DANISH DEFENCE
INTELLIGENCE SERVICE

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The DDIS Intelligence Risk Assessment 2014

An assessment of developments abroad impacting on Danish security

The DDIS Intelligence Service

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Introduction

This year's DDIS intelligence risk assessment focuses on Russia and the Ukraine crisis as well as developments in Syria. In addition, terrorism, developments in the Arctic and cyber threats are still high on our list of targeted issues.

A Danish risk assessment naturally centres on the threats posed against Denmark and Danish interests. The focus of this assessment is thus on negative trends and threats, while positive trends and the possibility of influencing developments fall outside the scope of such a risk analysis.

Threats are becoming increasingly complex. The number of conflicts and actors involved as well as the speed with which alliances are entered into and dissolved, for example in the conflicts in the Middle East, complicate the assessment of future developments in the threat picture. Nevertheless, it is our ambition for this risk assessment to give an estimate of how the Danish threat picture will develop over a period of up to ten years.

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

Additional information about the Danish Defence Intelligence Service, including the Centre for Cyber Security, can be found on our websites: www.fe-ddis.dk and www.cfcs.dk.

Information cut-off date is 20 October 2014.

Thomas Ahrenkiel
Director

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Main conclusions

Russia has demonstrated willingness to use military force to prevent non-NATO states in the post-Soviet space from forming close ties with the West. It is Russia's objective to keep Ukraine in a state of instability and weakness in order to undermine Ukraine's prospects for NATO membership. Over the next few years, the situation in eastern Ukraine will highly likely turn into a new frozen European conflict, and the Ukraine crisis will continue to strain relations between Russia and the West. Russia will continue to give high priority to the modernization of its armed forces with the emphasis on developing forces capable of conducting offensive operations along Russia's periphery. Russia will not risk an open military confrontation with NATO, but there is a risk that Russia might initiate intimidating military pressure on especially the Baltic countries, for instance in connection with a major international crisis with the West. Even though Russia has increased its military activities in Denmark's vicinity and Russian aircraft have occasionally flown offensive flight patterns in Denmark's vicinity, there are no indications that Russia constitutes an increased direct military threat to Danish territory.

The Middle East and North Africa will remain fraught with instability. Authoritarian and radical Islamist forces are gaining ground following the so-called Arab Spring. The rivalry between Iran and Saudi Arabia will add fuel to other conflicts, particularly the conflicts in Syria and Iraq. Terrorist organizations such as al-Qaida and Islamic State in Iraq and the Levant (ISIL), also known as IS and Islamic State, will exploit the instability in the region.

ISIL's growth in Iraq magnifies the religious and ethnic fault lines, threatening to divide the country. In the short term, ISIL will remain a military threat, particularly in the Sunni-dominated areas in Iraq. The new Iraqi government will find it difficult to bridge the ethnic and religious gaps in the country.

The armed opposition is under increasing pressure. In the western, populous part of Syria, the Assad regime is making progress, and in the east the opposition is under pressure from ISIL. The insurgency against the Assad regime is far from defeated, though. Syria will be fraught with unrest, instability and porous borders, and militant Islamists will have operational room for manoeuvre in Syria. In the future, the Assad regime will be increasingly dependent on Iran, Hezbollah and Russia.

The terrorist threat from abroad against Denmark, the West and Western targets in local conflict areas is serious. Operational conditions for militant Islamists in the Middle East, Afghanistan and parts of Africa have improved. In the short term, the militant Islamists' intent to attack the West has increased following the bombings in Syria and Iraq by the international coalition. However, the bombing campaign has made it harder for foreign fighters from the West to establish contact with militant Islamist organizations and experienced attack planners in Syria. Still, a large number of westerners will travel to Syria and Iraq to take part in the conflict. In the future, the majority of these foreign fighters will return home, thus increasing the number of individuals in the West with experience from war zones. The number of returnees will likely grow over the next two to three years. Consequently, globally oriented militant Islamists will gain more direct access to the West, including Denmark. In the medium term, the outcome of the internal fighting in Syria and Iraq and the success of the coalition campaign will impact decisively on the number of returnees and the nature of the terrorist threat in the West.

