

Intelligence Risk Assessment 2015

An assessment of developments abroad impacting on Danish security



Danish Defence Intelligence Service

Intelligence Risk Assessment 2015

Introduction

The DDIS Intelligence Risk Assessment gives an overview of our current intelligence-based assessments of developments in a number of countries and conflict areas and provides an outline of foreign policy issues that may impact on Denmark's security.

This year's Risk Assessment emphasizes the terrorist threat posed by militant Islamist groups, Russia's attempt at repositioning itself as a great power, cyber espionage against businesses and public authorities, and the conflict-ridden and unstable situation in the Middle East and North Africa.

The analyses contained in this risk assessment are based on classified intelligence. The assessment is, however, unclassified and aimed at a wide audience, which limits the level of detail in analyses.

The DDIS Intelligence Risk Assessment is published annually, but we also continuously publish – mainly classified – assessments that form part of the complex process that enables Denmark to pursue its foreign, security and defence policy as a sovereign state in a world where threats are becoming increasingly complex. We believe that terrorism, Russia's conduct and the extensive cyber espionage will continue to constitute the most serious risks to Denmark and Danish interests in the years to come. As a result, we monitor developments in these areas diligently.

Additional information about the DDIS, including the Centre for Cyber Security, can be found on our websites www.fe-ddis.dk and www.cfcs.dk. Every other year, we publish a report detailing our key activities. The most recent issue from October 2015 can be found on our website.

Information cut-off date is 27 October 2015.



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Contents

Terrorism 11

Piracy 48

Russia 17

African trouble spots 43

Cyber threats and cyber espionage 23

Afghanistan 41

The Middle East and North Africa 27

Weapons of mass destruction 39

The Arctic 33

China 37



Main conclusions

Denmark and other Western countries are facing a serious terrorist threat. Over the past years, militant Islamist groups have gained ground in certain parts of Africa and the Middle East. The threat against the West primarily stems from individuals sympathizing with Islamic State in Iraq and the Levant (ISIL) and returned militant Islamists. The group of returned militant Islamists will likely grow in the years to come. ISIL's and al-Qaida's capacity to plan and launch large-scale and more complex attacks in the West is limited.

It is Russia's ambition to restore its role as a great power with decisive influence on major international issues. In this context, Russia attempts to re-establish its dominant influence over the non-NATO member states in the post-Soviet space. Russia has demonstrated capability and willingness to use military means to achieve its strategic objectives. Russia continues to develop its armed forces, primarily for rapid deployment in local wars or conflicts along the Russian periphery. Russia is trying to sway the strategic balance in the Baltic Sea region by deterring NATO from increasing the alliance's military presence in the Baltic countries. Within a few years, Russia will highly likely improve its capability to threaten NATO reinforcements to the Baltic countries in the event of a serious crisis. However, it is highly unlikely that Russia has the political intention to engage in a military confrontation with NATO and Denmark. Even so, Russia will remain a significant security challenge to the West, NATO and Denmark in the years to come.

Espionage against Danish state institutions and private businesses still constitutes the most serious cyber threat to Denmark and Danish interests. This type of espionage is mainly conducted by state and state-sponsored groups. In recent years, cyber espionage against Denmark has increased significantly, and the methods and techniques employed by the perpetrators have become increasingly sophisticated. The threat from cyber espionage against Danish authorities and companies is very high. In the long term, it is highly likely that more states will exploit the Internet for offensive purposes.

Islamic State in Iraq and the Levant (ISIL) and its regional affiliates will exploit the instability and wars that will continue to characterize the Middle East in the short to medium term. Also, the conflicts will continue to generate pressure from refugees. ISIL and regional great powers Iran and Saudi Arabia contribute to exacerbating tensions between Sunnis and Shiites in local conflicts in the region.

The fight against ISIL will be enduring. In the medium term,

ISIL will likely still control a belt of unbroken territory in the Sunni-dominated areas stretching across Syria and Iraq. Resistance against ISIL in Syria and Iraq will remain relatively weak and reliant on massive external assistance.

The divide between the Iraqi communities will be counterproductive in the fight against ISIL, and much of the country will remain outside government control in the medium term. Iran will remain the dominant regional actor in Iraq in the short to medium term. There are no prospects of national reconciliation between Iraqi Shiites and Sunni Muslims.

There are no prospects that either of the parties to the Syrian civil war will be able to win by military means, and chances are slim that a politically negotiated solution will bring peace. Russia's engagement in Syria will shift the balance of the conflict to Assad's advantage but will not determine its outcome. Syria will be fraught with unrest and instability in the long term.

Russia's political and military activities in the Arctic reflect the country's idea of itself as a leading Arctic power. Russia continues to pursue a cooperative path, although a more challenging track in Russia's Arctic policy is beginning to emerge. This will not replace the cooperative approach pursued by Russia in the Arctic for several years. It will, however, constitute a parallel track, which may at times come to dominate relations between Russia and the other Arctic states. In addition, in recent years, Russia has initiated a military build-up in the Arctic aimed at ensuring control of the North East Passage and protecting Russia's northern areas against military threats. The military build-up and activity are militarily defensive, but at the same time politically offensive. Over the past few years, China's ambition for access to natural resources outside China has sparked increased Chinese interests in the Arctic, including Greenland.

China is pursuing an increasingly confident and ambitious foreign policy aimed primarily at strengthening China's economic and political clout in the Asia-Pacific region. Because of this, regional competition between China and the United States will intensify, and tensions between China and Russia are also likely to increase.

Based on the Iran nuclear agreement, it is highly unlikely that Iran will be capable of developing nuclear weapons undetected in the long term. North Korea is still expanding its capabilities to produce weapons of mass destruction.

North Korea is likely willing to spread this capability to other countries.

The Taliban is increasing the intensity of its insurgency in Afghanistan. However, the Taliban is unable to win militarily as long as the Afghan government receives heavy economic support from Western countries. The national unity government has great difficulties tackling the country's problems. International diplomacy could force the Afghan government and the Taliban to the negotiating table, but the prospects of a peace agreement are distant.

The economic growth and increased investments from Western and non-Western countries seen in numerous African countries over the past few years will continue in the short to medium term. However, weak state structures, poverty

and conflicts will characterize developments in the continent and trigger pressure from refugees and migrants along with widespread smuggling activities, including human, drug and arms trafficking. The threat from militant Islamist groups will remain a destabilizing factor in several countries and regions.

The Somali-based pirates have ceased their activities, and it is highly unlikely that they will try to resume attacks on civilian shipping in the short term. No collaboration exists between the Somali-based pirates and al-Shabaab. The pirates will remain a serious threat in some parts of the Gulf of Guinea. In the short to medium term, it is less likely that the littoral states will prove capable of defeating piracy. In addition, it is less likely that Boko Haram will participate in piracy activities in short term.

TERRORISM

Denmark and other Western countries are facing a serious terrorist threat. Over the past years, militant Islamist groups have gained ground in certain parts of Africa and the Middle East. The threat against the West primarily stems from individuals sympathizing with Islamic State in Iraq and the Levant (ISIL) and returned militant Islamists. The group of returned militant Islamists will likely grow in the years to come. ISIL's and al-Qaida's capacity to plan and launch large-scale and more complex attacks in the West is limited.

For years, the fight against terrorism has been at the top of the international agenda. On several occasions, the fight against terrorism has yielded results, both inside and outside of Denmark. However, the fight against terrorism in the West and in several of the world's conflict areas is still challenged by a number of factors.

Firstly, ISIL has relatively quickly managed to establish itself in a number of countries. ISIL's large geographical span has increased its resilience and made it more robust. When ISIL is under pressure or is defeated in one place, it can relocate its resources and members and find alternative safe havens.

Secondly, it will become increasingly difficult to gain access to information on attack plans and thus to counter terrorist attacks. Militant Islamists often act independently, and attacks are frequently launched without prior electronic communication. When militant Islamists communicate electronically, it is increasingly being encrypted. The tendency for militant Islamists to increasingly encrypt their communication will highly likely continue.

Thirdly, travel from the West to several of the world's conflict areas will remain easy. The number of individuals with ties to militant Islamists in local conflicts or extremist communities in the West is likely to increase.

ISIL supporters responsible for terrorist attacks in the West

The threat against the West primarily stems from ISIL supporters residing in the West. These ISIL supporters have not been to the conflict areas in Syrian and Iraq but are inspired by the organization's propaganda. A major theme in ISIL's propaganda is the call for terrorist attacks against countries participating in the international coalition against ISIL.

During 2014 and 2015, ISIL supporters have demonstrated their intent and capacity to launch attacks in Denmark and in the West. The February 2015 terrorist attack in Copenhagen on the Krudttønden cultural centre and the synagogue and the October 2014 attack on the Canadian Parliament are examples of attacks launched by individuals inspired by ISIL. Both attacks were launched without prior orders or instructions from the

ISIL leadership in Syria and Iraq. Moreover, the perpetrators did not have combat experience and had not received training in a conflict area. Nevertheless, they were capable of planning and carrying out terrorist attacks.

ISIL supporters recruited through online social media also pose a serious terrorist threat. The Internet-based recruiters usually reside in one of the world's conflict zones, and their English communication skills enable them to motivate and instruct ISIL supporters on where and how to attack targets in the West. ISIL supporters are typically instructed to attack individuals and institutions perceived to be critical of Islam or authorities such as the armed forces and the police. Also, they are instructed to launch attacks using simple weapons, for example handheld firearms. During 2015, there have been examples of Internet-based recruitment of ISIL supporters in the United States, Great Britain and Australia. For example, in June 2015, US police arrested an individual suspected of having been instructed via the Internet by people in Syria to build a bomb.

Returning foreign fighters pose a threat to the West

Militant Islamists who return to the West after having stayed with ISIL in Syria and Iraq pose a serious terrorist threat. Having often stayed in training camps and participated in fighting, they have learned how to plan, coordinate and launch terrorist attacks. In Iraq and Syria, these so-called foreign fighters have been part of a militant Islamist community using extreme forms of violence such as beheading of prisoners. Returning foreign fighters have thus become further radicalized and more prone to use violence.

More than 4,500 Europeans have left for Syria and Iraq, primarily to fight for ISIL. Even though the number of new fighters travelling to the conflict zone has diminished slightly, the overall number of foreign fighters will continue to rise. Foreign fighters with Western passports can relatively easily travel to and from the conflict areas in Syria and Iraq. However, it has become harder to enter these areas within the past year. This is due in part to the coalition's bombing campaign and in part to Turkey's increased security measures along the border with Syria.

It is likely that returning militant Islamists will launch an increasing number of attacks in the West. These attacks will likely be inspired by ISIL's propaganda and be launched by a few individuals with simple means. They will be directed at symbolic targets and authorities or individuals and institutions perceived to be critical towards Islam. The terrorist attack against the French magazine Charlie Hebdo in January 2015 and the attack against a Jewish museum in Belgium in May 2014 are examples of attacks launched by returning militant Islamists. In both attacks, the perpetrators had combat zone and weapons experience as well as the intent and capacity to launch terrorist attacks.

The number of returning militant Islamists will rise over the next few years. Consequently, the number of people in the West capable of planning and executing terrorist attacks will increase. Returning militant Islamists will also be able to inspire and provide support to ISIL supporters in Denmark and the West who want to launch terrorist attacks but lack experience from combat zones.

ISIL's and al-Qaida's capacity to launch large-scale attacks in the West is limited

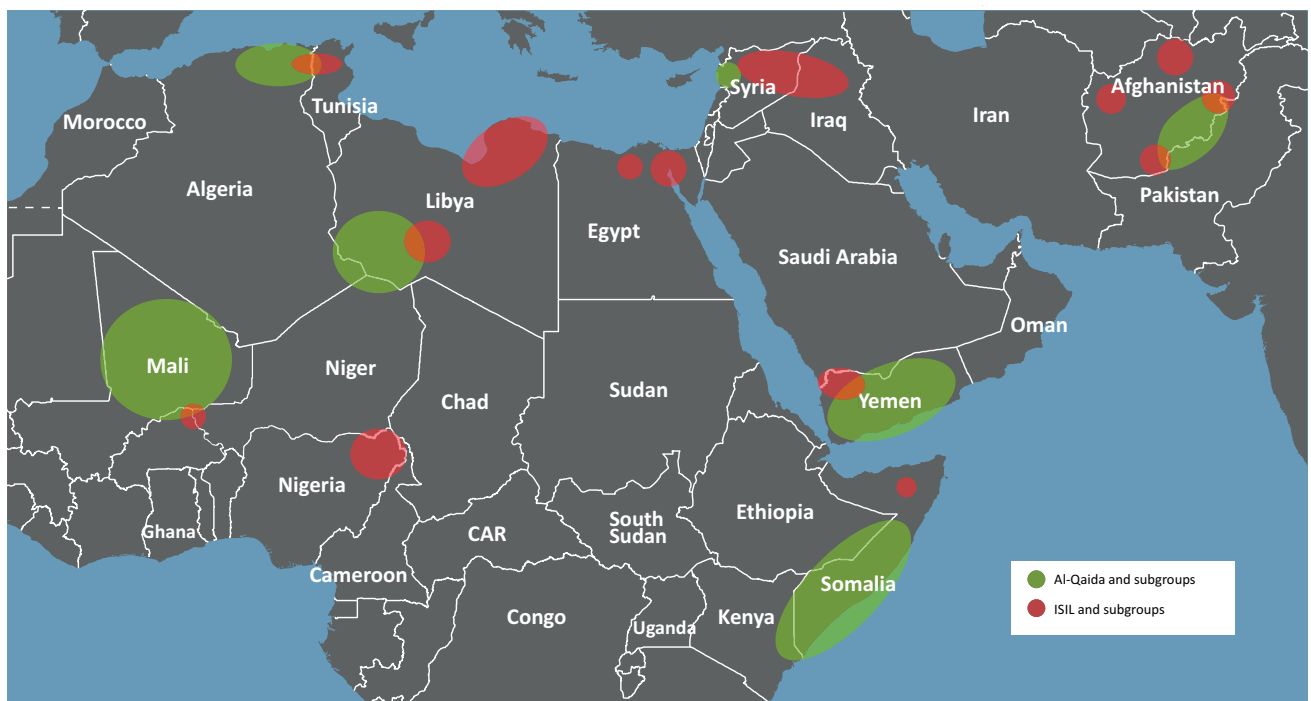
Over the past few years, ISIL has taken control of large territories in Syria and Iraq. Despite the international coalition's bombing

campaign and resistance from local military units and armed groups, ISIL has managed to consolidate its position in the conquered areas. During the past year, local militant Islamist groups around the world have joined ISIL. As a result ISIL has spread from Syria and Iraq to other conflict areas, including North Africa, Afghanistan and Yemen.

