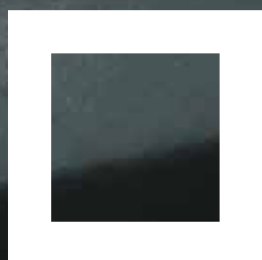
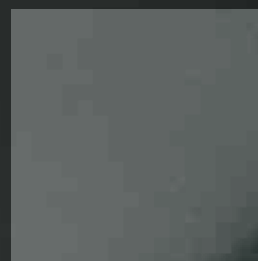
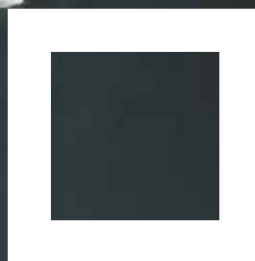
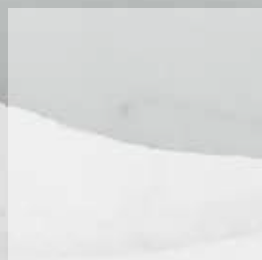


# INTELLIGENCE OUTLOOK 2021

An intelligence-based assessment of the external conditions  
for Danish national security and interests



**DANISH DEFENCE  
INTELLIGENCE SERVICE**



INTELLIGENCE OUTLOOK is the DDIS's assessment of the external conditions for Danish national security and interests. Here, we outline the most significant current and potential threats to Denmark, just as we look at other developments abroad significantly impacting Danish security.



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Translation of DDIS 2021 national intelligence outlook  
published December 2021.



# INTRODUCTION

■ Denmark is facing an increasingly diverse and complex threat landscape. Russia is on the offensive track and is building up its military capabilities, including in the Baltic Sea region. China is pushing for global influence and is challenging Western values, alliances and partnerships crucial to Denmark.

Meanwhile, the cyber threat continues to grow. Cyber attacks have become a tool used by states as well as criminal actors, and every day cyber attacks are launched against Danish public authorities and private companies, resulting in political and economic harm to Denmark.

The global terrorist threat persists, and the fundamental drivers of terrorism are ever-present, such as armed conflicts, poor governance and social unrest that characterize parts of the Middle East and North Africa. Terrorist groups can seize on these factors, which could result in a new surge of refugees and large, irregular migration flows to Europe.

The purpose of the DDIS 2021 Intelligence Outlook is to put a focus on these security challenges. Our main aim is to look into their impact on Denmark, Danish national security and Denmark's ability to protect its interests internationally.

In Intelligence Outlook 2021, we deal with strategic actors whose conduct poses threats or risks to Denmark and Denmark's security policy latitude. We will also look into significant conflict and crisis zones that impact on Danish national security, including places

where Danish troops are deployed. We also examine terrorist networks abroad that pose a threat to Denmark and Danish interests. In addition, we look at shifts in international politics and dynamics that hold the potential to change the foreign policy as well as security and defence policy landscapes that Denmark has to navigate. These in particular include the growing power of Russia and China, which comes partly at the expense of the global political, economic and military influence of the United States and the West.

The international rules-based order and strong alliances are the bedrock of Danish national security and Denmark's ability to promote its strategic interests and values.

Cyber attacks are inseparable from other threats posed by the countries and actors that are part of our daily focus. The threats emanating from the cyber realm are thus to a wide extent dealt with under the different actors, in particular under the sections dealing with Russia and China, and under the initial chapter on the changed security policy conditions. In addition, a separate chapter has been dedicated to the topic of the constant threat of cyber attacks. As always, a more in-depth outline of the threat from the cyber realm is available in the Centre for Cyber Security (CFCS) assessments of the collective threats posed by the cyber domain.

Enjoy your reading.



**Svend Larsen**

Acting Director of the Danish Defence Intelligence Service

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# MAIN CONCLUSIONS

■ The balance of power is shifting between the United States, China and Russia, challenging Western alliances and cooperation frameworks such as NATO and the EU that are of key importance to Denmark. China and Russia are increasingly challenging the international rules-based order, which, in their view, is defined by the West. Cyber attacks also contribute to the increasing tensions between the great powers. Asia's political, economic and military importance is rising, partly at the expense of, among others, Europe. The risk of war between the United States, Russia and China is very low. Increased tensions and shifts in the political and military balance of power increase the risk that crises may escalate and lead to the use of military force.

Cyber attacks by both states and cyber criminals pose a persistent and serious threat to Denmark – a threat often linked with other security policy challenges that Denmark faces. In the future, cyber attacks may cause even greater damage to the Danish society. This could occur, for example, in the event of a destructive cyber attack aimed at critical infrastructure.

The tense relations between Russia, the United States and China will determine the development in the Arctic. These tensions will also affect the Kingdom of Denmark. Russia regards itself as the leading Arctic state and continues to build up military capabilities that pose a potential threat to Western interests.

The United States and other Western countries are in consequence increasing their military presence in the Arctic to be able to respond to Russia's role in the region. China seeks a role in shaping the institutional framework for the Arctic, while in particular the United States is trying to counteract China's influence in the region.


Russia is underpinning its role as a great power with a growing capacity for military deterrence and is sharpening the confrontation with the West through its use of offensive intelligence operations, cyber espionage and influence operations. Russia is able to make quick decisions in narrow circles and has a deep-seated distrust of the West. These factors combined create a risk for miscalculation and unintentional military escalation, potentially with very little warning. Over the past few years, Russia has built up and modernized its armed forces in western Russia. In the initial phase of a conflict, Russia would be militarily superior in the Baltic Sea region due to its ability to deploy forces within a very short time. Though it is highly unlikely that Russia would intentionally risk a military conflict with NATO in the Baltic Sea region, Russia does regard a war with NATO as a real possibility and uses its large strategic exercises to train for such a conflict.

China's growing influence and global ambitions spark tensions in China's relations with a number of Western countries, including Denmark. Simultaneously, China seeks to counter criticism of what it considers internal Chinese affairs with increasing strength and determination. China uses its economic clout to put political and economic pressure on other countries as a way of advancing its strategic objectives, just as it uses targeted cyber espionage to promote its interests. These instruments have also been applied against Denmark. China views the strategic rivalry with the United States as a crucial factor in its further development and seeks to prevent the United States from limiting China's ability to gain influence and assert itself as a great power. It is China's goal to become the dominant regional power in East Asia and the Western Pacific. Consequently, China continues to expand its military and persistently pursues its claims in the South China Sea.

The terrorist threat remains serious, mainly embodied by militant Islamists but also right-wing extremists. Al-Qaida and Islamic State still inspire individuals and networks to launch attacks in and outside of Europe. Western foreign fighters will continue to pose a threat. Al-Qaida and Islamic State both remain intent on attacking the West, and their regional subgroups pose a threat to Western interests in large parts of the world. The Taliban's seizure of power provides terrorist groups in and near Afghanistan with wider latitude for operation and will likely increase the terrorist threat from militant Islamist groups in the country and the region as a whole.

Europe's neighbouring regions from North Africa and the Sahel over the Middle East to Afghanistan pose a security policy challenge. In the years to come, the regions will remain characterized by growing rivalry between regional powers, armed conflicts, and corrupt and authoritarian regimes. This situation will be further exacerbated by climate change and growing populations. Combined, these factors will fuel terrorism, refugees and migration and at the same time threaten trade, shipping and energy security. Europe will increasingly have to tackle these challenges by itself due to the diminishing US military presence and political influence in the regions.

# DENMARK IN A WORLD OF CHANGING SECURITY POLICY CONDITIONS



Tensions with Russia entail increased risk of conflict in the Baltic Sea region.

Tensions between China, Russia and the United States in the Arctic place great demands on Denmark's strategic conduct in the region.

RUSSIA

Despite the sometimes diverging interests of EU and NATO member states, smaller member states benefit from the Western political, economic and military community. China and Russia are making efforts to deepen disagreements.

CHINA

The changing dynamics in the Middle East and Africa will place demands on Denmark's and Europe's ability to address challenges such as terrorism and migration.

The balance of power is shifting between the United States, China and Russia, challenging Western alliances and cooperation frameworks such as NATO and the EU that are of key importance to Denmark. China and Russia are increasingly challenging the international rules-based order, which, in their view, is defined by the West. Cyber attacks also contribute to the increasing tensions between the great powers. Asia's political, economic and military importance is rising, partly at the expense of, among others, Europe. The risk of war between the United States, Russia and China is very low. Increased tensions and shifts in the political and military balance of power increase the risk that crises may escalate and lead to the use of military force.



China and Russia form new organizations that challenge Western norms and rules.

Like the United States, several European countries are present in disputed areas in the South China Sea. Heightened tensions in the region might lead to an increased international maritime presence.

THE UNITED STATES

The United States is increasingly trying to counter the pressure exerted by China and Russia on the US leadership and the international rules-based order. This places great demands on the United States' redirected geo-strategic focus, which in turn leads to new dynamics and demands for burden sharing among the US allies.

■ The established international rules-based order is under pressure, especially due to China's growing economic and military clout as well as Russia's military assets and willingness to use them. The balance of power between the United States, China and Russia is shifting, and China and Russia openly challenge the interests of the United States and other Western countries. Both Russia and China thus act as great powers, trying to assert themselves in regions all over the world and presenting their values as alternatives to Western liberal values. Both countries use a diverse array of instruments, including cyber attacks, economic sanctions and influence operations, to advance their interests and weaken what they perceive as a world order defined by the West.

The United States is fundamental to NATO's military superiority, and Russia will continue its efforts to sow internal division in the alliance with the aim of curbing its superiority. China and Russia have an interest in weakening the EU, as the union would present less of a political challenge to the two countries if its members do not stand united. At the same time, both countries are pursuing a strategy of economic cooperation with Europe that might help peel European countries away from the United States. China and Russia both wish to compete freely for influence and power without being restricted by what they view as Western-defined structures and norms for international politics, making the political and value-based confrontation between Russia and China on the one side and the United States and Europe on the other stronger than it has been for years.

The increased political, economic and military tensions and competition are playing out at a level well below that of open military conflict, and the risk of war between the great powers remains very low. However, increasing tensions raise the risk that crises in areas characterized by diverging great power interests may erupt, escalate and ultimately result in the use of military force.

China and Russia continuously strengthen their bilateral relations though their interests sometimes diverge substantially. In international organizations, the two countries coordinate their views, and they cooperate militarily in bilateral as well as multilateral forums as a way of curbing the influence of the United States and that of other Western countries.

Russia in particular is trying to establish a number of organizations around itself that can to some degree act as equivalents to Western institutions such as NATO and the EU. However, these organizations – which include the Collective Security Treaty Organization and the Eurasian Economic Union – are heavily characterized by the unequal relationship between Russia and its smaller partners. China is working to build institutions mirroring Western organizations and initiatives, especially in the economic sphere. Due to the size of its economy, China can engage in several cooperation projects that have a global scope, such as the Belt and Road Initiative. Russia and China will continue to put great emphasis on their seats in the UN Security Council, which they perceive as a key instrument when it comes to promoting their national interests.



The US withdrawal from Afghanistan is the most recent example of how the United States is shifting its long-term and strategic focus away from the protracted conflicts in the Middle East and South West Asia. Instead, the United States will focus on curbing the rising influence of China on international politics.



# NEW WEAPONS SYSTEMS CHALLENGE STRATEGIC STABILITY

Today, international politics are affected by an arms race between the United States, China and Russia at an intensity that has not been seen since the end of the Cold War. The strongest drivers are Russia's and China's attempts at gaining asymmetrical advantages over the West, and the efforts by the United States to counter this development. The arms race is closely connected to technological progress in the countries involved, which could significantly affect the global military balance of power.



The United States, China and Russia are investing substantially in their nuclear arsenals. Nuclear deterrence will continue to be a central theme in the strategic balance of power, both in terms of strategic and tactical nuclear weapons, which, for example, play a role in Russia's doctrine for military escalation.



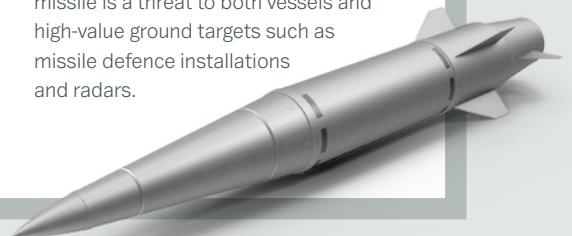
New long-range hypersonic missiles are in rapid development. They are characterized by their manoeuvrability at a very high speed over long distances in the upper part of the Earth's atmosphere, and they can carry conventional or nuclear warheads. In addition, these missiles are hard to defend against with current missile defence systems. Introducing capabilities such as the Kinzhal missile, Russia has taken a leading position in developing hypersonic weapons systems, but China has also demonstrated its capability to develop and launch manoeuvrable hypersonic missile systems.



Destructive cyber attacks are increasingly prioritized in strategic conflicts as a means to weaken a country's economy and stability outside the context of crisis and war. Used as tactical military instruments, destructive cyber attacks can destroy the infrastructure of other nations and influence their populations. Used as military tools in crisis situations, cyber attacks could, for example, be used to delay US reinforcements from leaving the American East Coast, or they could be used to sabotage the staging of NATO forces and their passage through Denmark.

## KINZHAL MISSILE

The Russian weapons arsenal includes new hypersonic missile systems such as the Kh-47M2 Kinzhal. The Kinzhal missile can be launched from the MiG-31-K fighter jet, giving it a total range of up to 2,000 km. In a part of its trajectory, the missile flies at hypersonic speed, allegedly travelling at up to 10 times the speed of sound. The very high speed and manoeuvrability of the Kinzhal missile during all phases of the flight make it hard to defend against. According to Russia, the missile has been tested in operational service since 2018. The missile is a threat to both vessels and high-value ground targets such as missile defence installations and radars.





China in particular is leaving a stronger mark on global security policy developments, though it also meets opposition. China's ascent and conduct are a source of concern for its neighbours, just as Russia's conduct in its neighbouring regions has contributed to isolating the country politically and economically from the West.

Asia's significance will grow due to its increased defence spending, technological development and substantial economic growth. This development will increasingly act as a driver for the US ambition to have European countries handle, to a certain extent, European security and defence matters on their own. For more than a decade, the United States has gradually

tried to redirect more of its focus to Asia, and Europe is now feeling the impact of this shift.

The US withdrawal from Afghanistan is the most recent example of how the United States is shifting its long-term and strategic focus away from the protracted conflicts in the Middle East and South West Asia. Instead, the United States will focus on curbing the rising influence of China on international politics.

#### **Independence from foreign actors**

Many countries increasingly focus on protecting their national supply chains. Their concern stems from issues such as increasing divergence of interests between the great powers, which is especially driven



Multinational fleet in the Gulf of Aden. **Photo:** Cover Images/Zuma/Ritzau Scanpix

by Russia's and China's conduct, and in particular the risk of espionage by way of Russian and Chinese information technology. In addition, drawing on the lessons learned from the COVID-19 pandemic, many countries have started focusing more on their own supply chains, trying to develop their own capacities and protect their own production against espionage and large foreign investments.

Acting on this development, many countries are trying to prevent strategic competitors from interrupting their supply chains and compromising their information security. This is especially the case with regard to critical infrastructure such as telecommunications, where security policy considerations have become key.



In the worst case, serious cyber attacks may trigger military responses that could ultimately lead to conventional war.



As economic and technological developments are becoming key themes in security policy, the contours of a new multipolar world economy are emerging. Tense relations between the West on the one side and Russia and China on the other will further stimulate the introduction of measures to reduce the vulnerability to economic blows from abroad, including from sanctions.

Recent years have seen the arrival of many new weapons systems that are unregulated by international arms control agreements or norms of use. The absence of clear rules and norms to regulate the cyber domain has created grey zones that allow actors to operate without their actions necessarily escalating into open conflict. Russia and China, as well as regional actors such as Iran, have already used cyber

attacks for limited political, economic and military objectives without it having resulted in military conflict. Still, there is an inherent risk of escalation, as it is hard to foresee what dynamics such operations and actions could trigger in a crisis situation.

In the past, arms control agreements contributed to maintaining a strategic balance between the United States and Russia, not least during the Cold War. Now, the emergence of many new weapons systems makes it difficult to compare and formulate rules, just as new advanced weapons systems increase the requirements for what capacities states should possess in order to ensure deterrence. This is especially the case for new high-tech weapons systems such as hypersonic missile systems. Within this field Russia has taken a leading



position, and as recently as in October 2021 China surprisingly tested a hypersonic missile system capable of challenging the United States militarily.

Due to China's growing military strength, strategic arms control agreements that do not include China lose their global relevance, reducing the prospects for new strategic arms agreements. China has shown no inclination to engage in such negotiations.

As a result of the more complicated environment for new arms control agreements, new and advanced weapons systems will come to play a larger role, since possession of such systems will provide a decisive edge and reduce the deterrence of other key weapons systems that currently serve to maintain the strategic stability. New weapons systems could also factor into Russia's overall calculation of the consequences of using military means.

