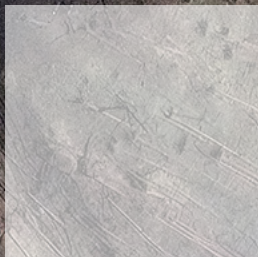


# INTELLIGENCE OUTLOOK 2025

An intelligence-based assessment of  
the external conditions for the security  
of the Kingdom of Denmark



DANISH DEFENCE  
INTELLIGENCE SERVICE



## THE OVERALL ASSESSMENTS OF THE THREATS TO THE KINGDOM OF DENMARK

**INTELLIGENCE OUTLOOK** outlines the external conditions impacting the security and interests of the Kingdom of Denmark. INTELLIGENCE OUTLOOK is one of four overall assessments of the threats within and against the Kingdom of Denmark. The other assessments are:

- **Assessment of the terrorist threat to Denmark,** in which the Centre for Terror Analysis sets the national terrorist threat levels and describes the terrorist threat to Denmark and Danish interests abroad.
- **Assessment of the espionage threat to Denmark, the Faroe Islands and Greenland,** which is published by the Danish Security and Intelligence Service and describes the threat from foreign state intelligence activities targeting Denmark, in particular espionage, influence operations and attempts to illegally procure technology and knowledge.
- **The cyber threat against Denmark,** in which the Danish Resilience Agency (DRA) describes and sets the national threat levels for cyber espionage, cyber crime, cyber activism, destructive cyber attacks and cyber terrorism.

# INTRODUCTION

Dear reader,

The Kingdom of Denmark faces a broader and more serious range of threats and security challenges than it has for many years. Intelligence Outlook, our annual contribution to the public debate on the Kingdom of Denmark's security, outlines these threats and challenges.

In 2025, we published several assessments of the threat from Russia. In February, we reported about the threat posed by Russia's military build-up; and in October, we reported on the hybrid war that Russia is currently waging against NATO and the West.

You will find these key assessments of Russia in Intelligence Outlook 2025, along with our assessments of the most important external threats and security challenges. These include the intensifying great power competition in the Arctic, China's ambition to assume a more dominant role and the threat of Islamist terrorism.

Information cut-off date is 2 December 2025.

Enjoy your reading.

A handwritten signature in black ink, appearing to read 'TAL - p', with a stylized flourish at the end.

**Thomas Ahrenkiel**

Director of the Danish Defence Intelligence Service

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# MAIN CONCLUSIONS



Great powers are increasingly prioritizing their own interests and wielding power to achieve their objectives. Russia continues its invasion of Ukraine while conducting hybrid war against NATO and the West. China is deploying its economic and, increasingly, military power to pressure other states, and is also supporting Russia's war in Ukraine. Together, China and Russia are at the centre of a group of countries seeking to reduce Western influence, particularly that of the United States, worldwide. Meanwhile, the United States is leveraging its economic and technological strength as instruments of power, also against allies and partners. While the future of China-US relations is uncertain, the two will remain strategic rivals in the long term.

Russia sees itself in conflict with NATO and is launching hybrid attacks against the Alliance, including sabotage and destructive cyber attacks. The Russian military is also adopting an increasingly threatening posture in Denmark's neighbouring region. Despite several US attempts to broker a peace agreement, the war in Ukraine will likely continue to tie up Russian resources through 2026. Russia's defence industry is expected to outproduce Europe's in the coming years. At the same time, uncertainty surrounds the role of the United States as the guarantor of European security. This will increase Russia's willingness to intensify its hybrid attacks against NATO. Russia's military threat to NATO will increase, even though there is no threat of a regular military attack on the Kingdom of Denmark at present. Russia also conducts espionage, not least cyber espionage, against the Kingdom of Denmark for a variety of purposes. One of these is to gain an advantage in the event of a war against NATO.

Russia, China and the United States have diverging interests in the Arctic, but all three countries seek to play a greater role in the region. In recent years, the United States has significantly increased its security policy focus on the Arctic, while Russia continues its military build-up, and China continues to develop its capacity to operate both submarines and surface vessels in the region. Russia remains the strongest military power in the Arctic but sees itself as being

challenged by the West. As a result, Russia will increasingly assert its interests through a more confrontational approach, both politically and militarily. Russia is under pressure from, among other things, Western sanctions and will therefore seek to deepen its Arctic cooperation with China and allow China greater access to the Russian Arctic.

China aims to assert regional dominance in Asia and to force reunification with Taiwan, among other things. Both ambitions require China to strengthen its position, particularly relative to the United States. Consequently, China is building up its military, deepening its partnership with Russia and cultivating ties with other non-Western states. At the same time, China is seeking to make its economic and technological development independent of the West. China maintains an extensive cyber espionage programme designed to accelerate technological progress, among other things. Overall, China is preparing for an intensified conflict with the West.

The terrorist threat in Europe will remain serious, partly due to continuing instability and conflict in the Middle East. The number of Islamist terrorist attacks in Europe has increased in recent years, especially as terrorist groups exploit the conflict in Gaza to inspire militant Islamists to carry out attacks. Meanwhile, instability in Syria is enabling Islamic State to regain strength and once again pose a serious threat to Europe. In Yemen, the Iran-backed Houthi movement remains a threat to maritime traffic in the Red Sea. As part of its conflict with Israel, Iran conducts terrorism against Israelis and Jews outside Israel.

A photograph of Xi Jinping and Uhuru Kenyatta. Xi Jinping is in the center, wearing a dark blue Mao suit with a red and yellow ribbon on his lapel. Uhuru Kenyatta is to his left, also in a dark blue suit. They are standing on a grassy area with a blurred background. The text 'GLOBAL POWER DYNAMICS' is overlaid in large, bold, green letters.

# GLOBAL POWER DYNAMICS

**INFLUENTIAL STATES ARE INCREASINGLY  
SEEKING TO ASSERT THEIR WILL OVER OTHERS,  
USING BOTH ECONOMIC AND MILITARY POWER**





Great powers are increasingly prioritizing their own interests and wielding power to achieve their objectives. Russia continues its invasion of Ukraine while conducting hybrid war against NATO and the West. China is deploying its economic and, increasingly, military power to pressure other states, and is also supporting Russia's war in Ukraine. Together, China and Russia are at the centre of a group of countries seeking to reduce Western influence, particularly that of the United States, worldwide. Meanwhile, the United States is leveraging its economic and technological strength as instruments of power, also against allies and partners. While the future of China-US relations is uncertain, the two will remain strategic rivals in the long term.

Russian President Vladimir Putin and Chinese President Xi Jinping  
at a Russian military parade in Moscow in May 2025.  
Novozhenina/Reuters/Ritzau Scanpix

■ A shift in the global balance of power has taken place. In recent years, China's influence has grown substantially, weakening the United States' position as the world's dominant power. China and the United States are competing for influence, alliances and resources, leaving neither in a position to shape global developments on its own.

For many countries outside the West, it has become a viable option to forge strategic agreements with China rather than the United States. China and Russia, together with other like-minded states, are seeking to reduce Western – and particularly US – global influence. At the same time, uncertainty has grown over how the United States will prioritize its resources in the future. This gives regional powers greater room for manoeuvre, enabling them to choose between the United States and China or to strike a balance between the two.

Influential states are increasingly asserting their will over others through economic and military power. This affects trust and international cooperation worldwide. Russia is now in the fourth year of its invasion of Ukraine, supported in part by China, and is conducting a hybrid war against the West. China relies primarily on economic power but also employs military pressure and hybrid tactics against other countries. The relationship between China and Russia is closer than ever. While the two countries are far from agreeing on everything, they have managed to deepen their cooperation in areas of shared interest.

Meanwhile, China is preparing to be able to fight a potential war with the United States in the Pacific. Thus, both Russia and China are engaged in a military build-up, putting pressure on Western countries to strengthen their own military capabilities. The West could, in a worst-case scenario, within a few years face a situation in which Russia and China are each prepared to fight a regional war – in the Baltic Sea region and the Taiwan Strait, respectively.

### **The United States is shifting its agenda**

The main strategic priorities of the United States are now its rivalry with China and US security in the Western Hemisphere. The balancing of US overall strategic priorities remains unresolved. The most significant change in 2025 is the significant prioritization of the

United States' neighbouring region, aimed in part at curbing China's influence in the region. The United States is leveraging economic power, including threats of high tariffs, to assert its will, and the possibility of employing military force – even against allies – is no longer ruled out.

China is currently the only country capable of independently challenging the global position and influence of the United States. In response, the United States is significantly adjusting its foreign and security policies to address this challenge.

It is not new that the United States intends to focus on its rivalry with China. China has become so powerful that the United States has begun to increase its economic and political pushback. US–China relations in the coming years remain uncertain and might be characterized by considerable turbulence, though both powers are set to maintain their strategic rivalry in the long term.

The United States and China are competing to develop advanced weapons systems and to lead developments in technological fields with probable application to military use, such as artificial intelligence. At the same time, China is intensifying its military build-up – and, to a lesser extent, so is the United States – each preparing to be able to handle a potential military confrontation that neither side wants.

The balance of power in the Pacific region is shifting in China's favour, which is why the United States intends to redeploy its military capabilities to the region. At the same time, the United States' increasing focus on the Pacific is creating uncertainty about its role as the primary guarantor of security in Europe – particularly in relation to the threat from Russia. This shift in US policy creates a greater demand for rearmament and for closer cooperation among the European countries to strengthen deterrence of Russia.

### **Distrust on the rise among states**

The use of power by the United States, China and Russia, in different ways, has deepened distrust between states – even among traditional partners and allies.

States have become increasingly aware of the vulnerabilities in their supply chains and of the countries they depend on, particularly in strategically important



## CHINA DOMINATES THE GLOBAL SUPPLY OF RARE EARTH ELEMENTS

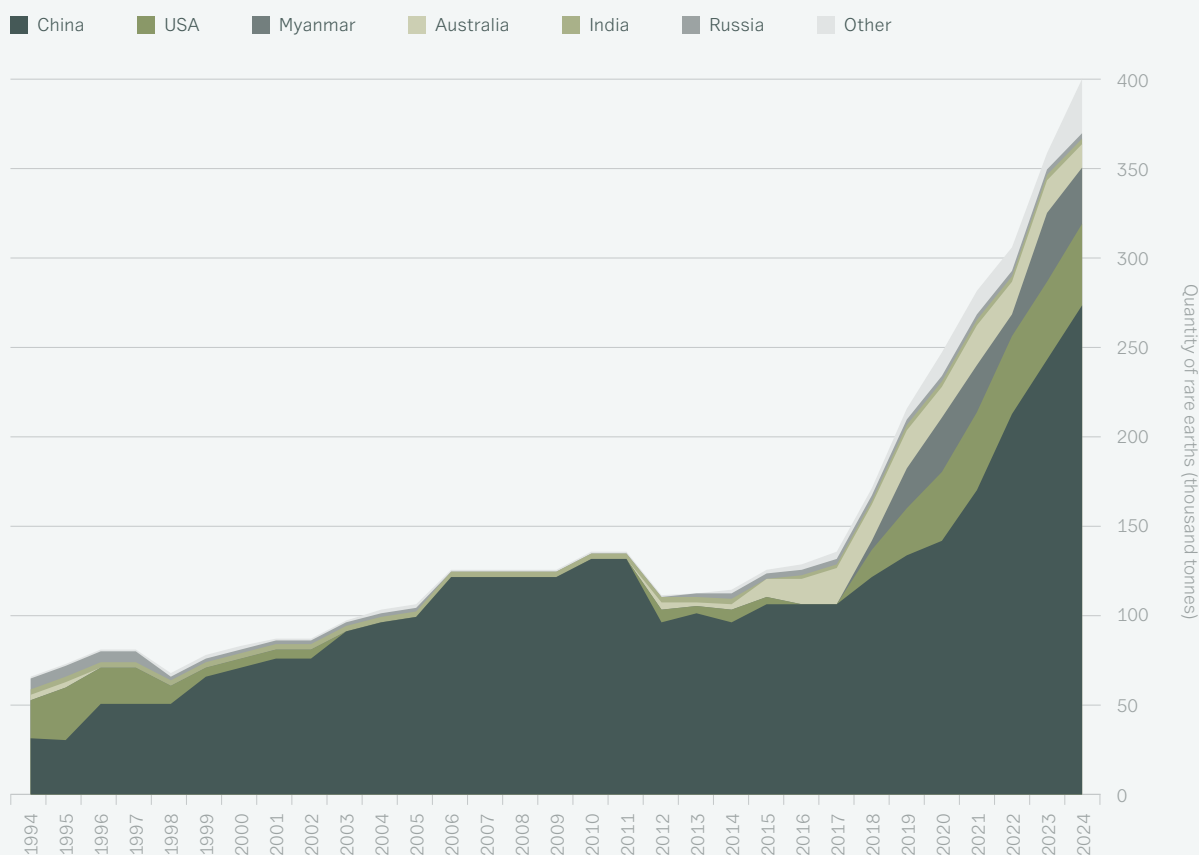
In 2024, China accounted for roughly 70 per cent of the global production of rare earth elements. The country possesses by far the largest processing capacity, which includes the separation and refining of minerals after extraction. China also holds the world's largest known reserves and, through a network of international partnerships, has secured mining agreements in several other countries. Together, these factors give China a dominant position in the global rare earths market – both in terms of extraction and processing.

Rare earth elements are a group of 17 metallic elements essential to the production of technologies ranging from smartphones and electric vehicles to guided missiles and satellites. They are typically divided into two categories – light and heavy rare earths – based on their properties and atomic weight. Despite their name, rare earths are relatively abundant in the Earth's crust – particularly the lighter ones.

The challenge lies not in discovering them but in locating deposits with sufficiently high concentrations and in extracting and refining them in ways that are both commercially viable and environmentally sustainable.

Some heavy rare earths possess particularly desirable properties, especially for use in magnets, which are a key component in certain weapons systems. Deposits of heavy rare earths are largely concentrated in China and Myanmar.

The extraction and processing of rare earths has become a strategic focal point in the US-China rivalry. In recent years, China has supplied around 70% of US imports of rare earths and likely remains the country's single largest source. Europe is also heavily dependent on China for certain rare earths. In 2025, China tightened its export regulations, a move that could affect both the defence and civilian industries in the United States and Europe.



Source: U.S. Geological Survey, Mineral Commodity Summaries, 1995-2025

## REGIONAL POWERS ALSO EXERT INFLUENCE IN A WORLD SHAPED BY GREAT POWER COMPETITION

Regional powers also leverage their strength to pursue their own interests within neighbouring regions. These states may gain greater room for manoeuvre if the United States and China, amid their rivalry, shift their focus to other regions.



### 1 The EU

Due to its economic strength, the European Union is a significant international actor. In response to developments in the security environment seen in recent years, European countries have increased their focus on military build-up.

### 3 Israel

Despite its small size, Israel has asserted itself as the dominant military power in the region since the terrorist attack on 7 October 2023. Through military action, it has significantly reduced Iran's influence in the region.

### 5 Japan

Militarily and economically, Japan is a key player in the Western Pacific. Its modern military, coupled with the presence of US bases and forces on its territory, gives Japan significant strategic importance in the event of a regional conflict. At the same time, Japan plays an active role in negotiations over regional economic agreements.

### 2 Russia

Much of its influence comes from its substantial nuclear arsenal and its demonstrated willingness to use military force against neighbouring countries.

### 4 India

The country is the world's most populous nation. It is undergoing significant economic development and has the potential to become a dominant regional power. At the same time, shifting global power dynamics have prompted India to orient itself both towards the West and towards China and Russia.

### 6 Brazil

The country is the largest and most populous country in South America, with significant economic and political influence, including through regional cooperation forums. It also plays an active international role, including within the UN and the BRICS partnership. Brazil – once firmly aligned with the United States – is now also cooperating with China and is looking towards Europe as well.



sectors such as raw materials, energy, technology and food. At the same time, an increasing number of states are imposing restrictions on cooperation – including in research, investments and the sharing of military technology.

### **China and Russia share a common ambition to reduce Western influence**

The cooperation between Russia and China is becoming increasingly close, and the two countries are now each other's most important partners. This holds true despite continued mistrust in their cooperation, due to conflicting economic and political interests and ambitions, including in Central Asia and the Arctic.

China and Russia are collaborating to reduce Western – particularly US – global influence and to position themselves as leading powers. They coordinate their positions in the UN Security Council and work to strengthen international organizations in which they both hold prominent roles. This includes, for example, BRICS, a partnership between Brazil, Russia, India, China and South Africa, and several other non-Western countries, and the Shanghai Cooperation Organisation (SCO), a collaboration between China, Russia and Central Asian states, among others.

Russia relies on China more than vice versa, particularly economically. This dependence has deepened since the war in Ukraine. China is Russia's main trading partner and the largest buyer of Russian energy. About half of Russia's imports now come from China, compared to roughly a quarter before the war. By contrast, exports from China to Russia account for only around 4% of China's total exports.

Russia is looking to deepen its economic cooperation with China, but there are limits to how far China is willing to go. China seeks to avoid Western sanctions and does not want to become too reliant on a single country for its economic or energy needs.

China's support for Russia's war in Ukraine is crucial to Russia's ability to sustain the conflict. The majority of the sanctioned goods used by Russia in the war come from China. Additionally, China's diplomatic backing is key to Russia's efforts to garner broader support for its opposition to the West.

The war in Ukraine and the threat from Russia have demanded significant attention from the United States and European countries, diverting particularly US focus from the threat posed by China. As a result, China has a vested interest in seeing the conflict between Russia and the West persist.