There are ISIL members in Syria who are working on launching attacks in the West. However, it is less likely that ISIL or ISIL subgroups have the capacity to launch large-scale, complex attacks in the West in the short term.

In recent years, the Nusra Front, which is affiliated with al-Qaida and located in Syria and Iraq, has posed a threat to the West. The Nusra Front has provided sanctuary to al-Qaida members who have planned large-scale, complex attacks against the West. However, the widespread bombing campaign against militant Islamist groups in Syria and Iraq has diminished the threat from the Nusra Front.

Within the past year, al-Qaida's influence has been on the wane as a result of its difficulty in attracting foreign fighters and positioning itself internationally. Even though al-Qaida and the Nusra Front are weakened, their intent to attack targets in the West remains intact. However, it is less likely that



The spread of al-Qaida and ISIL in Africa, the Middle East, Pakistan and Afghanistan

they have the capacity to plan and execute larger, complex attacks in the West. Heightened focus in the West on people travelling to and from conflict zones makes it difficult for ISIL and al-Qaida to launch larger, complex attacks in the West.

The growing refugee and migrant influx will make it more difficult to keep track of militant Islamist movements. However, in the short term, it is less likely that militant Islamist groups will use the current refugee and migrant influx to gain access to Europe and use it as a launch pad for terrorist attacks.

Serious terrorist threat in the world's conflict areas

Over the past few years, militant Islamist groups have gained a foothold in several regions. The security situation in parts of the Middle East and North Africa will deteriorate further in the years to come. ISIL and its subgroups will expand their presence in these areas. Militant Islamists in the world's other conflict areas will still pose a serious threat.

The Middle East and North Africa

In the Middle East, ISIL is the strongest in Syria and will probably be able to expand its presence in the densely populated western part of the country. In Iraq, ISIL's progress has been checked by the coalition's bombing campaign and, to a certain extent, by forces from the Iraqi government, the Kurds and the Shiite part of the population. The coalition's bombing campaign could force ISIL to retreat from certain places. However, it is highly unlikely that it will render ISIL incapable of maintaining areas in Iraq in the short term.

In North Africa, the security situation will remain serious over the next few years, and militant Islamist groups will continue to increase their influence. ISIL has established official branches in Egypt, Libya and Algeria. ISIL has been particularly determined to establish a presence in Libya, deploying experienced members to help establish and run its branch in the country. ISIL has made progress in Libya and is now an independent party to the Libyan civil war. A large number of militant Islamists from other North African countries receive training and participate in fighting in Libya. In addition to providing knowledge and funds, ISIL has called on its supporters in Libya and other North African countries to focus on local fighting rather than on travelling to Syria and Iraq.

In addition to ISIL, al-Qaida in the Islamic Maghreb (AQIM), al-Murabitoun and Ansar al-Sharia still pose a threat in North Africa. Present in the region since 2007, AQIM is still deeply rooted in Algeria, Tunisia and Libya. AQIM is responsible for a number of attacks in North Africa and will remain a threat in

Islamic State in Iraq and the Levant (ISIL)

- In 2014, ISIL broke with al-Qaida and later changed its name to Islamic State (IS), which is the name the group itself uses.
- In July 2014, ISIL announced a caliphate in Syria and Iraq. A caliphate is a form of Islamic government aimed at uniting the Muslim people of the world. Since then, ISIL has significantly increased its number of followers around the world.
- ISIL has between 20,000 and 30,000 fighters in Syria and Iraq.
- ISIL is fighting both the Syrian regime and local terrorist groups, such as the al-Qaida affiliate, the Nusra Front.
- Official ISIL subgroups exist in Libya, Egypt, Algeria, Tunisia, Yemen, Lebanon, Jordan, Saudi-Arabia, Afghanistan, Pakistan and Nigeria, several of which are former al-Qaida affiliates.
- Terrorist groups in Morocco, Somalia, Israel, Palestine, Uzbekistan, the Philippines and Indonesia have pledged their allegiance to ISIL but have not been accepted as official subgroups.

the area in the future. Both ISIL and AQIM are making efforts to target Western tourist hotels and embassies through bombing attacks, kidnapping and firearm-based attacks. It is less likely that ISIL, AQIM and other Islamist groups in North Africa have the capacity to attack targets outside North Africa.

North Africa struggles with severe social problems, including poverty and high youth unemployment rates, and terrorist recruitment opportunities are high in the area. The prospect of economic growth in North Africa within the next few years looks dim. Many North Africans will remain highly susceptible to militant Islamist propaganda.

Several of the North African countries are incapable of defeating the militant Islamist groups. Libya is in a state of civil war, and, in the short term, the country's two rivaling governments will not be able to counter the terrorist threat. In Egypt, the military is engaged in fierce fighting against Islamic State in Sinai and other local terrorist groups. However, in the short term, the military will not be able to defeat militant Islamism in the country. On the contrary, the security situation in the country will likely deteriorate. Like in Egypt, the Tunisian authorities have not been able to counter the terrorist threat.

The attacks on Westerners launched during the spring and summer of 2015 deeply upset the security apparatus, and Tunisia declared a state of emergency. Like in Egypt, the Tunisian authorities will not be able to defeat AQIM, ISIL and other terrorist groups in the short term.

In Algeria and Morocco, the security situation will continue to be better than in other North African countries. AQIM and ISIL supporters are present in both countries, but the authorities have years of experience fighting terrorism. Unlike the other North African countries, government and security institutions in Algeria and Morocco have been largely untouched by the political changes that swept through parts of North Africa and the Arabian Peninsula in 2010 and 2011. Consequently, in the short term, terrorist groups will find it more difficult to plan and execute attacks in Algeria and Morocco than in the other North African countries.

Afghanistan and Pakistan

The security situation in Afghanistan and Pakistan will continue to be serious. The al-Qaida leadership has been in hiding in the trackless mountains between Afghanistan and Pakistan for years. Al-Qaida cooperates closely with the Taliban, which has launched a number of large-scale attacks in Afghanistan within the past year. Among other things, al-Qaida has supported the Taliban with knowledge, training and funds. In addition to cooperating with the Taliban, al-Qaida collaborates with local warlords, smugglers and criminal networks in both Afghanistan and Pakistan.

In January 2015, the ISIL leadership recognized Islamic State in Khorasan Province (ISKP) as its branch in Afghanistan and Pakistan. ISKP primarily comprises breakaway members of the Taliban. However, ISIL and ISKP do not cooperate closely. On the contrary, much seems to suggest that ISIL and ISKP have different religious convictions and political goals. To the ISIL leadership, the admission of ISKP most of all represents a propaganda victory, enabling ISIL to heighten its position internationally. To ISKP, the admission into ISIL could help improve its recruitment potential and attract external funds. Over the next few years, ISKP will likely try to attack Western targets in Afghanistan, primarily in Kabul.

The rivalry between ISIL and al-Qaida has prompted the al-Qaida leadership to make efforts to increase its influence in the region. Consequently, in 2014, the al-Qaida leadership established al-Qaida in South Asia (AQIS) as a new member of the al-Qaida family. Officially, AQIS covers India, Pakistan, Bangladesh and Burma. The establishment of AQIS has not

increased the terrorist threat in the region, as the group's capacity to launch terrorist attacks has proven to be limited. AQIS has made attempts to attack a Pakistani warship at the Karachi naval base and has claimed responsibility for the killing of four Internet bloggers in Bangladesh.

Attacks against civilian and military targets in North Africa in 2015

- In Libya, there have been several attacks against civilian targets such as the Corinthia luxury hotel in Tripoli. In addition, ISIL's Libya branch has released a number of prisoner execution videos.
- Tunisia has been exposed to a number of terrorist attacks against the country's tourist industry. In March, two perpetrators killed 21 Western tourists at the Bardo Museum in Tunis. On 28 June, a perpetrator attacked tourists at a beach resort in Sousse, killing 38 tourists, primarily British citizens.
- In Egypt, Islamic State in Sinai has attacked several Western targets. On 11 July, a car bomb was detonated at the Italian consulate in Cairo, and on 12 August the group released a video showing the execution of a kidnapped Croatian national.

East Africa

In East Africa, al-Shabaab will pose a serious terrorist threat to both Western and local interests in the years to come. In Somalia, al-Shabaab has increasingly focused on terrorism activities during the past year. Al-Shabaab has primarily directed its terrorism campaign against the capital of Mogadishu and against Kenya, Uganda, Djibouti and Ethiopia, all of which contribute troops to the African Union Mission in Somalia (AMISOM). In Somalia, al-Shabaab primarily focuses on targeting Somali authorities, AMISOM, politicians and other individuals affiliated with the Somali government. Even though al-Shabaab is under heavy pressure from AMISOM forces, the movement still controls large territories in southern and central Somalia, which it uses as a base for tax collection and recruitment of new members. Al-Shabaab is officially affiliated with al-Qaida. In October 2015, a small group of militant Islamists in northern Somalia pledged allegiance to ISIL.

West Africa

In the years to come, the terrorist threat will remain severe in parts of western Africa. In the short term, the authorities

will be incapable of defeating local terrorist groups. In Nigeria, Boko Haram, also known as Islamic State's West Africa Province, officially joined ISIL in the spring of 2015. Boko Haram controls the northern part of Nigeria and regularly launches attacks on local targets in the northern and north-eastern part of the country. Boko Haram also carries out attacks in the neighbouring countries of Niger, Cameroun and Chad. Even though Boko Haram has officially joined ISIL, it still prefers to attack Nigerian targets over Western targets.

Despite international support, the Nigerian authorities have failed to defeat Boko Haram and gain control of northern Nigeria. In Mali, militant Islamists still attack local and international security forces. During 2015, the attacks have spread to the central and southern parts of the country, including the capital of Bamako.

Yemen

In Yemen, al-Qaida in the Arabian Peninsula (AQAP) will remain a serious terrorist threat. During the past year, ISIL has set up a branch in Yemen. Both AQAP and ISIL have been engaged in the Yemeni civil war, fighting on the Sunni Muslim side against the Shiite Houthi movement. It is likely that AQAP has the intent and capacity to also launch terrorist attacks against Western targets.

In the future, AQAP and ISIL will have ample opportunity to operate in the power vacuum generated by the war between the Saudi-led coalition and the Houthi movement. AQAP controls large parts of south-eastern Yemen, the port city of al-Mukalla and the surrounding area. However, in 2015, AQAP has faced pressure from ISIL and an intensive US-led bombing campaign. In September 2015, AQAP once again used its English-speaking magazine 'Inspire' to call for attacks on US and Western targets.



RUSSIA

It is Russia's ambition to restore its role as a great power with decisive influence on major international issues. In this context, Russia attempts to re-establish its dominant influence over the non-NATO member states in the post-Soviet space. Russia has demonstrated capability and willingness to use military means to achieve its strategic objectives. Russia continues to develop its armed forces, primarily for rapid deployment in local wars or conflicts along the Russian periphery. Russia is trying to sway the strategic balance in the Baltic Sea region by deterring NATO from increasing the alliance's military presence in the Baltic countries. Within a few years, Russia will highly likely improve its capability to threaten NATO reinforcements to the Baltic countries in the event of a serious crisis. However, it is highly unlikely that Russia has the political intention to engage in a military confrontation with NATO and Denmark. Even so, Russia will remain a significant security challenge to the West, NATO and Denmark in the years to come.

It is the ambition of Russia's political leadership to restore Russia as a great power capable of challenging the dominant role of the United States on the international scene. Russia is trying to promote a multipolar world order in which Russia is able to exert influence on key international issues. In this context, it is a high priority for Russia that the other great powers and key political actors accept Russia's dominant role over non-NATO countries in the post-Soviet space.

The Russian leadership perceives these objectives as long-term and permanent interests that prevail above all other issues, and it is less likely that Russia's strategic objectives will change significantly, even in the long term.

Russia is increasingly challenging and opposing the West in key international issues. The Ukraine crisis has made it evident that Russia's perception of basic rules and objectives in international politics differs significantly from the West's.

However, Russia will continue to cooperate pragmatically with the West on issues in which Russia perceives it has partially identical interests with the West, as has been the case in addressing Iran's nuclear programme.

Russia's political and military leadership have long held the view that the United States and NATO have not treated Russia as a great power with legitimate interests. It is also Russia's perception that the West and Russia are engaged in a political struggle in which the West is trying to roll back Russia's sphere of interest. The Ukraine crisis has deepened Russia's suspicious view of NATO, and Russia believes that NATO and the United States are using the Ukraine crisis as a pretext to elevate the alliance's potential for threatening Russia's sphere of influence.

Russia is increasingly using military means to achieve its strategic objectives, and military means will highly likely remain an important instrument in Russian foreign and security policy. Russia is thus regularly conducting military

exercises in the vicinity of NATO member states and Russian political leaders and diplomats often use rhetorical military threats against NATO member states. Russia has especially demonstrated its willingness to use military means in its foreign policy in the Ukraine crisis and, most recently, in Syria, where Russia has established a new military base.

Russian support for the Assad regime

The enhanced Russian military presence in Latakia is aimed at helping secure the Assad regime's continued control over north-western Syria and at weakening the armed opposition and ISIL. At the same time, the Russian military presence in Latakia is aimed at protecting the Russian bases and military installations in Syria. Moreover, through its military build-up, Russia intends to demonstrate to the United States and the West that Russia is an unavoidable actor in the Syrian conflict and that control over Latakia Airport will enable Russia to enforce its general strategic interests in the Middle East through a military presence.

The Russian military presence in Syria has reached an extent that makes it the most comprehensive Russian military deployment outside the former Soviet area since the end of the Cold War.

Russia will continue to assign high priority to the development and modernization of its armed forces in order to strengthen Russia's great power status. In the years to come, Russia's military spending will remain at high levels, though the rate of growth in military spending will likely decrease due to Russia's current economic problems.

Russia's relations with the EU and most EU members will likely be dominated by political conflicts over, for instance, Russia's policy in the post-Soviet space and energy policy.



The Baltic Sea region

There are no indications that the sanctions imposed by the West will cause a decisive change in Russia's Ukraine policy, just as there are no indications that the economic recession that hit Russia in 2014 as a result of the fall in global oil prices and the sanctions will significantly change Russia's foreign policy.

The country's political leadership under President Putin is stable, and power is strongly centralized around Putin and the presidential administration. It is less likely that eventual changes in the Russian political leadership will fundamentally affect Russia's current strategic priorities and foreign policy, even in the long term.

Only small and marginalized political groups advocate for a Western-oriented political agenda. The organized political opposition is insignificant and will not be able to threaten the current political leadership, and the authorities will effectively oppress any emerging political threats.

