking tools online. As a result, even hackers with

DDoS attack against Danish rail operator DSB

In September 2019, Danish rail operator DSB was exposed to a DDoS attack that paralyzed the DSB ticketing system, making passengers unable to buy tickets via the company's app and website for several hours. The attack did not, however, disrupt the running of the DSB trains.

limited technical skills are able to gain access to effective tools.

The ransomware GandCrab is an example of an effective cyber criminal tool that quickly spread. GandCrab is a ransomware-as-a-service, which cyber criminals can acquire via the Internet. In May 2019, the developers of GandCrab announced that they were shutting down operations and claimed that they had earned USD 2 billion since January 2018.

The threat of different types of cyber attacks may rise suddenly. Two examples from the spring of 2019 illustrate this, the surge seen in the spring of 2019 in the number of so-called sextortion mails, with which cyber criminals extorted victims by claiming they had access to private information or photos or video recordings of the victim, as well as the widespread phishing campaign that targeted Office 365 users. Cyber crime is constantly evolving as criminal hackers are willing and able to rapidly change tactics.

The ability of attackers to conceal their identities makes cyber attack an attractive tool

Cyber attacks are an attractive tool among different types of actors, as it is difficult for victims to attribute cyber attacks to specific perpetrators. By launching cyber attacks, attackers run a smaller risk of being hit by sanctions or legal action than they would had they employed conventional attack tactics.

State-sponsored hacker groups have been known to steal malware and infrastructure from each other. The stolen malware and infrastructure have subsequently been used to compromise foreign ministries, universities and businesses.

Malware theft and recycling make it difficult to identify the origin of an attack. In addition, as a result of malware and infrastructure theft, a victim who has been compromised by a given actor may also run the risk of being compromised by other hackers who have gained access to the same infrastructure.

Both criminals and state-sponsored hackers who want to gain access to knowledge use known hacker tools, for example malware available online. The use of publicly available malware makes attribution of a cyber attack difficult as the malware is not used exclusively by one particular group. It is easier for attackers to conceal their identity when they operate among a pool of actors using the same type of malware.

Armoured police car parked in front of the court building in Brussels, January 2019, in connection with the trial against Mehdi Nemmouche, who was convicted of killing four people in the 2014 terrorist attack on the Jewish Museum in Brussels. The attack was the first of several attacks in Europe launched by Syria fighters.

TERRORISM

Militant Islamists still pose a serious threat to the West, but the threat picture has changed, mainly as a result of strong military and counter-terrorism efforts against ISIL and al-Qaida. The number of terrorist attacks in the West conducted by militant Islamists reached an unprecedented high level during the years when ISIL controlled large swathes of territory in Syria. Today, attacks have fallen to a level which is comparable to the one seen in the period leading up to ISIL's proclamation of a caliphate in 2014. However, militant Islamists remain intent on attacking the West.

The global terrorist threat has changed. Today, the two primary militant Islamists groups, ISIL and al-Qaida, are weakened and have been forced to dedicate their focus to survival and local regional fights. However, they are far from defeated and maintain their regional and global ambitions. In addition, their ability to inspire sympathizers in the West and in numerous regions across the world to carry out attacks remains intact.

The loss of territorial control has reduced ISIL's capability for launching centrally directed, large-scale attacks against the West. However, the death of ISIL leader Abu Bakr al-

Baghdadi will not disrupt ISIL's operational capabilities or its resolve.

Strong counter-terrorism efforts and the loss of prominent leaders have had an impact on both ISIL's and al-Qaida's ability to launch and inspire terrorist attacks. However, the root causes of terrorism have not diminished, and the threat from militant Islamist groups and sympathizers will persist for years to come. In addition to the threat from militant Islamists, the terrorist threat landscape in the West has been characterized by an increasing number of right-wing extremist attacks in recent years.

The terrorist threat against the West

The primary terrorist threat to the West still comes from militant Islamists. The most serious threat emanates from lone wolf terrorists or small cells launching relatively simple attacks that require little planning and limited resources. Foreign fighter returnees will continue to pose a threat for years to come.

In 2014, ISIL proclaimed the establishment of an Islamic caliphate stretching from northern Iraq to eastern Syria. ISIL's self-proclaimed caliphate was unprecedented in size and structure. The idea of a caliphate appealed to a very large number of foreign fighters from across the world and heightened the terrorist threat against the West. From 2014 to 2017, ISIL managed to plan and execute several large-scale and relatively sophisticated attacks in Europe. At the same time, the group was able to radicalize, inspire and instruct sympathizers to carry out attacks, including attacks in their Western countries of residence. Within the span of a few years, militant Islamists were thus able to launch a high number of large- and small-scale terrorist attacks in the West.

In parallel with ISIL's territorial defeat in Syria and Iraq, Western authorities have bolstered their counter-terrorism efforts, killing numerous prominent members of ISIL as a result. The group's capability to launch centrally directed attacks against the West has diminished, and even though ISIL still produces propaganda, its ability to do so has diminished.

Even though ISIL's self-proclaimed caliphate was short-lived, it changed the threat landscape. If the pressure on ISIL and other terrorist groups is relieved, it may prompt a sudden increase in the number of attacks. To many, the narrative of ISIL still serves as a testament to the feasibility of a caliphate, and the group's military victories are still glorified in extremist circles. ISIL has set new standards for terrorist exploitation of propaganda, arms technology and brutality that could inspire extremist communities for years to come but potentially also influence, in particular, right-wing extremists in Western countries.

ISIL is far from defeated in Syria and Iraq. In parallel with losing its territory, ISIL has managed to transform into an insurgent and terrorist group with networks in most parts of Syria and Iraq. Despite of al-Baghdadi's death, ISIL will seek to exploit the changed balance of power in northern

Syria following the Turkish intervention to reconsolidate its position. The ISIL leadership still harbours ambitions to attack targets in the West, and the establishment of new subgroups and the execution of attacks in a number of different regions have demonstrated that ISIL and its ideology can still inspire local groups and networks to commit terrorist attacks on their own against local and Western targets.

In his capacity as the so-called caliph, al-Baghdadi was the personification of an Islamic state. How the remnants of the ISIL leadership decide to address the new situation will determine the future of the group, as Baghdadi's death may cause internal strife in the group, which is already under pressure and struggling to maintain its status. Al-Baghdadi's death does not immediately affect ISIL's capabilities and will have no direct impact on the terrorist threat posed by the group's networks, which remain intent on launching attacks on the West.

Similarly, al-Qaida's senior leadership remains resolved to attack the West. However, the group's capabilities have been depleted following years of intensive Western counter-terrorism efforts. Still, several of al-Qaida's regional subgroups have been strengthened in recent years but have so far zeroed in on regional targets.