### **China's support for Russia's war in Ukraine is crucial to Russia's ability to sustain the conflict.**

Military cooperation between Russia and China is expected to continue even after the war in Ukraine ends. Russia is continuously sharing operational experience from the war with China, including lessons on countering Western military equipment.

Russia and China are also collaborating on military technology, with their cooperation extending to both civilian and military educational institutions. For instance, Chinese companies and Russian universities have been collaborating to provide mutual support in education and training in drone and aerospace technology. This collaboration has gained particular significance since the war in Ukraine has highlighted the critical role of drones in modern warfare.

China and Russia's military-strategic cooperation will enhance both countries' understanding of how to counter Western military technology and doctrines, thereby strengthening their position in any potential future conflicts with the West. ■





# RUSSIA

**RUSSIA IS CONDUCTING A HYBRID WAR  
AGAINST THE WEST**





Russia sees itself in conflict with NATO and is launching hybrid attacks against the Alliance, including sabotage and destructive cyber attacks. The Russian military is also adopting an increasingly threatening posture in Denmark's neighbouring region. Despite several US attempts to broker a peace agreement, the war in Ukraine will likely continue to tie up Russian resources through 2026. Russia's defence industry is expected to outproduce Europe's in the coming years. At the same time, uncertainty surrounds the role of the United States as the guarantor of European security. This will increase Russia's willingness to intensify its hybrid attacks against NATO. Russia's military threat to NATO will increase, even though there is no threat of a regular military attack on the Kingdom of Denmark at present.

A Russian soldier fires an artillery piece during a Russian offensive in Ukraine in October 2025.  
Imago/Ritzau Scanpix



■ Russia is on a confrontational course with the West. The immediate trigger is the war in Ukraine, but the underlying conflict stems from the Putin regime's belief that Russia should be a leading great power, on par with the United States and China – and that NATO, the EU and the United States stand in the way of this goal. In the regime's view, extensive control over the former Soviet space – particularly Ukraine, Belarus, Moldova and Georgia – is a prerequisite for Russia's status as a great power.

### **Russia continues to set extensive conditions for ending the war in Ukraine**

The war in Ukraine is likely to continue beyond 2025 despite several attempts throughout the year to broker a settlement. While Russia publicly signals a willingness to negotiate, it continues to make extensive demands on Ukraine and NATO. Despite efforts by the United States to broker a settlement, there are no signs that Russia is prepared to make meaningful compromises for a ceasefire or peace agreement. The Putin regime remains confident that the war in Ukraine is progressing in Russia's favour and believes it will ultimately achieve its objectives because it views itself as more resilient than both Ukraine and the West. It is highly likely that Russia will only agree to a ceasefire or peace agreement if the vast majority of its demands are met – or if the costs of continuing the war outweigh the anticipated benefits.

Russia has so far primarily used negotiations with the United States over the war in Ukraine as a means to re-establish bilateral dialogue. Russia's main objective is to delay new US sanctions and, if possible, ease or lift existing ones. Even if relations between the two countries improve, Russia's deep-seated mistrust of the United States will persist. As a result, Russia does not view negotiations with the United States as a viable path to long-term gains that would make ending the war in Ukraine worthwhile. However, Russia will seek to exploit the US desire for a swift end to the war to sow division between the United States and Europe.

If Russia were to improve its relations with the United States, it could have a significant impact on Russia's cooperation with other countries. The fear of secondary US sanctions has so far complicated Russia's trade with many nations and made foreign companies wary

of engaging with Russia. Should this situation change, it would not only improve Russia's overall economic outlook but also make it easier for the country to access the components it needs, among other things, for its military build-up. This, in turn, would strengthen Russia's ability to maintain military pressure on Ukraine.

### **Russia is gaining ground in Ukraine but remains far from a military victory**

It is likely that neither Russia nor Ukraine will make significant battlefield advances in 2026. Russia will remain better positioned to wage a war of attrition than Ukraine, due to its ongoing recruitment of soldiers and greater military production capacity. Since 2022, Ukraine's resistance has prevented Russia from making large-scale territorial gains, and by 2025 Russia has managed to capture only around 1% of Ukraine's total territory. However, there will be an increased risk of sudden local breakthroughs as the Ukrainian forces are gradually being worn down.

Russia has significantly increased its number of long-range strikes in 2025, alongside rising production of drones and missiles. The frequency of Russian airstrikes is expected to grow further in 2026. These attacks primarily target Ukraine's military industry. While they complicate Ukraine's efforts to reverse the tide on the front lines, the airstrikes alone are highly unlikely to determine the outcome of the war in Russia's favour.

Ukraine is also launching increasingly large-scale airstrikes, primarily targeting military sites and energy infrastructure within Russia. These attacks have, among other things, contributed to rising fuel prices in Russia, partly due to significant damage to Russian oil refineries. Ukraine is likely to be able to intensify its strikes on targets deep within Russia using domestically developed cruise and ballistic missiles. If Ukraine succeeds in producing enough missiles to escalate its long-range attacks, the costs for Russia to sustain the war would rise significantly.

Ukraine's ability to defend itself, sustain the war and expand its military production will continue to depend on Western support. Although the United States has not enacted new aid packages for Ukraine in 2025, it continues to provide military assistance through

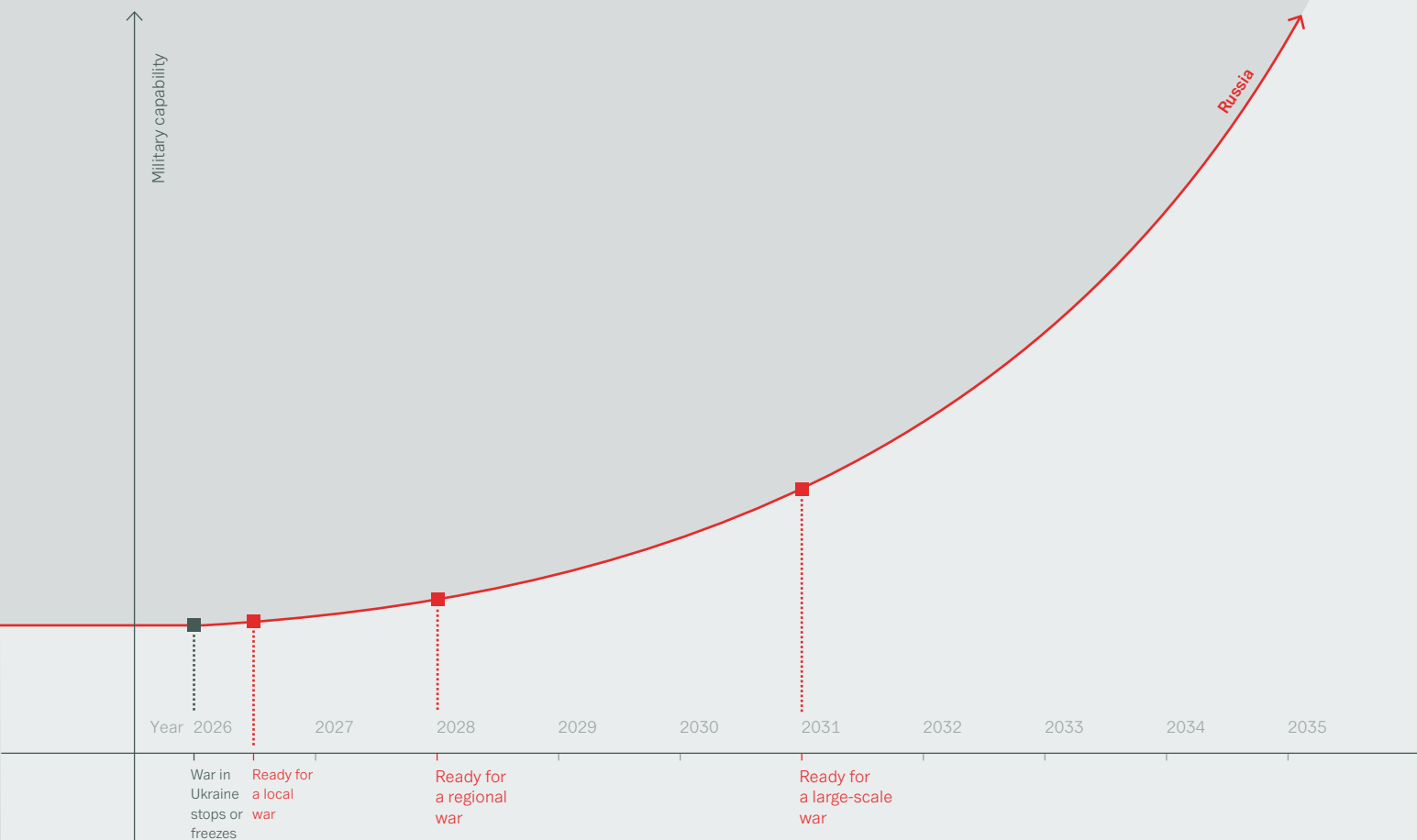
## THE PUBLISHED DDIS ASSESSMENT OF THE THREAT FROM RUSSIA AGAINST THE KINGDOM OF DENMARK REMAINS VALID

The assessment, dated 09 February 2025, states that the military threat from Russia will increase in the coming years even though there is no threat of a regular military attack on the Kingdom of Denmark at present.

Russia is preparing for a possible war against NATO. This does not mean that Russia has decided to wage a full-scale war, but Russia is rearming and rebuilding its armed forces and military capabilities to preserve this option. For now, Russia will still be careful to avoid having its military activities trigger NATO's article 5.

The threat of a conventional Russian military attack on NATO – and, by extension, the Kingdom of Denmark – depends primarily on three conditions:

1. That the war in Ukraine ends or turns into a frozen conflict.
2. That Russia perceives NATO as militarily weakened or politically divided – especially if Russia assesses that the United States cannot or will not support the European NATO countries in a potential war against Russia.
3. That Russia's conventional military capabilities continue to grow while the West fails to simultaneously build up its military capabilities at the same speed.





## ONE OF RUSSIA'S KEY GOALS: TERRITORIAL CONTROL OVER MUCH OF UKRAINE

The map shows the front line as of November 2025, along with the four Ukrainian regions and the Crimean Peninsula that Russia has already annexed. However, Russia's war aims may extend beyond these areas, with officials repeatedly hinting at possible annexations of Mykolaiv and Odesa in south-western Ukraine.

— Front line



### WHAT ARE RUSSIA'S DEMANDS

Russia has set out a number of conditions for entering a ceasefire or peace agreement. These, among other things, include:

- recognizing the four partially occupied Ukrainian regions – Kherson, Donetsk, Luhansk and Zaporizhzhia – as well as Crimea as Russian territory;
- ensuring that Ukraine remains neutral and does not join NATO.
- demilitarizing Ukraine while ending all Western support, including military equipment and intelligence.
- guaranteeing that NATO will not admit new members in Eastern Europe, and lifting all sanctions on Russia.

intelligence sharing and permits European countries to supply US weapons to Ukraine. If the existing support were to disappear, it could affect the country's ability to continue the war, unless Europe is able to make up for the loss.

Support for Russia's war in Ukraine – primarily from China, but also from North Korea and Iran – will remain crucial to Russia's ability to maintain military pressure on Ukraine. To date, China has supplied key components for weapon systems, but also drones, for example. Since 2022, China has also been the largest purchaser of Russian oil and has assisted Russia in circumventing Western sanctions.

Iran and North Korea have provided Russia with significant quantities of artillery ammunition, attack drones and ballistic missiles. In addition, North Korea has sent soldiers to the war and workers to support the Russian military industry. North Korea is expected to continue supplying material support in the coming years. However, Iran's capacity to deliver additional ballistic missiles may be limited following Israel's strike on Iran in June 2025.

In addition to China, India and Türkiye also import large volumes of Russian oil and petroleum products, helping Russia cover its war costs, despite having to sell its oil at substantial discounts.

#### **Russia is building up its forces against NATO, while the war in Ukraine drains its resources**

Russia's objective for its conventional forces is that they are able to win a war against NATO along Russia's western borders with minimal mobilization time, while remaining deployable against militarily weaker neighbouring countries.

Russia has undertaken the largest reform of its armed forces since 2008 in order to be better organized for a war against NATO in Europe. Since the start of the war in Ukraine, Russia has increased its troop numbers from around one million to nearly 1.5 million.

Since 2024, Russia's defence industry has been able to produce more equipment and ammunition than the country consumes in the war in Ukraine. Nevertheless, the conflict continues to tie up most of Russia's

resources and delays its broader military build-up. Once the war ends or becomes frozen, Russia will be able to redirect substantial resources from the war effort towards its military build-up. In addition, any easing of international sanctions would release additional resources for military expansion.

At present, the Russian defence industry is producing more equipment and ammunition than its European counterparts. The reason for this is that Russia began expanding its military-industrial base in 2022, whereas Europe's expansion started later. If the war ends in 2026, Russia is expected to maintain its current high level of production. Consequently, Russia could secure an even stronger position vis-à-vis Europe in the coming years – especially if European countries fail to translate defence investment pledges into actual combat capabilities as rapidly as Russia.

Since its invasion of Ukraine, Russia has steadily expanded its military forces, prioritizing the development of factories capable of producing short- and long-range drones, cruise missiles and ballistic missiles. As a result, Russia can now manufacture these weapons in significantly greater quantities than before the war began.

Although the Russian defence industry is operating at a high level, it faces several challenges that could limit further increases in production. These include labour shortages and a substantial debt burden, which undermines the industry's financial resilience and constrains its ability to invest in new production and development.

It is less likely that these challenges will prevent Russia from continuing its military build-up in the short term, i.e. over the next one to two years. This is primarily because the country is willing to take significant measures to support the defence industry's ability to maintain production. Nevertheless, it will be difficult for Russia to increase its military output significantly beyond 2025 levels.



Russia is conducting hybrid war against NATO and the West

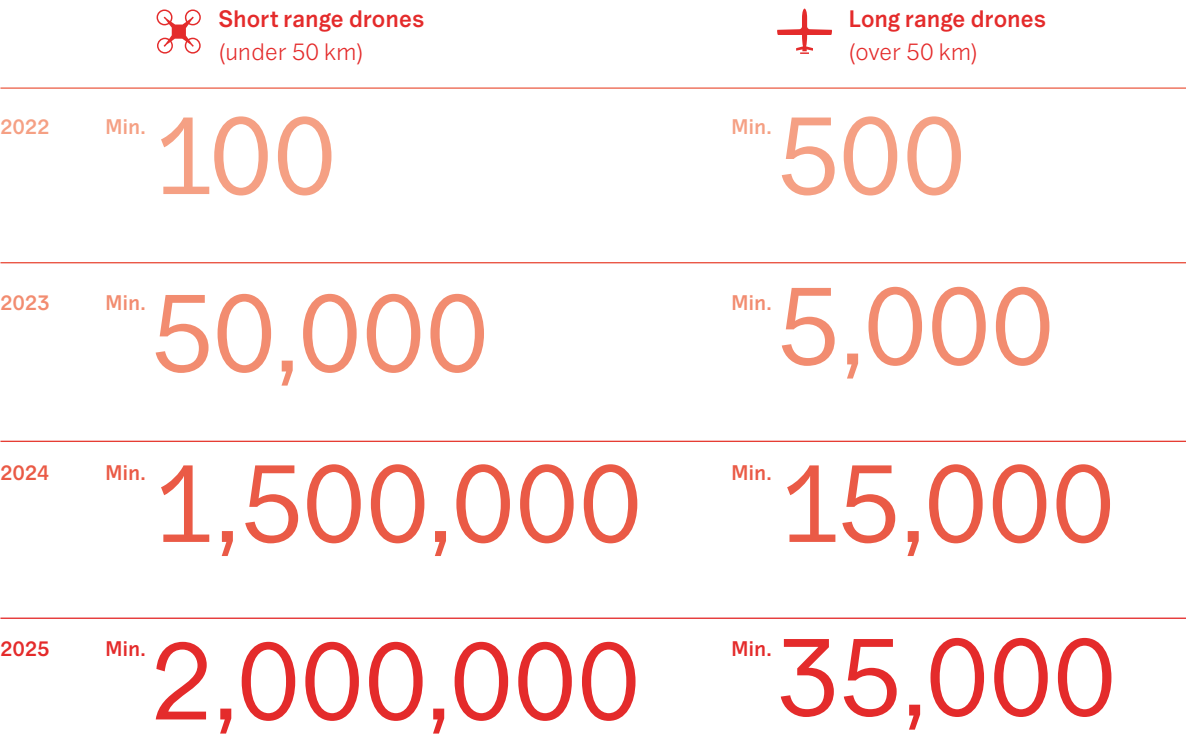
In the coming years, Russia will intensify its hybrid operations against NATO, seeing them as the most effective means to challenge and weaken the Alliance.

Russia is continuously seeking to raise the threshold for what could invoke NATO's collective defence under Article 5 through hybrid attacks. This has included acts of sabotage and destructive cyber attacks, which have damaged data and systems in Western countries. Furthermore, Russia's military activity in Denmark's surrounding region in the Baltic Sea has become increasingly assertive.

Russia's violation of Polish airspace in autumn 2025, using a large number of attack drones, was likely a deliberate provocation aimed at testing NATO's responses and creating uncertainty about how far Russia is willing to go without crossing the threshold into war.

Russia's willingness to carry out stronger military provocations against European NATO countries would increase if the United States were to publicly cast doubt on whether it would respond to a Russian attack on a European NATO member. Russia could carry out such provocations to test whether the United States would actually come to Europe's aid. Furthermore, Russia's willingness to confront European NATO countries would likely rise if the United States were to intensify its focus on the Indo-Pacific region and withdraw more of its troops from Europe.