Russia is trying to re-establish its influence in the post-Soviet space

The re-establishment of its influence over non-NATO members in the post-Soviet space is one of Russia's key

Russia is a leading actor in the cyber realm

Russia has long invested intensively in the expansion of its cyber capacities and now holds sophisticated capabilities to launch extensive cyber espionage campaigns against political and military targets in the West. Russia also has access to cyber capabilities suited to bolster the country's conventional military operations, such as targeted operations against critical infrastructure.

objectives. In Russia's perception, NATO and the EU are trying to intrude into Russia's sphere of influence in order to undermine Russia's security. Consequently, Russia will try to prevent Ukraine, Belarus, Moldova, Georgia, Armenia and Azerbaijan from cooperating closely with NATO and the EU. Russia perceives even closer collaboration between these countries and NATO and the EU as a slippery slope towards membership in the two organizations.

Russia regards the non-NATO member states in the post-Soviet space as part of its sphere of interest and as a security

zone in which Russia has the right to dominate the countries' foreign and security policy, including their foreign trade. In Russia's self-perception, it has the right and obligation to defend the interests of Russian minorities in the post-Soviet space.

Russia uses its role as energy supplier as leverage against Ukraine, Belarus, Moldova and Georgia. In addition, Russia is able to use political, economic and cultural levers, intelligence and cyber operations, and coordinated campaigns in news and social media to influence and manipulate political situations and crises in the post-Soviet space.

During the Ukraine crisis, Russia has demonstrated its willingness to use military and subversive means, including exploitation of Russian-speaking communities, as instruments in its policy in the post-Soviet space. The Russian leadership has shown that it can make quick decisions to use these means and that it is willing to take significant political risks in relation to the West in order to enforce Russia's strategic interests in the post-Soviet space.

It is likely that Russia will use military means in order to enforce its strategic interest in the post-Soviet space in situations where the Russian leadership perceives its strategic interest under significant and immediate threat. The Russian leadership assessed that such a situation occurred in Kiev in February 2014, when the Russian leadership perceived the political upheaval as a Western-instigated coup d'état aimed at admitting Ukraine into the EU and, eventually, NATO.

Russia is attempting to sway the strategic balance in the Baltic Sea region

Russia perceives NATO membership of the Baltic countries as an intrusion into its strategic sphere of interest in the Baltic. Still, Russia regards the EU and NATO memberships of the Baltic countries as facts that Russia cannot challenge without taking highly unacceptable risks.

Over the course of the Ukraine crisis, Russia has grown increasingly wary of NATO, believing that NATO and the United States are using the crisis as a pretext for expanding their military threat potential against Russia's sphere of interest. Russia's conduct in Ukraine has made NATO aware that it needs the capability to effectively bolster the alliance's security guarantees towards the Baltic countries and its Eastern European member countries. Russia perceives NATO's initiatives as potential offensive military preparations against Russia.

Russia's military modernization and its military activities in the Baltic Sea and in the vicinity of the Baltic countries since 2014 reflect Russia's attempts to sway the strategic balance in the region.

Russia has developed modern, professional and mobile forces capable of rapid offensive deployment in crises and local wars in the post-Soviet space. The Russian forces have gained experience in rapid deployment from garrisons into areas of operation. Since early 2014, the level of exercise activity of the forces in western Russia has been high, and many units have gained operational experience during the operations in and near Ukraine.

The Baltic Sea region

The forces in western Russia have the capability to launch offensive operations with combat units against the three Baltic countries within approximately a week.

However, it is highly unlikely that Russia will launch a military attack against the Baltic countries given the unacceptable political and economic costs. Russia would risk an open military confrontation with NATO and the United States.

In the Kaliningrad region, Russia launched snap alert exercises in 2014 and 2015 that included the reinforcement of the region with tactical combat aircraft as well as ground force and airborne troop elements. This type of exercise is a new element in the Russian exercise pattern and likely reflects Russian contingency planning. Also, the exercises are meant to demonstrate that Russia has the resolve and capability to deploy reinforcement forces to the Kaliningrad region from mainland Russia.

Russia's military activities are likely aimed at deterring NATO member states from increasing their military presence in the Baltic countries. In this context, Russia will attempt to demonstrate to NATO that it is resolved to maintain its military superiority in the region, including its ability to increase its military preparedness and thus its ability to threaten substantial NATO reinforcements that could be deployed to the Baltic countries during serious crises. Russia already has the military capability to threaten the access of substantial NATO reinforcements to the Baltic countries in the form of air defence missile systems in Western Russia that cover most of the air space of the Baltic countries. In addition, in the next few years, Russia will highly likely improve its access denial capability with the deployment of new surface-to-surface missiles and coastal defence missiles to the Kaliningrad region.

However, Russia's conventional forces are not capable of conducting large-scale, combined arms offensive operations involving coordinated deployment of ground, air and naval forces far from Russia's borders. It is highly unlikely that Russia has a political intention to start a military confrontation with Denmark.

However, Russia's willingness to use military means makes it likely that Russia, in the event of serious crises with the West, will initiate intimidating military activities in the vicinity of neighbouring states, and the Baltic countries will, in particular, be vulnerable in such a situation.

Russian air and naval activities in the Baltic Sea

Throughout 2014, activities involving tactical combat aircraft over the Baltic Sea increased but have stabilized in 2015. It is likely, though, that Russia will periodically increase its tactical combat aircraft activities over the Baltic Sea and close to NATO member states in response to NATO exercises and other Western military activities in the Baltic countries, Poland and the Baltic Sea. In addition, Russia continues its routine intelligence collection flights and strategic bomber patrol flights over the Baltic Sea.

The activity level of the Baltic Sea Fleet continues to be low in the Baltic Sea, consisting mainly of local training exercises in the eastern part of the Baltic, which is also the test site for ships and weapons systems, mainly export versions. However, many of the activities of the Baltic Sea Fleet will continue to involve temporary deployments out of the Baltic Sea to strategically important waters and crisis areas, including transport of military supplies and equipment to Syria.

Russia has the capability to launch a credible military intimidation campaign against the Baltic countries within a few days. Such a campaign may include a military build-up and aggressive military activities very close to the countries' borders and air space combined with simultaneous attempts at political pressure, destabilization and subversive activities similar to what is often referred to as hybrid warfare.

In case of a serious international crisis, Russia may decide to test NATO's cohesion by launching such a military intimidation campaign against the Baltic countries with the

intent of undermining NATO's ability to honour the alliance's security guarantees to the Baltic countries and, in general, of compromising NATO's credibility. There is also a risk that Russia may launch such a military intimidation campaign against the Baltic countries if it misinterprets NATO military activities along Russian borders in such a way that it perceives its security is seriously threatened by the United States and NATO.

Russia's willingness to use military means, its willingness to take risks, its distrust towards NATO and its growing military capability for rapid deployment against neighbouring countries will make Russia a significant security challenge to the West in general, to NATO and to Denmark in the years to come.

Russia is aiming at a frozen conflict in south-eastern Ukraine

Russia highly likely aims at creating a frozen conflict in south-eastern Ukraine, where the government in Kiev is de facto deprived of control over parts of the country's territory, the self-proclaimed people's republics of Donetsk and Luhansk as well as Crimea. As is the case with the frozen conflicts in Transnistria, Moldova, and in Abkhazia and South Ossetia, Georgia, Russia sees a frozen conflict in south-eastern Ukraine as an effective instrument to obstruct Ukrainian EU and NATO membership.

However, it is less likely that Russia considers a frozen conflict in south-eastern Ukraine as a sufficient instrument. It is thus highly likely that, in addition to the frozen conflict, Russia will use all of its political and economic leverage in Ukraine to divide and destabilize the Kiev government and to strengthen pro-Russian forces in Ukrainian politics in the long term in order to regain its dominance over Ukraine.

Russia has provided combat-decisive military equipment and other types of military support to the Russian-led separatists to an extent that has enabled the separatists to set up strong army units in Donetsk and Luhansk. Russian forces have also participated actively in the fighting in Ukraine. Russia has reduced its military presence close to its border with Ukraine. However, it is likely that Russia will maintain a military threat to Ukraine even in the long term, and Russia will still be able to launch military operations against Ukraine on very short notice.

Armed clashes still occur between separatists and Ukrainian government forces along the line of contact established under the February 2015 Minsk II Agreement. The fighting may unintentionally escalate into more extensive combat. However, there are no signs that Russia, at present, has the intention of letting the separatists launch extensive military

Nuclear weapons still play a vital role in Russian defence planning

Russia still gives a very high priority to its nuclear strike force, aiming for nuclear equality with the United States. As part of the START agreement complex with the United States, Russia has significantly reduced its arsenal of strategic nuclear weapons since the end of the Cold War. In addition, Russia has likely cut down the number of tactical nuclear weapons as well, though these weapons are not restricted by international safeguards agreements.

Russia still regards nuclear weapons as a key means of preventing both nuclear and conventional conflicts. It still appears from the Russian military doctrine that Russia not only predicts the use of nuclear weapons in response to a nuclear attack on Russia, but also in response to conventional aggression against Russia if this aggression threatens the survival of Russia as a state.

offensives to significantly expand the area under separatist control.

As long as the separatists are supported militarily by Russia, the Ukrainian forces will remain inferior, making it less likely that Ukraine will launch military operations to regain territory lost to separatist control. The Ukrainian forces have established defensive positions on their side of the line of contact.

Despite very different interpretations of the content of the Minsk II Agreement, there is presently a common understanding between Russia and Ukraine that the Minsk II Agreement is the best framework for handling the conflict in south-eastern Ukraine.

Crimea is not part of the Minsk II Agreement, and Ukraine will continue to claim its sovereignty over Crimea. However, the Ukrainian government is not actively pursuing the possibility of regaining control over Crimea. The peninsula remains dependent on Ukraine for electricity, water, food and other supplies, and this may complicate the political conflict between Russia and Ukraine.



CYBER THREATS AND CYBER ESPIONAGE

Espionage against Danish state institutions and private businesses still constitutes the most serious cyber threat to Denmark and Danish interests. This type of espionage is mainly conducted by state and state-sponsored groups. In recent years, cyber espionage against Denmark has increased significantly, and the methods and techniques employed by the perpetrators have become increasingly sophisticated. The threat from cyber espionage against Danish authorities and companies is very high. In the long term, it is highly likely that more states will exploit the Internet for offensive purposes.

Recent years have seen a significant rise in the number of attempted cyber espionage attacks against Denmark and Danish interests. A number of states have developed significant cyber capabilities that can be actively employed for espionage purposes against other states.

The threat against Danish authorities

The threat of cyber espionage against Danish authorities is very high. It is highly likely that several Danish authorities are prioritised targets for state and state-sponsored groups and that this trend will continue. As the hacker groups further develop their techniques and capacities, the risk that their attempts at espionage will be successful increases.

Some foreign states specifically target Danish authorities in an attempt to collect information on Danish foreign and security policy matters. Illustrative of this are several campaigns launched in 2015 by foreign states targeting the Danish central administration and other public authorities. The aim of the campaigns has been to meet foreign states' information needs regarding current Danish foreign and security policy.

Several of these cyber espionage attempts may thus be linked to Danish foreign and security policy.

The participation of Danish authorities in international negotiations and cooperation forums often leads to attempts at cyber espionage. In 2014, several Danish public authority employees were the targets of such attempts in connection with an international research project. A foreign intelligence service was behind the activity.

The threat against Danish companies

The threat of cyber espionage against Danish companies is very high. In recent years, several state-sponsored hacker groups have specifically targeted Danish companies.

A serious IT security incident that unfolded in 2014-2015 illustrates this. It involved a Danish company and one of its service providers, both of which were targets of cyber espionage for more than a year. The state-sponsored hacker group behind this incident gained access to the networks of both companies, thus gaining access to trade secrets stored

Cyber espionage and APT attack

Cyber espionage is increasingly used instead of other types of espionage. Espionage via the Internet is cheap and effective, and information can be collected over great distances and through third countries. This makes it harder to determine the identity of the perpetrator.

The espionage activities are often launched as so-called Advanced Persistent Threat (APT) attacks that are a particularly advanced, targeted and persistent kind of hacker attack, hence the name. An APT attack requires that the attacker is affiliated with or sponsored by an organization with sufficient economic resources, technical expertise and specific knowledge of the target. Most APT attacks are launched by foreign states.

The groups behind APT attacks operate with different agendas, which include collection of information of political, economic and military interest or information on the research and development activities of Danish and foreign companies. The attackers are persistent and will often work on an espionage target for years.

on various computers and servers. The group was also able to record sound from the built-in microphones in the companies' computers as well as create screen dumps and record keystrokes.

In the future, Danish companies will highly likely be the targets of even more sophisticated attempts at cyber espionage. This applies in particular to research-intensive sectors in which Denmark is among the market leaders, for example high-tech companies and pharmaceutical companies. In recent years, a number of Danish companies have most likely lost important trade secrets and intellectual property because of cyber espionage. The problem will grow as the hackers perfect their technical skills and use more advanced hacking methods. However, countermeasures adopted by companies

and authorities may make it harder and more costly for the hacker groups to access the IT infrastructure of their targets.

Advanced attacks on the rise

In recent years, state and state-sponsored hackers have grown more advanced in their methods and approaches. They are increasingly trying to conceal their activities and identities by using encryption and other techniques, such as Strategic Web Compromises (SWC). The latter is a technique by which hackers compromise specific websites to gain access to high-priority targets. If someone visits the compromised websites, an attempt to infect their computer will occur. The more advanced state-sponsored hacker groups that use this method will often combine SWCs with so-called white lists, restricting the attempted attacks to specific website visitors only. Mainly public authorities and target companies are on the white lists, not private individuals.

Nonetheless, hacker groups still mainly use spear phishing emails to compromise their targets (see below).

In addition, the state-sponsored hacker groups are increasingly using organizations whose networks they have already gained access to as platforms for attacking more targets with greater security awareness. As already mentioned, these targets often include authorities and companies within research-intensive sectors.

Conflicts will also be fought online

It is highly likely that more states will attempt to exploit the Internet for offensive purposes in their military operations. Currently, several states are developing offensive military capabilities with the aim of using the Internet to launch attacks at, for instance, the Information and Communication Technology (ICT) infrastructure that supports the provision of telecommunications, energy and water supply, industrial control systems and the transport infrastructure. In several instances, such capabilities have been tested successfully against European countries. It is likely that, if a conflict were to erupt between states with significant cyber capabilities, national infrastructure that supports functions vital to society would become a target. No attacks against this type of vital infrastructure have been observed in Denmark.

Denmark will likely grow increasingly vulnerable to cyber sabotage as more infrastructure elements, including industrial control systems, are connected to the Internet. In the short to medium term, it is highly unlikely that functions vital to Danish society would be the target of cyber sabotage.