#### **Cyber attacks increase tensions between the United States, China and Russia**

Not only do cyber attacks present a direct and serious threat to Denmark, they also serve to heighten tensions between the United States, China and Russia. The attacks are used to serve national interests, but also hamper cooperation and trade. In the worst case, serious cyber attacks may trigger military responses that could ultimately lead to conventional war. In this way, cyber attacks on other countries also have an impact on the conditions for Danish foreign, security and trade policy.

Russia and China mainly use their cyber capabilities for espionage purposes, giving them insight into, among other things, the West's plans and capabilities, which they can use in their rivalry with the United States and the EU. Also, Russia and China can use espionage to prepare destructive cyber attacks against critical infrastructure, etc.

The United States, the United Kingdom and the EU openly tell about specific attacks against their authorities and companies in an attempt to deter Russia and China from launching cyber attacks against the West. For example, they reveal how the Russian and

Chinese intelligence services execute the attacks, and follow up by introducing sanctions against Russia and China.

#### **Serious cyber crime has become point of contention between the United States, Russia and China**

As a new trend, cyber attacks launched by civilian criminal hackers have moved onto the international agenda due to the very harmful consequences of so-called ransomware attacks, especially for Western societies. In recent years, targeted ransomware attacks have become a favoured attack method for criminal hackers and are pivotal to cyber crime activities. The hackers behind the attacks are highly organized and cooperate through for example Russian language hacker forums.

In 2021, the United States has seen several large attacks, whose consequences have affected the supply of energy and food. As a result, the United States has started to categorize ransomware attacks as a threat to national security. The hackers that disrupted food supply chains in the United States have attacked companies in Denmark as well.

The United States is criticizing Russia for not doing enough to curb the activities of Russian cyber criminals and has announced its intention to hit back against the hackers. Despite the US efforts to strike back at the hackers, using economic sanctions and diplomatic pressure against Russia, there are as yet no signs that the threat is abating. As a result, ransomware attacks will likely continue to rank high on the diplomatic agenda between the United States and Russia in the years to come.

# CYBER ATTACKS – A CONSTANT THREAT TO DENMARK

Cyber attacks by both states and cyber criminals pose a persistent and serious threat to Denmark – a threat often linked with other security policy challenges that Denmark faces. In the future, cyber attacks may cause even greater damage to the Danish society. This could occur, for example, in the event of a destructive cyber attack aimed at critical infrastructure.

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Cover Photo: Julian Steenbergen/Unsplash

■ Denmark is continuously targeted by cyber attacks from both nation-state and criminal hackers – attacks that pose a serious threat to Denmark.

State-sponsored hackers pose a persistent and serious cyber threat to Danish public authorities and private companies. Russia and China, in particular, use their cyber capabilities to conduct espionage against other countries, including Denmark. Knowledge obtained through cyber espionage may be exploited to undermine Danish interests or damage Danish companies.

Cyber attacks are transnational and are often linked to other security policy challenges that Denmark faces such as the growing great power rivalry as well as Russia's and China's ambitions in Denmark's neighbouring area and the Arctic.

At the same time, Russia and China are not the only countries whose priorities include expanding their cyber capabilities. It is highly likely that an increasing number of states will pose a serious cyber threat to Denmark in the future.

In addition, Danish authorities and private companies are daily exposed to cyber attacks by criminal hackers seeking financial gain through methods such as fraud, theft and extortion. Targeted ransomware attacks in particular have become a popular extortion tool. The serious repercussions of ransomware attacks are not confined to the targeted companies but extend to society as a whole. A case in point is the May 2021 ransomware attack against the US oil company Colonial Pipeline that to a large extent affected fuel supply along the East Coast of the United States.

#### **Future attacks may cause even greater damage**

There is nothing to suggest that the cyber threat will decrease in the years to come. Rather, Denmark will risk being exposed to cyber attacks whose consequences to society exceed those of attacks seen today.

Targeted ransomware attacks illustrate this trend. Over the course of a few years, the threat from targeted ransomware attacks has evolved from being a new

type of cyber attack whose main target was victims in the United States to becoming part of the current cyber threat landscape in Denmark.

The repercussions could be significant if states were to become more inclined to launch serious types of cyber attacks, for instance destructive attacks aimed at disrupting critical infrastructure. The great powers, in particular, have for years developed and tested their cyber capabilities, mainly through the use of cyber espionage, but in some cases also in the form of destructive cyber attacks.

#### **THE ANNUAL ASSESSMENT OF THE CYBER THREAT AGAINST DENMARK**

The threat from cyber attacks is described in the Centre for Cyber Security's (CFCS's) national threat assessment, "The cyber threat against Denmark". This assessment outlines in more detail the threat from cyber attacks that serve a wide range of purposes and the different nuances of the threats.

In the most recent assessment from 2021, the CFCS classifies the cyber espionage threat and cyber crime threat at the highest threat level: VERY HIGH. These two threats are the most active cyber threats against Denmark.

The threats from destructive cyber attacks and cyber activism are classified at the threat level LOW. These two types of attack are rarely seen in Denmark. The threat of cyber terrorism is classified at the lowest level possible: NONE.

The threat assessment "The cyber threat against Denmark" is available in Danish and English at the CFCS website: [www.cfcs.dk](http://www.cfcs.dk)





The attack on Colonial Pipeline in May 2021 led to fuel shortage at US gas stations.  
Photo: Elijah Nouvelage/AFP/Ritzau Scanpix

Though destructive cyber attacks have mainly been used in Ukraine, the Middle East and other conflict areas, the 2017 NotPetya attack demonstrated that Danish organizations may also become victims of destructive cyber attacks.

Although several foreign states, including Russia, have the capabilities to launch destructive cyber attacks, it is less likely that they currently have the intention of launching such attacks against Denmark.

It is highly likely that Russia prioritizes being able to use offensive cyber attacks in the event of a future conflict with the West. As part of the preparations for such attacks, Russia may have an interest in testing its cyber capabilities to challenge and test the West's

reactions and norms regarding its response to cyber attacks.

At the same time, the continued technological development and digitalization will increase society's reliance on robust digital services and as a consequence widen the scope that states and criminals have to cause damage through cyber attacks. The increasing fusion of the digital and physical world may also serve to exacerbate the consequences of cyber attacks.



# THE ARCTIC – AN ARENA FOR GREAT POWER RIVALRY



The tense relations between Russia, the United States and China will determine the development in the Arctic. These tensions will also affect the Kingdom of Denmark. Russia regards itself as the leading Arctic state and continues to build up military capabilities that pose a potential threat to Western interests. The United States and other Western countries are in consequence increasing their military presence in the Arctic to be able to respond to Russia's role in the region. China seeks a role in shaping the institutional framework for the Arctic, while in particular the United States is trying to counteract China's influence in the region.

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Photo: Maxime Popov/AFP/Ritzau Scanpix

■ Cooperation among the Arctic states continues to be the foundation for developments in the Arctic region. Keeping Arctic issues separate from the tensions between Russia and the West will, however, be increasingly difficult. Russia has for a number of years built up military capabilities in the Arctic, which, though defensively motivated, constitute a threat to Western interests. This has prompted the United States and other Western countries to enhance their military presence in the Arctic. The result is a risk of unintentional clashes and escalation. For example, Russia may respond strongly to Western military activities that could challenge Russian ambitions for control of waters north of Russia.

Two factors will determine how the strategic balance of power in the Arctic will develop: firstly, developments in the relationship between Russia and the United States, and secondly, the global competition and rivalry between the United States and China.

At the same time, the Arctic is becoming increasingly important economically, especially to Russia but also to China, as the region is becoming more accessible for shipping and raw material extraction due to the receding ice cover. However, the increasing international focus on climate protection and sustainable transition may make it harder, in particular for Russia, to exploit these resources. Equally, the green focus can make it harder to attract investments for oil and gas extraction projects and other activities that may have harmful consequences for the environment.

The new security climate in the Arctic will also affect cooperation on regional issues, though the Arctic states will go to considerable lengths to ensure continuation of the cooperation. This is not least to demonstrate that the region's problems can be handled without the involvement of non-Arctic actors. The Arctic Council will continue to be the main platform for cooperation, though China, Russia and the United States will continue to prioritize bilateral contacts to Arctic states as well.

Tense relations between the West on the one side and Russia and China respectively on the other have deepened cooperation between Russia and China also on Arctic matters. Western sanctions against, for instance, offshore resource extraction have made Russia look to non-Western partners for investments.

### DELIMITATION OF THE ARCTIC CONTINENTAL SHELF

The five Arctic coastal states agree that delimitation of the Arctic continental shelf must be based on international maritime law, and they are submitting their claims to the UN Commission on the Limits of the Continental Shelf (UNCLOS).

So far, Russia has complied with the process, showing a constructive approach.

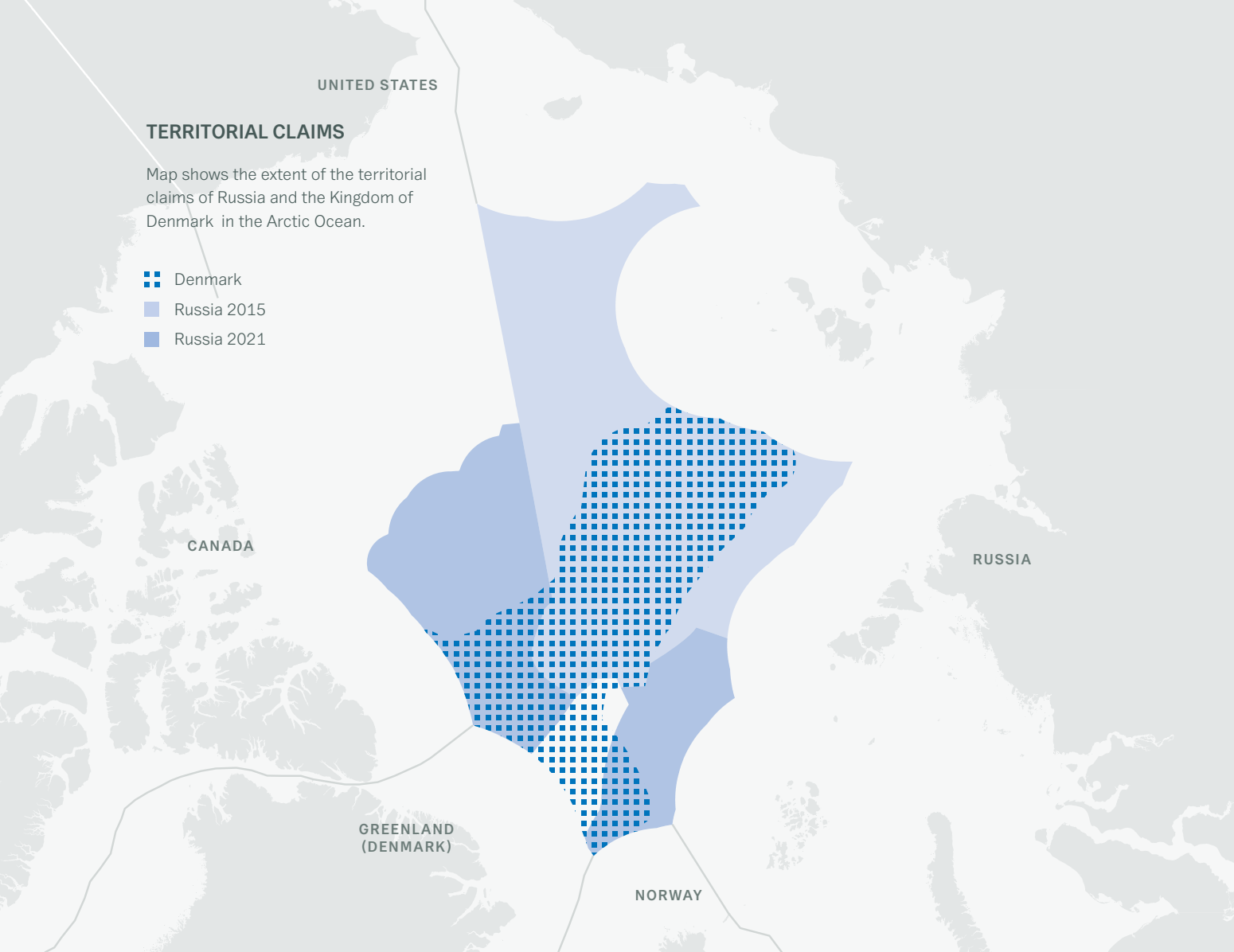
In 2001, Russia became the first Arctic country to submit its claim, amending it in 2015 and again in 2021. The new and extended claim borders the Greenland exclusive economic zone.

The Russian claim is the first to be processed. Prior to the submission of the amendments in 2021, processing was expected to be completed during 2021. Russia is now expected to receive the Commission's recommendation within a couple of years.

The Kingdom of Denmark submitted its claim in 2014, followed by Canada's partial submission in 2019.

It will likely be another 8 to 10 years before the Danish claim is processed and an additional couple of years for the Canadian claim.

The Commission delivers recommendations based on the data submitted, and recommendations may overlap. Subsequently, it is left to the countries with overlapping claims to reach a solution through negotiations.



Though Russia and China are increasing their Arctic cooperation due to partially intersecting interests, they are also deeply suspicious of each other's motives, which will limit how much influence Russia is willing to relinquish to China. Russia views China not only as a partner in the Arctic, but also as a competitor. Russia has no interest in becoming economically dependent on China or in handing over control of Arctic strategic resources or infrastructure to China.

#### RUSSIA'S CHAIRMANSHIP OF THE ARCTIC COUNCIL

Russia holds the chairmanship of the Arctic Council until the spring of 2023. Russia will use this post to strengthen the role of the Council and to draw focus to its own national interests, not least in the context of economic development in the Arctic. Russia will be sceptical of and subtly work against organizations and non-Arctic states seeking influence over and access to the Arctic, in particular the EU and NATO, but also several non-Arctic countries such as the United Kingdom, France and Germany.



### **Russia aims to keep lead position in the Arctic**

Russia sees itself as the leading Arctic nation whose right to play a key role in the region is rooted in history. The country is pursuing a two-pronged policy: On the one hand, Russia refers to the Arctic as an area of low tension that is safe for investments, while, on the other hand, Russia keeps expanding its military capabilities and strengthening its control over the Russian part of the North East Passage.

Western states are now reacting to the Russian military expansion by increasing their own presence, and it will be harder for Russia to maintain the objective of shielding Arctic issues from the tensions between Russia and the West. This is a challenge to Russia that is in need of investments to exploit the Arctic's vast natural resources. Russia is increasingly faced with the

dilemma of choosing between military priorities and economic interests.

Russia wants to preserve its military lead in the Arctic to be able to continue exerting influence on the regional development from a position of strength. Russia's lead in the Arctic has been relatively consistent since the country started restoring its military power a decade ago. Militarily, Russia has expanded or re-established strong capabilities. However, Russia's lead has been facilitated by the circumstance that, during this period, the Arctic was rarely high on the US military agenda. Russia's high priority on military build-up in the Arctic is motivated by the twin considerations of preserving its lead position in the Arctic while also being able to defend its northern flank against potential US attacks on strategic targets in Russia.



Photo: Tycho Gregers/Ritzau Scanpix



## Russia wants to preserve its military lead in the Arctic to be able to continue exerting influence on the regional development from a position of strength.

Though Russia's military build-up is mainly defensively motivated, it also holds considerable offensive elements that Russia may use in both the Arctic and the North Atlantic Ocean. Russia has thus reinforced its bases in the Arctic, deploying tactical air military capabilities that are not limited to surveillance and air defence systems. In the short term, Russia will thus be able to deploy MiG-31 fighter jets carrying Kinzhal airborne ballistic missiles to the Arctic. From bases in the Arctic, this missile can threaten US aircraft carriers in the North Atlantic Ocean or critical military installations in the Arctic. For example, from Russia's northernmost Arctic base, Nagurskoye, the Kinzhal missile will be able to reach the Thule Airbase within approx. 40 minutes. Russia keeps a close eye on US activities in Greenland and intends to push back against US interests. Russia will perceive any new military capability in Greenland or the Faroe Islands as directed against Russia, though it will highly likely also take into consideration the military potential of the capability in question. For instance, a strengthening of the Thule Airbase would be perceived as a direct threat, while deployment of an air surveillance radar in the Faroe Islands would not. This is mainly due to the fact that such a capability would exclusively contribute to improved surveillance of the air space over the Faroese part of the Kingdom of Denmark's exclusive economic zone, but also because a similar capability was deployed there as late as up to 2007. Russia would thus be less likely to mount a strong response to a radar capability in the Faroe Islands.