RUSSIAN DRONE PRODUCTION HAS INCREASED SIGNIFICANTLY SINCE 2022



### **Russia conducts espionage to strengthen its position against NATO**

For decades, Russian state hackers and agents have conducted espionage against the Kingdom of Denmark to advance Russia's security policy interests. Some of these espionage activities are aimed at gaining access to information that could provide Russia with an advantage in the event of a war against NATO. Russia could use information on, for example, NATO countries' defence and contingency plans, military equipment, force build-up and cohesion to improve its own military planning.

Russian state hackers and agents seek, among other things, to steal this type of information from NATO as well as from the defence and foreign ministries of its member states. They also target data held by companies involved in defence technology development. This information can be transferred to Russia's defence industry and used to develop domestic equipment. Knowledge of NATO's military hardware and technologies – including both strengths and vulnerabilities – can also provide Russia with a military advantage.

Russia has also repeatedly attempted to hack Danish and Western authorities and companies in the transport and energy sectors. One objective has likely been to obtain access and information that Russia could use to disrupt or disable critical infrastructure in the West at a later stage. This may take place both through destructive cyber attacks and sabotage. Russia may choose to carry out such attacks immediately prior to or during a war against NATO. For instance, Russia could do so to exert pressure on societies in NATO countries or to disrupt the Alliance's ability to move troops and equipment to the front line, including via Denmark.



The Baltic Sea region is where the risk of Russian military action against NATO is most significant, and where Denmark faces the greatest likelihood of being directly involved in a war with Russia.

### **Russia is building up its military forces in the Baltic Sea region**

The Baltic Sea region is where the risk of Russian military action against NATO is most significant, and where Denmark faces the greatest likelihood of being directly involved in a war with Russia.

Russia's strong focus on the Baltic Sea region is largely driven by the region's security policy and economic significance. The region hosts several key Russian ports used for exporting oil and gas, with roughly half of Russia's seaborne oil exports passing through the Baltic Sea and the Danish Straits. In addition, the Baltic Sea is vital to Russia's access to the Kaliningrad region, which is geographically separated from the Russian mainland.

Russia intends to strengthen its military presence in the Baltic Sea region in the coming years. However, the war in Ukraine is challenging and delaying these plans, as it ties up the country's military and economic resources. Nonetheless, Russia has already deployed new army units along the border with Finland, behind the three Baltic states and in western Russia.

In the coming years, Russia is also likely to deploy additional modern combat aircraft in and around the Baltic Sea region. Furthermore, Russia is reinforcing its Baltic Fleet with new vessels capable of launching long-range missiles that can strike targets across Europe. The Baltic Fleet is also prioritizing the development and training of drone capabilities, which Russia could employ against larger NATO naval forces in the Baltic Sea and the Danish Straits. Taken together, these plans suggest that, once the war in Ukraine concludes, the region will host significantly more troops and military capabilities than it did prior to 2022.

### **Russia's behaviour in the Baltic Sea region is heightening military tensions**

In political and security terms, the situation in the region is becoming increasingly tense, with Russia willing to employ its naval and air forces aggressively against NATO countries to deter them from taking steps that could challenge Russian interests.

Throughout 2025, Russia's military activities in the Baltic Sea region have become increasingly threatening to NATO. For instance, Russia has violated the airspace of NATO countries with combat and reconnaissance aircraft far more frequently than in 2024. Russian warships are also acting more aggressively in their operations around NATO vessels. On several occasions, weapon systems on these warships have even been manned when Danish military ships and aircraft were in close proximity – including within Denmark's territorial waters. In addition to these military provocations, Russia continues to disrupt GPS signals, affecting both military and civilian maritime and air traffic.

Russia is devoting considerable effort to protecting ships belonging to the so-called “shadow fleet”, which transports Russian oil through the Baltic Sea and the Danish Straits. The shadow fleet is vital to Russia's economy, as it enables the country to circumvent international sanctions on its oil exports. Revenues from Russia's energy production account for roughly 30% of the state's income.

In the spring of 2025, Russia deployed fighter jets and patrol vessels in the Gulf of Finland to prevent an Estonian Coast Guard ship from intercepting a tanker belonging to the shadow fleet. The incident did not escalate into a military confrontation, but similar events in the future could risk triggering armed clashes between Russian and NATO naval and air forces in the Baltic Sea. Should such clashes occur, they would not necessarily lead to a full-scale war between Russia and NATO.

### **Russia will prioritize military spending despite mounting economic pressure**

The Putin regime will prioritize funding for the war in Ukraine and Russia's military build-up in the coming years. These high military costs will come at the expense of other sectors of the Russian economy and society to a greater extent than before. This could lead

to even more severe economic consequences over the next five years, including sharp rises in inflation and shortages of goods. This, in turn, will increase the risk of spontaneous protests breaking out in Russia. However, the Putin regime appears willing to bear this risk to sustain both the war and its military build-up.

Russia is cutting back on long-term civilian investments, among other measures, to finance its immediate military expenditures. While military spending contributes to overall economic activity, it is no longer sufficient to sustain continued growth. According to official estimates, economic growth in 2025 has been significantly lower than in 2023 and 2024, and the Russian Minister of Economic Development has even warned that the country is on the brink of an economic downturn. These statements should be viewed in the context of Russia highly likely deliberately manipulating its economic data to conceal the real extent of the negative economic consequences of the war in Ukraine.

Russia will continue to rely on short-term measures, such as state subsidies and more lenient business regulations, in the hope that these will suffice to avert economic decline or, at worst, a full-blown economic crisis.

In general, the pressure on the Russian economy has increased significantly in 2025, partly due to lower revenues from oil and gas exports compared with previous years. In addition, many businesses are struggling with the high interest rates set by the Russian central bank to curb inflation amid high military expenditure. These rates make it costly for companies to borrow funds needed for new investments.

An expanding and increasingly diverse set of Western sanctions continues to exert intense pressure on the Russian economy. The measures are a major factor behind Russia's reduced earnings from energy exports. Although Russia has managed to find new buyers for its oil – including India and China – these sales come at higher costs. In order to redirect the large volumes previously sold to Europe, Russia has also been forced to offer steep discounts. New Western sanctions targeting Russian oil companies, introduced in October 2025, could further reduce the country's revenues from energy exports.



## RUSSIA'S ACTIVITIES IN THE BALTIC REGION HAVE BECOME MORE THREATENING

Russia's actions in the Baltic region have grown increasingly threatening towards NATO. The map highlights several examples. This assertive posture is partly driven by Russia's strategic need for unimpeded passage through the Baltic Sea and the Danish Straits to transport oil and military equipment abroad, indicated by the dashed lines on the map.



GPS jamming



Airspace violations



Russian attempt to prevent Estonian Coast Guard boarding of a shadow fleet vessel



Military equipment transport



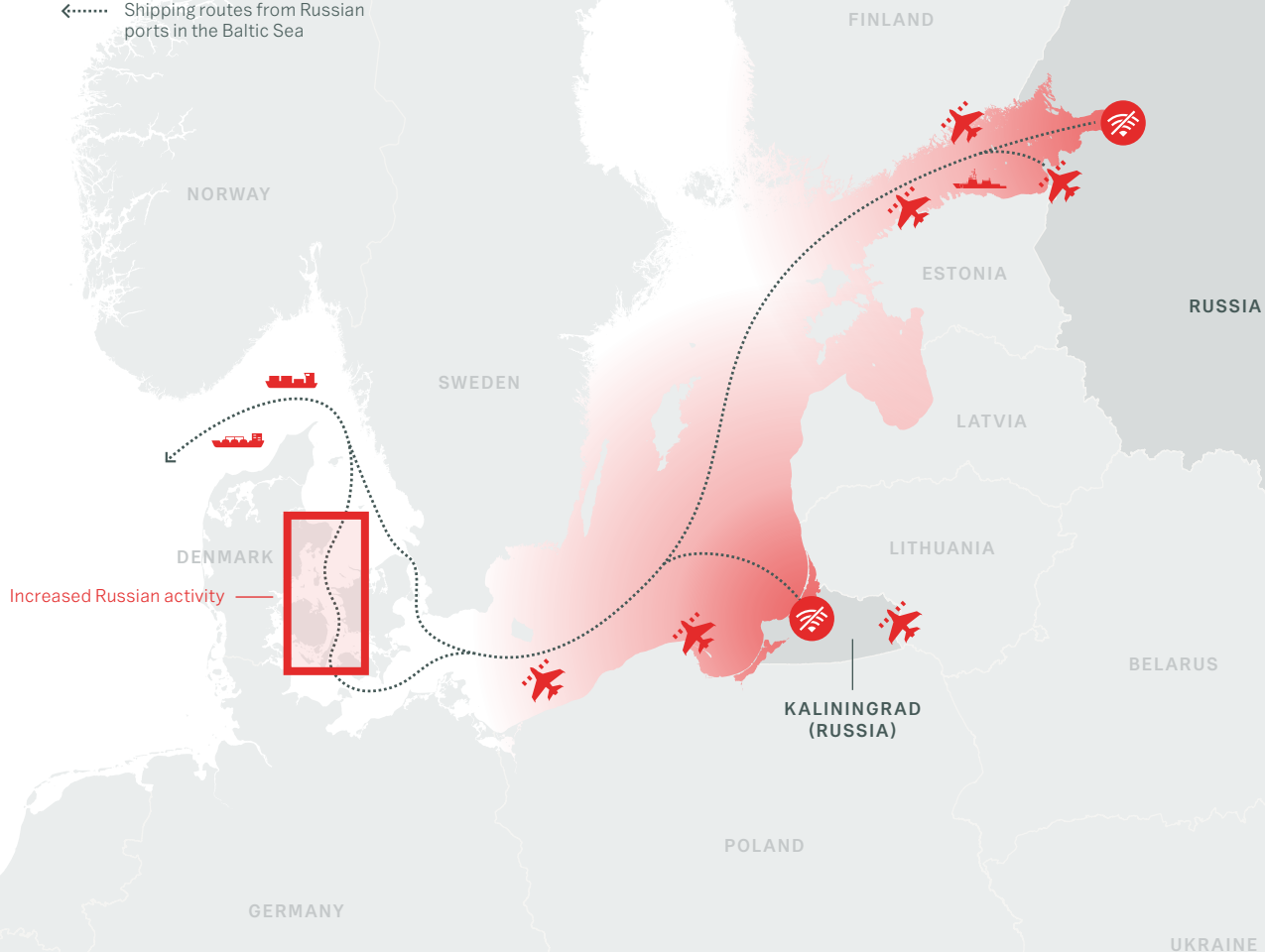
Oil and LNG transport

←..... Shipping routes from Russian ports in the Baltic Sea

### THE RUSSIAN SHADOW FLEET

Russia operates a fleet of tankers transporting Russian oil subject to Western sanctions. Most of these vessels are registered under foreign flags, and their ownership is deliberately opaque, partly to complicate the enforcement of sanctions against their owners.

Many of the vessels in the shadow fleet are old and often poorly maintained, which increases the risk of maritime accidents, including environmental pollution.



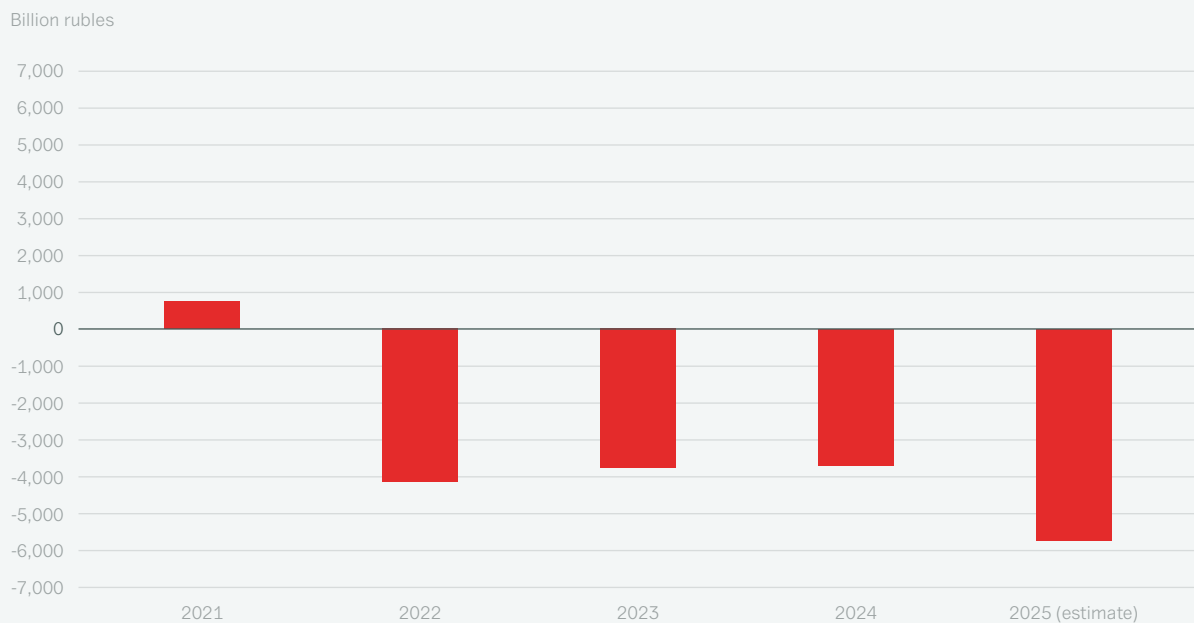


The Putin regime will prioritize funding for the war in Ukraine and Russia's military build-up in the coming years. These high military costs will come at the expense of other sectors of the Russian economy and society to a greater extent than before.

#### RUSSIA'S BUDGET DEFICIT SPIKES IN 2025

The bars show Russia's budget surplus or deficit for 2021-2025. The country's deficit grew sharply in 2025 compared with 2022-2024, driven largely by weaker economic growth

and lower energy revenues. The large deficit adds further pressure to the Russian economy.



Source: Russian Ministry of Finance

A separate set of sanctions targets Russia's defence industry and its imports of Western components. Russia has long relied on large volumes of Western-made parts for its weapons systems, including electronics. To some extent, Russia has been able to circumvent these restrictions via third countries. China, for instance, has significantly increased its exports of manufacturing equipment and components to Russia since the start of the war in Ukraine. Even so, the sanctions have made it more costly and cumbersome for Russia to obtain the components crucial to its military production.

The Russian state has only limited economic reserves remaining. Public debt, however, remains low, providing Russia with some room for manoeuvre to sustain economic activity. It is likely, though, that Russia will have to rely on state-owned banks and companies to purchase government bonds in order to raise new funds. As a result, maintaining high economic activity will be difficult without increasing the degree of state intervention in an already tightly controlled economy. Such a development would further exacerbate Russia's long-term economic challenges.

#### **Russia aims to boost its global influence and undermine the West**

Russia views maintaining a presence in Africa, Asia, Latin America and the Middle East as key to strengthening its global position. However, the war in Ukraine and the significant resources the war demands have weakened Russia's influence in other regions, including Central Asia and the South Caucasus, where countries are seeking to reduce their political and economic dependence on Russia, among other things, by deepening cooperation with alternative partners.

Russia is expanding its political, economic and military ties – especially with China and North Korea – to secure support for the war in Ukraine and to bypass Western sanctions. Similar dynamics apply, to some extent, to its cooperation with Iran, although this has likely weakened during 2025 due to Iran's war against Israel. In addition, Russia continues to promote non-Western organizations such as BRICS, which help secure its international influence and serve as a counterweight to Western-led organizations and institutions.

#### **Indoctrinating new generations with the notion of eternal conflict with the West**

The Putin regime employs extensive propaganda to reinforce anti-Western sentiment throughout Russian society, focusing, in particular, on nationalist and conservative values. As a result, new generations are being indoctrinated with the notion of Russia's perpetual conflict with the West. This is reinforced, in part, by the increasing militarization of society, including mandatory military training at all levels of education and in major state-run workplaces. Such indoctrination will have lasting negative consequences for Russia's relations with the West, extending well beyond Putin's rule. Consequently, it is likely that any successor to Putin will maintain a confrontational stance towards the West.

Moreover, voices critical of the regime are suppressed to such an extent that any genuine opposition in Russia has effectively been eliminated. The Putin regime therefore appears stable, with no signs of imminent change. However, Russia has a history of sudden and far-reaching societal upheavals. As a result, the regime remains highly alert to any signs of discontent among the population. ■

## THEME: HYBRID MEANS

Hybrid tools includes political, economic, informational, and military means used by a state to weaken and undermine other states. These means may be employed individually or in combination to achieve the greatest possible effect.

Russia uses hybrid activities to weaken NATO's political cohesion and decision-making capacity. Russia's aim is not to achieve quick gains, but rather to create a sustained state of uncertainty in which NATO's cohesion is gradually undermined. Russia will likely become more willing to intensify its hybrid attacks if the alliance fails to respond.

Russia highly likely sees itself as being in conflict with the West, in which the hybrid means employed are kept below the threshold of armed conflict.

Russia is carrying out hybrid attacks against the West on a much larger and aggressive scale than before the war in Ukraine. Russia has likely concluded that it can employ these hybrid means without risking escalation or retaliation. In addition, Russia likely believes that

NATO member states are behind similar activities directed at Russia. Based on this, the DDIS assesses that Russia is currently conducting a hybrid war against NATO and the West.

Russia represents the greatest hybrid threat to the West and to NATO. While countries such as China and Iran also employ hybrid means to advance their objectives, their activities are predominantly focused on countries within their own regions.

### Sabotage

Since 2023, Russia has orchestrated a series of sabotage operations against targets in Europe. Russia is likely conducting an actual sabotage campaign to undermine Europe's support for Ukraine.