Spear phishing

In an IT security context, the concept of spear phishing involves attempts by an attacker to obtain information about a user or to gain unauthorized access to the user's computer network, for instance by stealing the user name and password or installing malware. Most often, hackers start their spear phishing attempts by sending the user an email and by using so-called social engineering (see below), through which the user is manipulated into entering personal user data or opening a malicious attachment.

Social engineering

Social engineering is an attack method that involves manipulating the user into performing certain actions or into unknowingly passing on confidential information. In the context of IT security, the phrase is used to describe emails or websites that seem legitimate at first glance, but which, in fact, contain malware. In order to be effective, social engineering requires certain knowledge of the user.

Malware

Malware is software specifically designed to disrupt or damage a computer system. There are different kinds of malware, including viruses, worms and Trojans. However, advanced malware typically has functionalities that cut across these categories.

If an armed conflict were to erupt between a state holding cyber capabilities and Denmark, or a coalition with Danish participation, functions vital to Danish society would likely become the target of cyberattacks.

Diminished threat from non-state actors

Non-state actors, including ISIL, have expressed an interest in launching cyberattacks against vital functions. Nevertheless, in the short to medium term, it remains highly unlikely that terrorists will be able to launch harmful cyberattacks of this type, as they lack the prerequisite capabilities. A few Islamist militants are likely capable of launching simple cyber operations, such as Distributed Denial of Service (DDoS) attacks. Terrorists will be more prone to use the Internet for propaganda purposes, for instance by issuing threats against military personnel.

Minor DDoS attacks have been launched against public

websites by private individuals and small groups of so-called hacktivists who try to generate attention around a certain issue. Thus, hacktivists mainly target organizations that have a political, geographical or other affiliation with the subject in question. The politically motivated attacks have resulted in websites being taken over by hacktivists and used for dissemination of propaganda or, as was the case with the April 2013 attack against the Danish NemID log-in service, overload of a critical component, resulting in system breakdown. This kind of political activism will highly likely continue.

As a result of the easy online access to tools that can launch DDoS and other kinds of attacks, hackers do not need to have particular technical prerequisites to disrupt Danish websites and servers. In addition, technically skilled private individuals could still hack into even major government and private organizations if these organizations do not focus on security awareness.

Threat evolves from insufficient supplier security

Due to the extensive use of service providers by authorities and companies, malicious activities against, for instance, an operations service provider may have a strong negative impact on the cyber security of an organization. Illustrative of this trend is the compromise of several systems belonging to the Danish police through an attack against the service provider CSC.

Devices with low security quality in the IT and telecommunications infrastructure pose a risk as malicious actors are known to exploit weaknesses in, for instance, routers to conduct espionage or sabotage. In a few cases, the weaknesses are the result of integration of malware or remote-controllable components into the devices or software during production. More frequently, weaknesses in devices and software are the result of substandard quality in the processes of the producer or supplier. Many hardware and software components have become complex to the point where even major international companies and government organizations find it difficult to test the security of services, software and devices.

The Centre for Cyber Security is the National Regulatory Authority on information security in the telecommunications sector, and its supervision of the Danish telecommunications providers includes agreements with the providers regarding the scope of their information security efforts.

If public authority or private company employees fail to

observe in-house security policies when using their IT devices, it increases the risk of outsiders gaining access to internal company networks and stored information.

Mobile phones have thus become a key entry point for attacks launched by criminals and state-sponsored hackers, and there has been a significant increase in the amount of malware specifically targeting the operating systems used in smartphones and tablets.

Malicious actors are highly likely capable of tapping into the contents of mobile units, tracking their position or activating the device's built-in functions, such as microphones and cameras, without the user detecting it.

Centre for Cyber Security

The Centre for Cyber Security's key mission is to strengthen the protection of the ICT infrastructure that supports functions vital to society and to strengthen the nation's capability to resist advanced cyberattacks. Organizationally attached to the DDIS, the Centre has access to the special intelligence-based knowledge about cyber issues available to the DDIS. The Centre advises relevant authorities and companies on cyber-related issues and provides a Network Security Service to the same circle of clients.

The mission of the Centre's Network Security Service is to protect clients against advanced cyberattacks, for instance through detecting signs of intrusion in the Internet traffic of the connected authorities and companies.

The Centre for Cyber Security advises on preventive measures and issues guidelines and recommendations, including the 2014 joint recommendations by the Centre and the Danish Agency for Digitisation on the strengthening of the state's outsourced IT operations to reduce the risks and consequences of security breaches at the supplier level.

The Centre for Cyber Security is the National Regulatory Authority on information security in the telecommunications sector, and its supervision of the Danish telecommunications providers includes agreements with the providers regarding the scope of their information security efforts.



THE MIDDLE EAST AND NORTH AFRICA

Islamic State in Iraq and the Levant (ISIL) and its regional affiliates will exploit the instability and wars that will continue to characterize the Middle East in the short to medium term. Also, the conflicts will continue to generate pressure from refugees. ISIL and regional great powers Iran and Saudi Arabia contribute to exacerbating tensions between Sunnis and Shiites in local conflicts in the region.

Since the so-called Arab Spring, the Middle East and North Africa have been riddled with divides and regional uprisings, reflected over the past four years in several civil wars, deepening religious tensions between Sunni and Shia Muslims, progress for Islamist terrorist groups and increased involvement by regional great powers. Also, Russia and the West in general, and the United States in particular, have become militarily involved in the conflicts in the Middle East. These trends pointing towards increased conflict have grown and will continue in the short to medium term.

The conflicts in Syria, Iraq, Libya and Yemen will not be resolved in the short to medium term, and they have significantly weakened or completely broken down the state structures in the four countries. The wars will also continue to impact the neighbouring countries, resulting in political turmoil, strained regional economies and influx of refugees. In addition, countries such as Egypt, Tunisia and Algeria will be intermittently riddled with internal unrest and terrorist attacks.

The regional conflicts are rooted in fundamental political, social and economic problems. In the short to medium term, the individual states will not be able to solve the national conflicts, which will increasingly grow into regional challenges, resulting in political turmoil and increasing waves of refugees. In Syria alone, more than 12 million people have been displaced, many of whom have sought refuge in neighbouring countries such as Jordan and Lebanon, where the enormous pressure from the massive influx of refugees is taking its toll on the countries' fragile political and economic balance.

THE FIGHT AGAINST ISIL

The fight against ISIL will be enduring. In the medium term, ISIL will likely still control a belt of unbroken territory in the Sunni-dominated areas stretching across Syria and Iraq. Resistance against ISIL in Syria and Iraq will remain relatively weak and reliant on massive external assistance.

Conditions will continue to be in ISIL's favour in the years to come. The weak state structure and the deep ethnic-sectarian and political divides in Iraq as well as the internal conflict in Syria – which facilitated the growth of ISIL – will

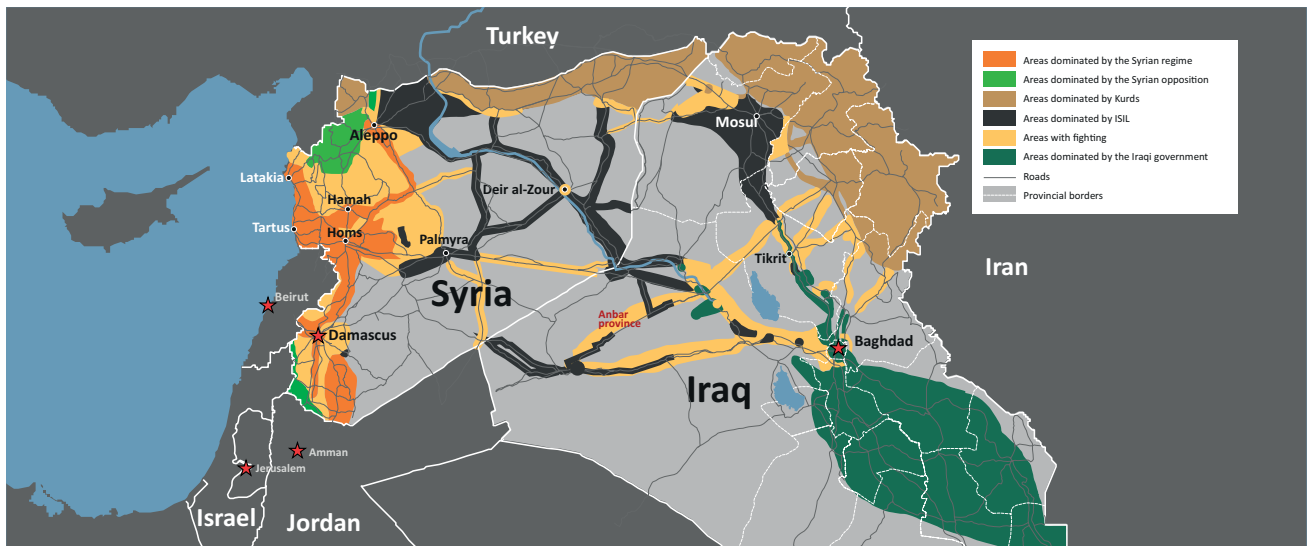
In the context of the Middle East conflicts, the divide between Sunni and Shia Muslims appears increasingly unbridgeable, and the divide is fuelled by terrorist groups and state actors alike. ISIL is deepening and exploiting Sunni and Shia tensions, and regional powers Saudi Arabia and Iran are also expanding the ethnic-sectarian divides nationally. The rivalry between Shiite Iran and the Sunni Arab Gulf states will continue through local proxies. The oil-rich Gulf states support Sunni actors such as the armed opposition in Syria, the Sunni tribes in Iraq and the military governments in Egypt, Yemen and Libya. Iran, on the other hand, supports the Assad regime in Syria, Shia groups such as Hezbollah in Lebanon and Syria, Iraqi Shia militias and the Houthi rebels in Yemen.

The conflicts in Syria and Iraq are also impacted by external interests due to the fact that countries including the United States, Russia, Turkey and, to a certain extent, European countries have become involved.

ISIL and its many affiliates will continue to exploit the overall instability and the porous borders in the region, thus increasing the terrorist threat regionally. Due to its presence in Syria and Iraq, ISIL is already negatively impacting developments in Lebanon, Jordan and Turkey just as ISIL affiliates in Egypt and Libya are influencing developments in North African countries, including Tunisia and Algeria. ISIL's rivalry with other militant groups such as al-Qaida does not weaken the capability of either ISIL or al-Qaida to spread terror and conflict in the region. On the contrary, the emergence of ISIL has introduced the Middle East to a new and strong regional actor that has increased the terrorist threat in the entire region.

still be present in the medium term.

The air support provided by the international coalition will extensively remain decisive in tactical standoffs with ISIL.



The military situation in Syria and Iraq, October 2015

Supported by local partners in Iraq, the coalition successfully halted ISIL's advance in June 2014 and secured military progress in some areas, most notably along the Kurdish areas in Iraq and Syria. Russia's reinforced involvement in Syria will not substantially impact the fight against ISIL, as the reinforcement is mainly focused on stabilizing the Assad regime.

On the ground, the fight against ISIL is slow and is mainly taking place on the periphery of areas under ISIL control. Besides the coalition success along the Kurdish areas in Iraq and Syria, the April 2015 recapture of Tikrit, Iraq, is still the most significant victory for the coalition and its local partners. ISIL, on the other hand, has been successful in Syria – capturing Palmyra and attacking western and southern Syria – and in Iraq, capturing Ramadi, the capital of Anbar province.

Weak and divided resistance from local partners against ISIL

The slow progress in the fight against ISIL is, in part, the result of the limited and divided resistance from local actors. The Kurds in Iraq and Syria have thus confined themselves to the Kurdish areas, showing little interest in and having limited capacity to engage ISIL far outside these areas. This trend will likely continue in the medium term, especially if the Kurds choose to more assertively pursue their ambitions of an independent Kurdistan.

In Iraq, the Sunnis will, in many ways, be pivotal in the efforts

to defeat ISIL. Widespread Shiite fear that Sunnis may turn their weapons against Shiites instead is still one of the key reasons why the central government is hesitant to arm the Sunni community.

The Iraqi security forces will be too few in number and too poorly trained to significantly shift the balance in the fight against ISIL in the medium term. The most effective units will continue to be concentrated in and around Baghdad to protect the capital. The Shiite militias, including the Popular Mobilisation Units (PMU), which have been decisive in winning the largest local victories, will have difficulties fighting ISIL for sustained periods of time deep inside Sunni-dominated areas, such as Anbar and Mosul.

Even though many Iraqis support the coalition effort, Iraqis have, on occasions, criticized the coalition air campaign, threatening to withdraw from the fight against ISIL. Dissatisfaction has been voiced by Sunnis, who regard the coalition as a Shiite militia ally, and by Shiites, who accuse the coalition of bombing positions belonging to the Iraqi security forces and of supporting ISIL.

The fight against ISIL in Syria is more complex due to the absence of a cooperating state partner. The Assad regime still lacks the incentive as well as the capability to provide a strong military effort in eastern Syria, an ISIL stronghold. The armed Syrian opposition is too divided and weak to defeat ISIL. In some locations, the armed opposition is also fighting the Nusra Front, an al-Qaida affiliate.

ISIL adjusts its strategies

Following the intervention by the international coalition in 2014, ISIL has adjusted its strategy. Having pretty much abandoned the use of large weapons systems such as tanks and rocket launchers, the organization is now engaged in a mix of conventional warfare, insurgency and terrorist campaigns. Militarily, ISIL's decentralized command structure and its ability to engage in asymmetrical warfare make it harder to deploy coalition air support. Also, the fight is increasingly unfolding inside the cities, complicating the identification of military bombing targets and increasing the risk of civilian casualties.

IRAQ

The divide between the Iraqi communities will be counterproductive in the fight against ISIL, and much of the country will remain outside government control in the medium term. Iran will remain the dominant regional actor in Iraq in the short to medium term. There are no prospects of national reconciliation between Iraqi Shiites and Sunni Muslims.

The conflict with ISIL and the internal gap between the Iraqis have left large parts of Iraq grappling with the absence of a state power, and the precariousness of the security situation will impact on the neighbouring countries. Despite opposing interests, Iraq's neighbours will continue to have converging interests in the resolve to prevent the ISIL threat from growing and in the ambition to not see a divided Iraq. In the short term, Iran's influence will far outweigh that of its rival, Saudi Arabia. Iran will maintain its strong involvement in Iraq to preserve its interests in a united Iraq headed by a Shiite pro-Iran government.

Division among Iraqis will persist

Despite promises of increased Sunni inclusion and democratization, Shiites will continue to dominate the political system and the security apparatus. This will do nothing to bridge the divide between Iraq's various ethnicities, and Iraq is, in effect, turning into a divided state with Shiite dominance in the south and Baghdad, Sunni dominance in the western and north-western part of the country and Kurdish dominance in the eastern and north-eastern parts of Iraq.