At the same time, Russia highly likely continues to pursue a cooperative track in the Arctic in the hope of preserving the image of the Arctic as a low-tension area and of reducing support in the West for establishment of Western military capabilities in response to Russia's new capabilities.

### **China aims for influence in the Arctic**

China's interests in the Arctic are persistent and long-term, though the country's actual activities in the Arctic are still limited. China is working to expand its influence on Arctic matters as a gateway to resources and sea routes. In China's view, the institutional framework governing international Arctic cooperation is still in a developmental phase. As such, China seeks to involve itself as a legitimate actor in various Arctic cooperation forums. In this way, China aims for an active role in formulating international rules for cooperation on Arctic regional matters.

At the same time, China is trying to cast itself as an attractive partner for the Arctic nations by offering technical knowledge and financing. Specifically, China is strengthening its Arctic research and is involved in building up infrastructure, mainly in the Russian part of the Arctic. China has long-term military strategic interests in the Arctic and likely aims to be able to operate militarily in the Arctic in the long run, for instance with strategic missile submarines under the ice cap. However, China's current military presence in the Arctic is limited to research expeditions, in part with the purpose to enable a future military presence.

### **United States claims stronger role in the Arctic**

The United States wants to act as a counterweight to Russia's position of military strength and to China's ambition for influence and economic involvement in the region. The United States views the Arctic as a security challenge on a global level, labelling China and Russia as strategic competitors. The United States also seeks to counter the potential threat from Russia against US and Western infrastructure.

## THE NORTHERN SEA ROUTE

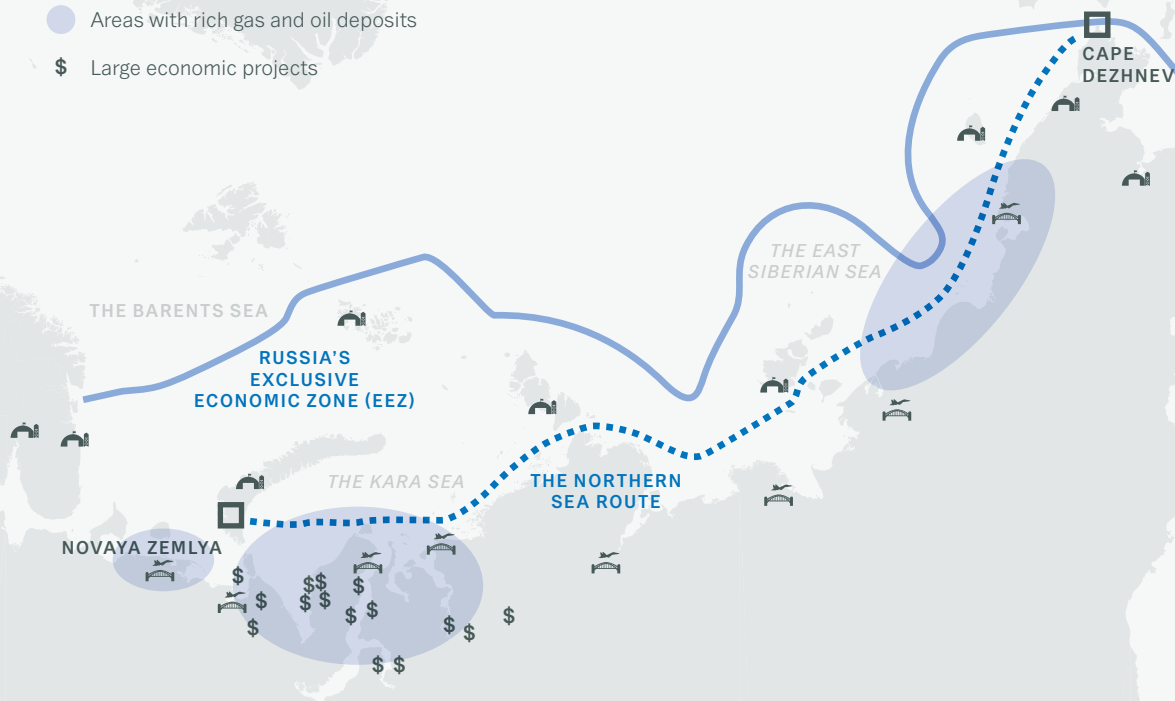
Map of the Northern Sea Route as defined under Russian law.

 Military bases

 Infrastructure (harbours and airports)

 Areas with rich gas and oil deposits

 Large economic projects



Acting on such motivations, the United States will continue to enhance its military capabilities in the North Atlantic part of the Arctic, calling on its allies to do the same. This will highly likely result in Western build-up of military capabilities in the region, with Russia for its part responding by continuing its military expansion.

### The Kingdom of Denmark's challenges in the Arctic

The broadening interests and behaviour of the great powers in the Arctic have a direct impact on the Kingdom of Denmark – specifically the interests of the great powers in terms of the region's geostrategic significance and its economic potential and the derived regional military dynamics. The great powers aim for influence in the Kingdom of Denmark's Arctic territories and will explore different avenues to obtain this objective.

Russia keeps a very close eye on US activities in Greenland and pushes back against the interests of the United States.

While Russia, like Denmark, aims to shield Arctic issues from the general tensions between Russia and the West, deterioration in the general Danish-Russian relationship risks spilling over into bilateral cooperation on the Arctic. This increases the risk that Russia uses influence operations against the Kingdom of Denmark in a bid to strengthen its own position by sowing division internally in the Kingdom of Denmark and between the Kingdom and the United States. This is highly likely what Russia tried to do in 2019 by sending a fake letter from Greenland's minister of foreign affairs to a US senator.



China has for a number of years shown an interest in investments and projects in Greenland, in particular within raw material extraction and infrastructure. This interest has yet to materialize into concrete projects, however, and the involvement of Chinese companies in Greenland is still limited. It is likely that the United States' growing focus on Greenland has dampened Chinese involvement and scope for action in Greenland, at least for now. However, China's interest in the Arctic, and thus in Greenland, is long-term, and China will continue to probe for investment and cooperation opportunities in Greenland.

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

### THE NORTHERN SEA ROUTE

The Northern Sea Route (NSR) is the part of the North East Passage that runs north of Russia. It is a main traffic artery and driver for economic development and extraction of natural resources in the Russian part of the Arctic.

Russia wants to control military passage along the NSR and has since 2019 worked on legislation to secure this control. This is in contradiction of the US maritime policy under which the right to free passage all over the globe is a key tenet. The United States asserts this right by conducting Freedom of Navigation Operations (FONOPs) and has spoken publicly about the possibility of a FONOP in the Arctic.

If Russia were to impose restrictions on the passage of military vessels along the NSR, this could provoke a US FONOP, which in turn would entail a risk of unintentional military escalation.

### Worsened security climate increases risk of espionage

The deteriorating security climate increasingly puts Denmark, Greenland, the Faroe Islands, and other Arctic countries into the crosshairs of Russian and Chinese espionage. Russia highly likely gives priority to collecting information about Denmark's role as an Arctic nation, not least through the use of cyber espionage.

Research, raw materials, commercial shipping, great power politics, and military presence are among the themes that are of interest to Russia and China in the Arctic. Danish, Greenland and Faroese authorities, companies and organizations whose activities in the Arctic are associated with these themes may thus find themselves targets of espionage.

Russia's espionage against Danish activities and Danish military presence in the Arctic will likely grow as the Danish Defence increases its engagement in the region. Russia highly likely uses a wide palette of espionage tools, including traditional tradecraft and cyber espionage, to protect its interests in the region.

Due to their location and geography, Arctic communities may be particularly dependent on well-functioning supply lines for food, power, heating, etc. Cyber attacks on or physical sabotage of these functions may thus carry particularly severe consequences.

A large Russian military helicopter, possibly a Mi-8 or Mi-17, is shown in flight against a cloudy sky. The helicopter is painted in a green and brown camouflage pattern and features a prominent red star insignia on its side. Several soldiers in full combat gear are rappelling down from the helicopter using ropes. The background shows a hazy, brownish landscape, suggesting a desert or arid environment. The overall scene conveys a sense of military readiness and operational capability.

# RUSSIA ON A COLLISION COURSE

Photo: Cover Images/Zuma/Ritzau Scanpix



Russia is underpinning its role as a great power with a growing capacity for military deterrence and is sharpening the confrontation with the West through its use of offensive intelligence operations, cyber espionage and influence operations. Russia is able to make quick decisions in narrow circles and has a deep-seated distrust of the West. These factors combined create a risk for miscalculation and unintentional military escalation, potentially with very little warning. Over the past few years, Russia has built up and modernized its armed forces in western Russia. In the initial phase of a conflict, Russia would be militarily superior in the Baltic Sea region due to its ability to deploy forces within a very short time. Though it is highly unlikely that Russia would intentionally risk a military conflict with NATO in the Baltic Sea region, Russia does regard a war with NATO as a real possibility and uses its large strategic exercises to train for such a conflict.

## RUSSIA HAS GROUND MILITARY SUPERIORITY IN THE BALTIC SEA REGION

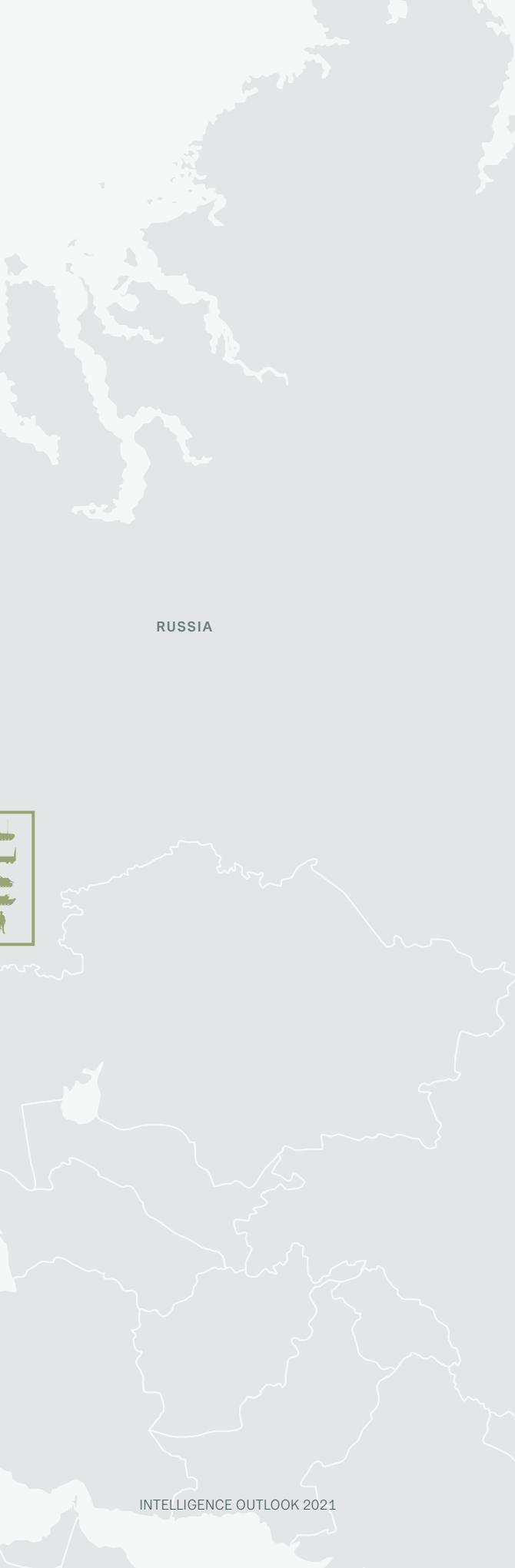
Russia's military modernization and build-up, especially of its ground forces, since the onset of the Ukraine crisis in 2014 have tipped the military balance between European NATO countries and Russia in Russia's favour, particularly in the initial phase of a conflict.

Russia will likely be able to deploy as many as 65 combat battalions as quickly as within two weeks. Russia demonstrated this capability to a large extent in the spring of 2021 along the border with Ukraine and most recently during the strategic exercise Zapad-2021.



**RUSSIAN NORTHERN FLEET SUBMARINES**  
The Russian attack submarines can delay US reinforcements to Europe.





■ Russia has established itself as a great power that is willing and able to challenge the West. Russia's foreign and security policy objectives and conduct differ from those of the Western countries on many parameters. Therefore, Russia will constitute a major security policy challenge to Denmark too. This is the case in the Baltic Sea region, which is an area of security tension between Russia and NATO, and in the Arctic, where the Kingdom of Denmark holds a central position in the strategic game between the great powers.

It is Russia's strategic objective to strengthen its position as a great power and to ensure the stability and survival of the regime. Russia believes that the United States and its allies are trying to undermine its great power role and its internal stability. Russia is therefore trying to use foreign and security policy initiatives and its own conduct as leverage to weaken the global great power role of the United States and the cohesion of NATO and the EU.

Russia is also pushing against a rules-based international order, which, in Russia's view, is based on Western values and norms of conduct. Instead, Russia tries to promote a looser international order in which the great powers and major regional powers are free to compete for influence and power.

The fragmentation on the international scene has given Russia an opening to reap strategic gains and, by extension, to expand its great power role. Russia's opposition to a rules-based international order thus resonates with many non-Western countries, giving Russia latitude to expand its ties with countries whose interests overlap with its own, including, in particular, China, but also several regional powers that Russia sees as attractive cooperation partners.

Russia's overall foreign and security policy strategy will remain fundamentally unchanged in the medium to long term. The 2024 presidential election will, in all probability, not bring any changes to the Russian leadership, which enjoys wide support among the Russian elites. The opposition holds no sway over Russia's foreign and security policy, just as it does not challenge the policy pursued.



Russia's economic foundation is likely strong enough to support its great power role in the medium to long term, especially due to Russia's large foreign currency revenues from its energy exports. This ensures large purchasing power relative to the size of Russia's economy, as military spending is chiefly paid for in Russia's own currency. In addition, Russia has large economic reserves, and the country's leadership will likely continue to keep a tight rein on state expenditures to ensure the basis for a strong state apparatus.

Russia allocates approx. 4 percent of its GDP to defence spending. Russia will continue to highly prioritize its armed forces, though it is less likely that it will further increase defence spending in the immediate future.

### **Russia's armed forces are fundamental to its great power role**

Russia has carried out a major military build-up and modernization of its armed forces, in many respects taking them to the same level as that of NATO forces in Europe in terms of both capabilities and quality. Russia is thus able to back up its continued confrontational course towards the United States and NATO with credible and growing military deterrence.

Russia also holds the military capabilities needed to mount a credible threat against its neighbours with very little notice, as demonstrated by its military build-up along Ukraine's eastern border in the spring of 2021 and again in late 2021. Russia highly likely intends for this move to serve as an unambiguous signal to Ukraine, the United States, NATO and the EU that Russia remains poised to defend its interests in relation to Ukraine, including with military means.



One of the four Steregushchiy-class corvettes belonging to the Russian Baltic Fleet carrying exercise mines on the aft deck. Photo taken as the vessel is exiting through Danish waters. **Source:** Royal Danish Air Force Photo Service



Therefore, Russia will constitute a major security policy challenge to Denmark too. This is the case in the Baltic Sea region, which is an area of security tension between Russia and NATO, and in the Arctic, where the Kingdom of Denmark holds a central position in the strategic game between the great powers.

In addition, Russia's armed forces enable the country to pursue its strategic interests and secure influence in areas far from Russia. Russia has thus inserted itself in a central role in regional crises and conflicts in the Middle East, North Africa and the eastern Mediterranean.

#### **Russia can make quick and bold decisions**

The Russian leadership is not constrained by the same norms and rules observed by Western governments. Russia's leadership thus makes its foreign and security policy decisions in narrow circles and virtually absent of public involvement. As a result, Russia is capable of pursuing its strategic objectives persistently and patiently, while also being able to make swift and bold decisions. It thus remains likely that Russia will try to exploit unexpected situations to reap strategic benefits.

At the same time, the Russian leadership is characterized by a one-sided and anti-Western world view that leaves no room for alternative points of view. This entails a risk that the Russian leadership may misinterpret Western intentions towards Russia or its neighbours, which may ultimately lead to Russia reacting more sharply than expected and possibly with military means.

#### **Russia employs offensive means**

Russia will continue to use offensive means that Western decision-makers are reluctant or unwilling to use. Russia uses its offensive means in close combination with its diplomatic, political, economic and military assets.

Russia has extensive intelligence capabilities to support its strategic objectives with a wide spectrum of intelligence operations, ranging from multi-pronged espionage activities against civilian and military targets to assassinations of political adversaries abroad.