In recent years, militant right-wing extremists have launched several terrorist attacks in the West against minorities and political opponents. Despite internal differences, the militant right-wing extremists share the same concept of the enemy and, to a certain degree, the same ideological conviction. They are increasingly making international connections, forming virtual networks across national borders, though they often operate alone. The threat from militant right-wing extremists will continue to be a focus for Western security and intelligence services.

The terrorist threat from within
Today, the main terrorist threat to the West emanates from lone wolf terrorists and small cells capable of launching relatively simple terrorist attacks that require little planning and limited resources. Propaganda and detailed instructions on how to build a bomb and launch a terrorist attack are readily available online, making it easier for people and networks that have never spent time nor have any affiliations with a terrorist group to plan and execute attacks in their countries of residence.

Radicalizers and foreign fighter returnees have a significant impact on the threat landscape in Western countries. Since

2016, only a handful of Western foreign fighters have managed to return to their home countries from Syria and Iraq. Unlike those who returned home prior to 2016, an increasing number of the foreign fighters who will return in the future have more actively opted for the extreme brand of violence that progressively characterized ISIL's rule.

In addition, the absence of an obvious and accessible conflict zone to attract fighters with terrorist aspirations will affect the terrorist threat in Europe. Between 2013 and 2016, more than 5,000 people left Europe for Syria to join ISIL and al-Qaida-related groups. The conflict in Syria has had a strongly radicalizing effect on Islamist communities but also, paradoxically, acted as a kind of valve draining Europe of a large number of seriously radicalized individuals, at least for a while. This has not been the case since 2016. Combined with the significant number of radicalized individuals who will be released from European prisons, this can affect the radicalized communities in Europe in the years to come.

ISIL is a regional terrorist and insurgent group with a global reach

ISIL's senior leadership and overall organizational structures have been severely reduced following the group's territorial defeat. Nevertheless, ISIL has managed to survive, morphing into an effective insurgent and terrorist underground movement in both Syria and Iraq. The group has networks and followers throughout the entire region. In addition, the group has official ISIL provinces and franchises in a number of countries and regions across the world as well as individuals and networks sympathizing with the group.

ISIL will pose a threat for years to come in Syria and Iraq due to the lack of government control over large territories and ISIL's continued anchoring in the local population, among other reasons. This is particularly evident in northern Syria, where ISIL is trying to exploit the vacuum that will follow as a result of Turkey's increased pressure on the Kurds, who will no longer be able to play the same vital role in the fight against ISIL.

Though ISIL's capability to launch centrally directed terrorist attacks in the West has diminished, the group has continuously made efforts to adapt to the counter-terrorism pressure by building new structures, allowing it to carry out attacks regionally and expand globally.

The establishment of several new ISIL franchises and provinces shows ISIL's continued relevance. In a speech

In April 2019, militant Islamists carried out a series of coordinated terrorist attacks in Sri Lanka that targeted both hotels and churches.

delivered in April 2019, al-Baghdadi emphasized ISIL's relevance by pointing out that the group had established several new ISIL provinces and praised the Sri Lanka terrorist attacks and ISIL's battles in Iraq and Syria. It is likely that the ISIL leadership will maintain its resolve to bolster its capabilities and significance outside of Syria and Iraq, as the group is under heavy pressure in the two countries and wants to preserve its global reach.

The December 2018 terrorist attack in Morocco in which an ISIL-inspired cell killed a Norwegian tourist and a Danish tourist and the massive terrorist attack in Sri Lanka are testaments to ISIL's ability to inspire its followers to carry out terrorist attacks globally. Both attacks were carried out by local cells that had pledged allegiance to ISIL prior to the attacks, even though none of the cells had any affiliations to leading ISIL members.

Rather, the perpetrators had been prevented from joining ISIL in Syria or Iraq, which likely prompted them to carry out the attacks locally instead. It is likely that, in the future, we will see more attacks of this type. Thus, ISIL's leadership or official franchises do not necessarily need to become involved in the planning or execution of terrorist attacks in order to maintain ISIL's reputation of being a potent terrorist group with global reach.

Al-Qaida is under pressure but remains intent on attacking the West
Despite years of targeted counter-terrorism efforts, al-Qaida still poses a threat to the West. Al-Qaida's senior leadership, which is primarily hiding out in Afghanistan, Pakistan and Iran, still considers the West its primary enemy, and al-Qaida has a more patient and strategic approach to the fight than ISIL.

However, al-Qaida's attack capabilities have been reduced, and many of the group's prominent leaders have been killed. Despite losing several of its prominent leaders over the past few years, the group still has several experienced leaders at its disposal and continues to produce propaganda directed at a global audience.

Al-Qaida's regional subgroups typically operate independently of al-Qaida's senior leadership and are primarily focused on local agendas. Nevertheless, they pose a terrorist threat to Western interests in the areas where they have established a presence. Al-Qaida subgroups in a number of countries in Africa, the Middle East and Asia have been strengthened over the past few years.

Al-Qaida and other terrorist groups in Afghanistan will be able to exploit the uncertainty surrounding the West's continued military involvement in the country. Many elements will factor in, but it is likely that al-Qaida will use a potential Western troop withdrawal from Afghanistan to strengthen its operational capabilities and in its propaganda.

At present, al-Qaida networks in Syria pose the most serious al-Qaida-related terrorist threat to the West. Syria is a cornerstone in al-Qaida's global ambitions. In north-western Syria, in particular, there are several al-Qaida-loyal groups present that have experienced leaders with ambitions to attack the West as well as a large number of operatives, including Western foreign fighters. Developments in the north-western part of Syria and the fighting between the Syrian regime and insurgent groups in Idlib province will thus impact significantly on al-Qaida and the terrorist threat that emanates from the area.

The threat from foreign fighters and the camps in Syria
Already before the launch of the Turkish offensive in the northern part of Syria in the autumn of 2019, relatively few Western foreign fighters were at large in Syria. The majority of the foreign fighters have returned to their home countries, been killed or are in prison. Of those still at large, many are staying around the city of Idlib in north-western Syria and are affiliated with al-Qaida-related groups.

After ISIL lost control of its last pocket of territory in Syria in March 2019, numerous foreign fighters and ISIL affiliates were taken prisoner or escaped to the Kurdish-controlled camps in northern Syria. The majority of the remaining foreign fighters have thus been held prisoner in Kurdish-controlled prisons and camps in northern Syria during most of 2019, as have the wives, widows and children of the more than 10,000 Western foreign fighters.

ISIL has established a strong presence in several of the camps, which are characterized by overpopulation and poor security. Consequently, during the course of 2019, ISIL has been able increasingly to disseminate its ideology to men, women and children in the camps through education, social control and the use of violence. The camps are thus a hub for radicalization and mobilization and could – depending on developments in the area – affect the terrorist threat for a long time to come.

After ISIL lost its last territory in the spring of 2019, a lot of the group's followers ended up in the Kurdish-controlled camps in northern Syria.