Financial challenges will not make ISIL collapse

Even though ISIL will be facing financial challenges in the medium term, this, in isolation, will not be sufficient to cause the organization to collapse. The coalition bombing campaign has reduced ISIL's income from oil, which used to be its key source of income. Consequently, ISIL is increasingly drawing on its alternative sources of funding, in particular taxation, extortion of companies and wealthy individuals, kidnap ransoms and donations from private sympathizers.

Through different political initiatives, the Iraqi unity government has tried to reconcile Iraq's Shiite and Sunni communities. However, Shiite opposition has hampered Prime Minister Haidar al-Abadi's reconciliation efforts, and the Iraqi Sunni politicians are also far from stable supporters of his reconciliation initiatives.

Many Iraqi Sunnis still regard al-Abadi as a militant Shiite and a puppet of Iran. Continued attacks by, in particular, Shiite militias will contribute to deepening Sunni suspicion of the central government in Baghdad. Part of the Sunni community will thus find ISIL to be less of an evil than Shiite dominance and will opt to actively support or tacitly accept the organization.

Though internally divided, the Kurds are united in their wish for independence. The Iraqi Kurds will continue to make resolved efforts towards Kurdish autonomy and control over oil-rich Kirkuk. This may lead to armed clashes between Kurds and the Iraqi Army or Shiite militias over control of Kirkuk.

SYRIA

There are no prospects that either of the parties to the Syrian civil war will be able to win by military means, and chances are slim that a politically negotiated solution will bring peace. Russia's engagement in Syria will shift the balance of the conflict to Assad's advantage but will not determine its outcome. Syria will be fraught with unrest and instability in the long term.

The military setbacks suffered by the Assad regime in the first half of 2015 are the key reason behind Russia's military intervention into Syria starting in September 2015. Opposition progress in north-western Syria in particular has threatened the core Assad territory towards the coast, where Russia already has a military presence.

Aided by Russian forces, the Syrian regime forces have won back the military initiative, halting the progress of the armed opposition. Iran has also stepped up its support. Both factors will improve the Assad regime's scope of securing the regime's prioritized areas around Damascus, along the coast and the main cities in western Syria. Still, it is less likely that this will be sufficient to secure the Assad regime full control over the entire western part of Syria. ISIL will continue to dominate eastern Syria.

It is highly unlikely that the Russian support will be enough to bolster the Assad regime to the point where it can win the conflict by military means in the short to medium term. Four years of war have fatigued the Syrian military, and the regime has to carefully consider where to deploy its increasingly scarce resources. The main problem facing the Assad regime is lack of troops. However, the Russian intervention has tipped the balance on the battlefield in Syria, improving the negotiating position of the Assad regime internationally. Russia has made itself an unavoidable part of the solution to the conflict.

The conflict in Syria has evolved from an internal insurgency during the so-called Arab Spring in 2011 to a conflict that is strongly influenced by external interests. The conflict has not only prompted Russian intervention, it is also part of the regional rivalry between Iran and Saudi Arabia and Turkish and US interests. The survival of the Assad regime hinges on sustained economic and military support from Russia, Iran and Lebanese Hezbollah. Also, support for the opposition efforts from the Sunni Arab states will likely continue even in the long term.

No prospect of peace in Syria

The prospects of the international community successfully reaching a politically negotiated solution to the hostilities are

remote. However, as the conflict drags on, both Russia and the United States seem more open to political compromise. Russia and the United States as well as the rest of the West have an interest in the preservation of the Syrian state structure.

A political solution involving the ousting of President Bashar al-Assad, the preservation of parts of the Assad regime and the inclusion of some opposition elements seems less likely and would fail to bring an end to the civil war. Such a solution may change the dynamics of the conflict, provided that it is backed by the international community.

The Assad regime is likely willing to let certain political opposition elements participate in some kind of coalition government, though not to an extent that would threaten the dominance of Assad and his supporters. Some political opposition groups seem willing to enter into such a government. But regardless of progress in the political process, the entry of these groups into a coalition government would have little effect on the battlefield as the political opposition generally only has very limited influence on the armed opposition.

The multifarious composition of the armed opposition has strongly contributed to the longevity of the conflict. The opposition comprises a multitude of heterogeneous groups that are increasingly dominated by extremist Islamist groups. In addition, ISIL and the Syrian al-Qaida affiliate Nusra Front are playing prominent and independent roles in the conflict. Adding to the diversity are the Syrian Kurds, who, through the Kurdish YPG militia, consolidate their position in the Kurdish areas.

Although President Assad's own Alawi backers, the Christians, the Shiites and the other minority groups seem fatigued by war, they see no alternative than to support the regime, making a coup d'état against President Assad less likely. Even if Assad were to be dislodged, this would not be enough to halt the fighting, as the civil war has developed its own negative dynamics and now involves a multitude of parties, none of whom are willing to compromise.

IRAN

In the short term, the newly forged nuclear agreement will not signify a shift in Iran's foreign and domestic course. Iran will maintain, and if necessary reinforce, its political and military support for allies and Shiite groups in, particularly, Iraq, Syria, Lebanon and Yemen. In the short term, Iran will maintain strong cultural, religious and political control.

In the short term, the international nuclear agreement, forged in the summer of 2015, does not herald a new course in Iranian foreign and domestic policy. Supported by conservative regime elements, including the Revolutionary Guards, Iran's supreme leader Ayatollah Ali Khamenei will maintain the final say in all key foreign and domestic policy issues, in effect preventing the nuclear agreement from evolving into political and cultural rapprochement between Iran and the West.

Khamenei will offer limited support to the efforts by moderate President Rouhani to continue a more open dialogue with the EU and Iran's Arab neighbours on a strengthening of trade relations.

In the short term, Iran will highly likely observe the terms of the agreement even though it will prevent Iran from producing nuclear weapons materials at its known enrichment facilities undetected. The agreement meets most of Iran's demands, facilitating the preservation of all existing nuclear facilities and the right to enrich uranium. In addition, the agreement provides for the lifting of the economic sanctions against Iran as soon as the International Atomic Energy Agency (IAEA) is satisfied that Iran is honouring the terms of the agreement. This will likely happen sometime in 2016.

In the medium term, Iran will likely gradually start interpreting the agreement more loosely once the economic sanctions have been lifted, thus challenging the limitations it imposes on the country's nuclear programme.

Iraq, Syria and Lebanese Hezbollah remain top regional priorities to Iran

Regionally, the nuclear agreement will enable Iran to keep up its political and military support for allies and Shiite groups in Iraq, Syria, Lebanon and Yemen. Iran will thus continue to back the Shiite militias in Iraq, Hezbollah in Lebanon, the Assad regime in Syria and the Houthi movement in Yemen. The lifting of the economic sanctions against Iran could free up funding for these groups. However, it is unclear whether Iran will choose to boost its support for these groups. Iran will only choose to do so if Iranian security interests in Syria, Iraq or Lebanon are jeopardized.

From Iran's perspective, the conflicts in Syria, Iraq and Yemen are the result of attempts by hostile powers, such as Western countries and Saudi Arabia, to limit Iranian influence and curb its regional interests.

Iran will support a united Iraq headed by a pro-Iran and Shiite-dominated government. Iran will thus continue its military and economic support for the Shiite militias in Iraq and will nurture its close political ties to Shiite senior politicians and Shiite militia leaders. Iran would only resort to large-scale deployment of troops if Baghdad were on the brink of falling under insurgent control or if ISIL were on the verge of spilling over into Iran.

In Syria, Iran has, acting in coordination with Russia, stepped up the military support to the Assad regime. Maintaining influence in Syria is a strategic objective to both countries. The enhanced Iranian support mainly includes special Revolutionary Guard units and Iranian-controlled Shiite militias from Iraq. Despite the enhanced Iranian support, it is less likely that Iran will deploy regular Army units to Syria.

In the short term, Iran will continue to provide very limited military and economic support for the Houthi movement in Yemen. Even though the progress of the Houthi movement in Yemen enables Iran to obtain a strategic edge on Saudi Arabia, Yemen still ranks below Syria and Iraq as a vital security interest to Iran.

Iran will maintain strong cultural, religious and political control. Despite the nuclear agreement and the prospect of a victory for Rouhani and his moderates in the February 2016 parliamentary elections, Rouhani will find it difficult to implement political, social and cultural reforms in the short term. Ahead of the 2017 presidential election, Rouhani will likely focus on ensuring economic reforms and on improving living conditions for the average Iranian.

However, in the medium term, it is possible that the effect of increased trade and contact with the West, as well the potential of a strong popular mandate for Rouhani's moderate course in the 2017 presidential election, will bring changes to Iran that will translate into lessened cultural, religious and political control.



THE ARCTIC

Russia's political and military activities in the Arctic reflect the country's idea of itself as a leading Arctic power. Russia continues to pursue a cooperative path, although a more challenging track in Russia's Arctic policy is beginning to emerge. This will not replace the cooperative approach pursued by Russia in the Arctic for several years. It will, however, constitute a parallel track, which may at times come to dominate relations between Russia and the other Arctic states. In addition, in recent years, Russia has initiated a military build-up in the Arctic aimed at ensuring control of the North East Passage and protecting Russia's northern areas against military threats. The military build-up and activity are militarily defensive, but at the same time politically offensive. Over the past few years, China's ambition for access to natural resources outside China has sparked increased Chinese interests in the Arctic, including Greenland.

RUSSIA IN THE ARCTIC REGION

Russia considers itself the leading Arctic power, which is reflected in the leadership's political priorities and military activities in the region. This self-perception is not only manifested in the Russian leadership but is also shared by the Russian population. Although relations between Russia and the West have been significantly strained by the Ukraine crisis, Russia pursues an overall cooperative approach on Arctic issues. However, Russia has toughened its Arctic policy over the past year. Key Russian politicians have repeatedly hinted at potential conflicts between Russia and the West on Arctic issues and emphasized the importance of Russia establishing clear objectives regarding its national interests to maintain Russia's claim to the Arctic region. The statements are backed by propaganda campaigns, including a visit to the North Pole in April 2015, which was set up to create an image of the Arctic as closely tied to Russian national identity.

This development reflects that the political and military leaderships' Arctic rhetoric and conduct in the Arctic deviate from the cooperative approach. A new and more challenging track in Russia's Arctic policy is thus taking form. In the coming years, this track may overshadow the previous cooperative approach at times.

There are no indications that Russia will abandon the UN track on the border demarcation issue or its cooperative stance on issues related to the environment, fishing, indigenous peoples and search-and-rescue. This is the case not least due to Russia's economic interests in the region, including the development of the North East Passage as a transportation lane and Russia's need for technological support for its energy projects in Russia's Arctic territories.

However, should the cooperative political approach fail to meet the Russian leadership's political strategic objectives in the Arctic, Russia will likely be willing to pursue its national interests in the Arctic at the expense of international cooperation, even if it means jeopardizing its economic interests.

Maritime demarcation process fraught with uncertainties

Denmark and Greenland will face a number of uncertainties in the Arctic in the coming years, most of which will revolve around the issue of the demarcation process between Russia and the Kingdom of Denmark. In the short term, Russia and Denmark may initiate negotiations on the issue of the maritime demarcation line. However, the negotiations could potentially drag on until the UN Commission on the Limits of the Continental Shelf has processed Denmark's, Canada's and possibly the United States' territorial claims to the Arctic continental shelf. Consequently, a solution may not be reached until after 2030, leaving the demarcation issue unresolved for a long period of time. In this case, Denmark would be forced to take a stance on Russia's military and political activities in the area to which both countries have submitted claims.

A possible outcome from the UN Commission on the Limits of the Continental Shelf concerning the conflicting territorial claims submitted by the Arctic states may be that parts of the Russian claims are rejected within one or two years. Such a recommendation from the UN Commission will likely be disregarded by Russia and could potentially complicate a subsequent demarcation of the border. An alternative outcome may be the backing of the Russian claim by the UN Commission. Under this scenario, parts of the Russian leadership may push for Russia's rights to the area, citing the UN Commission's recommendations and disregarding that consensus with Denmark on the issue of demarcation is pending. This means that Russia has yet to establish its legal claim to the area. In this case, disagreements over exploitation rights to the seabed and regional control may be intensified.

Russia expands its military presence in the Arctic

Despite its economic crisis, Russia has expanded its military presence, activity and capability in the Arctic region. This is a significant expansion which has escalated in recent years,

although from a low starting point. Consequently, Russia now has several military units capable of conducting operations in the Arctic, including its three brigades on the Kola Peninsula and a likely fourth brigade in the north-western part of Siberia. All of them will, to a certain extent, be specially equipped and trained to conduct military operations in the Arctic.

The nature of Russia's military expansion in the Arctic is primarily defensive. Russia is focused on establishing full control of the North East Passage, for instance by constructing six advanced bases on the Russian islands in the Arctic Ocean. Also, Russia is increasingly focusing on handling possible military threats and relocating its line of defence as far north as possible. Russia's military build-up is thus mainly defensive in nature, even though the initiatives contain elements that are politically offensive.

CHINA IN THE ARCTIC REGION

The Arctic and Greenland are not among the Chinese leadership's top foreign policy priorities. Over the past few years, however, China's ambition to gain access to natural resources outside of China has also increased its interest in the Arctic, including Greenland. Rapid growth in the industrial production sector has raised China's demand for energy and minerals. In its quest to secure access to strategically vital raw materials, China is investing in natural resource extraction in most parts of the world.

At the same time, China is interested in opportunities that may unfold when transit via Arctic shipping lanes becomes commercially viable. In this context, the North East Passage north of Russia is especially relevant, as it holds potential to facilitate significantly shorter and cheaper routes to Europe, depending on additional costs, such as those for Russian ice breakers and pilot assistance. Arctic shipping lanes would offer an increasing number of alternative transport routes for China, reducing the country's vulnerability to potential closures of transportation routes south of Asia.

In a bid to prevent the coastal states from exercising exclusive influence in the region, China is interested in gaining influence on developments in the Arctic region. Along with a number of other countries, China gained permanent observer status on the Arctic Council in May 2013, and China will gradually try to boost its influence in the Arctic. Through increased research and commercial cooperation with the Arctic states, China is

Russia's military build-up in the Arctic is a political signal that Russia considers large areas of the Arctic to be part of the Russian sphere of interest and that it is ready to defend its interests in the region. By use of the military build-up and activities, Russia likely wants to demonstrate its ability to use military force in extended parts of the Arctic. However, the new Russian units are not very suited for deployment outside Russia's vicinity.

As demonstrated in an April 2015 Russian-led exercise, Russia has both the capability and intent to launch operations in the Arctic. Russia's military focus in the Arctic region indicates that it has strong Arctic interests, which it feels an increasing need to protect, and that the Arctic region is a key element of Russia's strategic and security policy course.

strengthening its influence in the Arctic in the short term.