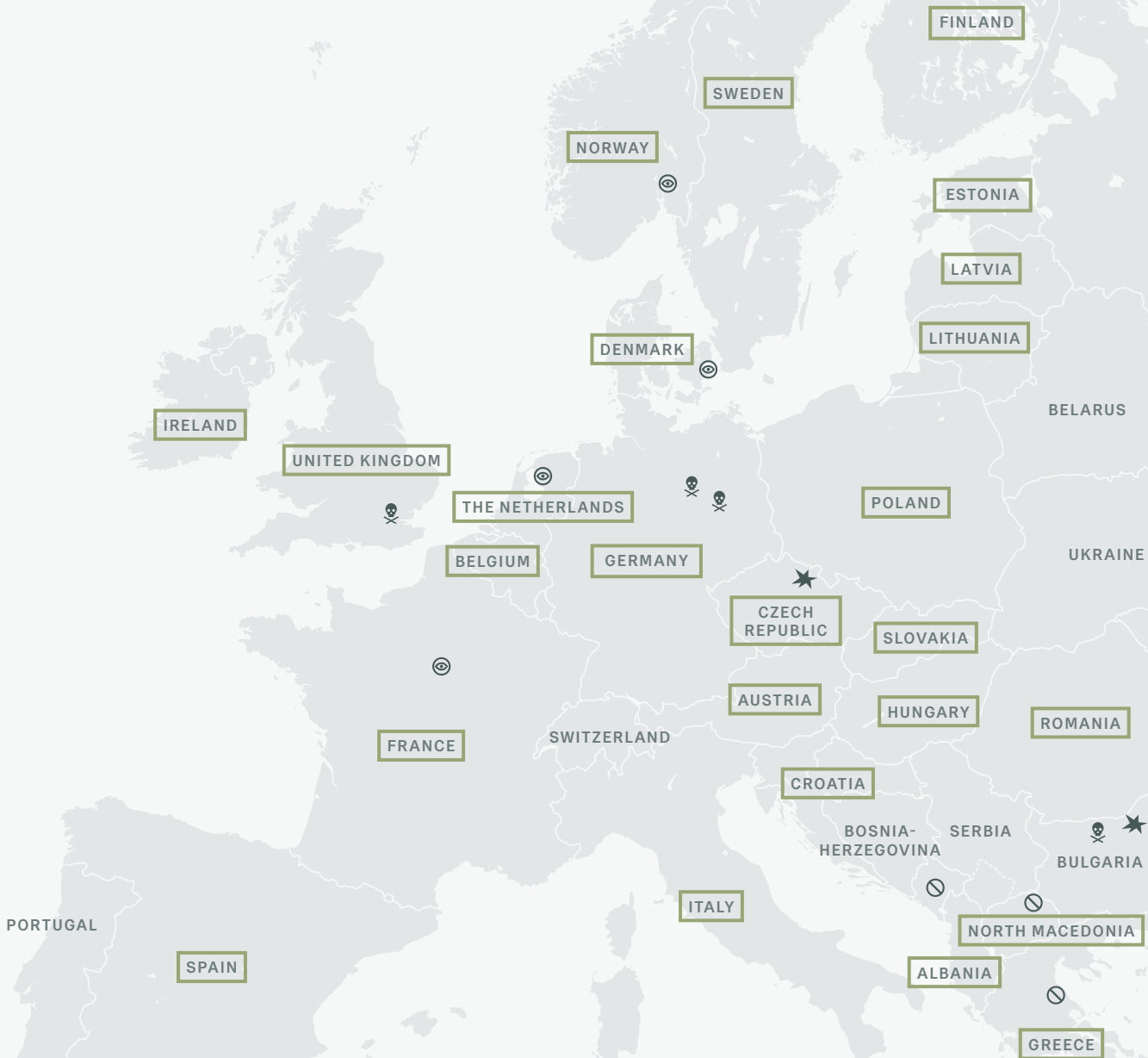
Russia uses influence activities to spread disinformation and conspiracy theories in the West and in its neighbouring countries in an attempt to sow public distrust in the political systems and the media. For example, Russia has used the COVID-19 pandemic to try to undermine trust in how Western authorities have handled the crisis and in Western vaccines.

Russia has extensive cyber capabilities that are used systematically to promote its national interests. These capabilities are especially used for espionage purposes. Cyber espionage may also give access to critical infrastructure that Russia can attempt to destroy or disrupt in the event of a serious crisis or war. Russia has for example used destructive cyber attacks in connection with the conflict with Ukraine. Russia also uses cyber attacks for other types of intelligence operations, for instance in connection with hack-and-leak influence operations.

Russia is deepening its confrontation with Western countries through highly offensive means, regularly triggering incidents that draw massive attention in the West. In an effort to conceal its involvement, Russia consistently denies responsibility for such incidents, insisting that the events are orchestrated with the intention of harming Russia. It is highly likely that Russia is aiming to sow doubt and confusion in Western countries to avoid a collective Western response.

Countries that have expelled Russian diplomats in response to activities carried out by Russian intelligence services.

- ☠ Assassinations
- 🕸 Cyber operations
- ⚡ (Attempts at) political destabilization by means of violence
- ★ Sabotage





# RUSSIA USES OFFENSIVE MEANS

The map shows the most high-profile publicly known operations that Russian intelligence and security services have been accused of orchestrating since 2014, excluding traditional (physical) espionage and operations in former Soviet republics (the Baltic countries have been included, though).

## OCTOBER 2014

The GRU blows up an arms depot in the Czech Republic, likely because it stored weapons intended for Ukraine.

## APRIL-MAY 2015

The GRU attempts to poison the owner of the weapons in the Czech Republic, Emilian Gebrev.

## OCTOBER 2016

The GRU is involved in plans for a coup attempt in Montenegro. The coup was intended to prevent parliament from ratifying Montenegro's accession to NATO.

## JUNE 2017

A destructive cyber attack dubbed NotPetya affects companies all over the world, including Danish shipping company A.P. Møller-Mærsk. Ukraine, in particular, is affected by the attack, which several countries attribute to the GRU.

## MAY 2017

A few days before the French presidential election, hackers steal information from Macron's election campaign, which they leak online. The United States subsequently attributed the attack to the GRU.

## MARCH 2018

GRU officers poison their former colleague Sergey Skripal and his daughter with Novichok in Salisbury, England.

## APRIL 2018

Russian nationals are intercepted while in the middle of a close access hack operation against the Organisation for the Prohibition of Chemical Weapons (OPCW) in the Netherlands. According to the United States and the Netherlands, the Russian nationals worked for the GRU. The purpose of the hack was likely to be able to monitor the organization's efforts to examine the poison that was used against Skripal.

## JUNE 2018

The Russian intelligence and security services likely incite protests in North Macedonia and Greece against the Greek-North Macedonian name agreement that enables North Macedonia to approach the EU and NATO.

## AUGUST 2019

An assassin hired by the FSB shoots exiled Chechen national Zelimkhan Khangoshvili in Berlin.

## AUGUST 2020

The Norwegian parliament, Stortinget, announces that email accounts belonging to politicians and staff have been hacked. The Norwegian Police Security Service, PST, attributes the hack to the GRU.

## AUGUST 2020

Russian opposition politician Aleksey Navalny is transferred to Berlin for treatment after an attempt by the FSB to poison him in Siberia. To avoid referring to Navalny by name, the Russian regime refers to him as for example "the patient from Berlin".

### **RUSSIA'S NEW HIGH-TECH WEAPONS SYSTEMS**

Russia has built up its military capabilities so that it can strike targets deep within European territory. This is possible due to new ballistic missiles, cruise missiles and other weapons systems that can be launched from the ground, sea or air. The systems are protected by a dense and overlapping integrated air defence system.

Russia is developing high-tech and highly flexible weapons systems. Due to their flexibility, the weapons can be deployed against strategic as well as non-strategic targets, just as they can be fitted with either nuclear or conventional warheads.

The new weapons systems include the hypersonic Avangard warhead with a strategic range, the hypersonic Tsirkon cruise missile, the Kinzhal ballistic missile, the nuclear-powered Burevestnik cruise missile, and the nuclear-powered Poseidon torpedo.

Russia can use these systems in combination with electronic warfare. In a conventional confrontation, Russia would be able to identify and jam targets, and defeat them within a very short time using one or more of these assets.

### **Russia will continue to counteract the United States**

Russia's extensive capabilities in terms of strategic deterrence prevent the United States from challenging Russia's strategic interests without risk, making Russia the only great power capable of directing an all-out destructive attack against the United States. Therefore, Russia continues modernizing its strategic nuclear weapons and developing new high-tech strategic weapons which can strike US targets over long distances and with great precision, and which can present new challenges to US progress within missile defence technology.

Russia will continue to oppose the United States on most key international issues. On the one hand, the countless disputes between the two countries will thus highly likely remain unresolved, while a few may be toned down at best. On the other hand, Russia will need to maintain dialogue with the United States on central international issues, such as the war on terror and arms control. It will, however, be very difficult for Russia and the United States to reach consensus on a new strategic nuclear weapons agreement to replace the NEW START treaty that expires in 2026.

### **Russia has strongly improved its military capabilities against the West**

Russia sees itself as being part of a conflict with NATO that is currently being fought with non-military means such as influence and intelligence operations.

It is highly unlikely that Russia would want a direct military conflict with NATO, including in the Baltic Sea region. Russia will be very careful to avoid having its military initiatives and reactions set off an armed conflict with the United States and NATO.



Cyber espionage may also give access to critical infrastructure that Russia can attempt to destroy or disrupt in the event of a serious crisis or war. Russia also uses cyber attacks for other types of intelligence operations, for instance in connection with hack-and-leak influence operations.



Russian military units from 4th Guard Tank Division and 104th Guards Air Assault Regiment conduct exercise activities close to the city of Brest in Belarus during the Russian strategic exercise Zapad-2021. Photo: Danish Defence Attaché/Moscow, BG Carsten Rasmussen

Still, Russia's decision-making processes and deep-seated distrust of NATO entail a risk that Russia, in the event of a crisis, could misinterpret NATO's intentions and military dispositions in the Baltic Sea region.

Russia has also markedly increased the number of military units in the Western Military District and improved the quality of their combat equipment and vehicles. This includes the number of units, electronic warfare capabilities, ground fire support capabilities, integrated air defence and missile capabilities. The Russian forces are now of a very high standard and, on some parameters, also superior to modern, high-tech military adversaries.

Overall, Russia's armed forces would be equally matched with NATO forces in a confrontation in the western border areas of Russia, in particular in the opening phases of a conflict, when Russia would also be able to outpace NATO with regard to assembling a high number of units. In addition, due to its closed and quick decision-making process that involves only a few decision-makers, Russia will be able to act very quickly in the critical opening phase of a conflict.

Russia regards a war with NATO as a real possibility, and the country's armed forces use large strategic exercises, most recently the Zapad-2021 exercise, to train for such a conflict.

### **Russia has regional military superiority in the Baltic Sea region**

The Baltic Sea region is very much characterized by the tensions between Russia and NATO. This is reflected in a high level of military activities that include Russian exercises, NATO exercises and Western national exercises. At times, Russia's military conduct can be of a provocative and aggressive nature.

Over the past five years, Russia has modernized its armed forces, established new units and deployed new combat equipment and vehicles to western Russia and Kaliningrad.

Following the Ukraine crisis in 2014, NATO has deployed smaller military contingents to the Baltic countries as part of the so-called enhanced Forward Presence. Though the units cannot match Russia's ground military forces, they help ensure that Russia is aware that a military conflict with the Baltic countries would evolve into a conflict with NATO as a whole.

In the opening phase of an escalating crisis, Russia would have the capabilities to make it complicated and costly for NATO to reinforce its military presence in the eastern part of the Baltic Sea, in the Baltic countries and in Poland, mainly due to Russian missiles and air defence systems deployed in the region. Russia also has an extensive arsenal of modern and mobile long-range missile systems deployed in the western part of Russia. These systems are a threat to NATO's freedom of movement in the region, just as they enable a massive and highly precise attack against critical military and civilian targets in all NATO countries across Europe in the event of an armed conflict. This enables Russia to assemble a superior military force at the border along the Baltic countries while delaying the assembly of NATO forces, thus hampering the fulfilment of NATO's collective defence commitment.

In the opening phases of a conflict, Russia would also try to challenge NATO's cohesion and ability to respond by using deception, influence operations and cyber attacks. These are all offensive means which, by themselves, have a low risk of triggering an armed conflict with NATO before Russia might possibly want to.

In the event of a crisis or conflict, Russia would thus be able to put the Baltic countries and NATO under significant political and military pressure.

#### **Russia is prepared for Belarusian colour revolution**

Belarus is of high military-strategic importance to Russia, not least in the event of a conflict between Russia and NATO. Russia therefore wants to preserve a pro-Russian regime and to increase the level of integration between the two countries. Russia believes that the so-called colour revolutions – a collective term for popular protests in Russia's neighbouring countries – are a Western creation. Russia would highly likely react

strongly to a popular uprising that leads to a change of government in Belarus. A serious crisis unfolding in Belarus could thus destabilize the entire Baltic Sea region.

A Western-backed popular uprising in Belarus was also the political scenario in Russia's comprehensive strategic exercise Zapad in 2017 and most recently in 2021. The premise of the Zapad exercises is thus that a situation unfolding in Belarus may serve as a trigger for a war with NATO.

#### **Russia's relationship with Denmark remains difficult**

Tensions between Russia and NATO in the Baltic Sea region will continue to characterize Russia's relationship with Denmark. Russia is suspicious of Denmark's foreign and security policy due to Denmark's close relationship with the United States and role in NATO. Russia's suspicion also extends to Denmark's participation in NATO's enhanced Forward Presence in the Baltic region. Russia also believes there is a link between Denmark's role in NATO and Denmark's criticism of Russia in matters related to the EU, not least Denmark's strong support for the EU sanctions regime.

Russia will, however, likely continue to pursue a pragmatic relationship with Denmark, motivated by the fact that Denmark is an attractive trade and investment partner and that the Kingdom of Denmark plays a central role in Arctic matters. Russia likely has an interest in strengthening its bilateral cooperation with Denmark to prevent the relationship from becoming dominated by the tensions related to Baltic Sea issues. However, the conditions for closer cooperation will remain difficult. In its policy towards Denmark, Russia will thus supplement its political and diplomatic means with cyber espionage as well as influence and intelligence activities whenever Russia deems it necessary.



Russia's decision-making processes and deep-seated distrust of NATO entail a risk that Russia, in the event of a crisis, could misinterpret NATO's intentions and military dispositions in the Baltic Sea region.

## **Russia conducts targeted espionage against Denmark**

Russia conducts targeted espionage against Denmark using a wide spectrum of methods to collect information on Danish security policy and military matters. Russia's interest in Danish political and military affairs is highly likely rooted in factors such as Denmark's membership of NATO, Denmark's geostrategic location at the entrance to the Baltic Sea, and Denmark's role as an Arctic nation.

Espionage activities are conducted through use of cyber attacks and through efforts by the Russian intelligence services to recruit agents, tap telephones, etc.

Cyber espionage in particular makes it possible for Russia to target a wide range of military and political authorities and organizations in Denmark and allied countries in one stroke. Through these means Russia can acquire detailed and extensive insight into key Danish foreign and security policy decisions as well as military capabilities and planning. In addition, Russia can use cyber espionage as a preparatory tool for destructive cyber attacks against Denmark that could be launched, for example, in the event of an escalating crisis.

In addition to being a target for political and military espionage, Denmark is also a target of Russian industrial espionage due to the Danish lead in certain technological fields. The industrial espionage underpins Russia's development of military capabilities and bolsters its ability to threaten the technical superiority of the NATO alliance in the event of a conflict. Russian espionage activities target the defence industry on a global scale, and Russia is likely also interested in the Danish defence industry's knowledge of military technology and equipment.

## **Russia will try to sow division among European countries**

The relationship between Russia and the EU has deteriorated to the point where Russia now likely counts the EU among its strategic opponents and will thus pursue a more confrontational policy. However, Russia will maintain a pragmatic relationship with individual EU countries, partly because several EU countries are key markets for Russia's export of gas.

### **RUSSIA'S COMPREHENSIVE STRATEGIC EXERCISE ZAPAD-2021**

In September 2021, Russia conducted its strategic exercise Zapad in the western part of the country and in Belarus. According to official Russian statements, as many as 200,000 troops took part in the exercise.

Overall, the scope of the 2021 exercise exceeded that of the 2017 Zapad exercise.

During the 2021 exercise, the Russian armed forces demonstrated their capability for rapid deployment of large units over great distances. Also, a number of units were in the field for months ahead of the exercise, which shows a high degree of logistical endurance.

The scenario for the 2021 exercise was an uprising in Belarus orchestrated and supported by the West, which is a testament to Russia's perception of NATO as a threat. It is highly likely that Russia meant to showcase its intent and capability of defending Belarus and securing stability, despite the limited extent of actual exercise activities inside Belarus itself.

Still, Russia will not significantly change its foreign policy or conduct to facilitate an easing or lifting of the US and EU sanctions, despite their detrimental effect on the Russian economy.