The regional terrorist threat

Over the past decade, the number of fragile and failed states and conflict zones has grown, and groups affiliated with ISIL and al-Qaida have established a presence in a number of areas, particularly in Africa, Asia and the Middle East. In addition to the official ISIL groups, loosely affiliated ISIL networks and cells and ISIL sympathizers also operate in a large number of countries. Al-Qaida's groups have consolidated their position in several places across the region, where they are engaged in local insurgencies, typically with no direction from the al-Qaida senior leadership. Foreign fighters returning from conflict zones may use their transnational networks and combat experience to add a more global perspective to local militant Islamist groups.

The Middle East
The situation in Syria is still very unstable, giving the remaining militant Islamist networks significant room for manoeuvre across the country. The north-western Idlib province, in particular, is a hub for militant Islamists, including al-Qaida and parts of the ISIL leadership. Turkey's and Syria's military involvement in north-eastern Syria, which has been under Kurdish control for years, will provide opportunities for ISIL to consolidate its presence in the area.

In Iraq, ISIL is mostly present in the central, northern and western areas that used to be under ISIL control and where the Iraqi government has little control. ISIL continues to launch terrorist attacks in the country against civilians and against the Iraqi security forces.

ISIL has significant networks in Turkey. Since 2014, Turkey has been a base for ISIL, which has used the country as a gateway for smuggling people and resources in and out of Syria and Iraq. In 2019, ISIL declared Turkey as an ISIL province. As part of its ambition of global expansion, ISIL likely wants to give priority to Turkey and expand the group's networks and facilities in the country for years to come.

In Yemen, where the government and the Houthi rebels are engulfed in a civil war, Al-Qaida in the Arabian Peninsula (AQAP) is the most significant terrorist and insurgent group. AQAP has previously demonstrated both capacity and intent to attack Western targets outside of Yemen. Despite AQAP's historical focus on the West, the group's current agenda is mainly focused on local elements, though this might change if the military pressure on the group eases. ISIL's presence in Yemen comprises very few fighters, which are engaged in fighting with AQAP and the parties to the civil war. At present, AQAP poses only a limited threat.

North Africa

Militant groups affiliated with al-Qaida have strengthened their position in Egypt. Since 2018, the groups have carried out several small-scale bombings, including against tourist buses in Cairo. The purpose of these attacks is likely to undermine the Egyptian regime by damaging the country's tourism industry. Islamic State in Sinai has turned out to be one of ISIL's most resilient regional affiliates. The group is mainly focused on attacking Egyptian authorities in the northern part of the Sinai Peninsula.

Islamic State in Libya has consolidated its position in the southern part of Libya, and attacks against targets in the capital city Tripoli and other places will continue in the next few years. ISIL followers from the North African countries will continue to travel to Libya, heightening the terrorist threat in the country, including the threat to Western interests. Al-Qaida-related groups will pursue a local agenda and focus on attacking local targets. However, they will continue to pose a threat to Western interests in Libya in the future.

In Tunisia and Algeria, Al-Qaida in the Islamic Maghreb and Islamic State in Tunisia are under constant pressure from the local security forces and primarily pose a threat locally. Security along the Tunisian coastline has been significantly reinforced since the 2015 attacks on Western tourists.

In December 2018, ISIL sympathizers killed a Norwegian tourist and a Danish tourist in Morocco. This is the first terrorist attack in Morocco in recent years, and the attack does not reflect a heightened threat against Western targets in the country in general. The Moroccan authorities' counter-terrorism efforts have helped ensure that militant Islamist groups have failed to establish a presence in the country.

West Africa

The militant Islamist groups in the western Sahel region, Jamaat Nusra al-Islam wal-Muslimin and Islamic State in Sahel, have expanded their presence in central Mali and northern Burkina Faso. The enhanced presence has strengthened the two groups' possibilities for carrying out attacks in the southern part of Mali, central and eastern Burkina Faso and the western part of Niger, just as it will heighten the threat to Western targets in West Africa. ISIL has claimed responsibility for attacks in several West African countries, including Mali and Niger.

In north-eastern Nigeria, Islamic State in West Africa has increased the number of attacks on local security forces. It is possible that the group will attack Western targets in northern Nigeria and in the border areas of neighbouring countries. Nigerian security forces have forced the militant Islamist group Boko Haram to go on the defensive in the border areas between north-eastern Nigeria and northern Cameroun. Boko Haram's capability to attack Western targets outside of north-eastern Nigeria is limited.

East Africa

Al-Qaida-affiliated terrorist and insurgent group al-Shabaab will remain a destabilizing factor in large parts of Somalia for years to come. For more than ten years, Somali and international forces have fought against al-Shabaab, but their efforts have failed to cripple the group.

Al-Shabaab will continue to maintain control of large parts of southern and central Somalia. From here, the group will be able to plan attacks inside and outside of Somalia. Al-Shabaab will highly likely primarily focus on attacking military and civilian targets in Somalia. In addition, al-Shabaab will continue to attack local and Western targets in Kenya and in other of Somalia's neighbouring countries. Within the past few years, al-Shabaab has managed to consolidate its position in Kenya, for instance by recruiting a large number of local Kenyans to the group.

ISIL also has an affiliated group in Somalia. However, the group is much smaller than al-Shabaab and has only conducted minor attacks, primarily in the northern part of the country.

Afghanistan, Pakistan and the rest of Asia

Al-Qaida will work to preserve its safe havens in Afghanistan and Pakistan, which will remain key bastions for the group and its regional affiliate Al-Qaida in the Indian Subcontinent (AQIS). Al-Qaida has training facilities in Afghanistan and is particularly active in the eastern and southern part of the country.

Al-Qaida continues to support the Taliban's insurgency and is closely connected to the local terrorist and insurgent group the Haqqani network and the Pashtun terrorist group Tehrik-e-Taliban Pakistan (TTP).

Al-Qaida and AQIS will continue to threaten Western interests in the area and remain resolved to attack the West.

The ISIL-affiliate Islamic State in Khorasan Province takes part in the Afghan conflict and poses a threat to Western interests in Afghanistan and Pakistan, primarily in Kabul and Jalalabad.

Iranian patrol boat in the Strait of Hormuz on Persian Gulf Day on 30 April 2019.

THE MIDDLE EAST AND NORTH AFRICA

For years to come, the Middle East and North Africa will remain an arena for regional and international power struggles. Instability, terrorism and refugees stemming from the region will pose a security threat to the EU. The United States will reduce its commitments in the region, and being the region's closest neighbour, Europe will increasingly be forced to tackle these challenges alone. State actors such as Russia, Iran and Turkey will continue to exert great influence, and their priorities will often differ from those of Europe.

Instability, terrorism and refugees stemming from the Middle East and North Africa (MENA) will continue to pose a security policy threat to the EU for years to come. While the West still stands united in the response against terrorism in the Middle East, other emerging and diverging interests have the potential to jeopardize the transatlantic consensus between the United States and the EU in the region.