As economic engagement in the Arctic intensifies, China will bolster its strategic interests in the Arctic region in the medium to long term.

Chinese investments in Greenland may increase vulnerability

A number of Chinese companies, investment banks and authorities are showing an interest in greater economic engagement in Greenland, particularly in the field of raw materials, including iron, copper and uranium but also in rare earth elements. Rare earth elements are important as they constitute key components in the development and production of high-tech products in the defence industry as well as green technology and civilian IT technology industries.

Due to close ties between Chinese raw materials companies and the Chinese political system, major investments in Greenland face a certain level of risks as large-scale investments impact significantly on small economies such as the one in Greenland. Therefore, investments in strategic resources are potentially prone to political interference and pressure.

In addition, the Chinese authorities demand that the investments of Chinese state-owned enterprises have to be commercially viable. Consequently, Chinese companies

involved in the extraction of raw materials have to adhere to a strict schedule of priority when deciding which markets to focus on. This might also apply to Chinese companies engaged in the Arctic region.



CHINA

China is pursuing an increasingly confident and ambitious foreign policy aimed primarily at strengthening China's economic and political clout in the Asia-Pacific region. Because of this, regional competition between China and the United States will intensify, and tensions between China and Russia are also likely to increase.

The Chinese leadership and President Xi Jinping have strengthened China's foreign policy. The current Chinese leadership has re-centralized China's foreign policy decision-making process, and President Xi Jinping has taken more control of China's foreign and security policy than his predecessors. Xi Jinping will personally work to ensure that China assumes a position in international politics and the global arena that reflects China's growing international importance. This also entails greater involvement of China's armed forces in operations abroad.

The Chinese leadership is more willing than earlier to launch initiatives that attract international attention. By doing this, China will possibly enhance its global influence, but China will also be more exposed to foreign policy risks and international criticism should its initiatives fail to meet international standards.

China's regional strategy challenges the United States. China is not challenging the United States on a global scale. However, China's increasingly active Asia-Pacific role is intensifying Sino-US competition in the region. In this context, China will benefit from its central location in the region and from the circumstance that the United States is likely to be more involved than China in crises in other parts of the world in the short to medium term.

In the medium to long term, China will likely play a dominant role in the region's economic affairs. However, China's neighbours will seek to balance their dependency on China by seeking closer ties with the United States, particularly concerning security-related matters.

China pushes for regional economic integration

The Chinese leadership aims to strengthen China's influence in its neighbouring countries by promoting increased regional economic integration. To this end, the Chinese initiative of establishing maritime and land-based trade routes and transport corridors leading from China to Europe, the so-called One Belt, One Road initiative, will provide a general and flexible framework for investments that promotes China's economic integration with countries in Central, South, and South East Asia.

China's multilateral Asian Infrastructure Investment Bank and newly established Chinese investment funds such as the Silk Road Fund will promote the introduction of technical standards and regulations governing regional economic integration that will likely benefit Chinese state-owned enterprises and other major companies in the region. This is ensured by Chinese investments in intergovernmental infrastructure projects that will form the basis of improved regional transport possibilities and thus also increased regional trade in the medium to long term.

In the long term, the Chinese leadership's ambitions regarding regional economic integration also include the establishment of a free trade agreement that will allow China to play a pivotal role in the regional trade agenda. China's pursuit of a regional free trade agreement will compete against the US-led regional free trade agreement, the Trans-Pacific Partnership.

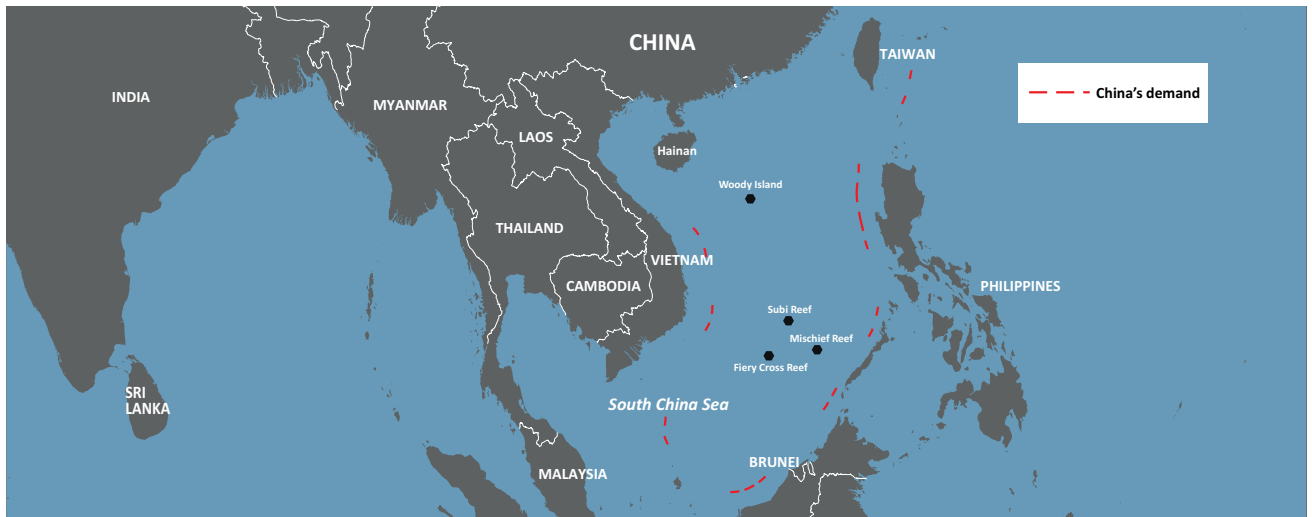
China expands its presence in the South China Sea

China will continue to expand its military facilities on the newly built artificial islands in the South China Sea. The Chinese leadership's regional economic policy is not accompanied by increased openness to compromise on issues related to China's current maritime disputes with several of its neighbouring countries.

In the long term, China will be able to use the artificial islands in the South China Sea as operating bases for the Chinese coastguard as well as for naval and air activities in the southern part of the South China Sea. China will highly likely use the artificial islands to expand its military presence in order to bolster China's territorial claims in the area.

In the short to medium term, it is less likely, though, that China will be capable of monitoring and enforcing an Air Defense Identification Zone over the South China Sea corresponding to the one established by China in the autumn of 2013 in order to monitor the parts of the airspace over the East China Sea that China considers Chinese territory.

Central Asia is a source of tension between China and Russia. China will gradually expand its influence in the Central Asian countries, raising the risk of sparking tension between China



China's demand in the South China Sea

and Russia in the short to medium term, as Russia perceives Central Asia to be part of the Russian sphere of interest.

The Chinese leadership will push to strengthen and expand China's economic, transport and security policy cooperation with the Central Asian countries through the Shanghai Cooperation Organization. In addition, China's regional investment funds will increase their funding of development projects and regional infrastructure projects.

Russia is becoming increasingly wary of the development and priorities of China's foreign policy. Russia has long feared the growing Chinese influence in Russia's neighbouring areas. However, Russia's and China's strategic interests converge when it comes to countering US influence, both globally and regionally. In addition, Russia's strained relations with the

West and the country's economic crisis will force the Russian leadership to enhance the economic ties with China.

Chinese cyber espionage

China has extensive access to cyber espionage tools and methods. Several Chinese authorities, including the Chinese military, have publicly been criticized by the West for orchestrating large-scale cyber espionage campaigns against a large number of foreign targets. China uses its cyber capabilities to collect information that may help promote its economic growth and information of political and military importance.

WEAPONS OF MASS DESTRUCTION

Based on the Iran nuclear agreement, it is highly unlikely that Iran will be capable of developing nuclear weapons undetected in the long term. North Korea is still expanding its capabilities to produce weapons of mass destruction. North Korea is likely willing to spread this capability to other countries.

In July 2015, Iran and the P5+1 countries (the United States, the United Kingdom, France, Russia, China and Germany) signed the so-called Joint Comprehensive Plan of Action (JCPOA). The JCPOA establishes greater transparency and allows the international community to exercise greater control of Iran's nuclear activities, as the International Atomic Energy Agency (IAEA) will monitor Iran's compliance with the technical aspects of the agreement. Both Iran and North Korea are continuing development of their ballistic missile programmes.

The agreement reduces Iran's nuclear capabilities

The JCPOA grants the IAEA increased access to inspect and monitor Iran's nuclear facilities, making it virtually impossible for Iran to produce fissile material for nuclear weapons undetected at declared Iranian nuclear facilities.

Under the agreement, Iran's active uranium enrichment capabilities will be cut in half for a 10-year period compared to its capabilities before the signing of the agreement. For the next ten years, operating and non-operating centrifuges for uranium enrichment will be under continuous monitoring by the IAEA, and there will be restrictions on the types of centrifuges Iran can use and further develop. In addition, Iran is to redesign the Arak heavy water reactor, making it unsuitable for production of fissile material for nuclear weapons.

Significant improvement of the international monitoring of Iran's nuclear activities

The agreement has improved the IAEA inspection regime. Under the agreement, Iran must allow the IAEA access to non-declared nuclear facilities within 24 days, and it also includes a dispute resolution mechanism in case of potential disagreements. In addition, a procurement channel has been created to monitor Iran's purchase of nuclear-related material and components for its civilian nuclear programme.

The agreement makes it highly unlikely that Iran will be capable of supporting a potential clandestine parallel programme designed to produce fissile material through procurements via the monitored procurement channel. However, Iran could still conduct illicit procurement activities by bypassing this procurement channel.

Safeguards agreements and the IAEA

The international Nuclear Non-Proliferation Treaty (the NPT) requires all non-nuclear weapon states to sign a so-called Safeguards Agreement with the IAEA. This agreement regulates IAEA's inspection and control efforts in the country concerned.

The signing of the Additional Protocol of the Safeguards Agreement will allow the IAEA extended access to the country's undeclared facilities.

The purpose of IAEA safeguards is to verify that the information disclosed by a state about its nuclear activities is correct and complete as well as to ensure that nuclear material or equipment is used for peaceful purposes only.

Duration of the agreement and the time beyond

For the duration of the agreement, the inspection regime will render it highly unlikely that Iran will be capable of covertly pursuing nuclear weapons capabilities. In addition, it is highly unlikely that Iran will be capable of concealing a potentially existing clandestine parallel capacity to produce nuclear weapons for the duration of the agreement.

The agreement recognizes that Iran has a right to enrich uranium and allows the country to build a nuclear capacity 10 to 15 years into the agreement, enabling Iran to quickly develop nuclear weapons. However, such efforts would require major economic and technological resources.

According to the agreement, Iran is obligated to sign the Additional Protocol of the Safeguards Agreement with the IAEA under the Non-Proliferation Treaty. See box.

Following the termination of the agreement, continuous IAEA presence in Iran will provide insight into the scope and purpose of Iran's nuclear activities.

Iran's missile programme seems unaffected by agreement

One of the most advanced in the Middle East, Iran's ballistic missile programme is capable of striking targets as far away as south-east Europe. Under the agreement, the current UN sanctions on the Iranian ballistic missile programme will be lifted no later than eight years after the implementation of the agreement.

Iran is in the process of developing missiles with increased range and better accuracy. A better accuracy would increase the threat from Iranian conventional missiles.

North Korea continues to develop ballistic missiles

North Korea is likely in the process of developing a nuclear weapon that can be delivered by a ballistic missile. The country is also developing missiles with even longer ranges. In the long term, North Korea will likely be able to develop operational ballistic missiles capable of reaching NATO territory.

In 2013, North Korea began expanding a ballistic missile launch site, and, in 2015, the country conducted on-site missile engine testing. North Korea will likely test a ballistic missile or launch a space rocket within two years. Progress made in the field of space rockets can often be transferred to ballistic missiles.

North Korea maintains nuclear ambitions

North Korea is capable of testing a nuclear device in the short term if the North Korean leadership is inclined to do so. The first half of 2015 has seen activity on the site where North Korea conducted its three nuclear device tests. Nuclear device testing is a significant aspect of nuclear warhead development.

Increased North Korean reserves of plutonium and enriched uranium

North Korea continues to develop fissile material such as plutonium, and the country has developed the capability to use gas centrifuges for uranium enrichment. These types of technology for fissile material production increase the risk of proliferation, as these technologies could be used to develop nuclear weapons. The proliferation risk is especially relevant

in the case of uranium enrichment technology. North Korea likely once exported a plutonium production reactor to Syria. North Korea's willingness to export such systems hampers the international efforts to limit the proliferation of nuclear technology aimed at nuclear weapons development.

Syria's chemical weapons programme

In 2013, Syria declared its chemical weapons programme to the Organization for the Prohibition of Chemical Weapons (OPCW), and almost all of Syria's declared production facilities have been dismantled. Still, its declaration may have been incomplete, and the OPCW has failed to convince the Syrian regime to dismantle the remaining parts of the programme.

Toxic chemicals used in terrorist attacks

Some non-state actors have a general intention to obtain weapons of mass destruction. Militant Islamists have used toxic substances in improvised weapons. Such weapons containing toxic substances or radioactive materials mainly have a psychological impact and a very limited weapons effect.

In Iraq and Syria, ISIL has, in connection with a few military campaigns, used improvised weapons containing chemical warfare agents. There is a potential risk that ISIL will also try to develop improvised weapons containing radioactive substances. Toxic chemicals and radioactive substances may be procured in the chemical industry or in hospitals that have access to equipment to treat cancer and other diseases.

Still easier access to technology and know-how

The general threat from proliferation of weapons of mass destruction remains significant. Due to globalization and the removal of trade barriers, the control of dual-use products has become increasingly difficult. In addition to their civilian use, these products can be used to produce weapons of mass destruction and means of delivery. In general, enforcement of export controls and sanctions have made it more difficult for sanctioned countries to purchase dual-use products directly from the West. Consequently, purchases increasingly take place in Asia.

AFGHANISTAN

The Taliban is increasing the intensity of its insurgency in Afghanistan. However, the Taliban is unable to win militarily as long as the Afghan government receives heavy economic support from Western countries. The national unity government has great difficulties tackling the country's problems. International diplomacy could force the Afghan government and the Taliban to the negotiating table, but the prospects of a peace agreement are distant.

In the short term, prospects indicate a more intensive insurgency as the Taliban's new leader Mullah Mansour strives to establish his position as the undisputed leader of the insurgent group. Consequently, the Afghan National Defense and Security Forces have faced even more problems as the intensity of the insurgency has increased in the northern and western part of Afghanistan throughout 2015, while the insurgents maintain sustained pressure in their traditional strongholds in the southern and eastern part of the country. It is difficult for the Afghan National Defense and Security Forces to determine which areas to defend.

Despite progress, the Taliban is a long way from winning a military victory. As long as the Afghan government receives heavy economic support and military assistance from the West, the insurgents will be unable to win militarily.