Russia will continue to try to play on diverging views among the European countries to undermine solidarity in NATO and interstate cooperation in the EU. Though it is highly unlikely that Russia will succeed in decisively undermining the ability of NATO and the EU to function, Russia will continue its efforts to undermine the ability of European countries to act united against Russia.

# FOREIGN POWERS WIELD INFLUENCE ONLINE

Foreign powers are increasingly trying to use the cyber domain to influence opinions and behaviour in Western democracies, including Denmark. This presents a growing threat to public and free debate in Denmark. In the attempt to manipulate public opinion, state actors use a host of different influencing methods. Three of these methods are described here.



## CYBERTURFING

China, Russia and other states use fake profiles on social media to promote specific messages. The profiles are fabricated and often pose as Western citizens supporting key Russian and Chinese issues. This method is called “cyberturfing”, and the fake profiles are often part of larger operations that include news media and official news channels.



1

State actors create fake profiles with special characteristics.



2

The profiles are programmed to automatically “like” and share specific content.



3

The profiles make certain messages trend.

## ENHANCERS

State actors use Western citizens to enhance their messages, offering money, services, etc. in return for dissemination of specific online messages, including disinformation, for instance through PR companies offering bloggers and influencers money to promote certain messages.



1

State actors spread disinformation on social media.



2

State actors contact Western citizens, offering money, trips, etc. in return for disseminating the disinformation.



3

The disinformation is enhanced by local citizens and can suddenly be experienced from several angles.

## HACK AND LEAK

State actors steal sensitive information and leak it with strategic timing to influence public opinion in the West. Leaks may be timed to occur ahead of elections in order to affect their outcome or to sow division in a population.



1

State actors hack information from a Western target.



2

The hacked material is prepared for use in a leak. This may involve selection of specific information or manipulation of the hacked information.



3

The hacked material is leaked, for instance in hacker forums at a strategically important moment.



# GROWING TENSIONS BETWEEN CHINA AND THE WEST

A raised fist in a dark suit sleeve is positioned on the right side of the frame. The background is a blurred red wall with vertical gold-colored lines. In the foreground, the black and white keys of a piano are visible, slightly out of focus.

China's growing influence and global ambitions spark tensions in China's relations with a number of Western countries, including Denmark. Simultaneously, China seeks to counter criticism of what it considers internal Chinese affairs with increasing strength and determination. China uses its economic clout to put political and economic pressure on other countries as a way of advancing its strategic objectives, just as it uses targeted cyber espionage to promote its interests. These instruments have also been applied against Denmark. China views the strategic rivalry with the United States as a crucial factor in its further development and seeks to prevent the United States from limiting China's ability to gain influence and assert itself as a great power. It is China's goal to become the dominant regional power in East Asia and the Western Pacific. Consequently, China continues to expand its military and persistently pursues its claims in the South China Sea.

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On 1 July 2021, Xi Jinping delivered a speech in Beijing during the celebration of the 100th anniversary of the founding of the Chinese Communist Party.  
Photo: Xie Huanchi Xinhua/Xinhua/Ritzau Scanpix

■ China continues to expand its global influence and wants to strengthen its political and economic clout. At the same time, China acts more assertively on the international scene and actively seeks to counter foreign criticism of Chinese domestic affairs. This conduct is rooted in the ambition to promote a narrative of China as a responsible great power. China's strategic goal of greater global influence and its more assertive behaviour increasingly affect the security and interests of Western countries.

As a result of China's political system, the commercial interests of Chinese companies and institutions are often closely integrated with China's national strategic and security objectives. This is a source of growing concern for several Western countries that are wary of the risk of espionage and unintentional transfer of knowledge and technology in connection with activities such as investments and research cooperation with China.

At the same time, China uses a variety of more offensive tools to pursue its interests and support Chinese companies and organizations abroad, including cyber espionage, sanctions and illegal technology transfer.

#### **Chinese tools may challenge Western countries**

Chinese interests, however, intersect with those of Western countries in many areas, and China still seeks to strengthen cooperation in international organizations as well as bilaterally.

China is showcasing its own economic and political development as an alternative to the Western liberal and market-based development model. For China, democracy and economic growth are not necessarily mutually dependent. China touts its own development model as an opportunity for countries to pursue modernization and economic growth without fundamentally reforming their political systems.

#### **China increases its global economic influence**

China has engaged economically with a number of regions across the world to strengthen its own economy and ensure continued growth – elements that are intrinsically linked to the legitimacy of the Communist Party of China. China is trying to increase its influence in

Europe through multilateral cooperation with a number of countries in Central and Eastern Europe, cooperation with the EU as an institution and bilateral cooperation with individual EU countries. China likely uses this cooperation as a gateway to secure its economic interests in Europe. It is also likely that China will exploit diverging views about China among European countries to prevent European unity against China in the event of a confrontation.

China has a strong interest in further economic involvement in Europe. This interest is rooted in China's ambition to improve its export performance and acquire knowledge and technology through investments in European companies. Such activities have led many Western countries to bolster their efforts to uncover the impact of Chinese investments on their national security.

China's economic clout can affect its trade partners politically, as China has demonstrated both the will

#### **THE UNITED STATES ACCUSES CHINESE STATE-SPONSORED HACKERS OF INTELLECTUAL PROPERTY THEFT**

Since 2014, US authorities have released several indictments in which they have described concrete examples of Chinese state-sponsored cyber espionage.

In July 2021, the US Department of Justice charged four named Chinese nationals with stealing intellectual property from – among others – US companies on behalf of the Chinese intelligence service. The stolen trade secrets included information on sensitive technology used for autonomous vehicles and genetic sequencing technology.

In July 2021, the United States along with other countries attributed a series of attacks on Microsoft Exchange Servers to hackers affiliated with the Chinese state.

## THE SENSITIVE TOPICS OF TAIWAN, XINJIANG AND HONG KONG

China considers Taiwan's status in the international community, ethnic minority policy in Xinjiang, and political control in Hong Kong as internal Chinese issues. China is actively trying to counter foreign criticism related to these issues.

### XINJIANG

#### XINJIANG:

In Xinjiang, Uighurs, Kazakhs and other ethnic and religious minorities are subject to extensive control, surveillance and internment.

### CHINA

#### HONG KONG:

In Hong Kong, a new security law passed in 2020 has been used to limit the freedom of citizens and dismantle the pro-democracy opposition.

#### TAIWAN:

China has stepped up pressure on Taiwan in regard to its international status and is making efforts to prevent Taiwan from establishing a foothold and gaining influence in international organizations.

### TAIWAN

### HONG KONG

and ability to sanction countries that voice criticism of what China considers internal Chinese affairs. Means to this end include economic sanctions and restrictions on access to China's domestic market as well as sanctions against specific individuals and institutions.

Chinese economic agreements and investments abroad often reflect a mix of economic, diplomatic and strategic initiatives designed to underpin China's foreign policy objectives and provide Chinese companies with a competitive edge globally. China provides government loans to Chinese companies, as well as access to foreign knowledge, technology and cyber espionage capabilities. This creates an uneven playing

field, as Danish and other European companies have to operate under different conditions.

In addition, the risk of Chinese cyber espionage has raised security concerns about giving Chinese companies access to critical infrastructure. These concerns have left many countries cautious about cooperating with Chinese companies in certain sectors.

### China seeks to strengthen its position in international organizations

China expands its influence through international organizations and multilateral cooperation. By participating more actively in international institutions and organizations, China strengthens its ability to exert influence

## CHINESE TOOLS MAY CHALLENGE WESTERN COUNTRIES



### ECONOMIC COOPERATION

Investments and acquisitions by Chinese companies in Western countries may be rooted in strategic interests. At the same time, these activities may be carried out with Chinese government support under unequal conditions.



### TECHNOLOGY TRANSFER

China may secure a technological lead in key strategic areas by recruiting foreign scientists and engaging in research collaboration that will facilitate access to knowledge and technology.



### SANCTIONS

China may introduce sanctions against Western institutions, companies and individuals that, in China's view, challenge the country's sovereignty.



### MILITARY USE OF CIVILIAN RESEARCH

Civilian-military fusion in China entails a risk that civilian research and technology acquired in Western countries can be used by the Chinese military.



### POLITICAL AND ECONOMIC PRESSURE

China can use its economic clout to put pressure on other countries and counter criticism.



### ESPIONAGE

China is able to conduct cyber espionage on a wide scale as well as launch targeted operations against Western authorities, companies and organizations.



The Chinese Navy now has significantly more recent and modern units than not only the Japanese, South Korean and Taiwanese navies, but also the US Navy. Combined with the overall modernization of the Chinese military, this will tip the future balance of power in East Asia and the Western Pacific in China's favour.

on these institutions as well as on individual member countries on specific issues.

At times, China's strengthened position in international organizations makes it more difficult for Western countries to safeguard their interests in these settings and reduces the chances of reaching consensus on key issues. On several occasions, China has successfully rallied countries in the UN to abandon criticism of China's atrocities in Xinjiang, just as China has opposed international investigations into global health risks such as virus outbreaks.

China is also working to build new institutions that would cater better to its national interests, promoting these institutions as supplements to existing ones. These include the Asian Infrastructure and Investment Bank and the Shanghai Cooperation Organisation. Such initiatives are meant as gateways for China to increase its influence on international frameworks, norms and rules.

### **Strategic rivalry between the United States and China**

China and the United States are engaged in strategic rivalry, and the competition between the two great powers is a central element in their respective foreign policies. The United States is trying to manage China's behaviour and development as a great power within the existing international framework. The Chinese leadership perceives US policy as an attempt to contain China's rise and to prevent it from expanding its role as a great power.

China is hampered by the United States' extensive network of alliances and partnerships, which, in China's view, serves to curb its development. As such, China is trying to strengthen cooperation with developing countries and select Western countries to prevent the formation of a united front of Western countries against China. It is likely that China's cooperation with Western countries is also motivated by the ambition to prevent them from supporting initiatives which China views as US attempts to curb its rise.

In addition, China is looking to forge bilateral relationships, especially with countries in South-East Asia, South and Central America, and Africa, through

political and economic agreements. China has, for example, given developing countries access to Chinese COVID-19 vaccines during the pandemic in an effort to cast itself as a responsible global great power.

Cyber espionage is a central point of contention between the United States and China. Chinese cyber espionage against the West constitutes a serious security problem, also for Denmark. The United States has responded by raising awareness about China's conduct and the risk of cyber espionage, for example by publicly attributing specific cyber attacks to China, either unilaterally or collectively with allies. Similar to a number of other Western countries, the United States has emphasized the risk of using Chinese technology and cooperating with Chinese companies, especially concerning critical infrastructure.

### **China challenges United States in East Asia and Western Pacific**

China's primary security objective is to position itself as the dominant regional great power in East Asia and the Western Pacific. This would enable China to protect itself against US intervention and influence. China continues to modernize and expand its military forces, in particular its strategic missile forces and navy, but also its military cyber capabilities. China focuses on building military capabilities that will allow it to win local wars in East Asia and the Western Pacific. To this end, China is constructing assets such as aircraft carriers, amphibious assault ships and cruisers as well as expanding its marine corps. These assets will also increase China's ability to project military power globally. In the long term, China's military power will be second only to that of the United States. China's increased military power will likely deepen existing regional tensions and translate Asian security concerns into global security issues.

The Chinese Navy now has significantly more recent and modern units than not only the Japanese, South Korean and Taiwanese navies, but also the US Navy. Combined with the overall modernization of the Chinese military, this will tip the future balance of power in East Asia and the Western Pacific in China's favour, unless the other countries in the region start expanding their shipbuilding programmes considerably.



The South China Sea is among China's top foreign policy priorities, and China is expanding its presence in the area. China will likely increasingly deploy forces to the artificial islands in the South China Sea and continue to expand control over disputed areas by its coast guard and military. It is likely that China wants to control and monitor the entire South China Sea in the medium to long term.

The United States challenges China's territorial claims in the South China Sea by conducting routine operations that will not in themselves cause US-Chinese relations to deteriorate, as such operations are routine and expected.

#### **China wants to acquire foreign technology**

China is working hard to acquire technology and knowledge, seeking to strengthen its technological development and reduce its reliance on foreign technology in key strategic areas. Consequently, China is focusing

on its domestic market and on developing products and technologies that Chinese companies currently import from overseas markets. In this way, China aims to increase its control over key supply chains such as advanced computer chips.

China pursues an extensive strategy to map and, where possible, transfer technology and knowledge to China. To this end, China has established a number of talent recruitment programmes aimed at attracting foreign scientists and strengthening China's research capabilities. In this context, knowledge and technology held by Danish research institutions are likely also of interest to China.

US authorities have repeatedly accused China of conducting cyber espionage against foreign private companies as well as research and government institutions to gain access to technology.



#### **CHINA'S TERRITORIAL CLAIMS IN THE SOUTH CHINA SEA**

It is likely that China increasingly will deploy forces to the large bases on the artificial islands (●) and Woody Island in the South China Sea and continue to expand the exercise of authority of its coast guard and military in the disputed areas.

The nine dotted lines show the extent of the area claimed by China in the South China Sea.



China's targeted prioritization of advanced technologies will likely improve its ability to set international standards within fields such as quantum technology and artificial intelligence. This would boost China's influence in technological fields that have previously been dominated especially by Western countries.

China's focus on developing advanced technological capabilities has become a defining element of the strategic rivalry between the United States and China, with the United States regarding China's strategy as a threat to US national strategic interests and security.

China has a military-civil fusion strategy designed to ensure that the Chinese military will be able to exploit civilian scientific and technological progress and that civilian companies will be able to use military technology. Consequently, specific research collaboration may, in certain situations, allow Chinese actors access to key strategic technologies within civilian as well as military fields. Such access would also entail a risk to certain research collaborations between Danish and Chinese institutions.

#### **China's growing influence affects Denmark**

China's increased global influence and more assertive conduct on the international scene also affect bilateral relations with Denmark. China considers Taiwan's status in the international community, ethnic minorities in Xinjiang, and political control in Hong Kong as internal Chinese issues. Criticism of these issues, in particular, has prompted China to react towards the EU, among others, by imposing sanctions that have also targeted Danish individuals.

China will continue to adopt strong measures to counter foreign criticism of Chinese domestic affairs, as such criticism, in China's view, challenges its sovereignty. China will likely also use its economic and political clout to exert pressure on foreign authorities and companies to stifle criticism or to secure their support.

China launches extensive and persistent cyber espionage campaigns against foreign countries – campaigns that also target Danish authorities, companies and organizations. The Chinese military and national



China will continue to adopt strong measures to counter criticism of what it considers internal Chinese affairs. China will likely also apply different means to exert pressure on countries that voice criticism of internal Chinese issues, including political and economic pressure on authorities and companies.

intelligence services have significant capabilities to target and gain persistent access to digital information. These cyber espionage activities are constant and long-term, and they benefit China's security and foreign policy as well as its economic and commercial interests.

The tense relations between the United States and China also affect Danish-Chinese relations. It is likely that China sees Denmark's relations with the United States as a determining factor in how and how far bilateral cooperation between China and Denmark can develop.

Nevertheless, China remains interested in strengthening cooperation with Denmark in a number of political and economic areas. As a result, Chinese authorities, institutions and companies will continue to probe for opportunities to establish or expand bilateral cooperation.

# THE GLOBAL TERRORIST THREAT

The terrorist threat remains serious, mainly embodied by militant Islamists but also right-wing extremists. Al-Qaida and Islamic State still inspire individuals and networks to launch attacks in and outside of Europe. Western foreign fighters will continue to pose a threat. Al-Qaida and Islamic State both remain intent on attacking the West, and their regional subgroups pose a threat to Western interests in large parts of the world. The Taliban's seizure of power provides terrorist groups in and near Afghanistan with wider latitude for operation and will likely increase the terrorist threat from militant Islamist groups in the country and the region as a whole.