Europe will increasingly be facing a multitude of challenges

The United States will continue to reduce its direct involvement in the region. This will affect the EU's ability to address local conflicts and terrorism as well as fundamental challenges such as democratic deficit, corruption, populist exploitation of ethnic-sectarian tensions, lack of resources,

The Middle East.

poverty and high unemployment rates. In the short to medium term, groups such as ISIL and al-Qaida will remain able to mobilize frustrated population groups, thereby posing a threat to stability in the region and security in Europe.

Thus, the EU will increasingly be forced to unilaterally tackle the various security-related challenges revolving around the influx of refugees and migrants into Europe sparked by the conflicts in the MENA region. Turkey will be a central, yet complicated, partner of the EU in addressing the refugee crisis. Turkey's October 2019 military intervention against the Kurdish YPG militia in north-eastern Syria and its announcement of plans to repatriate a large number of Syrian refugees to the north-east pose challenges to the EU. Among these challenges are the renewed influx of refugees into Europe and the repatriation of refugees to Syria under conditions that would be unacceptable to the EU. Similarly, the flow of migrants through North Africa will create a series of dilemmas for the EU with respect

to its cooperation with the governments south of the Mediterranean.

Regional rivalry will become increasingly militarized

In the years to come, the MENA region will experience increasing polarization and, in some cases, militarization of the conflicts between the region's key actors. The extensive regional rivalries between several of the countries in the Middle East will further complicate the European efforts to counter the region's political, economic and structural challenges.

The increased tensions between Iran on the one side and the United States, Saudi Arabia and Israel on the other could destabilize the situation, not only in the Persian Gulf, but also more broadly in the region. Likewise, the conflict may escalate to the point that it could threaten global oil traffic through the Strait of Hormuz.

Turkey's military intervention in north-eastern Syria has shifted the local power balance in the area, further complicating the West's fight against ISIL.

Libya will also remain an arena for rivalry between external actors, in particular the United Arab Emirates on the one side of the conflict and Turkey and Egypt on the other. However, Russia has also become increasingly involved in Libya.

The arms race between the region's key actors, such as the Gulf States and Iran, will likely contribute to further militarization of the regional conflicts.

New key actors with new agendas

Russia will take advantage of the West's lack of a common Middle East policy in order to position itself as a key power factor and broker in the MENA region. In addition, Russia will undertake efforts to exploit Turkey's strained relations with Europe and the United States. Russia is contributing to the heightened arms race in the region by selling sophisticated weapons systems to numerous parties. The diminished US involvement in the MENA region will boost Russia's position there.

China will seek to increase its so far limited economic influence in most of the region. In addition to China's substantial interests and investments in the Persian Gulf's energy resources, the Middle East is strategically crucial to China's Silk Road initiative. China still supports the nuclear deal with Iran and will continue to make efforts to bypass

US sanctions. However, China is attentive to its relations with the United States and wishes to preserve its good relations with Saudi Arabia. China also aims to preserve its neutrality in the regional rivalry between Iran and Saudi Arabia.

Turkey aims to bolster its influence in the region based on its own strategic interests, which increasingly seem to diverge from those of Europe, and in ways that will often involve military means. In addition to Turkey's intervention against the YPG, Turkey's enhanced cooperation with Russia on the Syrian conflict will deepen internal tensions within NATO. Turkey will continue to use the country's four million refugees as leverage to force Europe to accept its security policy ambitions in the region.

Iran will maintain its influence in the region through a combination of economic cooperation and support to pro-Iranian groups. Turkey, Iran and Qatar will seek to widen their cooperation, and their conduct will generate new divides with countries such as Saudi Arabia, the United Arab Emirates and Israel over local conflicts, for instance in Libya. Saudi Arabia's and Israel's joint interests in weakening Iran's influence in the region will likely bring the two countries closer together.

Front page photo from Iranian daily newspaper on 9 April 2019 showing Iranian President Hassan Rouhani and US President Donald Trump. The text means face-off (direct translation: eye to eye).

Iran

The conflict between the United States and Iran has escalated. As long as the United States upholds its pressure on Iran and prevents the country from exporting oil, Iran will continue its calculated opposition towards the United States and its allies militarily as well as by challenging elements of the nuclear deal. The conflict will still impact the entire region, and the situation may inadvertently lead to a de facto military confrontation. Despite the sanctions, the Iranian regime will stand united in the short term and Iran will consolidate its regional influence.

The situation in and around the Persian Gulf, where mounting tensions between Iran and the United States are at the centre, will grow increasingly complex. What, in May 2018, began as a limited bilateral crisis over the nuclear agreement and the US sanctions has developed into a much broader conflict which will continue to influence the security situation throughout the region. Iraq, Syria, Lebanon, Yemen, Afghanistan, the United Arab Emirates, Saudi Arabia and Israel will all, to varying degrees, become embroiled in the conflict between Iran and the United States.

Iran will not succumb to US pressure

Iran will continue its gradual and calculated opposition to the US sanctions, militarily as well as by challenging the nuclear deal. Iran will make efforts to drive a wedge between the United States, Saudi Arabia and the United Arab Emirates and has cast doubt on the United States' ability to protect its allies and the oil export. Iran has emphasized to Saudi Arabia and the United Arab Emirates

that stabilization of the region will not be attained at Iran's expense or without Iranian participation. This strategy may at some point open up new diplomatic possibilities, for instance as regards to the war in Yemen.

Even though Iran has no desire for an outright war with the United States or any of its neighbouring countries, Iran's more offensive strategy vis-á-vis the United States and Saudi Arabia carries a risk of misunderstandings and incidents that raise the potential for an actual military confrontation. However, the Iranian leadership will likely be willing to run the risk in the short term, as the country has no real other alternatives and as the Iranian leadership feels confident that the United States does not want a war. In addition, Iran will continue its cyber activities against regional and international actors as part of its more offensive strategy.

Iran will not develop a military nuclear programme

It is highly unlikely that Iran will develop a military nuclear programme in the short term despite the US withdrawal from the nuclear deal and the subsequent sanctions. However, Iran will continue to breach the nuclear deal as long as the US sanctions are in force and the EU is unable to counterbalance the impact of the sanctions and ensure Iranian trade and oil sales. Iran's nuclear breaches are quickly reversible, allowing it to return to compliance with the nuclear deal as soon as the country is again able to sell its oil on the open market.

Iran's overall objective will still be to normalize its political and economic relations with the international community. Iran will make efforts to force the EU to stay committed to the nuclear deal, drive a wedge between the EU and the United States and put a spin on the crisis, turning it into a choice of principle between support for US sanctions or commitment to international agreements.

Iranian regime stands united despite sanctions

Despite the serious strain on the Iranian economy, the Iranian leadership stands more united than it has for a long time, and the majority of the Iranian population support the regime's opposition to the United States' Iran policy. The US sanctions have served to sway Iranian politics in a more nationalist and anti-American direction. According to Iranian opinion polls, the majority of Iranians have been confirmed in their view that giving concessions to the international community on the nuclear deal was not in Iran's best interest.