The Afghan National Defense and Security Forces are enjoying growing respect among the Afghan population and are slowly becoming a national institution. Despite suffering heavy losses, the Forces have not lost morale. Their recruitment capabilities are still excellent, and they are greatly superior in number to the insurgents. In addition, the Forces comprise several units, specifically the Special Forces, which are tactically far superior to the insurgents.

The Afghan National Defense and Security Forces struggle with well-known weaknesses, such as command and control, logistics and equipment maintenance. In addition, corruption is rampant. However, there are signs that steps to combat corruption are being taken more seriously. Large Force turnover and high casualties also indicate that the Afghan National Defense and Security Forces use numerous resources training new troops and police officers. Finally, the Afghan Air Forces are the Achilles heel for the government forces, as they are unable to offset the reduction in support from NATO air forces.

The Taliban is gaining ground in Pashtun rural districts

The insurgency in Afghanistan is gradually changing. The Taliban is operating in larger formations, continuing fighting during winter and consolidating its control of the Pashtun rural districts. In the short term, the Taliban will continue

this operational pattern, block key supply routes and attack district centres. However, the Taliban is unable to maintain control of its conquests against well-prepared counterattacks by the Afghan National Defense and Security Forces.

Geographically, the insurgency is most intense in southern and eastern Afghanistan. However, the Taliban leadership has strongly stepped up the number of attacks in northern Afghanistan. Consequently, the Pashtun enclaves in this part of the country have become the scenes of more offensive operations.

Helmand is an example of the Taliban's tighter grip on the Pashtun rural districts. During the late summer of 2015, the Taliban gained ground in the northern part of the province. The fight for Helmand is draining the Afghan National Defense and Security Forces of resources. From their position in northern Helmand, the insurgents are now capable of boosting their influence in central Helmand and in the neighbouring provinces of Uruzgan and Kandahar.

Developments in Kunduz demonstrate how the Taliban leadership has increased the insurgency in northern Afghanistan. Throughout 2015, the insurgents have pressured the Security Forces in the province and have intermittently taken control of several district centres. In September 2015, the insurgents took control of the provincial capital of Kunduz. Security Forces have since dislodged the insurgents from most of Kunduz, though the insurgents still control large areas around the city. Kunduz illustrates the precarious security situation in Afghanistan.

In the northern part of Afghanistan, the conflict increasingly runs along ethnic divides. Here, the Taliban's intensification of the insurgency has promoted local power brokers to re-establish their militias to protect the civil population and their own interests. The conflict could intensify, resulting in more civilian casualties and an increase in the number of internally displaced persons if this trend expands.

Kabul still holds strong symbolic value to the insurgents. Consequently, they launch an increasing number of High Profile Attacks in the capital in a bid to demonstrate the power

of the new Taliban leader and to undermine the legitimacy of the Afghan government.

International backing ensures cohesive government

In the short term, strong international backing will prevent the national unity government from disintegrating. However, the president and his cabinet have major difficulties addressing Afghanistan's huge problems with security, the economy and poor governance. The appointment of ministers alone has proven to be a lengthy process, and President Ashraf Ghani's nominees for new defence minister were rejected twice by parliament.

Low economic growth and falling tax payments weaken the Afghan government's own ability to contribute further to the financing of the Afghan state. Consequently, the Afghan government will remain dependent on heavy international support to defeat the Taliban.

The Afghan government's lack of resolve provides a breeding ground for growing political opposition. The opposition remains divided between former mujahedin fighters, ex-ministers, high-ranking government officials and young dissatisfied intellectuals, but ex-president Hamid Karzai is making great efforts to unite the rivals of President Ghani and Chief Executive of the Ministerial Council Abdullah Abdullah. Karzai is a strong opponent of Ghani's foreign policy course, which is based on amiable relations with Pakistan and the United States.

International commitment could force the parties to negotiate

Afghanistan's neighbours are becoming increasingly open to finding a peaceful solution to the conflict. China and Pakistan have made efforts to broker a deal between the Afghan government and the Taliban, which resulted in a single meeting between the parties. The meeting was to be the first step towards actual peace talks, but, when the news of Mullah Omar's death broke, Mansour publicly rejected any further peace talks.

Following the meeting, China stated that it was still interested in brokering a deal between the Afghan government and the Taliban. Also, India and Iran are open to a negotiated solution, and the United States has stressed to Pakistan that it needs to step up its efforts to crack down on the safe havens of the Haqqani Network and the Taliban in Pakistan.

Afghanistan's neighbours and the United States could force

the Afghan government and the Taliban to the negotiating table, but the actual readiness of the parties to negotiate is vital to the realization of peace. There is widespread opposition against a peace process controlled by Pakistan. Anti-Pakistan sentiments are forcing President Ghani to curb political rapprochement with Pakistan. Following a wave of attacks in Kabul, Ghani stated that the peace talks are an Afghan matter and that the Pakistani government has to crack down on the safe havens of the Taliban and the Haqqani Network in Pakistan. The Afghan government and the key political groupings will not likely reach agreement on a common platform for negotiations with the Taliban in the short term. It is highly likely that the peace talks will continue for years, as neither party has been given a clear mandate from their support base to negotiate.

Improved scope of growth for Islamic State and al-Qaida

Insurgent and terrorist groups affiliated with the Taliban are divided over their loyalty following the news of Mullah Omar's death. Al-Qaida and the Haqqani Network have pledged allegiance to Mansour, the new leader of the Taliban, while the Uzbekistan Islamic Movement and Hezb-e Islami Gulbuddin have announced that they will support the local ISIL wing, Islamic State in Khorasan (ISKP).

The entry of ISKP on the Afghan scene has stepped up the violence of the insurgency and also the releases of execution videos. In addition, the ISKP's conduct towards the local population is very aggressive, and, in some districts, the organization has closed down schools and health clinics. The Afghan population harbours negative sentiments towards the ISKP due to its brutal behaviour.

Relations between the Taliban and the ISKP are tense, and, in some provinces, such as Nangarhar, Herat, Zabul and Farah, fighting has erupted between the Taliban and the ISKP. At the same time, the internal rifts in the Taliban and the question of the Taliban's legitimacy following the death of Mullah Omar have made it easier for the ISKP to recruit new members and establish safe havens. Unlike Omar, the new leader of the Taliban does not have the same legitimacy in claiming to be the rightful leader of the faithful.

In eastern Afghanistan, the local minor al-Qaida group has gained greater room for manoeuvre. The group is incapable of launching a well-coordinated attack in Europe, but single individuals affiliated with al-Qaida in Afghanistan could launch lone-wolf attacks in Europe.

AFRICAN TROUBLE SPOTS

The economic growth and increased investments from Western and non-Western countries seen in numerous African countries over the past few years will continue in the short to medium term. However, weak state structures, poverty and conflicts will characterize developments in the continent and trigger pressure from refugees and migrants along with widespread smuggling activities, including human, drug and arms trafficking. The threat from militant Islamist groups will remain a destabilizing factor in several countries and regions.



African trouble spots

The last decade of high economic growth rates has brought positive political developments to numerous African countries. Several countries show signs of democratic progress and fast-growing middle class segments, and they have improved their capabilities to extract raw materials, establish their own industry and attract foreign investments.

Despite visible progress, the African continent remains fraught with poverty, political instability and conflict. Even the more stable and economically sound states suffer from economic inequality and deep-seated ethnic and sectarian conflicts. In addition, regional tensions are rife, affecting the conflicts and impeding their resolution. Even though enhanced cooperation has improved the ability of African countries to handle conflicts independently, Africa will thus remain dependent on international support for conflict resolution, peacekeeping missions and political stabilization in the short to medium term.

Increased threat from militant Islamist groups

Militant Islamism will pose a growing threat to political stability in several African countries and regions in the coming

years. It is likely that militant Islamist groups will continue to establish a presence in countries where Islamists have already gained a strong foothold and where Muslim minorities feel politically and economically marginalized.

In the short term, al-Qaida in the Islamic Maghreb (AQIM), Islamic State in Iraq and the Levant (ISIL) and local terrorist groups will preserve their strong positions in North Africa. Militant Islamists are also highly active in Mali, and, in Nigeria, Boko Haram has officially joined ISIL and proven quite resilient despite strong government efforts. In the Horn of Africa, al-Shabaab has lost control over large areas, but, at the same time, the group has intensified its focus on terrorism. In the short to medium term, al-Shabaab will remain capable of launching very serious attacks in Somalia and Kenya.

Many African countries provide a breeding ground for militant Islamist groups due to porous borders, poor governance, ethnic and sectarian tensions, political and economic marginalization and widespread youth unemployment. In addition, AQIM and ISIL are increasingly becoming beacons for Islamists in numerous African countries. The Central

African Republic, Tanzania and Kenya are examples of African countries where tensions run high between Christians and Muslims and where Muslims feel politically persecuted. As a result, the recruitment base of international terrorist groups has improved, and the risk of local terrorist groups spreading to other countries has increased.

Conflicts fuelled by corruption and weak state structures

The conflicts in Africa increasingly involve minor and loosely affiliated militias fighting across borders. This trend will continue in the short to medium term. As a result of increased involvement by Islamist terrorist groups, local conflicts revolving around sectarian, economic and political issues will continue to spill over into other countries.

In the future, numerous militias will be heavily involved in different forms of informal and illegal trade, flourishing most notably in countries and regions with weak state structures and rampant corruption. These conflicts have a deep impact on the communities where they are fought and will continue to stimulate increased migrant and refugee flows in the short to medium term.

The numerous actors, obscure agendas, corruption and weak state structures hamper conflict resolution. Sudan, South Sudan, Mali and Somalia are all examples of countries where the conflicts involve rampant corruption and arms trafficking. Local ethnic and sectarian groups, with shifting alliances and individual agendas, are engaged in the fighting. Also in the future, the conflicts in Africa will develop dynamically and reflect the changing nature of the local and regional power structures.

In the conflict in South Sudan, the cohesion of the government and that of the rebel movement are constantly threatened. In late August 2015, the contending parties forged a

peace agreement. However, numerous questions remain unanswered, and it is unclear whether the agreement will hold. In reality, the military forces on both sides are made up of numerous ethnic militias headed by local power brokers, each with their own endgame. The conflict extensively emulates local dynamics, reflecting years of internal disputes in South Sudan's federal states. The conflict is further complicated by the interference of neighbouring countries, as significant economic and political interests are at stake.

Western influence in Africa diminishes

In the coming years, some African leaders may be less willing to satisfy Western demands for democracy, good governance and respect for human rights. This is attributable to the improved regional cooperation between African countries and to China's and other non-Western countries' more direct political role on the continent as result of years of diplomatic and economic investments. The diminishing importance of Western aid and investments will limit the ability of Western countries to affect the political agenda and defend their own security interests in the coming years.

China's strategy of not linking any political counterclaims to its investments will, in particular, pose a growing challenge to the West in the future. Previously, Western donors enjoyed significant clout in Africa and were thus able to make strict demands in exchange for aid. In the future, African leaders will increasingly be able to negotiate with states and regimes which primarily pursue economic goals and thus do not make political demands in exchange for investments. China's role in the conflict in South Sudan serves as an example. China is the largest investor in the South Sudan oil industry and has continued trading with the South Sudanese government while the West has pushed for sanctions. China has also made efforts to mediate in the conflict in a bid to defend its oil interests.

MALI

The security situation in Mali is tense, even though the government in Bamako and several rebel groups have forged a peace agreement. Pro-government groups and rebel groups are engaged in local fighting. At the same time, militant Islamists are active nationwide and into neighbouring countries, threatening regional stability.

The terrorist threat against Danish and Western interests in Mali remains serious. In the short term, militant Islamist and rebel groups will continue to operate in the northern part of the country, but they will increasingly make efforts to launch attacks in the southern part of the country, including the capital of Bamako.

By launching repeated attacks, militant Islamists have demonstrated that they have the capabilities to attack military and civilian targets in northern Mali. During the first six months of 2015, the attacks spread to the central and southern part of Mali. The United Nations Multidimensional Integrated Stabilization Mission in Mali (MINUSMA) has recurrently been the target of fatal attacks, including in Bamako. This trend will likely continue in 2016.

Although the French Operation Barkhane has successfully defeated several militant Islamist leaders in northern Mali over the past year, the militant groups still have a strong footing in Mali and the surrounding countries as the unstable security situation and the lack of political progress have created a favourable climate for militant operations. At the same time, the Malian security forces lack the manpower to control the entire country effectively.

Regional stability in jeopardy

Terrorist and rebel groups also threaten regional stability, and the security situation in the region will deteriorate. The militant movements exploit and exacerbate the serious political, economic and security problems facing several of the neighbouring countries.

Fighting in Mali is not only politically or militarily motivated;

rather, several examples illustrate that sometimes the true motive for confrontation is the ambition to control lucrative markets and hubs for illegal trade and smuggling activities. The fight for control of the illegal trade and smuggling will remain a destabilizing factor in Mali.

In the short term, it is likely that ISIL's influence over militant Islamists both in Mali and more broadly in the region will grow. Certain militant Islamist groups in Mali have already declared their support of ISIL. Militant Islamists in Mali also have close ties to like-minded groups in the remaining part of northern Africa, especially to groups in Libya, where ISIL has consolidated its presence throughout 2015. Militant Islamists from Mali use Libya as a training ground and base location.

Political progress clouds fundamental problems

The implementation of the 2015 peace agreement between the government and a number of rebel groups will be difficult in the short term, as Mali is fraught with fundamental disagreements among politicians, rebel groups, the military and ethnic groupings concerning the right of self-determination and access to resources. The peace agreement marks the first step towards peace and stability in Mali, despite the fact that fighting has continued in the northern part of the country after the signing of the agreement.

In Bamako, the failure of the political actors to effectively address the country's social and economic problems threatens to cause social and political instability in the north as well as in the south. As the rebel groups in northern Mali also struggle with internal discord and division, the situation here will remain tense.

SOMALIA

In 2015, Somalia experienced progress, but the country still faces serious problems. Political discord and strong power struggles between the clans threaten developments. Despite setbacks, the terrorist movement al-Shabaab remains strong enough to destabilize parts of the country.

In the short to medium term, al-Shabaab will remain capable of launching attacks all over Somalia and northern Kenya. The terrorist movement is under pressure but has proven resistant to the military operations launched by the African Union Mission in Somalia (AMISOM). Even though al-Shabaab has lost direct control of most major cities in southern and central Somalia, it maintains its strong influence in both rural and urban areas. Here, al-Shabaab has access to funds and arms. By steering clear of direct confrontations with AMISOM, al-Shabaab has managed to minimize its casualties. Instead, it has focused on terrorist attacks, repeatedly attacking Somali and foreign targets in the capital of Mogadishu over the past year.