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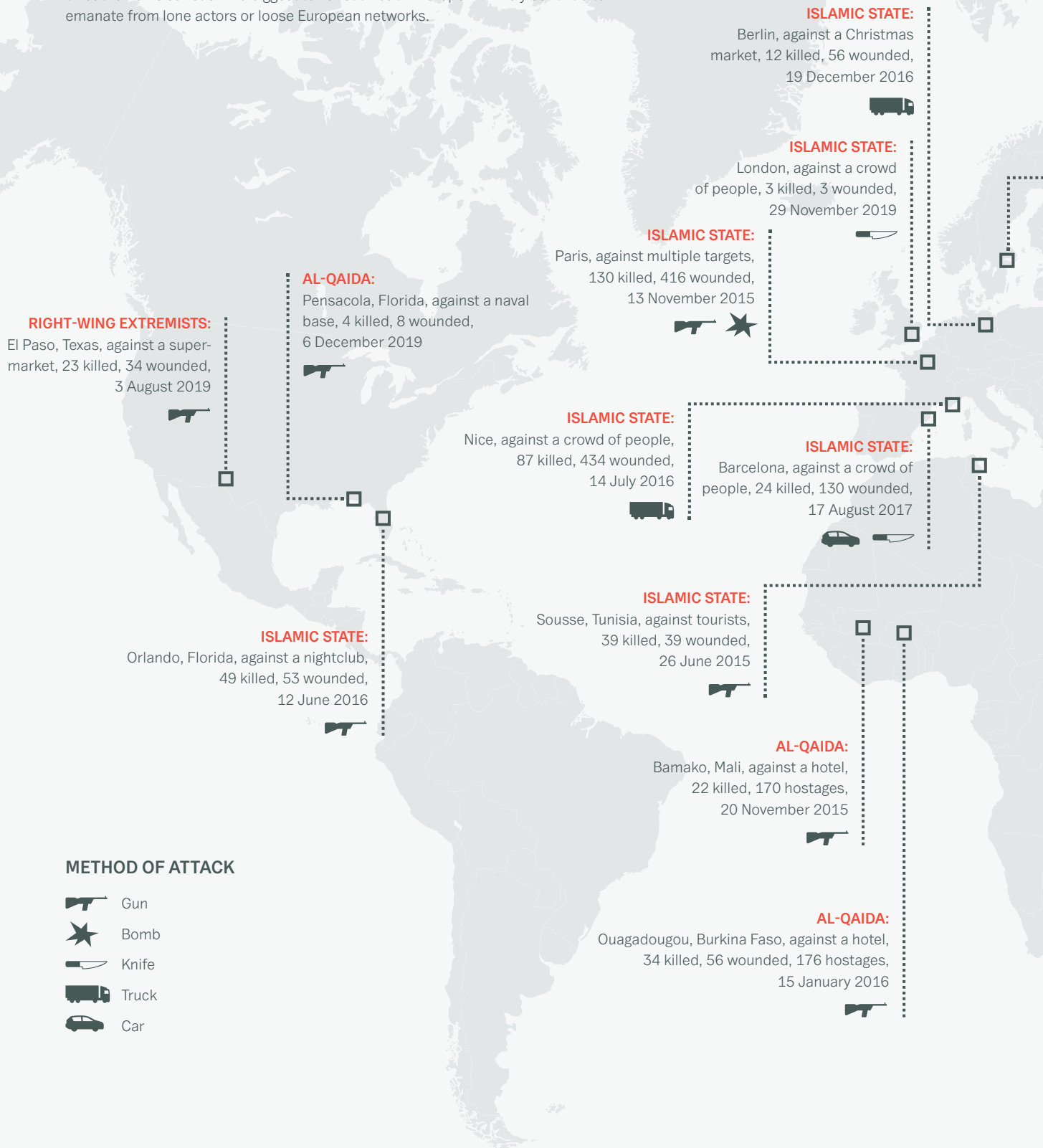
Attack by Islamic State Khorasan Province (ISKP) on Kabul Airport 30 August 2021.  
Photo: Abaca/Ritzau Scanpix





## SELECTED ISLAMIST AND RIGHT-WING EXTREMIST TERRORIST ATTACKS IN THE WEST AND AGAINST WESTERN TARGETS IN THE PERIOD 2015-2021

The number of terrorist attacks in the West has in recent years been significantly lower than in the years 2015 to 2017, when Islamic State still controlled a large swathe of territory. However, the root causes of terrorism still exist, and the terrorist threat remains serious. The biggest terrorist threat in Europe will likely continue to emanate from lone actors or loose European networks.





**ISLAMIC STATE:**

Stockholm, against a crowd of people,  
5 killed, 14 wounded,  
7 April 2017



**AL-QAIDA:**

St Petersburg, against the metro,  
16 killed, 64 wounded,  
3 April 2017



**ISLAMIC STATE:**

Istanbul, against a nightclub,  
39 killed, 70 wounded,  
1 January 2017



**ISLAMIC STATE:**

Kabul Airport, 182 killed, 150+ wounded,  
26 August 2021



**MILITANT ISLAMIST GROUP:**

Cairo, Egypt, against a tourist bus,  
17 wounded,  
19 May 2019



**ISLAMIC STATE:**

Sri Lanka, against churches  
and hotels, 259 killed, 500 wounded,  
21 April 2019



**ISLAMIC STATE:**

Surabaya (Indonesia), against a church,  
28 killed, 57 wounded,  
13 May 2018



**AL-SHABAAB (AL-QAIDA):**

Nairobi, (Kenya), against a hotel,  
27 killed, 27 wounded,  
15 January 2019



**RIGHT-WING EXTREMISTS:**

Christchurch, New Zealand, against mosques,  
51 killed, 40 wounded,  
15 March 2019







A Syrian refugee camp. Photo: Delil Souleiman/AFP/Ritzau Scanpix

### **Perceived insults and militant propaganda inspire lone actor terrorists**

The terrorist attacks seen in Europe in recent years have almost exclusively been conducted by Islamic State sympathizers acting alone and have often been launched in response to perceived insults to Islam. Both al-Qaida and Islamic State paint the West as the enemy of the world's Muslims in their propaganda and use perceived insults as their battle cries. In June 2021, for instance, al-Qaida posted a video in which al-Qaida leaders linked the perceived insults in the Charlie Hebdo case in France with the republication of the Danish caricatures of the Prophet Muhammad and al-Qaida's subsequent attacks on the Danish Embassy in Islamabad in 2008.

In recent years, al-Qaida and Islamic State have both lost several prominent leaders and spokesmen. Some have been killed, while others have been arrested. Despite these losses, both groups and their local sub-groups still manage to distribute effective propaganda to a global audience. Lone actor attacks in Europe are extensively fuelled by this propaganda, which promotes militant ideology and justifies the use of violence to defend Muslims across the world and Islam.

Al-Qaida and Islamic State focus on current events locally to legitimize the use of violence globally. In March 2021, for example, al-Qaida addressed the persecution of the Muslim Rohingya population in Myanmar in its propaganda, using it to illustrate what they perceive as the worldwide oppression of Muslims. Similarly, Islamic State has painted the recent outbreak of armed conflict between Israel and Hamas in the spring of 2021 as an example of atrocities against Muslims. The two terrorist organizations thus propagate a militant Islamist ideology that draws on current events to legitimize armed fighting against local rulers and against the West.

Militant propaganda is typically disseminated through digital newsletters, websites and encrypted communications channels. In some cases, ideology and propaganda are disseminated by individuals in closed communities and networks that are unknown to the public. In other cases, the propaganda is disseminated by al-Qaida's and Islamic State's official spokesmen and more openly on the Internet. In some cases, these spokesmen have direct links to the organizations' secret operational structures, thus performing several roles.

### Foreign fighters – a latent and long-term threat

Over the past 20 years, thousands of foreign fighters have travelled from the West to conflict hotspots, in particular in Afghanistan, Yemen, Somalia, Syria and Iraq. In a variety of ways, these foreign fighters, who typically joined al-Qaida's regional subgroups or Islamic State in Syria and Iraq, pose a long-term threat to the West.

From 2013 to 2015, Syria in particular became a magnet for Western foreign fighters. The notion of Islamic State's so-called caliphate appealed to an unprecedented high number of foreign fighters from the Middle East and Europe, though other militant groups, including al-Qaida, were also able to recruit foreign fighters to join the protracted civil war. In addition, Syria's close geographical proximity to Europe also made it easier for European foreign fighters to travel to Syria, at least for a while. It is less likely that other conflict zones will emerge in the near future that will be able to replicate the attraction of the Syrian conflict as a magnet for European foreign fighters.

Foreign fighters are still at large in Syria and Iraq, mainly in Idlib province in north-western Syria, where the majority continue to fight the Assad regime. Today, many of the foreign fighters who travelled to Syria are either dead or detained in the prisons in north-eastern Syria. These prisons are currently controlled by the Kurdish-dominated authorities. It is likely that Islamic State will try to smuggle group members, including foreign fighters, out of the prisons. Similarly, it is likely that detainees will be able to form new and strong networks during their incarceration and that some of these networks will persist, even following a release of the detainees.

In the Kurdish-run camps in north-eastern Syria, the majority of detainees are women who are held along with their children for suspected links to Islamic State. Many of these women are or have been married to foreign fighters from Western countries. These camps have seen several incidents of women radicalizing other women and indoctrinating some of the children with Islamic State ideology.

Some Western foreign fighters have returned to the West, some to face incarceration. Radicalization of prisoners during their incarceration still poses a problem.

### RIGHT-WING EXTREMISM STILL A THREAT IN THE WEST

Right-wing extremist groups and individuals will likely continue to represent a threat for years to come. In recent years, individuals affiliated with right-wing extremist communities have launched several large-scale terrorist attacks in the West. The perpetrators have been widely idolized, and they will likely remain a source of inspiration to right-wing extremist communities.

Right-wing extremists often draw inspiration from the same current events as militant Islamists do, an example being the Taliban takeover in Afghanistan. However, their views of these events are fundamentally different. For instance, militant Islamists have used the West's approach to refugees and migrants to paint the West as xenophobic and anti-Islamic.

Right-wing extremists, conversely, often emphasize immigration to the West as a threat to European culture and "the white race". They typically profess to ideologies that draw on anti-Semitism and racism and endorse different conspiracy theories. The threat from right-wing extremists primarily emanates from lone actors and is directed against a number of different targets, especially Jews, Muslims, and Western authorities which right-wing extremists hold responsible for what they perceive as the moral decay of society. Right-wing extremists typically use protests, pamphlets, graffiti, podcasts, memes and music to spread their message.

Virtual networks and online forums play a key role in recruitment and radicalization in right-wing extremist communities. During the COVID-19 pandemic, the online presence of right-wing extremists rose. Though several digital platform providers are trying to limit the dissemination of right-wing extremist messages, the Internet and the possibility of sharing encrypted information still provide right-wing extremists with ample opportunity to form networks and exchange ideas.

**MILITANT ISLAMIST TERRORIST  
GROUPS HAVE MORE SAFE HAVENS  
TODAY THAN THEY DID 20 YEARS AGO**

■ 2001  
■ 2021





## THE TERRORIST THREAT AND THE DEVELOPMENT IN AFGHANISTAN

The Taliban's seizure of power provides terrorist groups in and near Afghanistan with wider latitude for operation and will likely increase the terrorist threat from militant Islamist groups in the country and the region as a whole. This heightened terrorist threat is facilitated by the fact that terrorist groups such as al-Qaida, Islamic State Khorasan Province (ISKP) and other militant Pakistani and Central Asian groups are no longer under pressure from the Afghan security forces and US troops deployed to Afghanistan.

The development of the terrorist threat from Afghanistan against the West depends on a number of uncertainties. First and foremost, it will depend on the future intent and capability of the Taliban and regional powers to prevent terrorist groups in Afghanistan from bolstering their capabilities to direct or support attacks against Western interests. Similarly, the threat will depend on whether individuals from the West will be able to travel to and from Afghanistan to receive training and form ties to militant groups.

Both Islamic State and al-Qaida have celebrated the West's withdrawal from Afghanistan in their propaganda. Al-Qaida views developments in Afghanistan as a monumental victory over the United States and the West, which the group will seek to exploit in order to increase its global appeal.

It is likely that Pakistani and Central Asian groups will be able to use the Taliban takeover of power in Afghanistan to build their own capacities. Even though these groups primarily pose a regional threat, their presence in Afghanistan may allow foreign fighters from the West the opportunity to receive training and gain combat experience.



## **AFRICA: AL-QAIDA HOLDS A STRONG POSITION, AND ISLAMIC STATE WANTS TO EXPAND**

Militant Islamists will likely be able to consolidate their presence in Africa in the years to come, like they previously did in Afghanistan. Al-Qaida and Islamic State will both be parties to a number of conflicts, including in the Sahel.

Islamic State has been able to establish a presence in Africa, in particular, since the 2019 collapse of its so-called caliphate, while al-Qaida groups have been present in Africa for the last 30 years. Islamic State's expansion in Africa has not seriously weakened al-Qaida's subgroups in the continent, which still hold a strong position in many places, including official al-Qaida affiliate al-Shabaab. Most of al-Shabaab's attacks are directed against local authorities and international military forces, which have been present in East Africa for a number of years. However, al-Shabaab also regularly attacks Western interests in Somalia and its neighbouring countries, including Kenya. This type of terrorist attack and al-Shabaab's affiliation with al-Qaida ensure the group's visibility to an international militant Islamist audience.

Islamic State's expansion in Africa is typically based on a kind of franchise model, with local militant Islamist groups that have years of experience from local insurgencies joining Islamic State. This has happened in the eastern part of DR Congo and in northern Mozambique. Both places have seen local groups joining Islamic State and launching a large number of attacks, primarily against local authorities and civilians. In addition, the Islamic State group in northern Mozambique has launched attacks on targets related to Western gas extraction companies. Islamic State's leadership has highlighted attacks conducted by the subgroup in Mozambique in its international propaganda.

At the same time, some of the released foreign fighters will likely stay radicalized and pose a terrorist threat. Since 2015, there have been examples of perpetrators committing terrorist attacks in Europe within the first six months of their release.

Over the years, it has become increasingly difficult for militant Islamists to travel from the West to one of the world's conflict areas due in part to the measures introduced by Western countries to prevent travel to foreign conflict zones. However, travel is still possible, and as long as al-Qaida and Islamic State subgroups successfully present local conflicts as causes that are relevant and legitimate to participate in, some will try to travel to these conflict zones. At the same time, Islamic State and al-Qaida will maintain their appeal to foreign fighters from countries bordering conflict zones – a trend that is prevalent in the conflict-ridden regions of Africa.

### **Islamic State and al-Qaida will build capacity in local conflict zones**

Al-Qaida and Islamic State are composite organizations comprised of central leaderships and subgroups around the world. Together, these two organizations pose a persistent terrorist threat to the West and to the conflict zones where their local subgroups reside.

Al-Qaida's remaining few and senior leaders are likely primarily located in Iran and Afghanistan at present, while Islamic State's decimated leadership likely resides in Syria. It is highly likely that the two organizations' leaders remain intent on launching large-scale, complex attacks in the West on the scale of the 11 September 2001 attack against the United States. Though it is less likely that they currently have sufficient capabilities to launch large-scale attacks in the West, both al-Qaida and Islamic State continuously make efforts to build capabilities to strike the West again, just as they are rebuilding local alliances and capacities in places such as Iraq, Syria, Africa and into Europe.

Al-Qaida and Islamic State pose an extensive threat to Western interests outside of the West. Their subgroups are present in many of the world's conflict zones. Here, they wage local insurgency and threaten Western interests in their own right and, increasingly, through cooperation with local insurgent groups.





Knife attack in Rambouillet, France, in April 2021. Photo: Ian Langsdon/EPA/Ritzau Scanpix

Several of the conflict areas in the Middle East and Africa lack government control and thus act as safe havens where terrorist groups are able to train their members, disseminate propaganda and prepare attacks. Militant Islamists will in all likelihood remain strongly focused on building capabilities in armed local conflicts.

In Syria and Iraq, Islamic State's and al-Qaida's affiliated networks take part in local conflicts. Since 2019, Islamic State has primarily been present in the large desert areas of Syria and Iraq, where the group has worked to rebuild its attack capabilities. Al-Qaida networks have established a presence in the north-western part of Syria, in particular. However, it is likely that they are trying to expand their area of operation to other parts of Syria, and the threat to the West will thus increase if the networks achieve greater room for manoeuvre.



Al-Qaida and Islamic State focus on current events locally to legitimize the use of violence globally.