The sanctions carry significant social and economic consequences for the Iranian population. Among the repercussions is restricted access to essential medicines. The economic and political frustration among the Iranian population will continue to fuel civil unrest. If the unrest escalates, the regime will continue its policy of cracking down on protesters to quell resistance.

It is highly likely that Iran may be able to withstand the economic pressure until the November 2020 US presidential election, as Iran's alliances with Russia and China will likely enable the country to continue to sell limited quantities of oil.

Despite the sanctions, Iran will still be able to consolidate its regional influence through economic and political cooperation with parties in countries such as Iraq, Syria, Lebanon and Afghanistan, thereby consolidating the cross-border influence Iran already exerts through the military support it provides to pro-Iranian proxy groups in the Middle East. First and foremost, Iran will be able to strengthen its trade relations with Iraq and seek economic and political influence in the upcoming reconstruction of Syria.

Syria

Syria will remain unstable in the long term even though the Assad regime is consolidating its grip on power. The reconstruction and stabilization of Syria, including the repatriation of Syrian refugees, will be difficult. The country will remain an arena for future regional and international rivalries. At the same time, ISIL will take advantage of the Assad regime's lack of efforts against the group.

Even though Syrian President Bashar al-Assad is consolidating his power over the country, Syria will remain challenged by the same socio-economic and political problems that triggered the civil war in the first place. These challenges have only been exacerbated by eight years of conflict. Despite reconciliation agreements, the Assad regime continues to target former rebel fighters and civilians in several of the recaptured areas. This has given rise to social unrest and low-intensity conflict that will further impede the repatriation of refugees from Syria's neighbouring countries and Europe. The lack of stability and economic prospects in the government-controlled areas will also help incite recruitment to militant Sunni extremist movements.

External interference in Syria will continue. Rivalling regional and international actors will make efforts to maintain their influence, which will hinder the stabilization and reconstruction of Syria. For instance, Turkey's October 2019 intervention has shifted the local balance of power in north-eastern Syria between the area's local and external actors, forcing tens of thousands of civilians to be on the run.

The Syrian armed opposition has largely been defeated. The Assad regime will gradually recapture the remaining rebel-held Idlib area. The pace of the recapture will depend on Turkey's and Russia's internal relations and the extent of their support to the Syrian rebel groups and the Syrian government forces respectively. Russia is trying to balance its support for the Assad regime's efforts to restore its control over Syria with its ambition to maintain good relations with Turkey, particularly as part of the negotiations on a political solution to the conflict.

Russia will likely make efforts to persuade Iran to minimize its presence and influence in Syria in order to accommodate Israel's security interests, thereby further reducing the US incentive to maintain its presence in Syria.

It is possible that Iran will minimize its already limited military presence in Syria, but Iran and Syria will maintain their close strategic alliance. Israel will continue its airstrikes on Iranian targets in Syria, including on supplies to Lebanese Hezbollah.

Russia will try to pave the way for Syria's international rehabilitation and use the UN-supported constitutional committee to drive a potential reform process. The Russian initiatives are likely aimed at appeasing the international community into lifting the sanctions on the Assad regime and at securing support for the reconstruction efforts from the West and the Gulf States. However, it is less likely that this will lead to actual political reforms or weaken the Assad regime's control of the Syrian institutions and security services.

Abu Bakr al-Baghdadi's death in October 2019 will not curb ISIL's ability to operate in the desert areas in central Syria and across the border areas into Iraq in the short to medium term. ISIL's ability to regroup and expand its underground networks will not be affected by the Assad regime's insufficient measures against the group. ISIL will maintain the capability to launch attacks in Syria, including attacks on Western coalition forces in Kurdish-controlled north-eastern Syria. However, at present, ISIL will not be able to capture and hold large populated areas or cities.

The continued fight against ISIL in north-eastern Syria will be complicated by Turkey's confrontational approach to the Kurdish YPG militia which, being the largest militia in the Syrian Democratic Forces (SDF), is the Anti-ISIL Coalition's most important local partner in the fight against ISIL in Syria. Turkey's intervention in north-eastern Syria will create room for ISIL to consolidate its position and cause additional unrest in the area. The schism between the coalition's efforts to fight ISIL through cooperation with the SDF and YPG on the one side and Turkey's animosity towards the YPG on the other will remain a source of tension and hinder the fight against ISIL.

Iraq

The security situation in Iraq rests on a fragile foundation and international, regional and local tensions will continue to feed into the instability. The Iraqi government will face a number of challenges which it will be unable to address unassisted.

In the medium term, Iraq will remain a hotspot of tension and conflicts between international and regional actors. The external influence from countries such as Iran promotes instability, exacerbates already existing internal tensions and diverts focus away from the fight against ISIL.

Politically, Iraq will be characterized by internal power struggles, corruption and clientelism in addition to the external interference. The Iraqi government is weak and will be challenged by growing political opposition and regional conflicts in the short term. It is less likely that the incumbent government, and perhaps even a new one, will be able to handle Iraq's fundamental problems in the short term. Poor governance and unfulfilled expectations will continue to spark tension, just as the perception of uneven distribution of resources between the capital of Baghdad and the provinces will continue to contribute to division and conflict.

The security forces still face challenges

Despite some progress in the security forces' capabilities, power struggles and rivalries within the overall security structure will impede the necessary reformation of the Iraqi security sector. In the medium term, the Iraqi security forces will thus find it difficult to provide security in all parts of Iraq and to continue its counter-insurgency efforts without foreign assistance.

For the Iraqi state, Baghdad is the main security priority, and the military's focus is generally on its conventional capabilities, which leaves the security forces in need of critical counter-insurgency capabilities and skills. In addition, the security forces' capability to fight ISIL hinges on fragile popular support and trust. Political and economic conditions will likely hamper the social efforts required to carry out effective and long-term counter-insurgency initiatives.

Significant Iranian influence

Iran still exercises significant influence in Iraq. Most recently, paramilitary militias, some of which are pro-

Iranian, have cemented their power position in the Iraqi society and the Iraqi security structure. The new role of the militias will likely complicate relations between the United States, the Anti-ISIL Coalition and the Iraqi government. In the short to medium term, this will adversely affect efforts against ISIL.

At the same time, increased tension between the United States and Iran may result in attacks on Western forces and interests in Iraq, mainly by pro-Iranian militias.

Complex fight against ISIL

ISIL still has an extensive underground network in Iraq, where the organization is able to exploit the opportunities afforded by the regional tensions. The fight against ISIL has grown increasingly complex, and ISIL will remain a threat to security in Iraq in the short to medium term.