Sabotage is an effective hybrid tool, as its very nature makes it difficult for Western authorities to attribute responsibility. Russia often uses individuals who are not directly linked to Russian intelligence services to carry out sabotage operations. Consequently, Russia has only partial control over the saboteurs. The attacks have generally been relatively simple to execute.

### Cyber attacks

Russia and other countries, such as Iran, also employ cyber attacks to sow fear and uncertainty and to influence the political processes and decision-making of other countries. For instance, Russia has used hackers to leak sensitive information in an effort to discredit individuals or organizations.

Destructive cyber attacks represent another means employed by Russia, Iran and North Korea against other countries.

Since 2023, pro-Russian hacker groups have increasingly launched destructive cyber attacks, including against Western critical infrastructure. The targets were all poorly protected. In Denmark, pro-Russian hackers caused water pipes to burst at a Danish water utility in December 2024, leaving some of its customers temporarily without water.

### HYBRID WAR

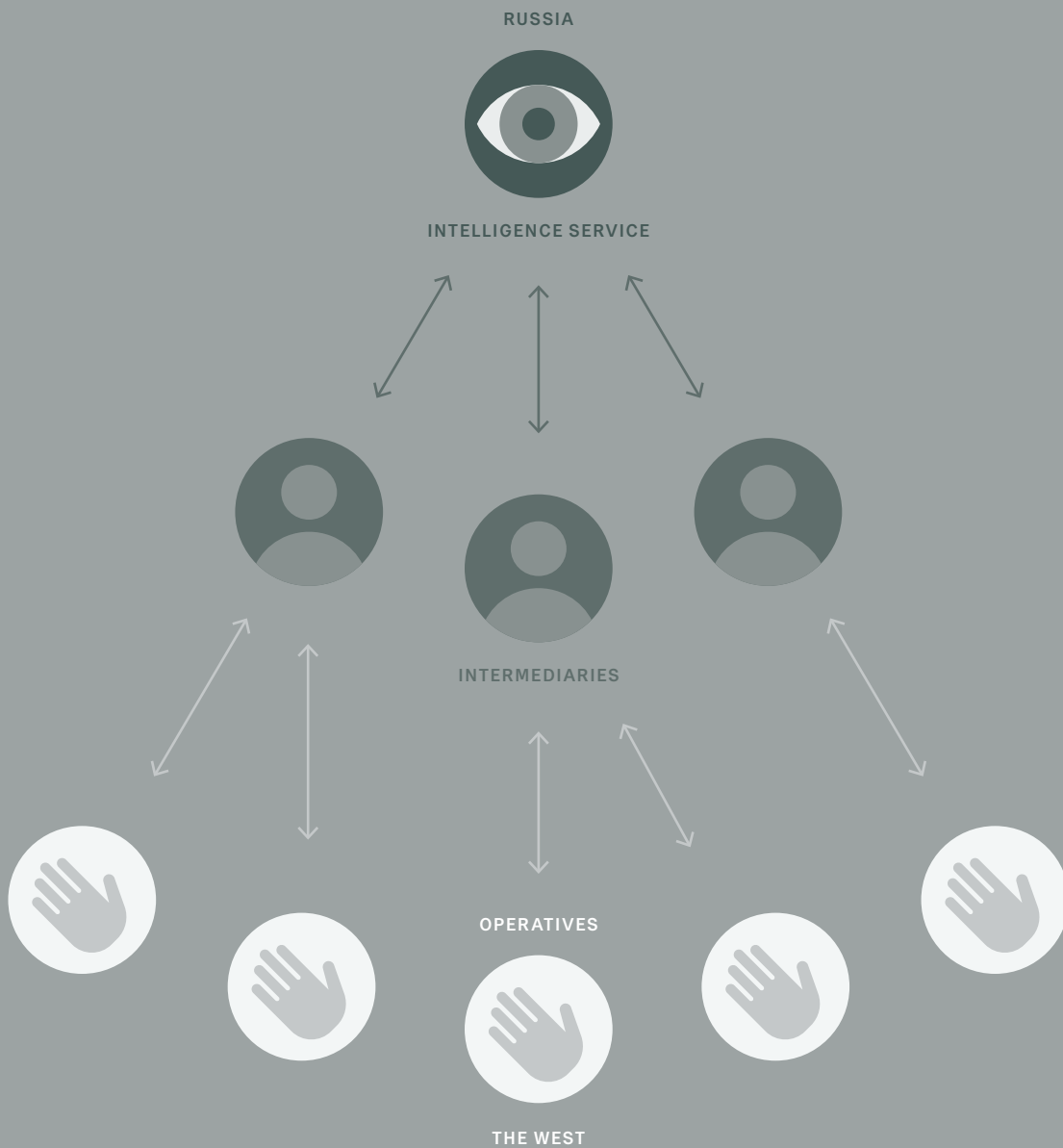
Hybrid war is not a legal concept entrenched in international law. The DDIS uses the term "hybrid war" to describe a stage in which a state employs a combination of hybrid measures, including military means, in a highly aggressive manner to exert pressure on and undermine another state, while remaining below the threshold of open armed conflict.

A state may choose to engage in hybrid warfare when it assesses that traditional diplomatic instruments are unlikely to achieve the desired outcome and that a conventional armed conflict would entail too much risk.

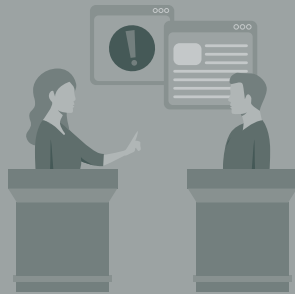


## RUSSIAN INTELLIGENCE SERVICES PLAN SABOTAGE IN EUROPE

Russian intelligence agencies use intermediaries to recruit individuals to carry out espionage and sabotage for payment. Recruitment often happens via social media and, in some cases, the operatives do not even realize they are working for a Russian intelligence service.



## THE VARIOUS FORMS OF INFLUENCE ON FOREIGN POPULATIONS AND LEADERS



### DISINFORMATION

Denmark and Greenland were likely targeted by a Russian influence operation in early 2025. The incident involved a false statement attributed to a Danish member of parliament and sought to exploit public debate over the relationship between Denmark and Greenland to damage the relationship between the Kingdom of Denmark and the United States.



### USE OF PRIVATE ACTORS

The Russian state frequently outsources its influence campaigns to private actors. For instance, it relies on private companies with expertise in information technology, media and sociology to design and implement operations on Russia's behalf aimed at shaping public opinion.



### RELATIONSHIP-BUILDING

China operates through organizations affiliated with the Communist Party to cultivate ties with politicians abroad, seeking to turn them into champions of Chinese interests abroad.



### CYBER ATTACKS

States employ cyber attacks as a means of influence, often combining them with the dissemination of political messages. These messages are frequently circulated via social media, and in some cases even displayed directly on the screens of targeted individuals.

One thing these attacks have had in common so far is that they have required neither extensive preparation nor any specialized technical skills. In addition, the hackers have publicized their actions on social media in an attempt to attract attention. Although the consequences have so far been limited, this type of attack carries the potential for far more serious consequences. This is due to the hackers' high risk tolerance, exemplified by their targeting of systems used in critical infrastructure.

Furthermore, pro-Russian hacker groups have repeatedly carried out disruptive cyber attacks aimed at rendering Danish government and corporate websites unavailable. It is likely that some of the pro-Russian hacker groups are linked to the Russian state.

### **Military provocations**

Military activities can also serve as hybrid tools, provided they remain below the threshold of war.

Since 2022, Russian military units have exhibited increasingly threatening and aggressive behaviour, engaging in reckless navigation, simulated attacks on NATO forces, and jamming of civilian and military ship and aircraft communications systems as well as GPS signals.

There are also examples of Russia having acted very aggressively towards NATO states operating close to its borders. For instance, in September 2022, a Russian fighter jet fired an air-to-air missile towards a British reconnaissance aircraft over the Black Sea.

In addition, Russia has repeatedly violated the airspace of several NATO states with attack drones and fighter jets, among other things. This type of violation has significantly increased in 2025.

China employs military means in similar ways within its own region. For example, it has exhibited threatening behaviour towards Taiwan and has deliberately rammed Philippine vessels in disputed areas of the South China Sea.

### **Malign influence**

Russia continuously seeks to shape political decision-making and public opinion across Europe, including in Denmark. Russia's influence operations have, since the

## **THE CYBER THREAT AGAINST DENMARK**

The Danish Resilience Agency (DRA) assesses the cyber threat against Denmark.

The DRA assesses that the threat of:

- cyber espionage is VERY HIGH
- cyber crime is VERY HIGH
- cyber activism is HIGH
- destructive cyber attacks is MEDIUM
- cyber terrorism is NONE

The threat assessments can be found on the DRA website at [www.samsik.dk](http://www.samsik.dk)

start of the war in Ukraine in 2022, primarily been aimed at sowing discord in Europe and weakening Western support for Ukraine.

The influence operations are conducted both via online platforms and through influence agents who are individuals cooperating with foreign intelligence services to establish and exploit relationships abroad for the purpose of exerting influence. After several years of minimal contact with European politicians – particularly in the immediate aftermath of the war in Ukraine – Russia has resumed inviting them to conferences in the country. The initiative is intended to build relationships that can later be exploited for influence operations.

China seeks to shape public opinion in Western countries. In doing so, it aims both to improve its image and to steer political decisions in a direction favourable to its interests.

Russia and China often target young people, emerging leaders and opinion formers in other countries with their influence activities. China, in particular, makes use of organizations linked to the Communist Party to cultivate relationships with politicians who can help foster a favourable perception of China. In the long term, these relationships can be leveraged to shape the policies of other countries in ways that serve Chinese interests.





# THE ARCTIC

**THE SECURITY TENSIONS BETWEEN  
RUSSIA, CHINA AND THE UNITED STATES  
HAVE SPREAD TO THE ARCTIC**





Russia, China and the United States have diverging interests in the Arctic, but all three countries seek to play a greater role in the region. In recent years, the United States has significantly increased its security policy focus on the Arctic, while Russia continues its military build-up, and China continues to develop its capacity to operate both submarines and surface vessels in the region. Russia remains the strongest military power in the Arctic but sees itself as being challenged by the West. As a result, Russia will increasingly assert its interests through a more confrontational approach, both politically and militarily. Russia is under pressure from, among other things, Western sanctions and will therefore seek to deepen its Arctic cooperation with China and allow China greater access to the Russian Arctic.

Two Chinese research vessels during China's 15th Arctic expedition in the Arctic Ocean in August 2025. The expedition operated mainly north of the United States and Canada, approx. 1,000 km northwest of Greenland.  
Xinhua/Abaca/Ritzau Scanpix



■ Competition among the great powers – Russia, China and the United States – is increasingly playing out in the Arctic. The region is no longer defined by the low level of tension that existed prior to Russia's invasion of Ukraine in 2022. The strategic importance of the Arctic is rising as the conflict between Russia and the West intensifies, and the growing security and strategic focus on the Arctic by the United States will further accelerate these developments.

The intensifying great power competition in the Arctic has brought significant international attention to the region, particularly with the growing US interest in Greenland and its implications for US national security. At the same time, this attention increases the risk of espionage – including cyber espionage – and attempts of influence operations targeting the entire Kingdom of Denmark.

The Arctic has significant military-strategic significance, particularly because most of Russia's, China's and the United States' ballistic missiles would travel over the Arctic region in the event of a major conflict between two or more of the countries.

For more than a decade, Russia has steadily expanded its military infrastructure and modernized its forces in the Arctic. Russia remains the strongest country militarily in the region, although its war in Ukraine is delaying and constraining its plans for further Arctic military build-up.

Most of Russia's nuclear-armed submarines are stationed in the Arctic. They form a key component of Russia's plan to deter the United States from attacking, providing Russia with the capability to launch a potential retaliatory nuclear strike.

The United States' growing strategic interest in the Arctic reflects an increased prioritization of regional defence. In recent years, it has stepped up military activities and conducted exercises with allies in the region, including Denmark. For the United States, the Arctic represents the first and most crucial line of early warning in the event of a great-power conflict with Russia or China. The radars at Pituffik Space Base play a central role in detecting hostile missiles heading towards the US mainland.

The United States' assessment of the scale and nature of future Chinese military activity in the Arctic is a key factor shaping its engagement in the region. Any Chinese military activity in the Arctic – particularly in proximity to US territory – would be regarded as a serious concern. China is the United States' principal competitor in terms of security policy, and deterring it from deploying military vessels and aircraft to the Arctic is a priority for the United States.

### **Russia continues to prioritize the Arctic**

Russia has ambitious military and civilian plans for its entire Arctic territory. Neither the war in Ukraine nor the increased US focus on Greenland and the Arctic has altered Russia's long-term interests and objectives in the region. Its rearmament plans are aimed at maintaining regional military superiority, with particular emphasis on controlling access routes to the Russian Arctic. To this end, Russia is enhancing its military capabilities in the Arctic by expanding its ground forces in north-western Russia, strengthening the Northern Fleet and modernizing and extending military infrastructure across its Arctic territory. Russia is already imposing restrictions on navigation in certain waters north of Russia beyond what international maritime law permits, and these restrictions may be further tightened. In addition, Russia seeks to exploit the vast natural resources within its Arctic territory.

Russia's ability to achieve its objectives depends largely on the course of the war in Ukraine. The conflict is depleting the country's military and economic resources. At the same time, Russia remains dependent on foreign investment and the import of specialized – and often sanctioned – components, many of which are obtained via third countries.

However, Russia faces a range of challenges beyond its already strained economic resources. In particular, increased Western military activity in the Arctic, the accession of Finland and Sweden to NATO and the plans of Western Arctic states to expand their military capabilities will make it more difficult for Russia to preserve its regional superiority.

Although Russia has deployed much of the personnel and equipment previously stationed in the Arctic to the war in Ukraine, its core capabilities in the Arctic

## POSSIBLE PATHS FOR LONG-RANGE MISSILES IN THE EVENT OF WAR

The shortest path between North America and Russia is over the North Pole. The map shows possible paths for missiles launched by Russia against the United States.



**THE ARCTIC**

**THE NORTH ATLANTIC – A GATEWAY TO THE ARCTIC**

Russia uses every available tool to monitor and chart the waters between Greenland, Iceland, the Faroe Islands and the United Kingdom – the so called GIUK gap. This surveillance is part of the preparations for a potential confrontation with NATO.

- Fishing vessels
- Research vessels
- Submarines
- Russian aircraft
- Russian satellites

GREENLAND

ICELAND

THE FAROE ISLANDS

GREAT BRITAIN

GIUK GAP

RUSSIA

N +

34 INTELLIGENCE OUTLOOK 2025

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- 34 INTELLIGENCE OUTLOOK 2025



remain largely intact. The Northern Fleet, for example, still has surface vessels, attack submarines and nuclear-armed submarines at its disposal. While the majority of Russia's air forces are engaged in the war, the country retains the capability to rapidly deploy fighters and bombers to its Arctic bases. From there, Russia would be capable of striking Western targets across much of the Arctic and the North Atlantic at short notice.

Russia is well positioned to maintain a military presence in the Arctic. This is largely due to the civilian infrastructure developed to support economic projects, and the military installations Russia has expanded over the past decade. These include permanent bases along the coastline and facilities on islands north of Russia, providing the country with a forward line of defence in the Arctic Ocean.

Russia also operates a substantial fleet of civilian icebreakers, which could enhance the operational freedom of its navy during a crisis or war. Several of these icebreakers can be fitted with missile systems capable of striking both naval and land targets.

Russia's push for control in the Arctic is rooted in the perception that its northern flank is vulnerable. Russia fears it would be unable to defend against an attack from the north and views the threat as growing, as the West strengthens its capabilities and receding ice cover leaves Russia's northern coast increasingly exposed. Russia does not regard its current Arctic capabilities as sufficient to achieve the level of control it seeks in the region, making Arctic rearmament a top priority. For instance, Russia's newest nuclear-powered submarine joined the Northern Fleet in July 2025. However, it is highly unlikely that Russia will be able to carry out all of its Arctic rearmament and modernization plans over the next three to five years so long as the war in Ukraine is ongoing.

### **The North Atlantic holds strategic significance for Russia**

For Russia, the waters between Greenland, Iceland, the Faroe Islands and the United Kingdom – the so-called GIUK Gap – form the main maritime gateway to and from the Arctic. Thus, the GIUK Gap is vital for Russia in the event of an armed conflict with NATO.

In such a conflict, Russia would seek to disrupt the supply lines between the United States and Europe by deploying attack submarines capable of transiting the GIUK Gap undetected. At the same time, Russia would seek to monitor and track any NATO submarine movements within the gap.

Consequently, Russia systematically monitors NATO activities and charts the waters of the GIUK Gap, employing a mix of military and civilian vessels, including fishing boats, alongside other assets such as aircraft and satellites. The collected information is used to refine its operational plans for the area. In the lead-up to, and during, an armed conflict with NATO, Russia seeks to restrict the freedom of movement of NATO surface vessels and to sabotage or attack critical undersea infrastructure.

#### Patrol flights

In the summer of 2024, Russia and China conducted their first joint strategic bomber patrol north of the Bering Strait.



#### Coast guard

According to the Chinese coast guard, a Russian and a Chinese coast guard vessel carried out a joint patrol in the Arctic Ocean in the autumn of 2024.



#### Research vessels

In 2025, four icebreakers and one research vessel conducted an expedition in the Arctic – the largest to date. The vessels collect data to support, among other things, China's ambition to operate both surface ships and submarines in Arctic waters.