Al-Shabaab still enjoys favourable operational conditions

In the coming years, AMISOM will still find it difficult to gain control of the rural areas in southern and central Somalia. AMISOM has launched several offensives against al-Shabaab. However, AMISOM will not likely be able to broadly defeat al-Shabaab in Somalia in the short term. A reduction in the number of AMISOM troops could relatively quickly translate into al-Shabaab regaining control of its lost territories.

Al-Shabaab exploits the inability of AMISOM and the Somali authorities to create stability and true progress. Thus, in the short term, the terrorist movement will have ample opportunity to operate and recruit new members in Somalia as well as in the neighbouring countries. Al-Shabaab will appeal to groups excluded from the political process that have not experienced improved living conditions. In the short term, the government will find it particularly difficult to provide security and social services such as education and health to large parts of the population, especially to Somalis living outside of Mogadishu. Consequently, al-Shabaab's

operational conditions in Somalia will remain favourable.

The fight against al-Shabaab is also hampered by the Somali Army's lack of basic skills. In the short term, it is not likely that the Somali Army will obtain the capabilities necessary to replace AMISOM and effectively fight al-Shabaab.

Intensified battle for power in 2016

The political fight for power will become increasingly intense ahead of the planned 2016 presidential and parliamentary elections. Throughout 2015, clans, political groupings and individuals have made efforts to keep or take over government control and the associated benefits. This trend will continue in 2016, and internal discord could thus affect the government. President Hassan Sheikh Mohamud has made efforts to build a strong power base, but former ministers and opposition forces in parliament could challenge his position.

The power struggles will likely hamper the implementation of the political and economic programmes aimed at getting Somalia back on its feet. The problems of forming a new government witnessed in early 2015 caused a significant delay in the implementation of the programmes, and, in the short term, the prospects of improvement look dim.

The power struggles in Mogadishu could also negatively affect the establishment of federal states in Somalia. It is less likely that the government and local power brokers will be able to negotiate a solution that will satisfy all clan groups. 2015 saw progress in the state formation process, but this progress could rapidly collapse if the power struggles intensify. The number of conflicts and violent acts in the regions could escalate as a result of the strong clan interests at stake.

KENYA

The terrorist threat from al-Shabaab and Kenyan militant Islamist groups will increase in the short term. So far, the Kenyan government has failed to contain the threat, and terrorism in Kenya could spread to other East African countries.

Even though Kenya's political stability has improved, the country has increasingly been plagued by terrorism launched by the Somali terrorist group al-Shabaab and local terrorist groups. In the short to medium term, Kenya will remain a terrorist target. Al-Shabaab's focus on Kenya is primarily rooted in Kenya's military intervention into the southernmost part of Somalia in 2011. The main purpose of the intervention was to establish a safe zone inside Somalia aimed at repelling attacks from al-Shabaab and protecting revenue brought in by Kenya's tourism industry.

However, the strategy of establishing a safe zone has failed, and the terrorist attacks have become frequent and serious. Many of the attacks are planned and prepared in southern Somalia, which is under official, but not actual, Kenyan control.

Terrorist groups will be strengthened

It is likely that militant Islamism in Kenya will be strengthened in the short to medium term. The Kenyan government has launched a host of heavy-handed initiatives that honour the majority of the population's demands for a tough and consistent course towards al-Shabaab and local terrorist groups. However, the initiatives have proven insufficient to counter terrorism. Rather, they have helped increase radicalization and boost the scope of al-Shabaab's recruitment in Kenya. The initiatives have been widely directed at Kenya's Muslim and Somali minorities, exacerbating the feelings Somalis and Muslims have of being excluded from Kenya's economic and political centre.

The fight for power affects counterterrorism efforts

The critical security situation will be a key theme ahead of the elections expected in 2017. The question of how to counter terrorism will likely play a main role in the fierce fight for ethnic and political alliances that is a hallmark of Kenyan politics and never more so than before an election. It is possible that some Kenyan authorities will be tempted to use antiterrorism laws and means to strike at opposition elements. Al-Shabaab and local Islamist groups will likely exploit the mounting tensions and the increasing polarization between Muslims and Christians ahead of the next election to boost their support in Kenya.

Risk of militant Islamism spreading in East Africa

In the short to medium term, it is possible that militant Islamism will spread from Kenya to other East African countries where Muslim minorities feel politically marginalized. Al-Shabaab sympathizers are found in several East African countries where large Muslim minorities are being increasingly radicalized. In addition to al-Shabaab, Islamist organizations affiliated with the Middle East increasingly represent a source of emulation. In Tanzania, in particular, Islamist groups and networks may become further radicalized and spurred on to commit terrorist acts, if al-Shabaab's influence and Muslim discontent keep growing. Just like in Kenya, tensions between Christians and Muslims run deep in Tanzania and have been fuelled by extremist Muslim organizations and leaders for a number of years.

PIRATERI

The Somali-based pirates have ceased their activities, and it is highly unlikely that they will try to resume attacks on civilian shipping in the short term. No collaboration exists between the Somali-based pirates and al-Shabaab. The pirates will remain a serious threat in some parts of the Gulf of Guinea. In the short to medium term, it is less likely that the littoral states will prove capable of defeating piracy. In addition, it is less likely that Boko Haram will participate in piracy activities in short term.

PIRACY IN THE HORN OF AFRICA

The Somali-based pirates have likely ceased their activities, and, in the short to medium term, the threat from piracy will likely be eliminated entirely, provided that the current pressure on the pirate groups is maintained.

The pirates have abandoned their activities as a result of the merchant ships' adoption of best management practices, notably the use of armed security guards, as well as the coalition's anti-piracy operations at sea, the Somali authorities' intensified anti-piracy efforts supported by the international community, and the reduced financial gains from piracy.

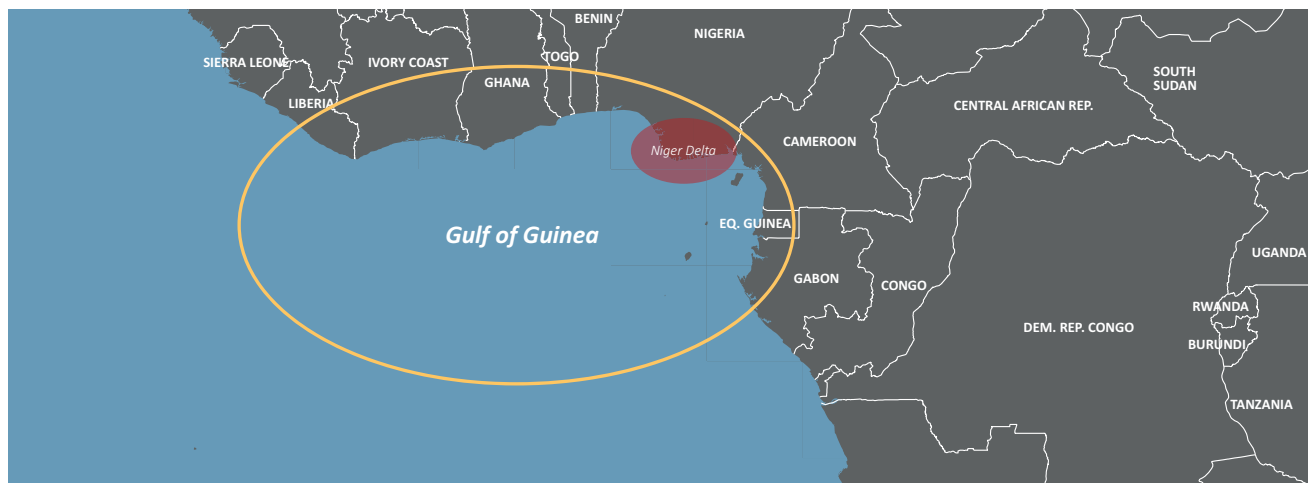
In the short to medium term, the Somaliland regional government will continue its efforts to impede piracy activities in the vicinity. In the short term, the land-based anti-piracy operations launched by the Puntland maritime police forces in northern Somalia will continue to hamper piracy operations along the coast and on shore. Similar developments have been observed in the central part of Somalia's east coast, where local coastguards operate. This trend will continue in the short term.

In the short term, it is doubtful whether new pirate leaders will attempt to exploit the power vacuum left by the defection

of numerous former pirate leaders to re-establish the pirate networks. Over the past few years, the pirate networks have not only been exposed to external pressure; internal rifts and inter-group conflicts have also contributed to weakening the established pirate networks. Many pirates have been killed in internal conflicts, and the external pressure has facilitated the capture of key pirate leaders. Finally, a number of pirates have abandoned their piracy activities and are increasingly pursuing political careers in Somali politics.

The fishing industry in Somalia is flourishing, and there are no indications that pirate groups will attempt to hijack fishing vessels for piracy operations. In the short to medium term, the absence of pirate groups will highly likely result in an increasing number of foreign fishing vessels in Somalia territorial waters. Over time, the increasing regional fishing activities could lead to overfishing, potentially jeopardizing the livelihood of local fishermen. However, it is less likely that this would force them into taking up piracy.

As more and more pirate groups abandon their activities, it is highly unlikely that individuals affiliated with al-Shabaab will try to establish formalized cooperation with the pirates.



Gulf of Guinea off West Africa and the Niger Delta in southern Nigeria

Definition of piracy and armed robbery at sea

The UN Convention on the Law of the Sea defines certain criminal acts as piracy if committed on the high seas, which are defined as waters outside the jurisdiction of any state. Similar criminal acts committed in a state's territorial waters are defined as armed robbery at sea. The distinction between piracy and armed robbery at sea is important in terms of state rights, duties and intervention options. In the context of the present Risk Assessment, the term piracy is used broadly and includes armed robbery at sea.

PIRACY IN WEST AFRICA

In the short to medium term, piracy will remain a threat to shipping in the Gulf of Guinea. The majority of attacks will be launched within the littoral states' territorial waters and particularly off the coast of Nigeria. The piracy activities in the Gulf of Guinea are diverse, ranging from simple theft and robberies to more complex criminal acts such as kidnapping and, to a lesser extent, hijacking. A common characteristic of piracy in the Gulf of Guinea is that most pirates prefer quick gains to large profits. Consequently, piracy activities in the Gulf of Guinea differ from those in the Horn of Africa, where large ransom demands have resulted in protracted negotiations.

In the Gulf of Guinea, the threat is particularly serious off Nigeria, where attacks are most frequent and often violent. The Niger Delta in the south-eastern part of Nigeria is a key stronghold for Nigerian-based pirates. Here, kidnapping is a regular occurrence, and the local pirates, many of whom are affiliated with militant groups in the Niger Delta, are generally better organized and more prone to violence than the pirate groups operating in the rest of the region. Some pirate groups occasionally use mother ships to expand their activity range, but the majority of attacks against shipping will likely continue to be launched from small boats in coastal waters.

Petty theft and robberies conducted near harbours and mooring sites are commonplace in the entire region. In the short to medium term, this type of piracy activity will remain an everyday occurrence, highly motivated by the widespread poverty and high youth unemployment rates in the littoral states.

In the short term, Nigeria's anti-piracy operations in the Niger Delta will be particularly hampered by local militant groups and a national security policy that is focused on combatting

Boko Haram in the north-eastern part of the country. It is highly unlikely that the authorities will be able to make efforts to fight Boko Haram and at the same time control the Niger Delta in the south. Here, militant groups are a threat to the country's strategically important oil production, and they are also involved in local piracy activities. The Nigerian government's need to secure some level of stability in the Niger Delta will likely motivate it to pursue a more low-key policy against the militant groups, thus allowing them to extensively continue their involvement in piracy activities.

It is less likely that Boko Haram will participate in piracy activities or other types of criminal activity in the Niger Delta in the short term. The group will likely be under pressure from the Nigerian authorities, and there are no indications that it has the intent or capability to launch attacks on shipping in the Gulf of Guinea.

In the short to medium term, it is less likely that the regional littoral states will be capable of combatting piracy. The littoral states have shown increased political resolve to address the issue of maritime security through national and regional initiatives. However, anti-piracy efforts will likely remain a relatively low priority in practice.

In the medium term, the inability of the littoral states to combat piracy and the need to protect the growing economic activity in the Gulf of Guinea may reflect in an increased use of private security companies. Starting in mid-2015, Ghana was the first state in the region to allow the use of armed security guards in its territorial waters. In the short to medium term, other states in the region may adopt similar measures, and Ghana will play a key – and likely successful – role in inspiring its neighbours to do so.

Terms and definitions

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

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

Probability levels, terms and definitions used in this risk assessment are as follows:

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

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



Degrees of probability

- **Highly unlikely.** We do not expect a certain development. Such a development is (almost) not a possibility.
- **Less likely/doubtful.** It is more likely that something will not happen than vice versa.
- **Possible.** It is a likely possibility, however, we do not have the basis to assess whether it is more or less possible that something will happen.
- **Likely.** It is more likely that something will happen than vice versa.
- **Highly likely.** We expect a certain development. It has (almost) been confirmed.

Time frames

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

Perspectives exceeding 10 years (very long term) are subject to great uncertainty and are thus only seldom used.

Terrorist attacks

We assess the complexity of an attack based on the capabilities of the attackers as regards recruiting, reconnaissance, coordination, financing, logistics, technical know-how, special skills and operational security. The capacity to launch simultaneous attacks reflects a certain capability within more of these areas. We divide attacks into four categories:

- **Simple terrorist attacks** may involve a single individual or a few individuals obtaining, for instance, a handgun or a simple homemade bomb to launch an attack against unprotected targets.
- **Terrorist attacks of a certain complexity** may involve a smaller number of coordinated bomb explosions or a single large car bomb launched against unprotected or poorly protected targets.
- **Complex terrorist attacks** may involve a larger number of coordinated bomb explosions or more than one large car bomb.
- **Highly complex terrorist attacks** are those such as the 11 September against the United States in 2001 and the planned attacks against transatlantic flights from London in August 2006.

Photo credit list**Front page**

POLFOTO: Flowers in front of Charlie Hebdo's office in Paris following the January 2015 terrorist attack

Scanpix: Russian Ka-32 helicopter over the North Pole ice cap, August 2015

iStock Photo: Cyberattack illustration

POLFOTO: ISIL fighters training near Mosul, Iraq, April 2015

Page 16

Scanpix: Russian destroyer at Vladivostok, July 2015

Page 22

iStock Photo: Cyberattack illustration

Page 26

Scanpix: Militant Islamists taking part in military parade in Raqqah, Syria, July 2014

Page 32

Scanpix: Russian Ka-32 helicopter over the North Pole ice cap, August 2015

Page 36

POLFOTO: Chinese Air Force parade in Dafangshen Airport, China, September 2015



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27. oktober 2015
ISSN 1604-4444