ISIL will seek to exploit existing tensions and the perceived marginalization of the Arab Sunni Muslims to expand its position as a local terrorist and insurgent group. In addition, the lack of reintegration and conciliation of individuals and families affiliated with ISIL will hamper the stabilization of Iraq and enable militant Sunni extremists to recruit future members to the group. However, it is less likely that ISIL will be able to mobilize wide popular support in Iraq in the short term.

Libya

The military escalation seen in Libya in 2019 will impact adversely on the neighbouring countries, including Europe, in the medium term, as it has created renewed latitude for great powers and non-state actors to pursue their interests in Libya. In the long term, Libya will continue to struggle with organized crime, smuggling and insufficient state structures to control the country's economy and borders. The battle for the capital of Tripoli and over the country's vast oil reserves has drawn neighbouring countries and regional great powers into the new conflict.

In early 2019, a new armed conflict erupted in Libya, and even if it were to subside, Libya will continue to be fraught with political division, ethnic conflicts, militia rule and crime. Several EU countries will feel the repercussions of these problems as the situation in Libya provides greater latitude for terrorists and criminal groups to operate, just as it could trigger new challenges with the management of refugees and migrants. Diverging views among the EU countries on how to address the conflict in Libya leave room for other actors, most notably Turkey, Russia and the Gulf States, which eye new possibilities. Finding a joint EU migration policy is difficult, as the security challenges facing the EU members in North and Eastern Europe differ from those encountered in the South European EU member states that border on Libya and whose key focus is thus on keeping Libya stable. Other national agendas, such as energy policy of the southern EU member states, are also challenging and another reason behind the weakened European effort in Libya.

Regional competition and access to the Mediterranean aggravate Libyan conflict
The rivalry among regional actors in Libya, including Turkey, Russia, the United Arab Emirates and Egypt, will likely impact adversely on stability in the medium term.

Russia likely keeps the conflict alive by supporting the Libyan Arab Armed Forces (LAAF) insurgent militia while also maintaining contact with the government in Tripoli, where Turkey's position is strong. Without international support, both political and military, the LAAF would likely have a poor bargaining position following its failed offensive against Tripoli in early 2019. Such outcome would also have served to weaken Russia's position in Libya. Russia aims for regional influence and access to Libyan ports. Moreover,

Russia seeks a strengthening of relations with Egypt through the involvement in Libya and support for the LAAF.

The United Arab Emirates also provide direct military support for the LAAF and will likely continue to do so in the short term. Finally, Turkey is pursuing the potential for extraction of undersea gas in the eastern Mediterranean and aims to adopt the role as Libya's leading security partner. Interference by regional actors on different sides of the Libyan conflict may cause further escalation and instability at Europe's southern border.

The UN Security Council will still struggle to adopt initiatives to successfully halt the armed conflict in Libya, and the arms embargo will suffer continuous violations. Military support from regional actors is pivotal in keeping the balance between the two main factions in Libya. The international actors have very few soldiers on the ground and mainly provide support through air strikes, which have come to characterize the conflict in Libya. Air strike targets include civilian airports and hospitals and thus have a severe impact on Libya's civilian population.

War economy, oil, and militia cartels characterize a fragmented Libya
It is less likely that a new Libyan government would be able to unite Libya within the next few years. Militia cartels will likely keep a de facto grip on power in the large coastal cities with solid networks extending into the political and economic systems. The Libyan state continues to finance the armed actors on both sides of the conflict as militias all over the country are on the state payroll. Transparency in the banking system and oil production, which haemorrhage large sums of money, is not on the cards.

South Libya will remain outside of the coastal cities' control and continue to be marred by a lack of law and order. Sudan- and Chad-based militias and insurgent groups will thus continue to be present in Libya, occasionally receiving weapons from and supporting the factions in Libya. The area will continue to be a hub for traditional informal economic activities as well as illegal "black market" activities such as smuggling of weapons via Sudan, narcotics via West Africa, oil from Libya to the south, gold from Niger and migrants bound northwards from sub-Saharan Africa. The international community's narrow focus on counter-terrorism efforts in southern Libya may serve to undermine the traditional way of life there, leaving some actors with few alternatives than to resort to crime.

Migrants in Niger on their way north to Sahara and on to Libya, Algeria and Europe.

WEST AFRICA

Ethnic tensions and growing population rates in the western Sahel region will cause an increase in the number of displaced people and contribute to aggravating the security situation in the region. The national security forces in Mali and Burkina Faso are unable to uphold security and fight militant groups. Militant Islamists will continue to threaten Western targets in the region. The Gulf of Guinea will remain an area characterized by pirate attacks conducted by organized criminal networks in Nigeria.

Western Sahel is struggling with a number of challenges such as a growing population, decades of increasing drought, food scarcity, ethnic conflicts, widespread poverty, poor governance, ineffective security forces and an increasing volume of migrants. In addition, the militant Islamist groups in the western Sahel region, Jamaat Nusra al-Islam wal-Muslimin and Islamic State in the Sahel, have increased their presence in central Mali and in the northern part of Burkina Faso to varying extents. Islamic State has claimed responsibility for attacks in several West African countries, including Mali. Combined, these challenges mean that an improvement in the regional security situation is not on the cards in the short to medium term.

The fight over resources will increase the number of internally and externally displaced persons
Ethnic conflicts over the region's scarce resources have long persisted between farmers, who cultivate the land, and nomadic cattle breeders. These conflicts will continue and become more pronounced due to the drought and the growth in population. As a result, the fight over resources and lack of food will likely continue for many years.

This, in turn, will result in an increase of internally and externally displaced persons forced to move in or out of the region. Also, the aggravated situation will be a driver for recruitment for extremist groups that have increased their presence in western Sahel by fuelling and exploiting the ethnic conflicts. The conflicts and the ensuing violence may spread to other West African countries, such as Ivory Coast, Ghana, Togo, Benin and Niger.

National security forces unable to maintain security

In the short to medium term, it is highly unlikely that the security forces in Mali and Burkina Faso will be able to maintain security in northern and central Mali and in northern and eastern Burkina Faso. In Mali, the security forces are focusing on maintaining control over southern Mali, including the capital of Bamako. In northern and central Mali, the presence of security forces is limited. The Malian security forces suffer from corruption, lack of morale and discipline. The Malian population has little faith in the security forces, as they have been known to be behind killings, violent assaults, and theft of food and water.

In Burkina Faso, the limited number of security forces are unable to create security throughout the entire country; their sparse resources are focused on central Burkina Faso, including the capital of Ouagadougou. In the northern and eastern part of the country, only few security forces are present. Militant Islamists and criminal groups are exploiting the lack of presence by national authorities.

International and regional security initiatives face an uphill struggle

It is highly unlikely that, in the short to medium term, the United Nations Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) will successfully improve the security situation. The Mission is fraught with logistical challenges that hamper its scope of solving the prioritized tasks such as restoring Mali's authority over its own territory and protecting civilians and human rights.
In addition, many of the units are poorly trained and generally lack the ability to conduct extended operations. Consequently, the Mission will only locally, and even then only to a very limited extent, be able to improve the security situation.