Most frequently used sea route north of Russia

RUSSIA

N  
+

GREENLAND

### CHINA IS PREPARING FOR A MILITARY PRESENCE IN THE ARCTIC

Chinese icebreakers and research vessels operate in the Arctic and have conducted joint patrol exercises with Russia in the region. China aims to develop the capacity for independent military operations in the Arctic. Chinese activities are primarily concentrated in the waters north of the Bering Strait, extending towards the North Pole.

THE FAROE ISLANDS

GREAT BRITAIN

### **China views the Arctic in a global context**

China's military ambitions in the Arctic are closely tied to its strategic rivalry with the United States. While China currently has no military presence in the Arctic, it aims to develop an independent capability to operate both surface ships and submarines in Arctic waters within five to ten years. China's long-term goal is to deploy missile submarines beneath the ice, thereby attaining the same nuclear second-strike capability as Russia and the United States.

China has gained access to the Arctic Ocean through its research icebreakers. Each year, it conducts expeditions in the Arctic, collecting data that support, among other objectives, its ambition to operate both surface ships and submarines in Arctic waters.

China is rapidly expanding its icebreaker fleet, and in 2024, for the first time, it operated three icebreakers in the Arctic at the same time. By 2025, four icebreakers and a research vessel were conducting expeditions in the region. In recent years, their operations have focused on the waters north of the Bering Strait.

China also has long-term economic interests in the Arctic, seeking access to both sea routes and natural resources. Unrestricted access to Arctic shipping lanes is intended to reduce China's reliance on routes such as the Suez Canal and the Strait of Malacca, which, if blocked during a crisis, could have a significant impact on the Chinese economy. Access to Arctic natural resources would also allow China to import energy and minerals from multiple sources across the world.

Although Chinese companies have shown interest in investing in Greenland, this has so far not produced tangible results. Nevertheless, China's long-term Arctic interests include Greenland, and it is expected to continue pursuing cooperation with Greenland, particularly in research but also in commercial ventures.

### **Russia and China deepen Arctic cooperation – with a potential military dimension**

Russia and China are expected to expand their Arctic cooperation in the coming years, despite conflicting interests in the region. Russia maintains that only Arctic states should have influence and a military presence in the region, including ships and aircraft, and does not want China to gain a military foothold in the Arctic.

However, Russia is in a severely weakened negotiating position vis-à-vis China, forcing it to grant China greater influence and access in the Arctic. The tough sanctions imposed on Russia prevent it from fully exploiting the economic potential of the vast oil, gas and mineral reserves in its Arctic territory. It relies on foreign technology, expertise and financing to sustain existing projects and develop new ones. The export of Arctic natural resources is likely to become increasingly important for Russia, as sanctions and the ongoing war in Ukraine continue to weaken its economy.

China will leverage its strengthened position vis-à-vis Russia to secure inexpensive natural resources and improved access to the Northern Sea Route. In recent years, China has faced difficulties establishing new commercial projects or research initiatives in the Western Arctic states. Growing US attention to the region is likely to exacerbate these difficulties, increasingly making Russia China's primary gateway to the Arctic.

China will also seek to tap into Russian expertise and experience in the Arctic as a military theatre. Russia retains a technological and operational edge, particularly in operating attack submarines under the ice and building nuclear-powered icebreakers. The two countries may conduct joint exercises in the Russian Arctic in 2026. For both countries, joint exercises both inside and outside the Arctic would also serve as strategic signalling to the United States and the West. Russia's willingness to hold joint exercises with China in the Arctic will thus depend on its relationship with the United States.



If Russia and the United States were to normalize aspects of their bilateral relationship, this could influence Russia's cooperation with China in the Arctic. For instance, US investment in Russian Arctic energy projects and similar initiatives could reduce Russia's reliance on China, potentially making it more cautious about granting China greater access to its Arctic territory.

#### **Russia intends to take a harder line in the Arctic**

Russia expects the West to take advantage of Russia's preoccupation with the war in Ukraine to weaken Russian control in the Arctic. Consequently, Russia continues to prioritize naval and air patrols throughout its Arctic territory and the Arctic Ocean.

Russia will seek to deter the West from maintaining a military presence near its Arctic territory. In response to increased US and Western activity in the Arctic, Russia will attempt to demonstrate its strength – including in new ways. Russia is expected to act in an increasingly unpredictable and confrontational manner. This could include aggressive responses to Western military exercises in the region, such as hazardous navigation or simulated attacks. Russia may also harass, or even detain, Western fishing vessels operating close to its Arctic waters.

Russia's willingness to take risks in the Baltic Sea region could also come into play in the Arctic and may continue even after the war in Ukraine ends.

#### **The threat from Russia to the Kingdom of Denmark is different in the Arctic and the North Atlantic**

The military threat from Russia against the Kingdom of Denmark will increase in the coming years. However, the threat of a regular military attack against Greenland or the Faroe Islands is different from the threat against Denmark. Russia highly likely sees Greenland and the Faroe Islands in a North American context, meaning it does not necessarily want to involve Greenland and the Faroe Islands in a European conflict.

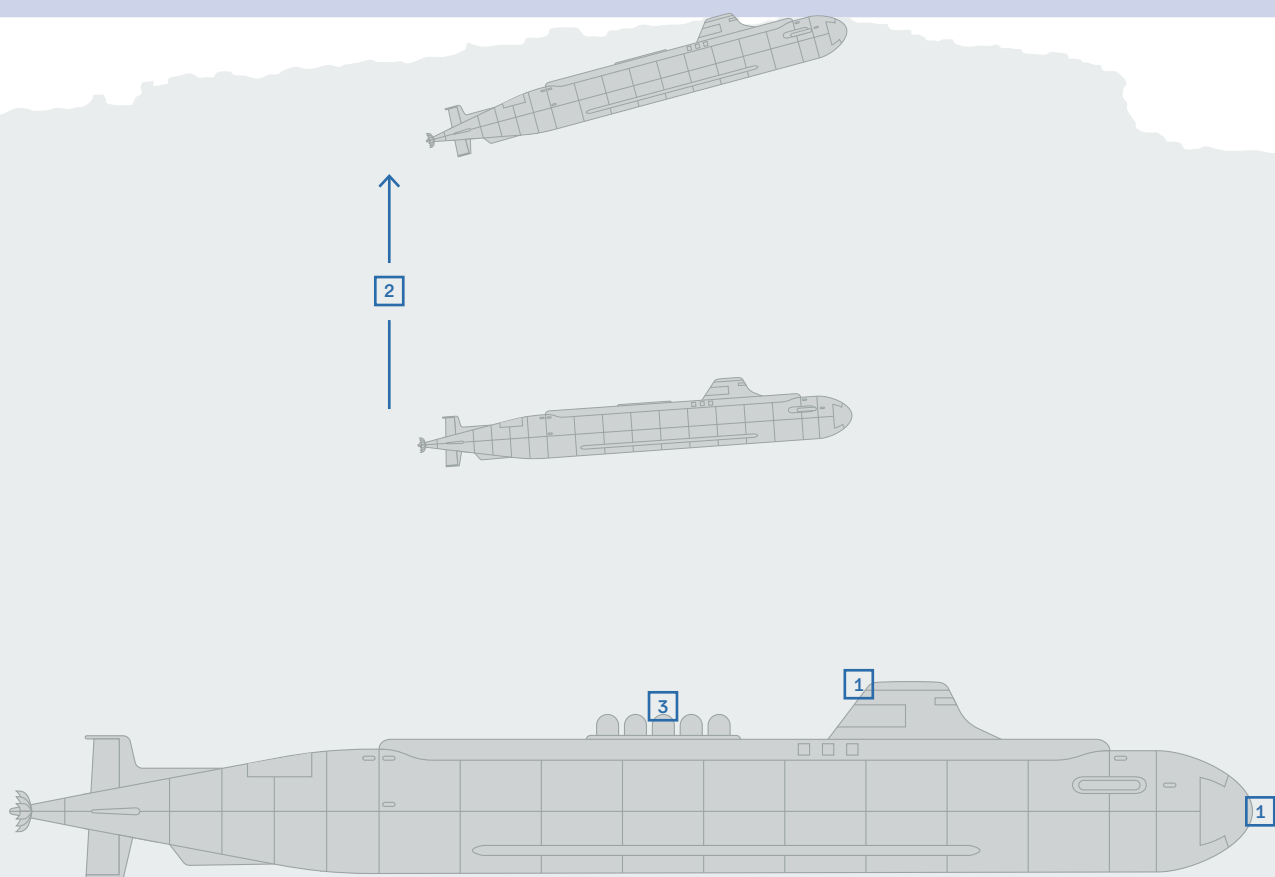
The Kingdom of Denmark may, however, face more aggressive Russian actions in the North Atlantic and the Arctic. Russia's risk-taking behaviour, as evidenced by its use of hybrid means against Western countries, could also play out in the Arctic. Despite the considerable geographical distance, Russia periodically deploys submarines, surface vessels and aircraft near both Greenland and the Faroe Islands, as well as throughout the waters between them. In addition, Russia employs civilian vessels operating in the area to carry out tasks such as surveillance on behalf of the Russian state.

Russia is also increasingly disregarding international rules and norms. For instance, it is possible that Russia may assert sovereignty in areas over which it has no jurisdiction under international law. In its updated maritime doctrine from 2022, Russia grants itself the right to employ military force across the extended continental shelf to which it lays claims.

Were Russia to enforce sovereignty further north beyond the limits of international law, there would be a risk of direct armed confrontation with Danish or other Western vessels and aircraft.

Despite its generally more confrontational approach, Russia will, when convenient, emphasize the need for cooperation in the Arctic. It is likely to pressure the Kingdom of Denmark, as chair of the Arctic Council, to facilitate greater Russian involvement in activities under the auspices of the Arctic Council. In addition, Russia is likely to criticize the Kingdom of Denmark and other Western Arctic states occasionally for harming the Arctic environment or infringing the rights of indigenous peoples, arguing, among other things, that the current limited cooperation within the Arctic Council is detrimental to the region.

However, Russia does not take the interests of indigenous peoples or environmental considerations into account when pursuing its objectives in the Arctic. In 2024, Russia – contrary to its own regulations – allowed several vessels, including oil tankers, to navigate ice-covered waters despite not being designed for such conditions. In recent years, Russia has also cracked down on Russian NGOs representing indigenous communities in the Russian Arctic. ■



## CHINA SEEKS THE CAPABILITY TO OPERATE SUBMARINES IN THE ARCTIC

The Arctic provides an ideal location for launching nuclear missiles against targets across the northern hemisphere, as short flight times make them harder to defend against. The region also offers the advantage that submarines can easily hide beneath the Arctic ice cap. The capability to operate strategic submarines beneath the Arctic Ocean ice cap is therefore part of the capacity that both Russia and the United States have to retaliate in the event of a nuclear attack.

China is determined to acquire this capability too. This requires the ability to operate missile-carrying submarines beneath the Arctic ice. Hence, China's growing interest in developing the capability required for submarine operations in the Arctic.

Submarines can be reinforced <sup>1</sup>, to break through Arctic ice when surfacing <sup>2</sup>. Moreover, all large submarines can be fitted with missiles with ranges of up to 10,000 km and capable of carrying nuclear warheads <sup>3</sup>.

## THEME: THE THREAT TO CRITICAL INFRASTRUCTURE

Russia in particular, but other foreign states as well, pose a significant threat to critical infrastructure in the West. Pro-Russian hacker groups are already conducting simple destructive cyber attacks against Western critical infrastructure, among other targets. Since 2023, Russia has also been behind a series of sabotage operations against targets across Europe.

Future attacks on critical infrastructure could have far more serious and wide-ranging consequences for vital societal functions such as transport, electricity supply and the internet. This threat is currently reflected in the efforts by foreign states to develop the capability to conduct attacks on critical infrastructure, among other targets. Preparations to carry out such attacks are taking place across both the physical and digital domains and encompass many types of infrastructure, including cables, pipelines, ports and airports.

### Critical subsea infrastructure is inherently vulnerable

Russia is systematically mapping critical infrastructure in Denmark, including subsea infrastructure in and around the waters of the Kingdom of Denmark. These efforts likely aim to identify potential targets for sabotage or attacks on critical subsea infrastructure, such as power cables and internet cables, in case of an escalating conflict or war with NATO. Russia has the capability to attack subsea infrastructure, for instance using submarines or underwater drones. These capabilities are continuously being developed and improved.

It is difficult to protect subsea infrastructure against attacks, as it often spans vast areas that are hard to monitor and guard. This also makes it difficult to conclusively determine who orchestrated an attack.

Every year, multiple subsea cables are damaged in the Baltic Sea. The number of incidents damaging cables or other subsea infrastructure in the Baltic Sea over the past few years has remained at the same level as in the last decade. Damage to subsea infrastructure occurs regularly and is generally not the result of attacks or sabotage. Damage often occurs in winter, from accidents involving fishing gear or ship anchors in harsh weather. Subsea infrastructure in Danish waters and the Baltic Sea is particularly vulnerable to such accidents.

### State hackers poised to disrupt critical infrastructure

Russia is capable of far more destructive cyber attacks than the relatively simple attacks it has already carried out against Western critical infrastructure. Russia has repeatedly demonstrated this capability in Ukraine, where Russian state hackers have disrupted critical infrastructure among others.

A large-scale destructive cyber attack could affect most of Denmark at once. This includes cyber attacks disrupting the power supply or internet for hours or days in a large area. This could potentially also have cascading cross-border effects, just as similar attacks on other countries could impact Denmark.

It is less likely that Russia, in its current situation, will launch a large-scale destructive cyber attack against Denmark. However, Danish critical infrastructure has increasingly become a target of interest for Russian state hackers in recent years. Consequently, Russia is likely already making efforts to compromise Danish and Western critical infrastructure systems. It is likely that some of these activities are preparations for potential destructive cyber attacks against critical infrastructure which Russia might choose to carry out at a later time. This also means that the threat could escalate at short notice.

The Russian state hackers are, among other things, interested in targets that are essential to the functioning of Danish society and expected to play a significant role in a potential NATO-Russia conflict.

Although China has the capability, it is currently highly unlikely that it would launch destructive cyber attacks against critical infrastructure in the Kingdom of Denmark. However, in the event of an escalating conflict, such as between China and Taiwan, this could change. In that scenario, China would likely target countries it considers potential providers of military support to Taiwan.





### Foreign technology – a potential vulnerability

Several countries grant security and intelligence services access to or control over digital products. This is the case, for example, in China.

Digital products include consumer grade items such as routers as well as critical infrastructure components, for example those used in the energy or telecommunications infrastructure.

Access to or control over digital products can allow a country such as China to exploit vulnerabilities within the product itself. Knowledge of potential weaknesses can, among other things, be exploited to compromise internet-connected devices – either to conduct cyber espionage or to disrupt critical infrastructure.

#### INFRASTRUCTURE IN THE BALTIC SEA

The Baltic Sea is particularly vulnerable to accidents caused by vessels dragging their anchors across the seabed.

- The Baltic Sea is one of the busiest seas in the world, carrying a higher risk of accidents than waters with less vessel traffic.
- Its shallow waters allow a dragging anchor to reach most parts of the seabed.
- It is home to extensive subsea infrastructure, meaning that a dragged anchor runs a high risk of hitting cables and pipelines.
- In winter, strong winds and high waves increase the risk of anchors accidentally falling into the water.

■ Subsea telecommunications cables

Source: submarinecablemap.com



# CHINA

CHINA IS PREPARING FOR  
CONFRONTATIONS WITH THE WEST





China aims to assert regional dominance in Asia and to force reunification with Taiwan, among other things. Both ambitions require China to strengthen its position, particularly relative to the United States. Consequently, China is building up its military, deepening its partnership with Russia and cultivating ties with other non-Western states. At the same time, China is seeking to make its economic and technological development independent of the West. Overall, China is preparing for an intensified conflict with the West.

Military parade in Beijing in September 2025.  
Imago/Ritzau Scanpix



■ China seeks to establish itself as the dominant power in Asia and a leading global great power. To this end, China is exerting political, economic and military pressure on its neighbours, modernizing its armed forces and transferring foreign technology and know-how.

China views the United States as a rival seeking to curb its rise and prevent it from becoming a pre-eminent global power. In response, China is preparing to withstand potential conflicts by building up its military and pursuing greater economic and technological independence from the West.

#### **Increasing risk of a conflict over Taiwan**

China considers Taiwan an inseparable part of its territory that must be brought under the control of the People's Republic of China to fulfil its ambition of becoming a global great power. Control of Taiwan would also grant China unrestricted access to the Western Pacific in the event of a conflict with the United States. Consequently, reunification of Taiwan with the mainland is a top priority for the Chinese Communist Party and President Xi Jinping – a goal they are likely to pursue patiently.

China is applying various forms of pressure on Taiwan to force reunification through measures below the threshold of war. Its aggressive stance towards Taiwan is most evident in its military activities, with Chinese warships and aircraft operating near Taiwan on an almost daily basis. Since 2022, China has also conducted large-scale military exercises simulating blockades and military strikes. The exercises can be difficult to distinguish from preparations for actual acts of war. In addition, China regularly practices amphibious landings on selected beaches along its coasts.

China also employs influence campaigns and conducts espionage, including cyber espionage, against Taiwan. In addition, it seeks to isolate Taiwan diplomatically, for instance, by pressuring third party states not to host Taiwanese officials or recognize Taiwan as a sovereign state. Western countries may also become the targets of China's influence and espionage activities as part of its pressure on Taiwan and preparation for a potential conflict.