The competition for legal rights to the Arctic seabed will be intensified in the coming years. Russia continues to pursue the UN track and cooperate on issues related to the Arctic, but the cooperative track will be put under strain internally in the Russian leadership should Russia be unable to reach its key objectives through this strategy. Russia appears increasingly determined to pursue its strategic interests more rigorously, even when this is to the detriment of relations with the West. This could also prove to be the case in the Arctic. However, long-term development in the Arctic region will likely be more characterized by cooperation and competition than by conflict and confrontations. China's primary interests in the Arctic are the shorter shipping lanes and access to natural resources; however, Chinese investments in the Arctic, including in Greenland, will generate Chinese political and strategic interests in the Arctic region.

Danish authorities and companies continue to be exposed to extensive and increasing cyber espionage from state-sponsored actors. Cyber criminals and politically motivated hackers, so-called hacktivists, pose a minor threat to Danish interests. The technological development has brought about a changed risk pattern, increasing the need for security measures and preparedness.

The threat from proliferation of weapons of mass destruction is growing. A number of countries maintain or

strengthen their capabilities to develop weapons of mass destruction and associated means of delivery. However, Syria's handover of its declared chemical weapons stockpile is a major step forward. Furthermore, negotiations with Iran on its nuclear programme are still ongoing. A final agreement between Iran and the P5+1 countries (the United States, Russia, China, Great Britain, France and Germany) is less likely in the coming year.

The threat from piracy in the waters off the Horn of Africa has declined to a very low level and will remain low in the short term, provided that the recommended best management practices are adopted by merchant ships to counter piracy and that the international coalition's pressure on the pirate groups is maintained. Pirates and al-Shabaab are not directly cooperating. In the Gulf of Guinea, civilian shipping comes under attack regularly. The threat will remain present in the short to medium term, even though the affected countries in the Gulf of Guinea have taken measures to improve maritime security.

China's foreign policy focuses on strengthening China's economic clout and political influence in the Asia-Pacific region and on its relations with the United States. The objective of the modernization programme for the People's Liberation Army is to promote China's ambitions for increased strategic influence in the Asia-Pacific region. In the long to very long term, China will enhance its global engagement, although domestic issues and internal stability will remain top priorities for the Chinese leadership.

How the situation will unfold in Afghanistan in the next couple of years is uncertain. Politically, the presidential election has created deep fissures between the most important power brokers. The cohesion of the Afghan government can be weakened by these dividing lines. Despite this, the Afghan government has made military progress, and there are budding signs of discord among insurgents. In any event, the development in Afghanistan depends on whether the coalition government between the election winner Ashraf Ghani and loser Abdullah Abdullah proves durable and on continuous economic support from Western countries.

RUSSIA AND THE UKRAINE CRISIS

Russia has demonstrated willingness to use military force to prevent non-NATO states in the post-Soviet space from forming close ties with the West. It is Russia's objective to keep Ukraine in a state of instability and weakness in order to undermine Ukraine's prospects for NATO membership. Over the next few years, the situation in eastern Ukraine will highly likely turn into a new frozen European conflict, and the Ukraine crisis will continue to strain relations between Russia and the West. Russia will continue to give high priority to the modernization of its armed forces with the emphasis on developing forces capable of conducting offensive operations along Russia's periphery. Russia will not risk an open military confrontation with NATO, but there is a risk that Russia might initiate intimidating military pressure on especially the Baltic countries, for instance in connection with a major international crisis with the West. Even though Russia has increased its military activities in Denmark's vicinity and Russian aircraft have occasionally flown offensive flight patterns in Denmark's vicinity, there are no indications that Russia constitutes an increased direct military threat to Danish territory.

In the course of the Ukraine crisis, Russia has shown that it is willing to use military means to enforce its strategic objectives in the post-Soviet space. This is reflected in the military annexation of Crimea, the military build-up along Ukraine's border with Russia, the material and training support to the pro-Russian separatists and, finally, the incursion of regular Russian forces into Ukraine.