It is less likely that the G5 Sahel security cooperation between Mauretania, Mali, Burkina Faso, Niger and Chad will be able to improve the security situation in the border areas without long-term external support and financing.

The focus of the French-led operation Barkhane, comprising some 4,500 troops, is on counter-terrorism. France does not intend for the operation to solve the region's many other diverse challenges or for it to take over the tasks of the national, regional and international security forces.

Piracy continues in the Gulf of Guinea

The risk of piracy in the Gulf of Guinea off West Africa will likely not change markedly in the short to medium term, nor will the number or nature of attacks. Consequently, the Gulf of Guinea will likely continue to be a setting for pirate attacks.

The majority of the pirate attacks in the region are likely launched by a handful of organized criminal groups. The pirates' key purpose is kidnapping of ship crews for ransom. Local criminals also regularly try to rob ships at anchor off the large ports. Such thefts make up a large part of the incidents, and they carry a relatively low risk for the ships and their crews.

A number of the economic and social problems that have triggered piracy in the Gulf of Guinea will remain unsolved. The maritime security capabilities of the coastal states are generally limited, the transnational cooperation is weak, and existing legal structures are inadequate.
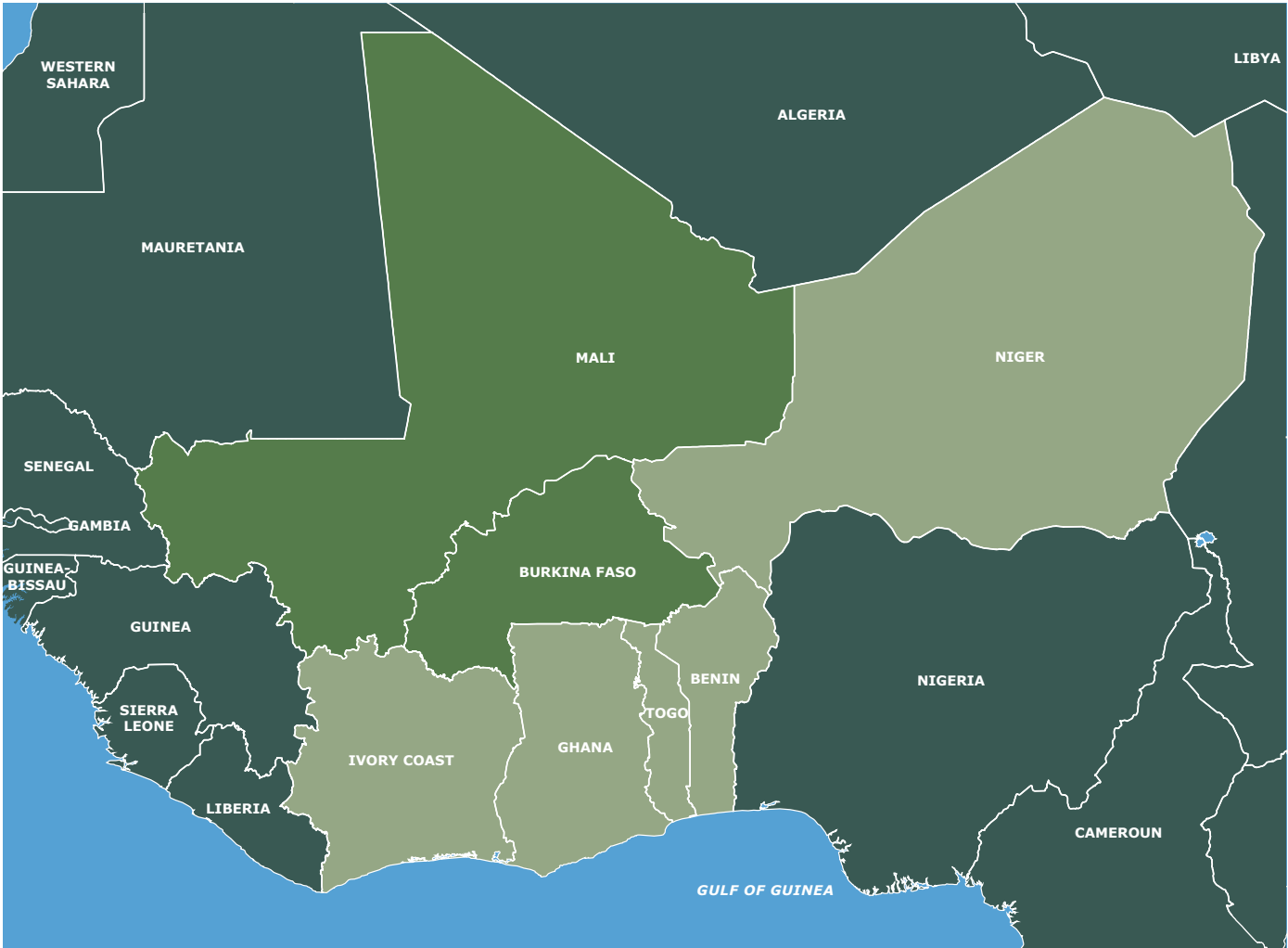
West Africa.

Russia is making efforts to play a key role in the negotiations on Afghanistan. 30 May 2019 photo showing Taliban chief negotiator Mullah Abdul Ghani Baradar leaving a conference centre in Moscow following talks with a delegation of Afghan politicians.

AFGHANISTAN

The security situation in Afghanistan remains precarious. Collapsed US-Taliban negotiations have halted a potential Afghan peace process. The Taliban is becoming more powerful, while the Afghan government's power is weakening. The regional great powers are increasing their involvement, increasing the fragmentation of the country and raising the risk of civil war.

US-Taliban peace talks have come to a halt

Since the summer of 2018, the United States has negotiated with the Taliban. The peace talks were derailed by President Trump's comments that the United States cannot continue to be the policeman of the world and that he wants to withdraw US troops from Afghanistan. During the peace talks, the Taliban has vehemently demanded a complete withdrawal of US and NATO troops and refused to negotiate directly with the Afghan government. The US chief negotiator accepted the Taliban's demands in exchange for Taliban guarantees that the group would be willing to participate in negotiations with representatives of the Afghan society and that Afghanistan would never again be used as a base for terrorist groups. However, President Trump broke off peace talks with the Taliban in response to the 5 September 2019

Taliban attack in Kabul. Nevertheless, the Taliban and the US chief negotiator have subsequently stated that they have left the door open for a resumption of peace talks.

The Taliban poised to intensify the insurgency

The Taliban leadership was surprised by the breakdown of peace talks, and opponents of the peace talks have likely strengthened their position. Taliban spokesmen warned that the breakdown could have serious consequences for the United States and its allies. The Taliban will likely respond to President Trump's cancellation by intensifying its attacks on US and coalition forces. In 2019, the Taliban focused its attacks on the security forces' smaller camps, checkpoints and supply routes and will continue this strategy as this type of attack requires few resources and inflicts minimal losses on the group.