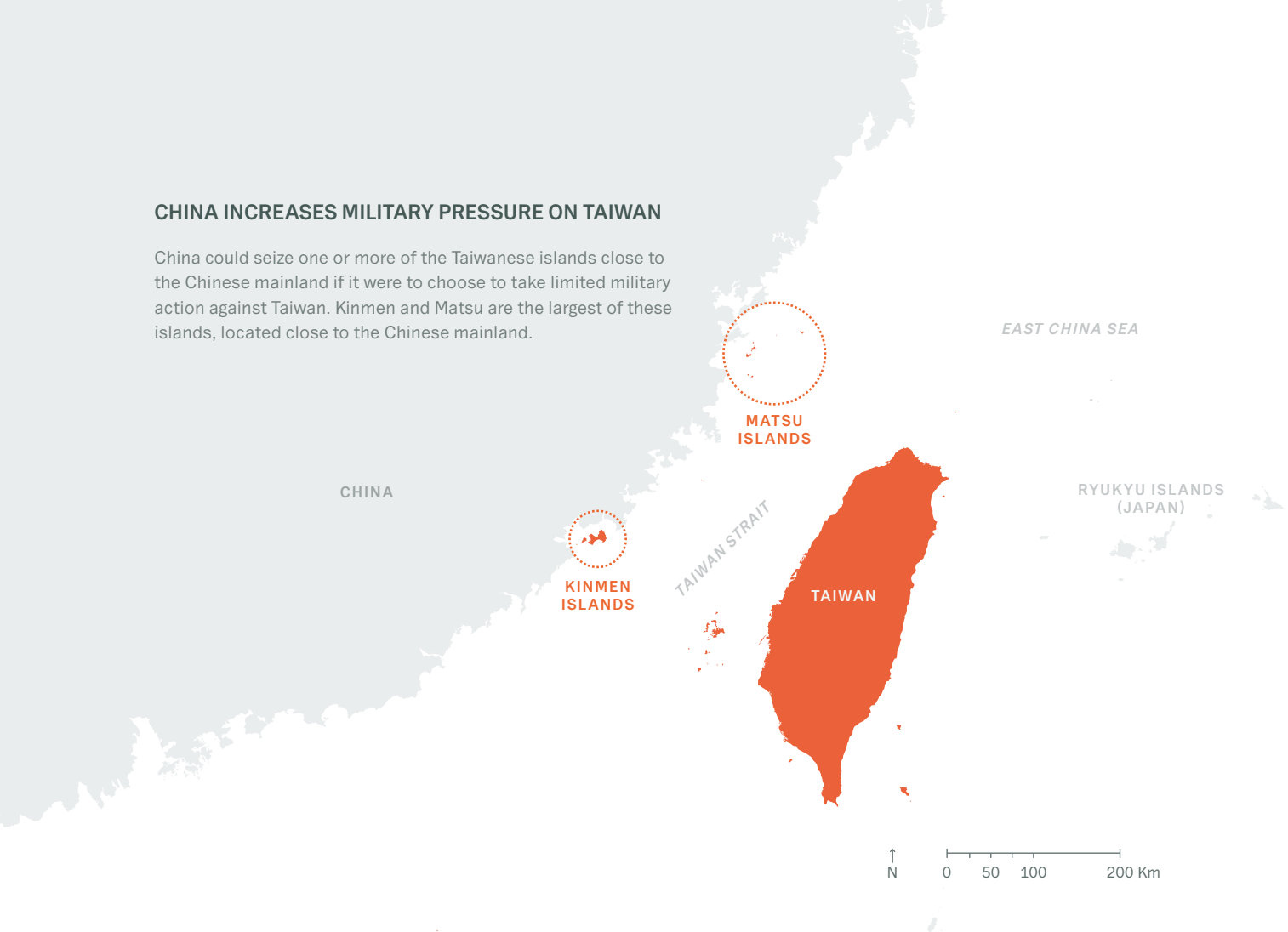
Peaceful reunification with Taiwan remains China's preferred outcome. Nevertheless, its ongoing military exercises, coupled with rapid military build-up, mean that the risk of a war over Taiwan is steadily increasing. President Xi Jinping has set 2027 as the deadline by which the military must be ready to invade Taiwan, and it appears likely that this goal will be met. The 2027 target is intended to advance military modernization and does not mean that China has decided to launch an invasion.



Peaceful reunification with Taiwan remains China's preferred outcome. Nevertheless, its ongoing military exercises, coupled with rapid military build-up, mean that the risk of a war over Taiwan is steadily increasing.

## CHINA INCREASES MILITARY PRESSURE ON TAIWAN

China could seize one or more of the Taiwanese islands close to the Chinese mainland if it were to choose to take limited military action against Taiwan. Kinmen and Matsu are the largest of these islands, located close to the Chinese mainland.



It is highly unlikely that China currently possesses the capability to launch a successful invasion. Nevertheless, should China decide to invade, for instance in response to a formal declaration of Taiwanese independence, it could do so with very little warning.

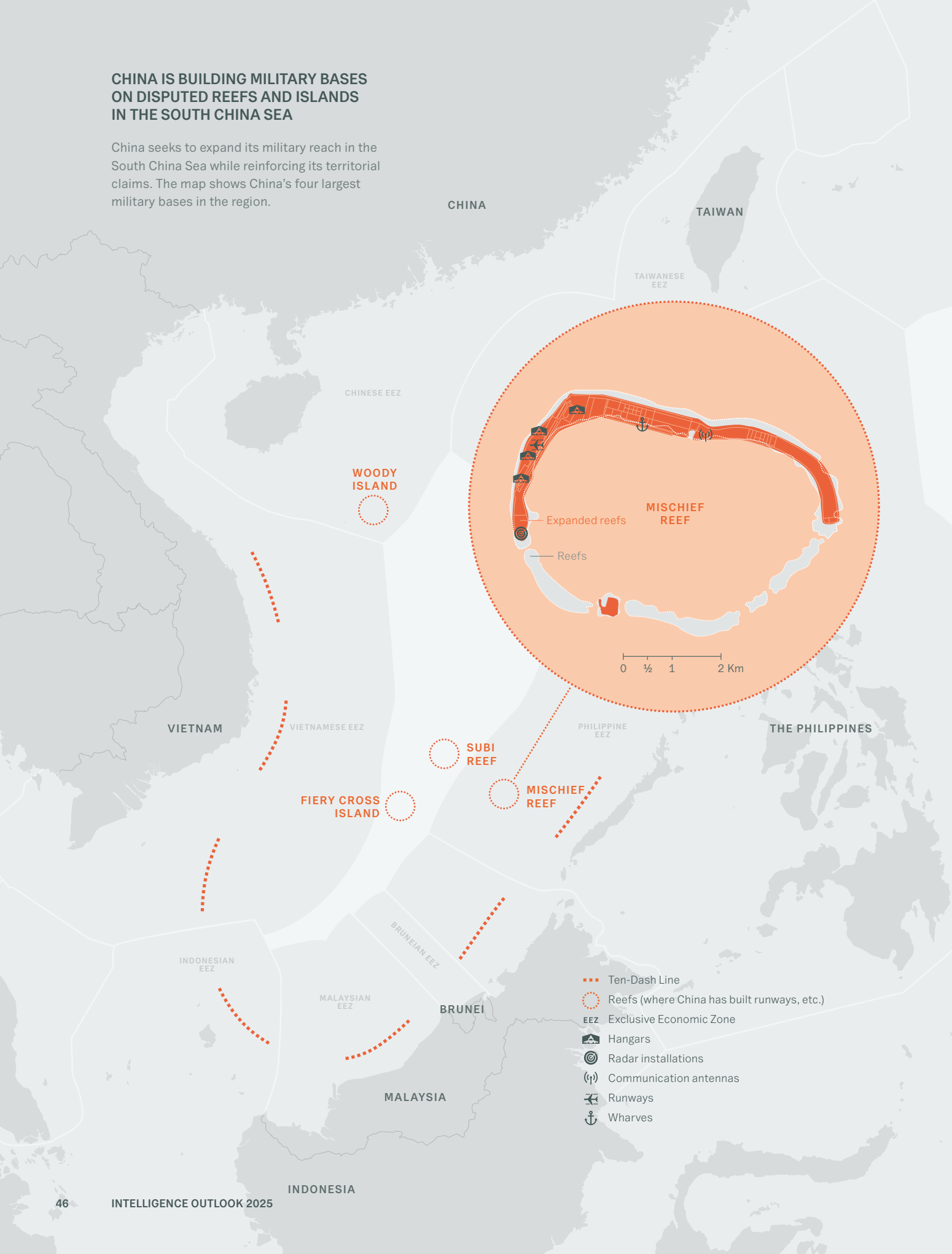
China could also resort to other military measures, such as a blockade or bombardment, to pressure Taiwan into surrendering. Furthermore, China may opt for limited military actions, for example the seizure of one or more of the smaller Taiwanese-controlled islands close to the Chinese mainland. Such steps could be taken to signal that Taiwan is unable to defend its territory and to push the limits of what China can do without prompting a military response from the United States.

The risk of a Chinese attack on Taiwan depends not only on China's preparations and intentions but also on the actions of Taiwan, the United States and allied nations. The risk increases if the United States and its allies signal that they will not intervene in a war or will not impose sanctions. In a scenario in which the West is divided – for instance on trade policy – it may prove difficult to agree on sanctions against China. Should Taiwan declare independence, the likelihood of a Chinese attack would also increase significantly.

A war over Taiwan would fundamentally change the security policy conditions for Denmark and the rest of Europe, partly because the ability of the United States to contribute to European security would be reduced, especially if the United States chooses to enter the war to defend Taiwan.

## CHINA IS BUILDING MILITARY BASES ON DISPUTED REEFS AND ISLANDS IN THE SOUTH CHINA SEA

China seeks to expand its military reach in the South China Sea while reinforcing its territorial claims. The map shows China's four largest military bases in the region.





Should a military conflict over Taiwan involving the United States occur, it is highly likely to trigger a global economic crisis, given both China's pivotal role in the world economy and Taiwan's key position in producing advanced computer chips. These chips are for instance used to develop data centres for artificial intelligence and Western military capabilities.

### **China is modernizing and expanding its military**

Since the turn of the millennium, China has modernized and significantly expanded its military to pursue its ambition of playing a dominant role in Asia and becoming a global great power. The build-up is also intended to enable China to challenge the United States and prevail in a war over Taiwan. Additionally, China's growing military power is also aimed at deterring other countries, particularly the United States, from becoming involved.

China's official defence budget is the second largest in the world, exceeded only by that of the United States. China's actual defence budget is likely significantly higher, as funds from non-defence budgets are often used to finance military equipment. Although China's defence budget amounts to only about one third of the US defence budget, China procures roughly three times as many new warships each year and builds more modern combat aircraft than the United States. In general, China is able to produce military equipment at a lower cost than the United States.

The rocket, naval and air forces have all expanded since the beginning of the 21st century. China now possesses the world's largest navy in terms of sheer number of warships, excluding auxiliary vessels. China's military build-up focuses especially on ships and missiles capable of challenging the United States and its allies for sea and air supremacy in the Western Pacific. The aim is to deter the United States from intervening in a conflict over Taiwan or preventing the deployment of US forces to the region.

In the Western Pacific, China's military strength is already roughly on a par with that of the United States. In a war over Taiwan, however, China could risk facing not only Taiwan and the United States but also US allies in the region, most notably Japan, which ranks among the world's strongest military powers.

China's navy and air force continue to expand, and their equipment is generally more modern than that of Taiwan, the United States and Japan. US efforts to expand its military at the same pace as China's would prove extremely challenging, partly because much of the aging equipment currently in use by the United States and its allies is set to be phased out in the coming years. Consequently, the balance of power is highly likely to shift further in China's favour over the next decade.

China deploys a limited number of warships on operations, such as anti-piracy missions in the Gulf of Aden, and conducts exercises far from its mainland. In February and April 2025, the Chinese Navy carried out exercises near the waters of Australia and New Zealand. As China's military power continues to grow, it is poised to play an increasingly prominent role on the global stage.

### **China flexes its muscle in the South China Sea**

China is making extensive claims in the South China Sea on the basis of its so-called Ten-Dash Line, which conflicts with internationally recognized maritime boundaries and overlaps with the claims of the Philippines and Vietnam, among other countries. China is building military facilities on reefs in the sea to extend its operational reach in the area and to promote its territorial claims.

China employs aggressive tactics to prevent the Philippines from navigating, extracting resources or building military facilities in disputed waters. Chinese vessels have deliberately rammed Philippine vessels, resorted to water cannons and set up physical blockades with nets.

China's actions in the South China Sea heighten the risk of accidents and misunderstandings that could spark a conflict. A major armed confrontation would have serious repercussions for the global economy, as a significant share of world trade passes through these waters.

### China seeks to curb Western influence and rival the United States

China aspires to a dominant role in Asia and a leading position globally. To that end, China is taking advantage of the current political situation, in which not only China but also Russia and the United States are increasingly using their political, economic and military power to pressure other states. In doing so, China is further reinforcing this trend.

China is making concerted efforts to diminish Western influence in international politics and to position itself as a viable alternative to the United States. Among other means, it pursues this goal by shaping the work of established international organizations such as the United Nations. China consistently seeks to shape the policies and discourse of these organizations, for instance by framing human rights as context-dependent rather than universal, varying across countries. At the same time, China aims to develop and influence new international organizations in which it plays a leading role, including the Shanghai Cooperation Organization and BRICS, which promotes cooperation among Brazil, Russia, India, China and South Africa and an array of other non-Western countries.

China continues to regard Russia as its most important partner in its competition with the United States. Consequently, China is deepening cooperation with Russia despite Western criticism and sanctions targeting Chinese companies that circumvent sanctions on Russia. Bilateral trade between the two countries has grown significantly since Russia's invasion of Ukraine.

Also, in an effort to make its economy more resilient and to strengthen its position vis-à-vis the West, China is expanding cooperation and trade with non-Western countries across Asia, Africa, Latin America and Oceania. This strategy aims to provide China with alternatives to cooperation and trade with Western countries. By 2024, trade with non-Western countries accounted for over half of China's total exports and imports. However, part of this growth reflects a shift in trade patterns, as Chinese exports to Western markets are shipped via non-Western countries.

### China is seeking economic and technological self-sufficiency

China is preparing for potential conflicts, particularly with the United States. Consequently, in recent years, China's economic decisions have increasingly been driven by security policy. To reduce dependence on the West, China is investing in domestic technological development, among other things. Despite significant progress, Chinese companies and research institutions will still need to collaborate with Western partners.

At the same time, China is seeking to increase other countries' dependence on China, including in areas such as rare earth elements, battery technology and solar cells. This strategy is primarily aimed at increasing China's influence abroad, while also making it more difficult for other countries to impose sanctions on or restrict trade with China. Reliance on Chinese technology may also complicate Western nations' military build-up.

Technology is a central pillar of China's economic growth and a high priority in its national development plans. China is concentrating on strategically important fields such as quantum technology, artificial intelligence and biotechnology. Advancements in these areas would not only provide China with military advantages but also challenge Western economic strengths and advantages.

Several of China's priorities in these strategically important technologies could prove critical in a potential conflict with the West. For instance, artificial intelligence could be applied in drone warfare, while quantum technology has the potential to compromise existing encryption methods.

China devotes substantial resources to achieving its ambition of becoming a frontrunner in these priority technologies, as reflected in national programmes designed to systematically transfer technology and knowledge from Western countries. This transfer occurs on a large scale, through both legitimate and illicit means. Despite already leading the world in a range of technological fields, China continues to engage in espionage to acquire technology from countries such as Denmark.

China's extensive knowledge-transfer efforts pose the greatest threat to Danish research, innovation and technology.

## CHINA DEVOTES SUBSTANTIAL RESOURCES TO TRANSFERRING TECHNOLOGY FROM THE WEST

China engages a wide range of organizations and individuals to plan and execute technology transfer.

**1** Party bodies, state-run organizations, universities and companies in China **assess the need** for technology transfer and development in the fields of science and technology.

**2** **These bodies, organizations, etc. then activate actors abroad** to transfer technology and know-how to China. Such actors include Chinese companies, hacker groups, associations for Chinese nationals abroad, investors and intelligence agencies.

**3** These actors **identify overseas resources** in the fields of science and technology to attract experts and recruit sources, invest in companies, or compromise corporate IT systems.

**4** The actors assist experts and companies to **establish themselves in China** through state-run talent programmes, research agreements and joint ventures with Chinese companies. Hacker groups and intelligence agencies steal knowledge and technology from Western companies and research institutions.

## CIVILIAN CHINESE UNIVERSITIES CONTRIBUTE TO CHINA'S MILITARY BUILD-UP

China's military works with civilian universities to develop technologies for military purpose under its military-civil fusion strategy. As a result, research collaboration with China may, in some cases, contribute to the development of the country's military technology.

A significant share of Chinese universities are legally required to collaborate with the military, including leading research institutions such as Beijing University, Tsinghua University and the Chinese Academy of Sciences. These and other civilian research institutions collaborate with military research units across a broad spectrum of fields, including Arctic research, artificial intelligence, quantum technologies and shipbuilding.





### China at the forefront of quantum technologies

Quantum technologies are emerging and advanced technologies that utilize the principles of quantum physics. While still under development, these technologies could eventually enable secure communication, ultra-precise measurements and specialized computational tasks far beyond the capabilities of conventional computers.

The quantum technologies can serve both civil and military purposes and will offer substantial economic and military advantages to the countries that control them.

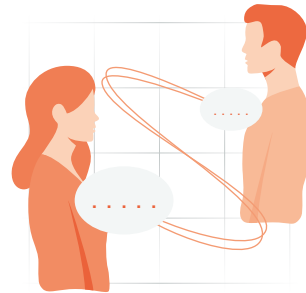
Today, a race is on to develop quantum technologies, with China positioned as the primary competitor to the United States and other Western nations. China is investing heavily in quantum technology and currently leads in areas such as quantum communication. Western countries, recognizing the security risks of cooperating with China on quantum technology, have begun taking precautionary measures, including restricting China's access to academic partnerships, limiting the procurement of critical components and curbing investments in Western technology companies.