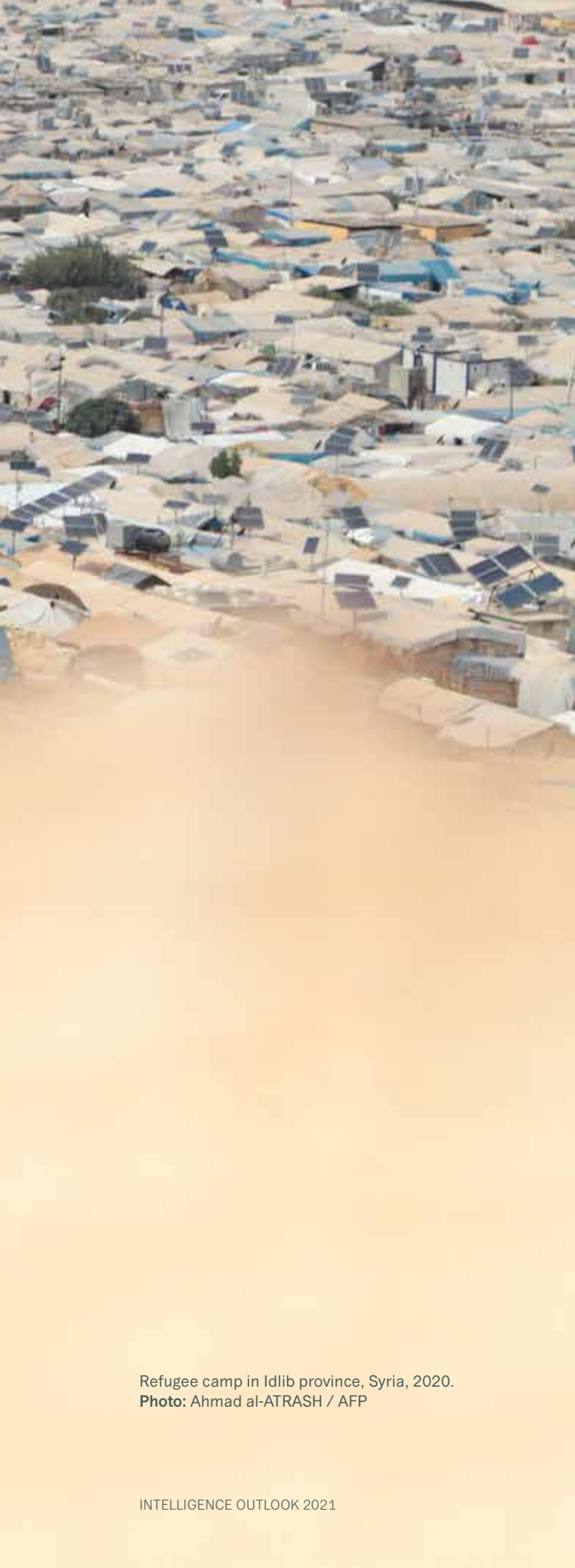


# EUROPE'S CONFLICT-RIDDEN NEIGHBOURING REGIONS

Europe's neighbouring regions from North Africa and the Sahel over the Middle East to Afghanistan pose a security policy challenge. In the years to come, the regions will remain characterized by growing rivalry between regional powers, armed conflicts, and corrupt and authoritarian regimes. This situation will be further exacerbated by climate change and growing populations. Combined, these factors will fuel terrorism, refugees and migration and at the same time threaten trade, shipping and energy security. Europe will increasingly have to tackle these challenges by itself due to the diminishing US military presence and political influence in the regions.

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Refugee camp in Idlib province, Syria, 2020.  
**Photo:** Ahmad al-ATRASH / AFP

■ The complex problems facing North Africa, the Middle East and Afghanistan will continue to pose political and security challenges to Europe. Over the past decade since the Arab Spring, several authoritarian regimes such as Egypt, Saudi Arabia and Iran have increased their control by using heavy-handed tactics and increased monitoring. Nevertheless, these regimes will remain vulnerable. Oppression, inequality and corruption will likely spark renewed civil unrest. Other countries in the region with weak government institutions will suffer from the same types of problems, especially countries such as Afghanistan, Libya, Yemen, the Sahel countries and, increasingly so, Lebanon. This could ultimately lead to state collapses, the emergence of terrorist groups and radicalization of marginalized groups.

Local instability and conflicts close to Europe's borders will contribute to refugees and migrants heading towards Europe. Recent developments in several countries will likely lead to rising refugee pressure inside and outside of the Middle East. Over the past few years, fighting over scarce water resources in the Middle East and Africa has intensified, brought about by factors such as high population growth and climate change. Countries such as Iraq, Syria and Lebanon suffer from water scarcity, while the Sahel is one of the world's regions that has been hit the hardest by climate change. Conflicts over water access will likely increase in the short to medium term, resulting in intensified clashes between neighbouring states and vulnerable population groups.

## REGIONAL HOT SPOTS WITH POTENTIAL IMPACT ON EUROPE

### LEBANON

Lebanon is likely in the early stages of a long-term, extensive crisis. Without external aid, the country will likely balance on the edge of collapse in the short to medium term.

### SYRIA

In the coming decade, Syria will be deeply affected by the war and its economic and humanitarian consequences. Despite the fact that a number of Arab states seem ready to normalize their diplomatic relations with Syria, the Assad regime will still be faced with challenges caused by a deep economic crisis, lack of control of vital natural resources, and a worn-down military. Terrorist organizations such as Islamic State will still enjoy favourable conditions for recruitment and will be able to wage low-intensity insurgency in Syria's peripheral areas.

### TURKEY

### LIBYA

In the short to medium term, Libya will likely remain a fragile state at risk of seeing the rise of new local conflicts, whose consequences could spread to the entire region. Ineffective border control may affect the flows of people fleeing conflict, oppression or poor living standards brought about by climate change and natural resource scarcity.

A map of the Middle East region, with Iraq and Iran highlighted in a darker shade of gray. A dashed line connects the text box for Iraq to the label 'IRAN' on the map.

## IRAQ

Iraq will remain an arena for rivalry between Iran and the United States in the years to come, even in the event that a deal is struck on a return to the nuclear agreement. The Iraqi government is engaged in a delicate balancing act between the United States on the one side and Iran on the other. Growing tensions between the two countries will contribute to aggravating the security situation in Iraq, not least in and around the bases accommodating Western troops, including Danish soldiers. In the long term, Iraq will continue to suffer from poor governance, civil unrest and social and ethnic tensions.

IRAN

# REGIONAL POWERS OF STRATEGIC IMPORTANCE TO EUROPE

## Iran

Tensions between Iran on the one side and the United States, Israel and Saudi Arabia on the other will continue to shape the situation in the Middle East. Iran's nuclear programme, in particular, will exacerbate the country's conflict with the United States. If the countries fail to renew the nuclear agreement, there is a risk that the United States' regional partner Israel will resort to military force to stop or delay Iran's nuclear programme. Iran will increase military spending on ballistic missiles, drones and cyber capabilities, and step up its military presence in the waters in and around the Strait of Hormuz and the Red Sea. At the same time, Iran will continue to provide support for proxies in Iraq, Yemen, Lebanon and Syria. In Iraq, Iran will continue to cooperate with pro-Iranian militias and parties to challenge the United States' presence in the country.

## Turkey

The Turkish government is manoeuvring between an economic crisis and an assertive foreign policy. The actions of the Turkish government will likely be increasingly opportunistic and unpredictable ahead of elections in 2023, the year which marks the 100th anniversary of the Turkish Republic. Turkey will continue to exploit its strengthened cooperation with Russia and China to establish itself as a more independent regional actor.



## MIGRANT AND REFUGEE ROUTES



Conflicts, oppression and humanitarian crises close to Europe's borders will bring an influx of refugees and migrants towards Europe. Developments in several countries will likely lead to rising refugee pressure inside and outside of the Middle East. In the medium term, Libya will remain a fragile state that may risk seeing the rise of new local conflicts, the consequences of which could extend to the entire region. In the near future, any Libyan government will lack internal backing and will thus be faced with the daunting task of stabilizing the country and controlling its borders.

Since 2015, it has become increasingly difficult for migrants and refugees to reach Europe, and, as a result, some countries, in particular Turkey and Iran, will increasingly be forced to tackle very high numbers of refugees and migrants in the region. The two countries will in all likelihood respond to this situation by adding political pressure on Europe.

### DRIVERS OF MIGRATION AND REFUGEE FLOWS

- Local conflicts and civil wars
- Enhanced oppression since the 2011 Arab Spring
- Poor economic development
- Increased corruption and poverty, and poor future prospects
- Local instability in states on the verge of collapse
- Population growth and growing climate challenges caused by rising temperatures as well as water and food scarcity
- Human trafficking as a result of unstable countries lacking a strong central government and strong border control measures

## INSTABILITY IN WESTERN SAHEL CHALLENGES EUROPE

### Military support to Mali

As part of the Danish effort against terrorism and to secure stability in the Sahel region, Denmark will as of 2022 make a force contribution to the UN MINUSMA mission and the French-led Task Force Takuba.

### Fragile governments

The weak governments in Africa's western Sahel region will not be able to address the fundamental drivers of conflicts in the region. The governments in Mali, Burkina Faso and Niger struggle with poor governance, corruption, poverty and high population growth. In addition, Mali has suffered two coup d'états in less than a year, and the political situation in Mali will remain precarious in the run-up to the 2022 elections. The electoral process may lead to unrest, both before and after the elections.

### Terrorist groups in Sahel

The militant Islamist groups in western Sahel affiliated with al-Qaida and Islamic State will continue to bolster their influence in Mali, Burkina Faso and Niger. Over the past year, militant Islamists have stepped up their presence in southern and eastern Burkina Faso, and in southern and western Mali. From here, they will work to establish a presence in the northern regions of the coastal states along the Gulf of Guinea. Consequently, the conflicts and violence may spread south to other, more stable West African countries such as the Ivory Coast, Ghana, Togo and Benin.

### Consequences of climate change

Sahel is one of the regions in the world that has been hit the hardest by climate change, which will cause soil depletion, drought and extreme weather conditions. This, in turn, will lead to increased conflict over resources between ethnic groups as well as further migration flows and internal displacement in the region.

### Russia's involvement on the African continent

Russia is highly likely also considering stepping up military cooperation with Mali, through for example private military companies closely affiliated with the Russian state. Russia is in contact with different actors in the country but considers Mali's military and the transitional government its key partner. Russia's increasing presence may complicate Europe's commitment in Mali. For instance, Russia is working on improving its own image among the Malian population at the expense of Western players. Russian influence campaigns are aimed at undermining France's image as the most important external player in the country.



Conflicts in the western Sahel continue to intensify as a result of fragile governments, poverty, high population growth and the spread of militant Islamism.









## AFGHANISTAN – THE TALIBAN EMIRATE

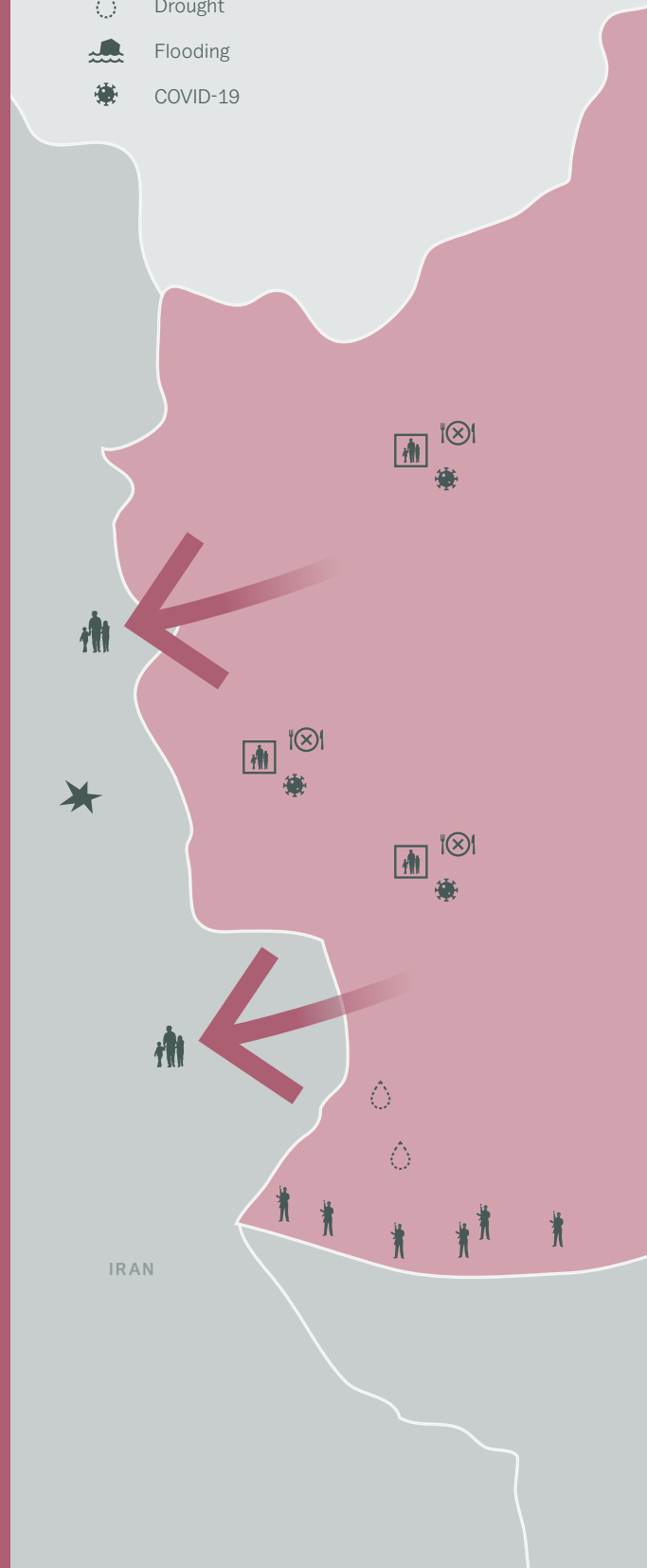
The Taliban has taken over power in Afghanistan and re-established its Islamic Emirate of Afghanistan by combining insurgency, local governance, political negotiations and propaganda. The Taliban gradually seized territory, undermined the legitimacy of the former Afghan government, seized control of many of the previous government's institutions and used international economic aid to its own advantage, for example through control of local schools and medical clinics. Though the Taliban has declared its intention to pursue a moderate policy, the regime's conservative interpretation of Islam has already manifested itself: women's and minority rights have been restricted, public protests have been met with heavy repression, and media freedom has been further restricted. The Taliban has also chosen to disregard its previous promises of forming an inclusive government that would include representatives outside of the Taliban's own ranks.

The Taliban has quelled the remaining pockets of regime resistance that were strongest in the provinces of Panjshir, Baghlan and Bamyān. In the short term, the risk of civil war has diminished, but the risk will likely rise in the medium term as a result of inter-group tensions within the Taliban, its transition from insurgent group to national government, and problems of disarming, demobilizing and reintegrating the former Afghan security forces. Aversion to the Taliban in the non-Pashtun communities, and the economic and humanitarian crises in Afghanistan will combine to increase the risk of civil war in the medium term. Afghanistan's neighbouring countries may seek to exploit these deep fault lines and provide support for different competing armed groups in an effort to gain influence in the country.

### The Taliban wants close relations with Pakistan and China

The Taliban regime's foreign policy is closely aligned with the foreign policies of Pakistan, China and, in part, Russia. The Taliban wants closer economic cooperation with China. Pakistan will work to convince as many countries as possible to recognize the new regime. China, Russia and Iran are wary of the increased militant Islamist activities in the region, the prospect of a humanitarian crisis in Afghanistan, and new waves of refugees. In addition, Russia and China will make efforts to prevent the Taliban's more radical brand of Islamism from spreading to the Central Asian countries. Turkey and Qatar might try to act as mediators between the new Taliban regime and the West in order to ensure continued Western economic aid to Afghanistan.

-  Militant Islamist groups
-  Terrorist attacks
-  Internally displaced
-  Refugees
-  Food insecurity
-  Drought
-  Flooding
-  COVID-19





### Increased terrorist threat from Afghanistan

The Taliban's seizure of power may increase the terrorist threat from militant Islamist groups in Afghanistan and the region as a whole. This heightened terrorist threat is facilitated by the fact that terrorist groups such as al-Qaida, Islamic State Khorasan Province (ISKP) and other militant Pakistani and Central Asian groups are no longer under pressure from the Afghan security forces and US troops deployed to Afghanistan.

### Increasing risk of civil war in the medium term

The Taliban regime has to balance between its resolve to enforce its ideology and its task of leading a country which has gradually adopted a Western way of life, particularly in the cities. The Taliban also has to manage internal power struggles and take into account the country's ethnic and religious minorities.

### On the verge of economic and humanitarian crisis

Funding from the international community has so far comprised three-quarters of Afghanistan's public expenditure. Foreign aid to Afghanistan has almost entirely ceased following the Taliban takeover of the country. The combined effects of the COVID-19 pandemic, drought, and the high numbers of internally displaced people have rapidly aggravated the humanitarian situation and put more than half of Afghanistan's population at risk of acute hunger, according to the UN. Today, more than half of Afghanistan's population lives below the UN poverty line; that number will increase significantly in the year to come.

### Refugees and internally displaced

The Taliban's strict rule and the dire economic situation will likely prompt numerous people in the cities and among the ethnic minorities to flee Afghanistan, to the neighbouring countries of Iran and Pakistan and some onwards to Turkey. Many of the people belonging to the growing Afghan diaspora communities in these countries will migrate to Europe.



Afghans attempting to get onboard US Air Force C-17 plane in Kabul Airport, 16 August 2021.  
Photo: Uncredited/Ritzau Scanpix



The waning US influence in North Africa, the Middle East and Afghanistan will leave more room for involvement by China, Russia and regional powers such as Iran and Turkey. These countries will have better opportunities to pursue their own interests that often conflict with European interests and have direct consequences for European security.