Russia's military operations during the Ukraine crisis also demonstrate that Russia has developed modern, professional and mobile forces capable of rapid offensive deployment in crises and local wars along the Russian periphery.

It is a high-priority objective for Russia to prevent other non-NATO states in the post-Soviet space from forming close security policy and economic ties to the West. It is Russia's objective to establish a sphere of influence along its periphery composed of states under dominant Russian influence.

Russia will primarily be inclined to use its military instruments, destabilization and misinformation in situations where Russia perceives that its strategic interests in the post-Soviet space are seriously threatened.

It is highly likely that the capability of Russia's armed forces to launch offensive operations at short notice along Russia's border will improve further. Also in the long term, the Russian armed forces will remain superior to the armed forces of Russia's neighbours in the post-Soviet space.

Ukraine – the core country in Russian interests
Ukraine is the core country in Russia's strategic interests in the post-Soviet space due to Ukraine's geographical location as a buffer state between the West and Russia, its size and its economic, cultural and religious ties to Russia. An important contributing factor is the predominant perception in Russia that Ukraine is the cradle of the first Russian state and that Ukraine, after the fall of the Soviet Union, accidently became a border state between the West and Russia.

Thus, it is a key Russian strategic priority to prevent Ukraine from joining NATO and the EU. Instead, Russia is attempting to integrate the countries in the post-Soviet space into a customs union, which later will be crowned with a political superstructure, the Eurasian Union. So far, the three cornerstones of the customs union are Russia, Belarus and Kazakhstan, but Russia still has the ambition to include Ukraine as well.

Russia also perceives the EU Neighbourhood Policy as a serious challenge to Russian dominance in the post-Soviet space. Russia views the support from the EU and the United States for the political upheaval in the Ukrainian capital of Kiev in February 2014 as the culmination of the West's intention to incorporate Ukraine into the EU and, at a later stage, also into NATO.

Russia will maintain its objectives in Ukraine
Russia will not succumb to Western pressure and abandon Crimea, and Russia would highly likely defend its possession of Crimea by military means if Russia should deem that necessary. By illegally annexing Crimea, Russia has secured the presence of its Black Sea Fleet and improved its strategic position in the Black Sea. In addition, the prospect of a future NATO presence in Crimea has been eliminated.

It is less likely that it is Russia's objective to annex other parts of Ukraine beyond Crimea. Russia has, however, destabilized parts of eastern Ukraine through its support for the pro-Russian separatists and its direct military involvement.

Russia will highly likely try to keep Ukraine in a permanent state of political weakness and instability in order to undermine Ukraine's prospects for NATO membership.

It is highly likely that Russia considers the present situation with Crimea under Russian rule and an unstable and weak Ukraine as a strategic gain that offsets Ukraine's signing of the association agreement with the EU in June 2014.

Russia will continuously calibrate its policy towards Ukraine in order to maintain its dialogue with the West on the Ukraine crisis, but it is less likely that Western sanctions will have a decisive impact on Russia's policy.

Russia will not allow the Ukrainian government to defeat the pro-Russian separatists militarily. Consequently, in mid-August 2014, Russia deployed regular units to Ukraine. This incursion into Ukraine tipped the balance of forces in favour of the separatist forces and sent a clear signal to the Ukrainian government that Russia will not accept a defeat of the separatists.

Ukraine crisis will drag on
The political upheaval in Kiev in February 2014 did not fundamentally change the political and economic structures in Ukraine; it did, however, strongly change the

political balance in the country in favour of western and central Ukraine. The heavy fighting in eastern Ukraine and the collateral damage done to civilian society will make it even harder to unite an already politically divided country.

Russia and the pro-Russian separatists have not succeeded in gaining extensive popular support in eastern Ukraine for the secession of this area from Ukraine. However, the pro-Russian separatists would not have been able to sustain their activities in parts of eastern Ukraine without a certain sympathy and support from the local populations in parts of eastern Ukraine.

In western and central Ukraine, Russia's policy has boosted the support for Ukraine's integration into the EU. It is likely, though, that Ukrainian politicians and oligarchs will still lack the ability and resolve to fundamentally reform and modernize the country. In all, the cohesion of the Ukrainian state has been further weakened by the crisis. Russia will maintain leverage on Ukrainian politics, which Russia will use to obstruct Ukrainian attempts at forging close ties to Europe.