Quantum technology can enhance a range of existing military technologies, including submarine detection and navigation in areas where GPS signals are jammed. Quantum technology can also counter eavesdropping and enable secure communication. If developed effectively, these technologies could provide a decisive military edge over adversaries lacking equivalent capabilities.

China is working on the development of quantum computers that will be capable of breaking current encryption, potentially granting it access to classified data and communications, including government information or other sensitive material. China is likely already collecting encrypted data from other countries with the intent of decrypting it in the future.

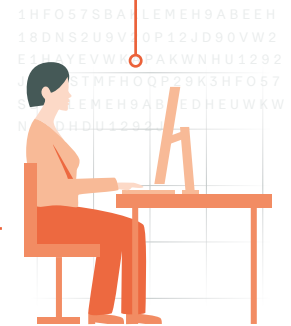
Another challenge is that China could forge digital signatures, potentially gaining unauthorized access to secure systems and sensitive information. It could also impersonate Danish authorities in communications, making it virtually impossible to distinguish between genuine messages and fraudulent ones.

### THE THREAT OF QUANTUM COMPUTERS TO SECURE COMMUNICATION

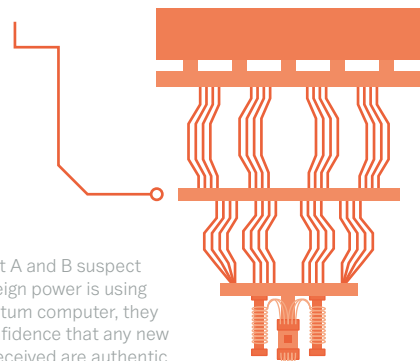


A sends a message to B. A knows that only B can read it, and B knows that only A could have sent it. Both parties trust that their communication is secure and authentic.

A foreign power is interested in intercepting what A and B are exchanging. It collects the messages but is unable to read them because of their encryption and therefore settles for storing them.



If the foreign power develops a sufficiently powerful quantum computer, it could decrypt past messages between A and B. It could also manipulate future messages by impersonating either party.



The moment A and B suspect that the foreign power is using such a quantum computer, they will lose confidence that any new messages received are authentic.

Once a quantum computer capable of breaking encryption is believed to exist, global uncertainty over digital communications is likely to follow.

China could develop a quantum computer capable of breaking encryption within the next 10–15 years. Predicting critical breakthroughs is difficult, as the technology is highly complex and progress is not always made public.

### **China uses espionage and influence operations to drive its domestic development and bolster its readiness for conflict**

China maintains an extensive cyber espionage programme designed to accelerate technological progress and strengthen its economic and political influence. In Western countries, Chinese cyber espionage operations specifically target political institutions as well as companies in the technology and defence sectors. Espionage is used to harvest data related to advanced Western technologies, defence capabilities and critical infrastructure.

China conducts espionage against foreign ministries, defence institutions and government agencies to obtain intelligence that can advance its strategic development and provide insights into the military capabilities and diplomatic relations of adversaries.

#### **CHINESE CYBER ESPIONAGE**

In 2025, the Czech government announced that the Chinese state hacker group known as APT31 had carried out a cyber attack against the Czech Ministry of Foreign Affairs. The group, which operates on behalf of China's intelligence service, the MSS, had maintained access since 2022 and during that time collected information on foreign policy issues concerning both the Czech Republic and its partners. Such information could give China and Chinese diplomats an edge by providing advance knowledge during negotiations or in potential conflicts with the Czech Republic or its partners.

Such intelligence may, for example, give China a clearer understanding of the positions that other countries have on the Taiwan issue.

China uses its intelligence services and organizations affiliated with the Communist Party to influence foreign policymakers, including in Europe and Denmark. Chinese intelligence agencies place or recruit agents close to key political figures to monitor strategic deliberations and shape policy decisions in ways favourable to China and the Communist Party. Chinese influence operations aim to prevent the West from presenting a united front against China and to strengthen China's ability to navigate conflicts with Western countries.

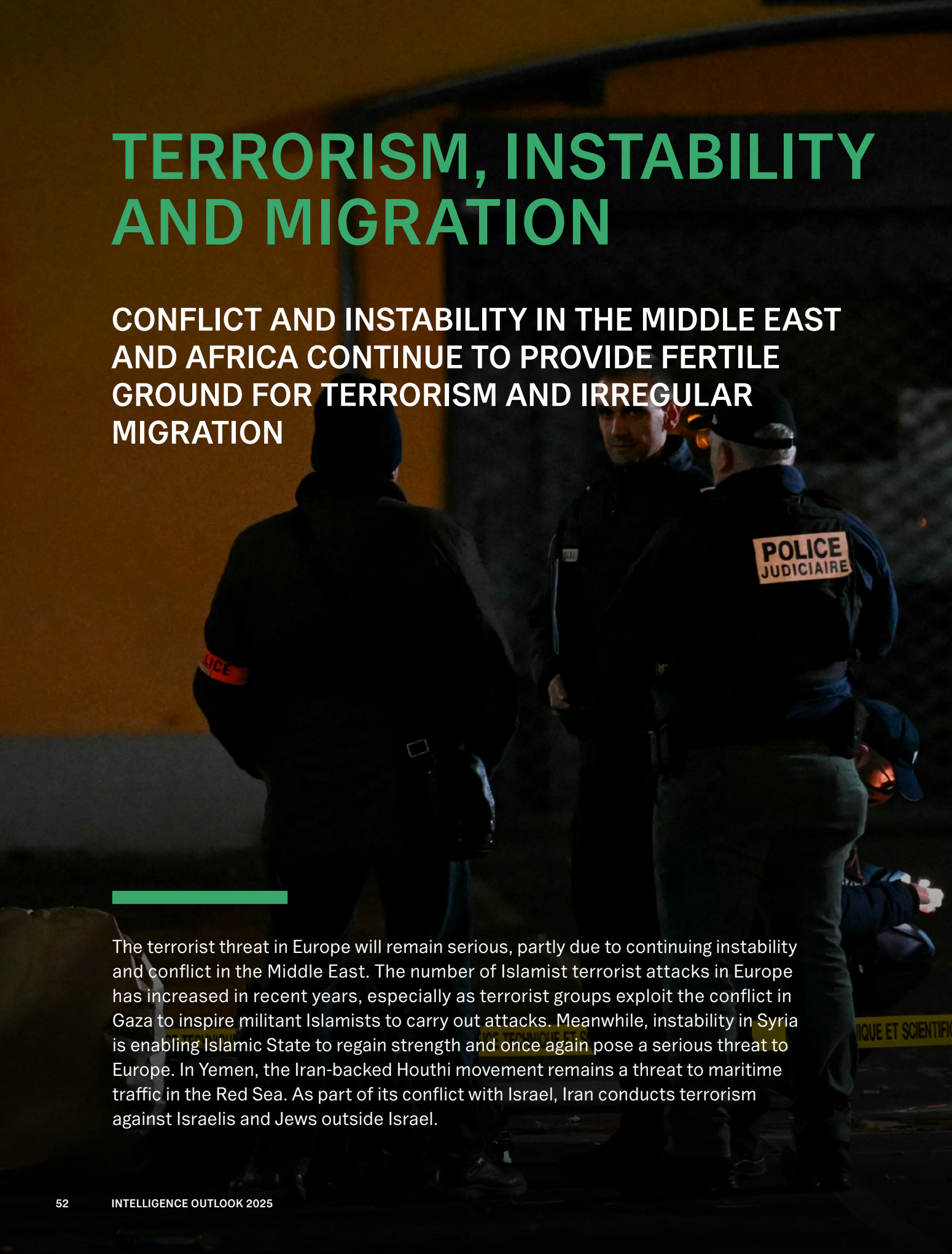
China also devotes significant resources to monitoring and controlling Chinese nationals abroad to prevent them from criticizing the Communist Party or opposing Chinese interests. ■

#### **SPYING FOR CHINA**

In 2024, Chinese national Jian Guo was arrested in Germany while serving as an aide to Maximilian Krah, a member of the European Parliament representing the Alternative für Deutschland (AfD) party. In September 2025, Jian Guo was sentenced to four years and nine months in prison for providing a Chinese intelligence service with confidential information on European Parliament negotiations over a period exceeding four years and for spying on Chinese dissidents living in Germany. In connection with the case, a Chinese woman received a suspended sentence of one year and nine months for supplying Jian Guo with information on Western military aircraft, troops and drones.

# TERRORISM, INSTABILITY AND MIGRATION

## CONFLICT AND INSTABILITY IN THE MIDDLE EAST AND AFRICA CONTINUE TO PROVIDE FERTILE GROUND FOR TERRORISM AND IRREGULAR MIGRATION



The terrorist threat in Europe will remain serious, partly due to continuing instability and conflict in the Middle East. The number of Islamist terrorist attacks in Europe has increased in recent years, especially as terrorist groups exploit the conflict in Gaza to inspire militant Islamists to carry out attacks. Meanwhile, instability in Syria is enabling Islamic State to regain strength and once again pose a serious threat to Europe. In Yemen, the Iran-backed Houthi movement remains a threat to maritime traffic in the Red Sea. As part of its conflict with Israel, Iran conducts terrorism against Israelis and Jews outside Israel.





French police investigators examine the site of a knife attack in February 2025 that was in all likelihood an Islamist terrorist attack.

Sebastien Bozon/AFP/Ritzau Scanpix

■ The terrorist threat from militant Islamists in Europe has increased in recent years and remains serious. Conflict and instability in the Middle East will continue to influence the nature of threats. At the same time, weak and unstable states in the Middle East provide fertile ground for militias to establish their foothold and target Western interests in the region.

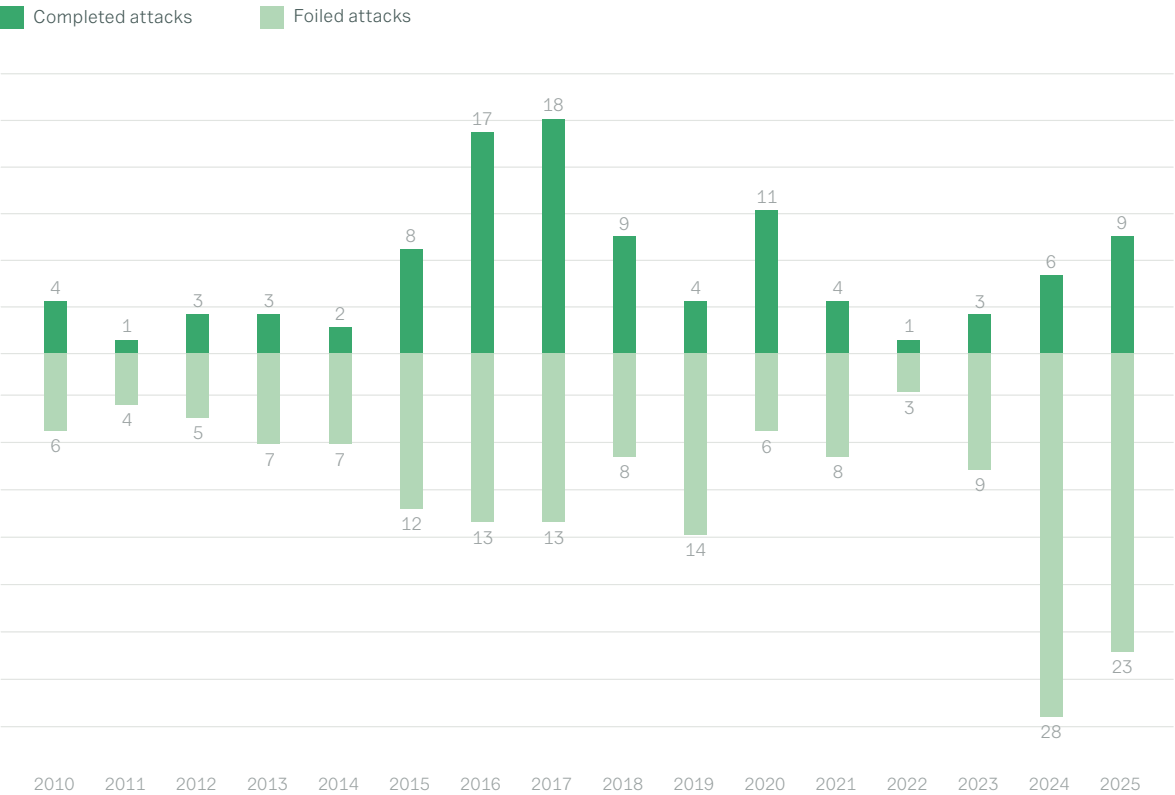
**Islamic State continues to call for terrorist attacks in Europe**

In recent years, the number of completed and foiled militant Islamist terrorist attacks in Europe has been rising, and it remains at a high level in 2025. This level is likely to remain high throughout 2026. During 2025,

Germany, Austria and France were among the countries most frequently targeted by terrorist attacks and plots.

The vast majority of attacks and attempted attacks continue to be carried out by militant Islamists acting alone or in small cells. In most cases, the attackers are inspired by militant Islamist propaganda. Some also have prior contacts to established militant Islamist groups, notably Islamic State. In 2024, Islamic State's subgroup in Afghanistan, ISKP, actively sought to support sympathizers in Europe in carrying out attacks. However, the group was weakened in 2025 and no longer poses the same level of threat to Europe.

**THE NUMBER OF MILITANT ISLAMIST TERRORIST ATTACKS IN EUROPE IS HIGH ONCE AGAIN**



The number of completed and foiled militant Islamist terrorist attacks in Western Europe has increased in the past few years.

(Source: Nesser, P. (2024). Introducing the Jihadi Plots in Europe Dataset (JPED). Journal of Peace Research, 61(2)). The 2024 and 2025 figures are based on DDIS estimates and cover the period up to and including October 2025. The DDIS has used the same data collection method as Nesser.

Militant Islamists most often target crowded places such as markets, festivals and train stations. They also seek to attack symbolic locations, including synagogues, churches, religious memorials and embassies.

Many militant Islamists carrying out attacks in Europe are motivated by conflicts in the Middle East. Al-Qaida and Islamic State regularly call on Muslims worldwide to avenge the deaths of Palestinians in Gaza. The conflict remains a continuing source of inspiration for militant Islamists.

Nearly all attacks in Europe have one thing in common: the use of simple means, particularly knives and, in some cases, vehicles. Consequently, the number of victims is relatively low compared to attacks involving firearms or explosives. In its propaganda, Islamic State frequently encourages militant Islamists to carry out such simple attacks, partly because they are harder for European intelligence services to detect and prevent. Moreover, acquiring firearms or manufacturing explosives is generally difficult for militant Islamists in most European countries.

Part of the reason for the increase in attacks in recent years is that they are simple to plan and carry out. The attacks also tend to inspire other militant Islamists to follow suit.

## ASSESSMENT OF THE TERRORIST THREAT TO DENMARK

In its April 2025 publication *Assessment of the terrorist threat to Denmark*, the Centre for Terror Analysis (CTA) assesses that the terrorist threat to Denmark remains at the level of SIGNIFICANT. The global security situation has deteriorated in recent years. Among other things, some state actors use methods and means that are comparable to terrorism, leading to a more fragmented and complex threat landscape. The conflict in the Middle East continues to hold considerable potential for mobilisation, which is expected to remain a major driver of the terrorist threat to Denmark in the coming year. However, terrorist attacks carried out by militant Islamists, right-wing extremists, left-wing extremists and anti-establishment extremists continue to pose the primary threat to Denmark. The militant Islamist terrorist threat to Denmark remains at the level of SIGNIFICANT, with the most likely militant Islamist terrorist attack remaining an attack carried out by a lone actor or a small group.

The CTA assesses that the terrorist threat from right-wing extremists in Denmark remains at the level of GENERAL.



### Unrest in the Middle East may strengthen terrorist groups

Weak governments, internal power struggles, and, in some cases, armed conflicts across the Middle East create space for militant Islamist groups to expand their presence in these states, most notably in Syria, where the security situation remains precarious a year after the fall of the Assad regime.

Years of war, economic crisis and frictions among Syria's ethnic and sectarian groups have made national unity a distant prospect. Moreover, human rights violations by the Syrian security forces under the new regime have only deepened public distrust in the government.

Developments in north-eastern Syria will be particularly significant for the country's overall stability. The new government has demanded that the Kurdish-led autonomous administration disarm and relinquish control of the area. The risk of a military confrontation between the two parties has grown in 2025 as negotiations on the region's future have reached an impasse. As a result, the United States will come to play a decisive role as mediator between the parties.

Islamic State in Syria is likely to exploit any armed confrontation between the Kurdish-led autonomous administration and the Syrian government to re-establish its foothold. In 2025, the group regained considerable operational freedom, partly as a result of the power shift within Syria, which enabled its expansion, and partly because of reduced US pressure, after the United States scaled back the airstrikes that once kept the group in check.

The group will also exploit the growing instability to attack camps and prisons in the Kurdish-controlled areas in an attempt to free some of the estimated 10,000 Islamic State members held at the facilities. A mass breakout would increase the terrorist threat to Europe. Many Islamic State members in Syria – both inside and outside the camps – have European ties and likely remain intent on carrying out or supporting terrorist attacks in their countries of origin. This also applies to female members, who make up the majority of detainees and are increasingly linked to extremist networks, including across Europe.