## CHINA, RUSSIA AND REGIONAL ACTORS CHALLENGE EUROPE IN THE NEIGHBOURING REGIONS

The waning US influence in North Africa, the Middle East and Afghanistan will leave more room for involvement by China, Russia and regional powers, including Iran, Turkey, Israel, Saudi Arabia and the United Arab Emirates (UAE). This will challenge Europe's ability to address the issues emanating from its neighbouring regions.

In particular, China's and Russia's increased involvement will make it difficult for Europe to exert influence over key regional actors. Neither China nor Russia will contribute to the strengthening of democracy and human rights.

It is likely that China will increasingly pursue its interests in the region. These interests include the following three elements in particular: stable oil supplies, increased influence through investments under the "Belt and Road" umbrella, and prevention of militant Islamist groups affiliated with the oppressed Uighur minority in China from attacking China or Chinese interests in the region.

Russia, for its part, will seek to maintain its reestablished role as a key security policy actor in the region. Russia uses an array of tools to gain influence, including arms sales, influence activities, and investments in the mineral extraction sector. In addition, Russia uses proxies to help

cloak the involvement of the Russian state. Russia has thus used private military companies to forge cooperation agreements and gain influence in countries such as Syria, Libya and the Central African Republic.

As the United States is reducing its military engagement in the region, regional powers, including Iran and Turkey, will also widen their scope of pursuing national interests that often conflict with those of Europe.

In recent years, the regional powers have forged a number of agreements, such as the Abraham Accords, and engaged in diplomatic activities to bridge otherwise deep regional divides. At the same time, as of November 2020, Turkey has not only adopted a more conciliatory approach towards the EU and NATO, it has also sought rapprochement with its regional rivals Saudi Arabia, the United Arab Emirates (UAE) and Egypt. However, countries such as Turkey, Iran, Saudi Arabia, the UAE and Egypt each continues their strong rearmament efforts, with Iran and Turkey developing and using drones that have proven difficult to defend against. These drones are also deployed to non-state actors in the region.



China strengthens its involvement in Europe's conflict-ridden neighbouring regions. **Photo:** Ibrahim Noroozi/AP/Ritzau Scanpix

## THE USE OF DRONES WILL COMPLICATE FUTURE WESTERN ENGAGEMENT IN THE MIDDLE EAST

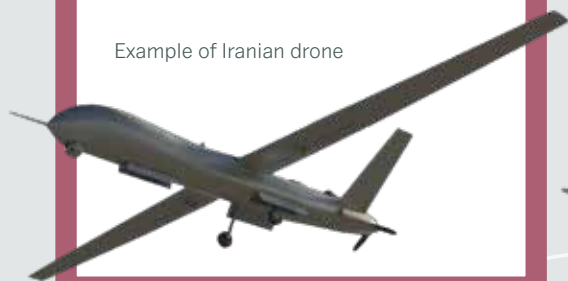
A surge in the use of drones in the region will further complicate Western engagement. Countries including Turkey and Iran are increasingly using drones for warfare. Non-state actors are also increasingly developing and using high-precision drones, for instance in Iraq, Syria and Yemen. It is likely that developments within drone technology and the use of drones in the short to medium term will result in larger explosive charges, extended ranges and increased precision, increasingly challenging Western military presence and the ability to defend military involvement in the region.

- Areas with Turkish use of drones
- Areas with Iranian use of drones
- Areas with drone use by non-state actors



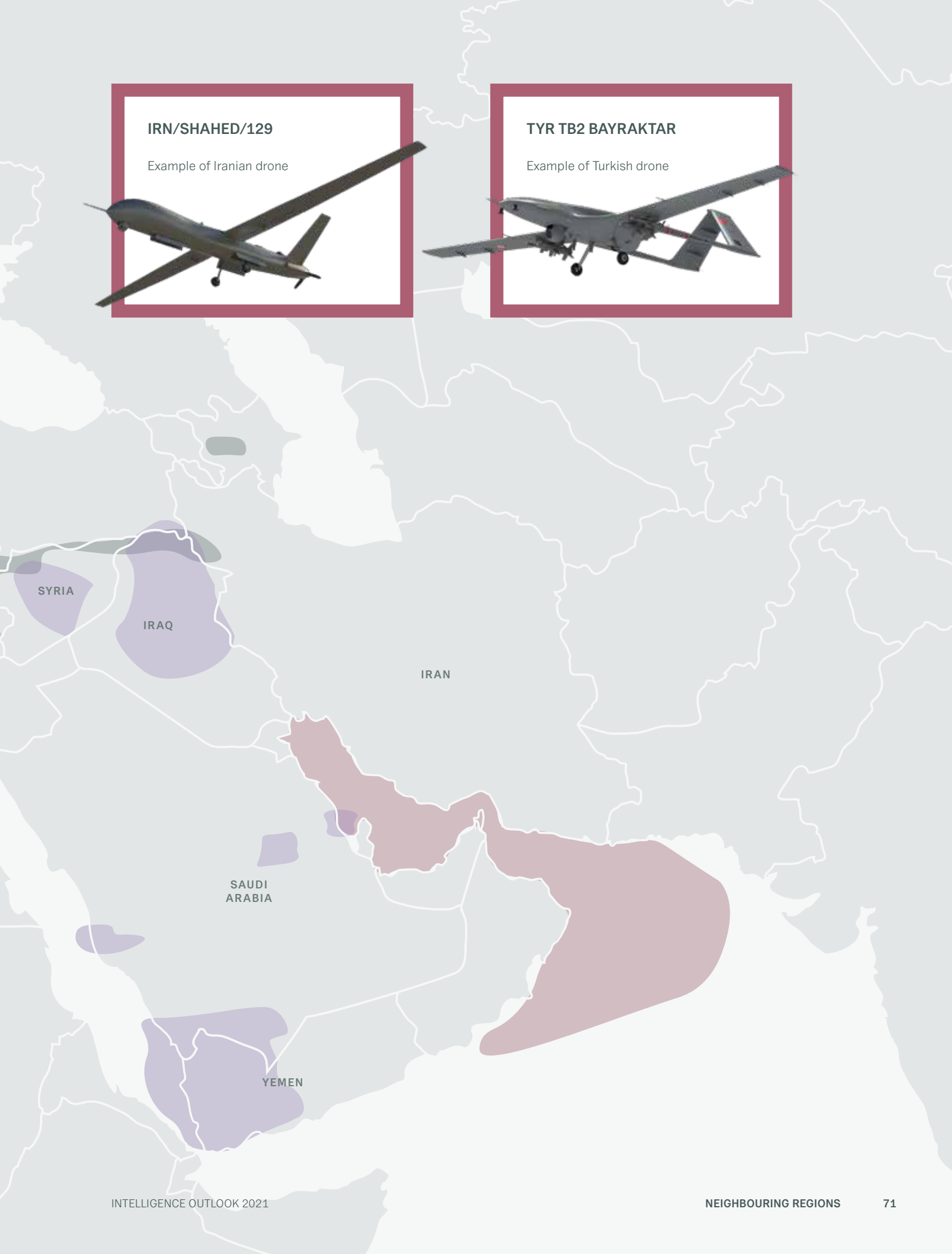
### IRN/SHAHED/129

Example of Iranian drone

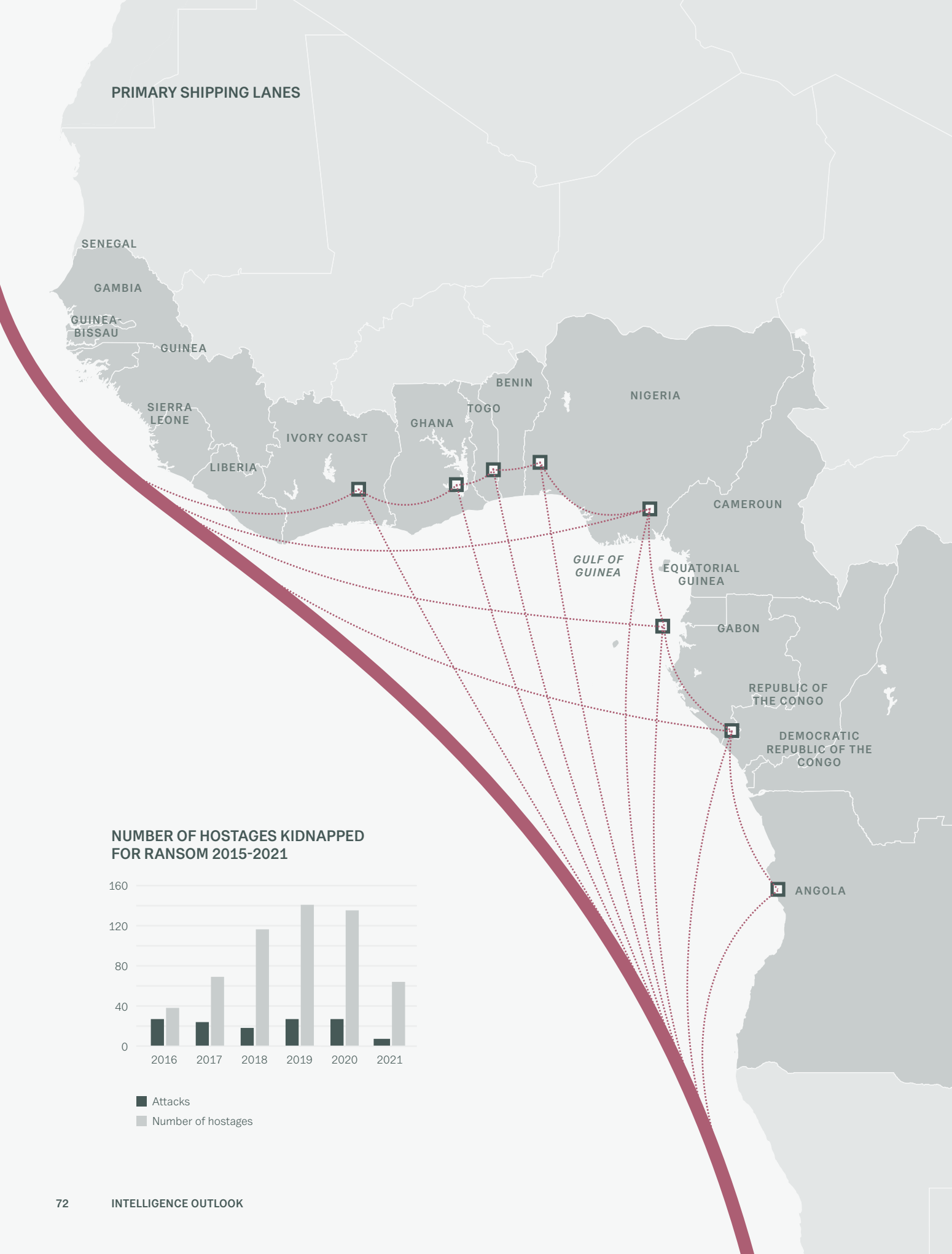


### TYR TB2 BAYRAKTAR

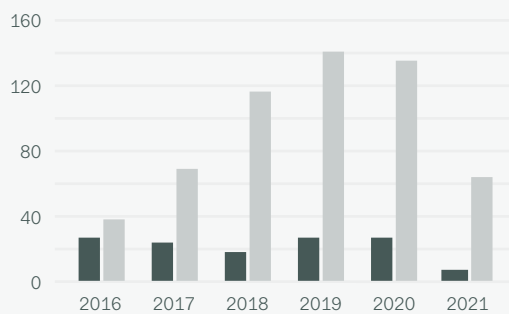
Example of Turkish drone



## PRIMARY SHIPPING LANES



## NUMBER OF HOSTAGES KIDNAPPED FOR RANSOM 2015-2021



■ Attacks  
■ Number of hostages

## THREATS AGAINST SHIPPING AND TRADE

Pirates in West Africa and conflicts in the Middle East continue to threaten international and Danish shipping.

In recent years, organized piracy has spread from Nigeria to the waters of other coastal states, from Ghana to Gabon. Today, pirates target all types of merchant vessels, and, at the same time, they have demonstrated the capability to operate farther away from the coast, even as far out as 300 nautical miles. This has served to generally aggravate maritime security in these waters. The attacks have grown more successful, as most of them are conducted by well-organized criminal groups and networks from southern Nigeria.

The coastal states around the Gulf of Guinea will not be able to end piracy in the region without external assistance in the short to medium term due to their insufficient maritime assets and efforts, both in terms of their maritime capabilities and their inability to reach a joint maritime strategy.




In recent years, the number of attacks on maritime traffic in the Middle East has increased. These attacks are not carried out by pirates but by states engaged in mutual competition and conflict. The example of the maritime conflict between Israel and Iran, which has

been raging since 2019, is a testament to this. In 2021, merchant ships affiliated with Israel were exposed to attacks or attempted attacks, while at least 10 Iranian merchant ships were attacked or sabotaged. An escalation of this maritime conflict could threaten international shipping, including Danish vessels. The conflict stems from Israel's ambition to weaken Iran's regional influence and Iran's response to what it considers sabotage and shadow warfare.

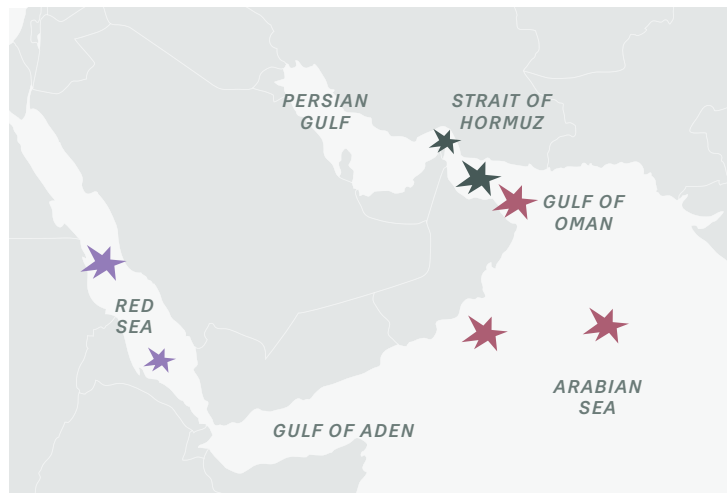
Iran may also decide to launch attacks on international shipping in case tensions rise between Iran and the United States, as was the case during the Trump administration's "Maximum Pressure" approach. In 2019, Iran was, in all likelihood, behind attacks on four merchant ships in the Strait of Hormuz and the Gulf of Oman.

During the spring and summer of 2020, Israel and Iran fell victim to a number of cyber attacks against their critical infrastructure. Each country has accused the other of the attacks. One of the attacks targeted the port in Bandar Abbas in Iran. The attack affected the operation of the port, causing delays for the ships using the port. Destructive cyber attacks may also affect partners in Europe, for example. In 2018, Italian oil and gas company Saipem fell victim to a destructive cyber attack. Saipem is a sub-contractor of Saudi oil company Saudi Aramco, which has previously been exposed to similar attacks.

### THE MARITIME CONFLICT BETWEEN IRAN AND ISRAEL

-  Attacks on merchant ships affiliated with Israel (early 2021-)
-  Attacks on and sabotage against Iranian tankers (mid-2019-)
-  Attacks on regional (non-Iranian) and Western ships (May/June 2019)

*The markings indicate areas where incidents have occurred, not the number of attacks. Attacks on and sabotage against Iranian ships in the Mediterranean are not included.*





# DEFINITIONS

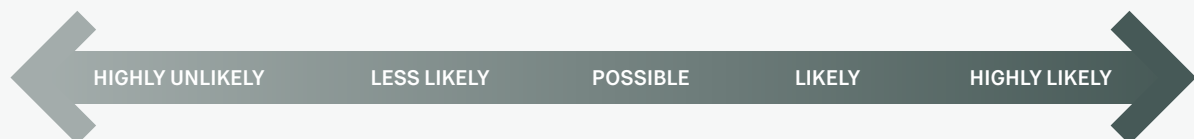
In order to facilitate reading of INTELLIGENCE OUTLOOK, we have prepared a brief outline of the special terms and definitions used in our assessments.

As intelligence assessments almost always contain elements of doubt, the level of probability in assessments must always be made clear. To facilitate this and to ensure that all analysts express levels of probability consistently, we use standardized phrases to indicate probability.

The DDIS applies the below scale of probability:

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

Probability levels are not an exact science but are intended to give the reader an indication of our level of certainty. Probability levels, terms and definitions used in this risk assessment are as listed below.



## TIME FRAMES

|                       |                 |
|-----------------------|-----------------|
| <b>Few months:</b>    | Very short term |
| <b>0-2 years:</b>     | Short term      |
| <b>2-5 years:</b>     | Medium term     |
| <b>5-10 years:</b>    | Long term       |
| <b>Over 10 years:</b> | Very long term  |





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