In September 2014 in Minsk, Ukraine and Russia together with representatives of the pro-Russian separatists agreed on a peace plan containing a number of key points for the
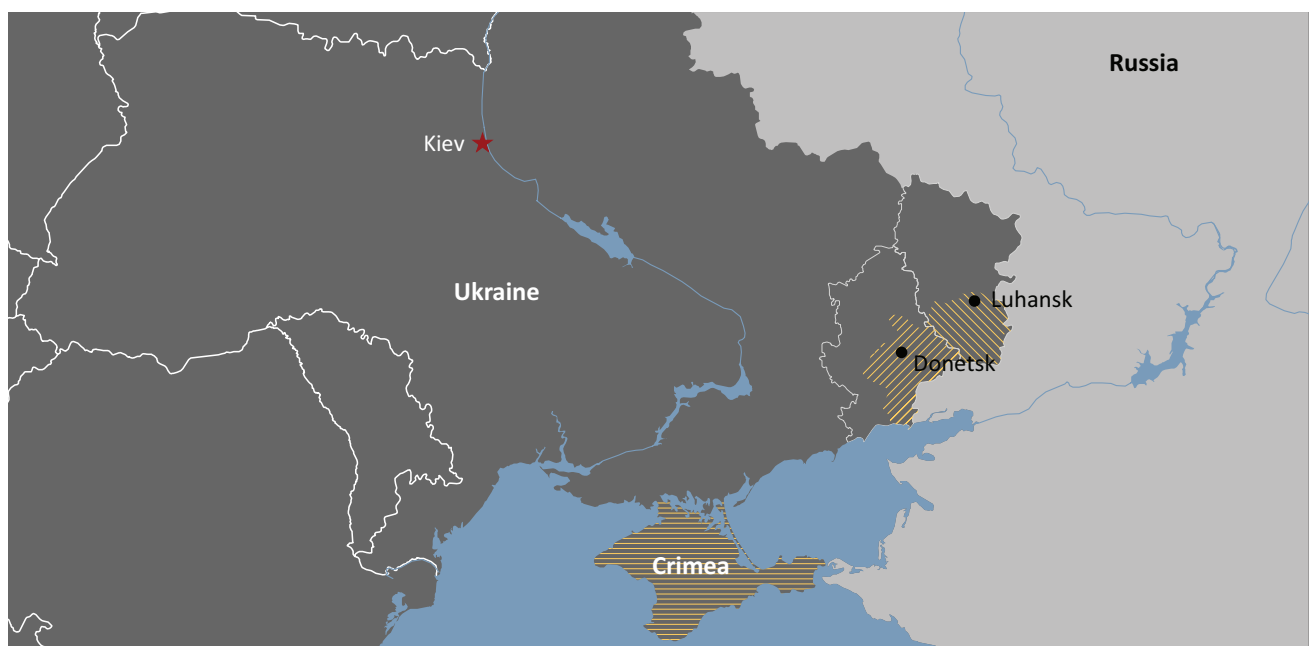
Map showing the parts of Ukraine controlled by Russia and pro-Russian separatists.
Crimea is annexed by Russia and the south-eastern parts of the Donetsk and Luhansk regions are controlled by pro-Russian separatists.

solution of the conflict. The Minsk Agreement also led to a truce, which still holds despite scattered fighting.

Still, it is less likely that the Ukraine crisis will be solved in the short term, even though the military dimension of the conflict will be reduced. The Minsk Agreement will likely result in a buffer zone monitored by an OSCE observer mission. The buffer zone will divide the Donetsk and Luhansk regions in eastern Ukraine in two parts, controlled by the pro-Russian separatists and the Kiev government respectively. It is likely that the situation in the two East Ukrainian regions will turn into a new frozen European conflict over the next few years.