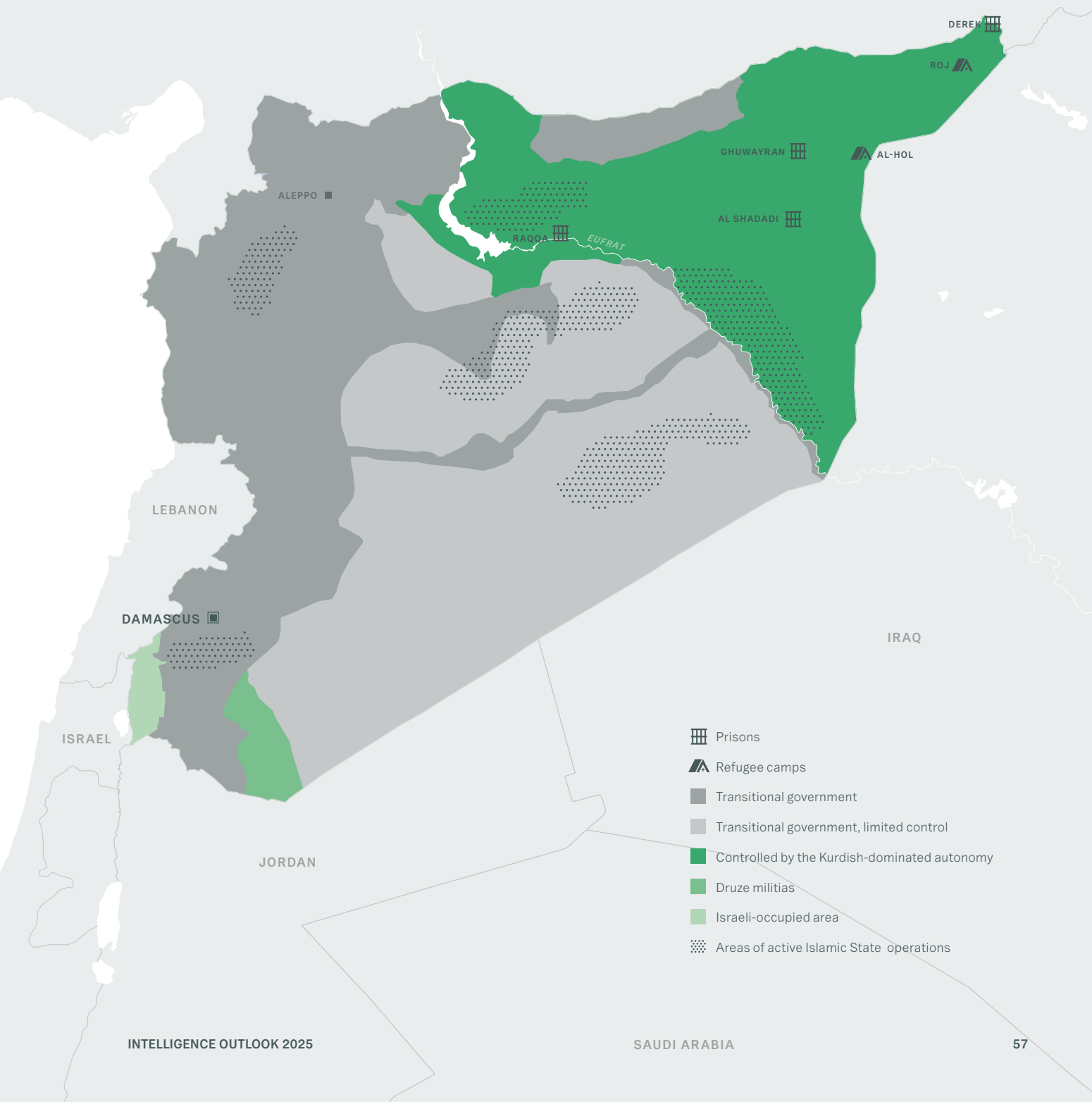
The fragile Syrian state, coupled with the resurgence of Islamic State, will heighten insecurity across the country, increasing the risk of renewed conflicts, and consequently, new refugee flows from Syria to Europe in the coming years.



The terrorist threat from militant Islamists in Europe has increased in recent years and remains serious. Conflict and instability in the Middle East will continue to influence the nature of threats.

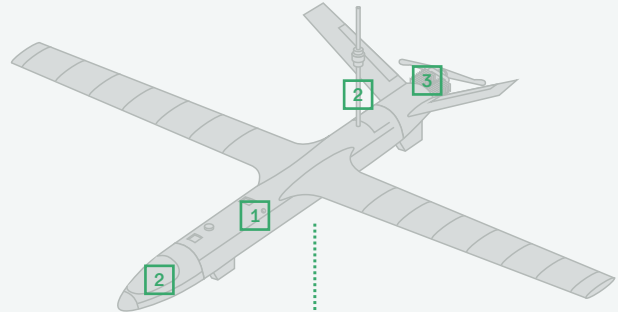
## SYRIA REMAINS DIVIDED DESPITE THE FALL OF THE ASSAD REGIME

Large parts of Syria remain beyond the control of the transitional government, allowing terrorist groups – Islamic State in particular – to expand across the country and pose a growing threat to Europe.



## SAMMAD DRONES – THE UNIVERSAL WEAPON OF THE HOUTHIS

The Houthi movement deploys drones in many of its armed attacks. Its most versatile UAV is the Sammad, based on an Iranian design that the Houthis have been using since 2018. Other users of the Sammad include Hezbollah in Lebanon and pro-Iranian militias in Iraq. Sammad drones are simple yet adaptable, easy to manufacture and relatively inexpensive, with an estimated unit cost of approx. USD 50,000.

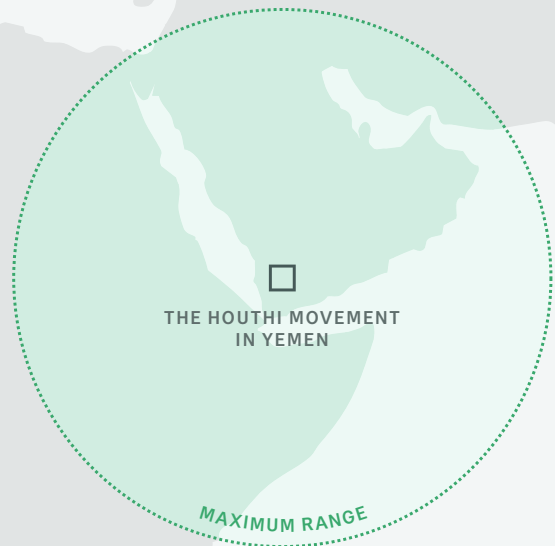


### A kit of simple and advanced components

- 1** The drone frame and fibreglass propellers are produced locally.
- 2** Drone electronics, precision components and sensors are typically supplied by Iran or private suppliers, such as Chinese companies.
- 3** Propulsion comes from a small propeller motor, often of the type used in hobby-grade model aircraft, which can be purchased online for USD 1,000-2,000.

The drone is then assembled locally.

The Sammad is approx. 3 m long, with a wingspan of 4-5 m and an explosive payload capacity of approx. 20 kg – sufficient to cause serious damage to, for instance, a residential building. Some variants have a range of up to 2,000 km, allowing the Houthi movement to strike targets in Israel from Yemen. A single Sammad drone is relatively easy to shoot down with modern air defence systems. However, the Houthis operate a multitude of drones, making defence both complex and costly; a single surface-to-air missile may cost as much as USD 2-3 million.





### **Advanced military technology increases the threat from militias and insurgent groups**

An increasing number of insurgent groups and militias in the Middle East and Africa, including the Houthi movement in Yemen, several pro-Iranian militias in Iraq, Hezbollah in Lebanon and Rapid Support Forces in Sudan, now possess long-range drones and missiles. Armed with these weapons, the groups are capable of striking adversaries far beyond their own territories, should they choose to do so.

Insurgent groups and militias in the Middle East are largely driven by opposition and hostility to Western values and what they perceive as Western political, economic or military dominance. The war in Gaza and Israel's actions in the occupied West Bank as well as continued US support for Israel have further fuelled this resentment and hostility.

Components needed to manufacture military equipment have generally become cheaper and easier to obtain, enabling a growing number of groups to acquire, and develop and produce advanced weapons that were previously available only to government armed forces.

Advanced military technology may enable insurgent groups and militias to counter and deter both rival factions and state adversaries. These groups could, for instance, threaten transport and energy hubs such as international airports and refineries. As a result, insurgents and militias may be able to pressure even powerful adversaries into adjusting their political, diplomatic or economic course.

The Iranian-backed Houthi movement in Yemen continues to pose a threat to one of the most important maritime trade routes between Europe and Asia. Since late 2023, the group has targeted vessels in the Red Sea and the Gulf of Aden in response to the Israel-Hamas conflict, leading to a significant decline in merchant shipping through the Red Sea. The Houthis have also launched drone and missile attacks against Israel, prompting retaliatory strikes by both Israel and the United States.

The attacks by the Houthis have likely helped to deter the movement's regional adversaries, notably Saudi Arabia and the United Arab Emirates. These two

countries are the main backers of the Houthi movement's political and military opponents in Yemen and have in recent years deployed their own armed forces against the movement. Nevertheless, both countries refrained from using the intense US strikes on Yemen in the spring of 2025 as an opportunity to launch or support a military offensive against the movement. Moreover, the countries on the Arabian Peninsula have requested that the United States refrain from using its regional bases to launch attacks on the Houthis and their Iranian sponsor. This reflects the desire of Arab countries to remain neutral in the conflicts between the United States and Iran and with the Houthi movement.

The gains secured by the Houthi movement through its attacks on Israel and on maritime traffic off Yemen may encourage other militias to pursue similar capabilities. Should this occur, the resulting dispersal of long-range, advanced weapons could accelerate the regionalization of threats that have so far been confined to local conflict areas.



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### Iran employs state-sponsored terrorism against Israel and critics in Europe

Since the 1979 Iranian Revolution, Iran has relied on its intelligence services to conduct state-sponsored terrorism, targeting opposition groups, media outlets and individuals who criticize the regime. However, in recent years, Iranian intelligence services have also been implicated in plots against Israeli and Jewish targets in Europe and the Nordic countries. This escalation is largely driven by the situation in Gaza, the broader conflict between Israel and Iran and its regional partners.

Iran increasingly frames itself as locked in a perpetual defensive struggle against Israel and against Iranian dissidents in Europe whom the regime regards as a threat. In this context, attacks on Iranian dissidents and Israeli targets worldwide, including in Europe, are treated by Iran as legitimate instruments of state policy.

However, the Iranian government and its intelligence services seek to distance themselves from the attacks by operating through proxies recruited in Europe and neighbouring states. These proxies may be individuals or members of criminal networks, not necessarily aware that they are acting on Iran's behalf.

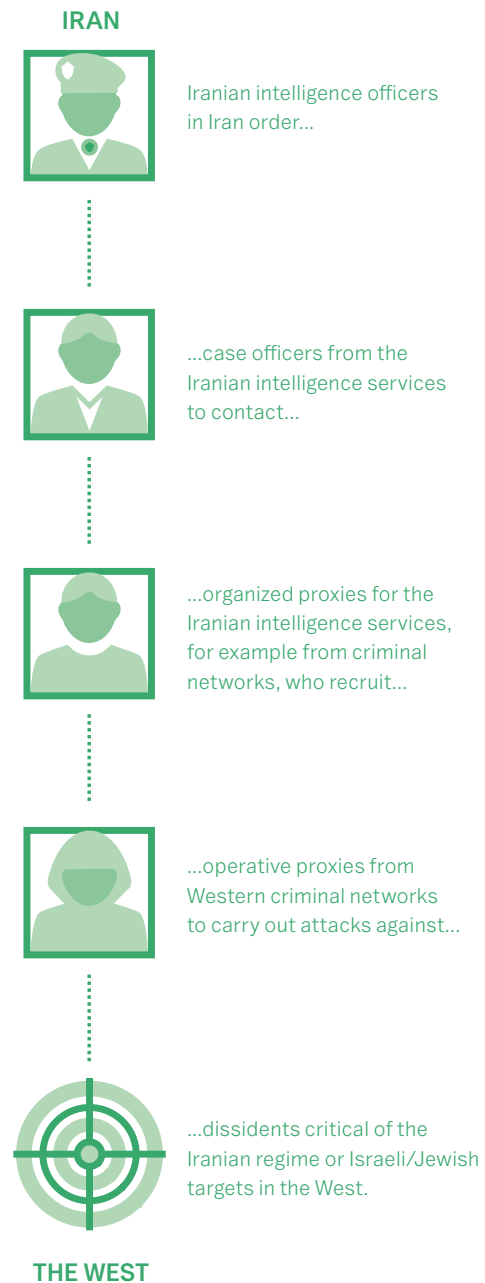
### Militant Islamism on the rise in parts of Africa

Islamic State and al-Qaida are set to continue expanding across fragile African states. Overpopulation, unemployment, poverty and political and economic inequality remain key drivers of the rapid rise of militant Islamism, particularly in West Africa. This trend is especially evident in Mali, Burkina Faso, Niger and northern Nigeria, where the precarious situation has played a decisive role in the expansion of militant Islamism. Similar conditions have enabled Islamic State and al-Qaida to also gain a foothold in the Horn of Africa, where al-Shabaab, an al-Qaida affiliate, has taken control of large parts of Somalia while also maintaining a presence in Kenya and Ethiopia.

Islamic State and al-Qaida continue to pose a threat to Western targets in Africa, such as embassies. In recent years, the risk of kidnapping, particularly of Western citizens, has increased. Ransom payments remain an important source of income for both groups. The two groups frequently collaborate with local

### IRAN USES PROXIES TO CARRY OUT TERRORIST ATTACKS AGAINST DISSIDENTS AND ISRAELI TARGETS IN EUROPE

Iran seeks to avoid direct attribution for terrorist attacks in Europe. To that end, it mobilizes individuals or criminal groups to execute the attacks. The process can be illustrated as follows:



militias, who carry out the actual abductions and subsequently hand over the hostages to al-Qaida or Islamic State. Nevertheless, al-Qaida and Islamic State in Africa still primarily target local security forces and civilians.

Islamic State has managed to draw foreign fighters to several parts of Africa, primarily from other African countries but also from Europe. Militant Islamists from Europe who join terrorist groups in Africa often exploit their networks to mobilize other militant Islamists in Europe. In many cases, however, militant Islamists from Europe are unable to join a group in Africa; in such instances, they are typically instructed to remain in their home countries and carry out attacks locally or facilitate support in other ways, for instance through money transfers. ■

### **MIGRANTS FROM AFRICA TOWARDS EUROPE**

Migrants will continue to travel from Africa to Europe, although the number of irregular arrivals has fallen in recent years. This decline is the result of new EU initiatives, including agreements with several North and West African countries aimed at curbing irregular migration.

Although the inflow of irregular migrants has declined in recent years, the root causes of migration from Africa to Europe remain unchanged. Poverty, unemployment, political repression, conflict and rapid population growth will continue to push people from African countries to migrate towards Europe. This is particularly true in conflict-ridden areas in West Africa, where militant Islamist groups have taken control of large swathes of territory. In addition, many countries in this region have increasingly isolated themselves from the West, further straining their already fragile economies. There is no indication that this trend will reverse in the coming years.

### **THE THREAT FROM RIGHT-WING EXTREMISM HAS BECOME MORE COMPLEX**

The threat from right-wing extremists in Europe is evolving. Extremists form networks both online and through personal contacts. In particular, the right-wing "Active Club" network has expanded across the West, operating under the guise of legitimate communities centred on physical training and nationalist values.

Terrorist threats from right-wing extremists largely originate from individuals inspired by extremist propaganda and attack videos to plan and carry out attacks. This propaganda increasingly targets younger audiences, increasing the risk that older-generation right-wing extremists will radicalize youths and exploit them to promote their own agendas.

In addition, it is likely that unidentified actors with ties to the Russian state apparatus are supporting both physical and online right-wing extremist groups and propelling them towards violent extremism. Right-wing extremists on digital platforms, in particular, may be inspired and enabled to carry out terrorist attacks in Europe. In addition, Russia is likely still supporting extremist movements at the far ends of the political spectrum in Europe with the aim of destabilizing European countries.

Right-wing extremists may exploit political unrest, social divisions and societal rifts to mobilize far-right networks through dissemination of false information, while also inciting violence and terrorism against different ethnic or religious minority groups. The 2024 and 2025 riots in the United Kingdom and Northern Ireland are prime examples, with large-scale anti-immigrant campaigns sparking widespread civil unrest, including arson attacks on asylum centres and assaults on police.



## TERMS AND DEFINITIONS

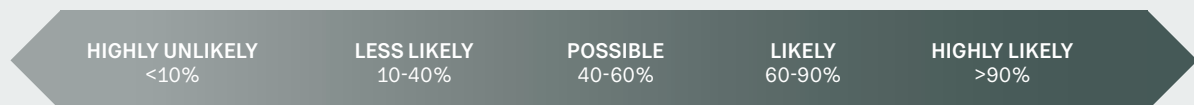
To provide a common framework of reference, we have prepared a brief outline of the special terms and definitions used in **INTELLIGENCE OUTLOOK**.

### The degree of certainty in assessments

Intelligence assessments almost always contain elements of doubt. Consequently, our analysts attempt to clarify for our readers the degree of certainty that they attribute to their assessment, using standardized expressions and consistent use of probability terms to express the same degrees of certainty.

We use five degrees of probability to express the level of certainty in our assessments. The probabilities are estimates, not calculated statistical probabilities. The estimation of probability depends on the strength of the available information and the complexity of the subject.

We apply the probability scale shown below:



### 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





Satellite image of the damage from a drone strike on an  
ammunition depot near Toropets, Russia, September 2024.  
Afp Photo/AFP/Ritzau Scanpix



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