The ANDSF continue their downward spiral

The Afghan National Defense and Security Forces (ANDSF) are under pressure, exhausted by years of attrition, increasingly poor training, corruption, poor leadership and political instability. The ANDSF have been incapable of implementing reforms to address these issues. Consequently, the ANDSF only have the capability to launch small-scale offensives and are often limited to defending bases, checkpoints and specific routes, making them vulnerable to Taliban attacks, given that the insurgent group is able to choose the time and place for attacks. Increased and more aggressive US support such as deployment of special operations forces and air strikes will likely curb Taliban advances, but not stop them altogether. Although the Taliban will be incapable of defeating the ANDSF, it will continue to gain traction and bolster its influence in the rural areas, cut off supply routes and threaten government control of vulnerable provincial capitals.

Political crisis

For a long time, it looked as though the US-Taliban peace talks and the prospect of an intra-Afghan dialogue would suspend the 28 September 2019 Afghan presidential elections. The Taliban was vehemently opposed to the elections, declaring the vote illegitimate. The United States remained hesitant, while the European countries wanted the elections to be held in a bid to strengthen the Afghan government's bargaining power vis-à-vis the Taliban. President Ghani pushed for the holding of elections. However, the majority of the remaining 17 presidential candidates favoured delaying the election, accusing Ghani of abusing authority and rigging the election and making them question the election's fairness.

The presidential election was tainted by attacks and, in particular, threats from the Taliban, low voter turnout and allegations of election fraud. The results are not yet available, but despite a large pool of candidates, the election will be a choice between Ghani and de facto Prime Minister Abdullah as president. Although the election results may lead to the formation of a unity government, the situation could also ultimately spark a crisis, similar to the one seen in 2014, as strong political factions may refuse to accept the results. The new president's main task will be to come up with a Taliban policy and assemble a broadly accepted team responsible for conducting negotiations with the insurgent group.

International power play surrounding Afghanistan

Russia, Iran and China are pursuing a strategic objective to push the United States and NATO out of Afghanistan and Central Asia, and thus closely followed the US-Taliban peace talks. However, the prospect of the United States and NATO pulling out of Afghanistan raised concerns that the Taliban might become a dominant force in the country following a peace agreement or a potential collapse of the Afghan government, possibly raising their interests in preventing the Afghan government, public institutions and security forces from collapsing. However, the great powers would not look favourably on the potential re-election of Ghani, as they fear that he will be an obstacle to the intra-Afghan negotiations.

Russia and Iran are pursuing their strategic interests by providing military support to the Taliban in the form of weapons, equipment and money. In addition, they support the insurgent group by offering military advice and training, including advisers who operate in Afghanistan. Similarly, Pakistan provides military support to the Taliban, just as the Taliban uses Pakistan as a base area. Pakistan's support is mainly aimed at hampering India's influence in Afghanistan. Iran and Russia will likely increase their support to the Taliban following the collapse of the peace talks, and Pakistan may follow suit in an effort to maintain its influence over the Taliban.

China is making efforts to consolidate its position in northern Afghanistan in general, and in Badakhshan province in particular. The Chinese leadership wants to prevent militant Islamists among the Uighurs in China's Xinjiang province from crossing the borders between China and Afghanistan. Also, China is eager to bolster its economic interests in Afghanistan. Like Russia, Iran and Pakistan, China is engaged in political dialogue with the Taliban. Following the breakdown of peace talks with the

United States, Taliban negotiators visited Moscow, Teheran, Beijing and Islamabad.

India is also closely following developments in Afghanistan given its relations with Pakistan. India's decision to revoke Indian-administered Kashmir's autonomy is possibly rooted in the prospect of a pro-Pakistani, Taliban-dominated government in Afghanistan. Like Russia, Iran and China, India has an interest in preventing the Taliban from consolidating its power in Afghanistan.

Russia will try to cast itself as an Afghan peace broker, making efforts to cement this role through various diplomatic initiatives. China will likely support Russia's initiatives, and India will expand its dialogue with Russia in a bid to gain influence on long-term developments in Afghanistan.

The Taliban and the Afghan government run the risk of fragmentation

The political fragmentation in Afghanistan may escalate in the next few years. The Taliban will be deeply affected by Iran's, Russia's and Pakistan's attempts to gain influence on different networks within the insurgent group. The internal political division within the government will also be fuelled by President's Ghani's inability to garner support from the most powerful politicians among Afghanistan's ethnic groups. Financial support and weapons supply from regional great powers to Afghan political factions may also contribute to further fragmentation among the current political factions.

Al-Qaida and Islamic State

During the failed US-Taliban talks, preventing Afghanistan from becoming a haven for terrorist groups remained a US top priority. The United States wanted the Taliban to cut ties with al-Qaida. Al-Qaida is still closely affiliated with the Taliban, the Haqqani network and the terrorist group Tehrik-e-Taliban Pakistan (TTP). Al-Qaida supports the Taliban insurgency by providing technical guidance, weapons and combat training. Even though al-Qaida in Afghanistan has been successful in recruiting new members, its support for the Afghan insurgency has made little difference. The fight against the West remains at the heart of al-Qaida's ideology, which is why it focuses on attacks against Western targets.

Afghanistan and Pakistan are safe havens for numerous militant Islamist factions, including ISIL's franchise Islamic State in Khorasan Province (ISKP). The group has a strong foothold in parts of the provinces of Nangahar and Kunar in eastern Afghanistan. The group also operates in northern Afghanistan and launches spectacular attacks in Kabul and Jalalabad, in particular. The ISKP has been responsible for several attacks on Shiites in an effort to add a sectarian dimension to the conflict. The United States, the ANDSF and the Taliban are fighting the ISKP, which has had a hard time expanding its areas of operation. The collapsed US-Taliban peace talks may help reduce the number of disgruntled insurgents shifting loyalty to the ISKP. As a result, the ISKP will likely find it difficult to boost its influence in Afghanistan, although the insurgent group will remain secure in its stronghold in eastern Afghanistan. The ISKP likely receives donations from patrons in some of the Gulf States.

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.

Degrees of probability

◄ **Highly unlikely**   **Less likely**   **Possible**   **Likely**   **Highly likely** ►

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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Page 51 Migrants in Niger on their way north to Sahara and on to Libya, Algeria and Europe, *Ali Abdou/AFP/Ritzau Scanpix*

Page 54 Russia is making efforts to play a key role in the negotiations on Afghanistan. 30 May 2019 photo showing Taliban chief negotiator Mullah Abdul Ghani Baradar leaving a conference centre in Moscow following talks with a delegation of Afghan politicians, *Evegenia Novozhenina/Reuters/Ritzau Scanpix*