Russian great power policy and patriotism
President Vladimir Putin intends to resurrect Russia as a great power capable of challenging the United States' dominant role on the international stage and promoting a multipolar world order in which Russia is capable of obtaining global influence. In Russia's self-perception as a great power, the country has a legitimate interest in all key international issues, and it is of particular importance to Russia that the other great powers accept Russia's dominant and exclusive role in the post-Soviet space. For years, it has been the perception in Russia's political and military leadership that the United States and NATO have not treated Russia as a great power on equal footing and that the West and Russia are locked in a geopolitical struggle through which the West is trying to encroach on Russia's sphere of interest. This perception is solidly founded in Russian society.

The Ukraine crisis has made it evident that Russia's perception of basic rules, objectives and means in international politics differs considerably from that of the West.

Putin uses the crisis for a further mobilization of the Russian society along national-conservative lines, and Putin's popularity has grown steadily during the Ukraine crisis. The crisis will highly likely deepen anti-Western sentiments and increase national-conservative trends in the political leadership and in the Russian society.

Western economic sanctions and their impact on the Russian economy will likely cause dissatisfaction in the Russian business society and in parts of the middle class. However, the sanctions will less likely result in a fundamental change in Russia's policy towards Ukraine. The Russian leadership will not succumb to Western pressure in the Ukrainian

crisis as this would be perceived in the Russian society as a humiliating capitulation to the West on an issue of utmost importance to Russia's self-esteem as a great power.

Russia and the West are drifting apart
The Ukraine crisis has clearly demonstrated that Russia prioritizes a heavy-handed defence of its national interests in the post-Soviet space over cooperation and partnership with the United States and the EU countries and that Russia is willing to take significant political and economic risks in its relations with the West.

The Ukraine crisis will continue to impact strongly on relations between Russia and the West, and it will highly likely not be possible to re-establish mutually trustful NATO-Russia cooperation in the short to medium term. It is still uncertain whether Russia's relations with the EU have suffered to the same extent, though it is likely to be the case.

Russia will still not have sufficient economic and military power to set the international agenda to an extent that reflects the country's ambitions, nor will Russia have clout to pursue its objectives with strength and credibility. Thus, Russia's foreign policy will, to a large extent, still be formulated as reactions to the strategies and policies pursued by the United States, China, NATO and the EU.

It is highly likely that Russia will be increasingly willing to obstruct Western policy in key international issues, and other powers will likely, to a certain extent, be inclined to support Russia's stance against the West. Russia will intensify its relations with China and major regional powers such as Iran and Brazil in an attempt to challenge the global dominance of the United States.

Russia resolved to strongly pursue its interests
Russia will likely resolutely pursue its interests vis-à-vis non-NATO member states in the post-Soviet space if they attempt to develop their cooperation with the West in a way Russia perceives as seriously threatening to its strategic interests.

Russia will prefer to use its array of non-military means to dominate non-NATO member states in the post-Soviet space. Russia's dominating economic weight and role as supplier and price maker of energy gives Russia considerable leverage to pressurize these countries if they fail to accommodate Russia's demands.

Also, links between Russia's leadership and the political elites, the presence of Russian-speaking communities and the Russian Orthodox communities in the post-Soviet space enable Russian influence.

In addition, Russia will be able to launch synchronized operations involving intelligence activities, cyber operations, misinformation and coordinated campaigns in news outlets and social media to influence and manipulate political situations and crises in the post-Soviet space. It will be difficult to determine when and how such operations gradually produce a crisis that evolves into deployment of special forces and, ultimately, to open use of military force.

Russia's military development
Russia's political leadership gives very high priority to the development of Russia's armed forces.

It is the ambition of Russia's political leadership to modernize the armed forces with a broad range of modern, high-tech and combat-decisive weapons systems. Russia's economic development has made increased defence spending possible, and it is likely that longer periods of low economic growth will not deter the political leadership from prioritizing defence spending. However, it is less likely that the ambitious state armament programme will be fully implemented.

To a large extent, Russia still bases its status as a great power on its nuclear capabilities, in particular its strategic nuclear weapons. It remains a key Russian priority to preserve its nuclear deterrence, which gives Russia some kind of military equality with the United States.

Russia gives priority to the capability of its naval and air forces to operate in long-distance power projection operations to demonstrate that Russia has the military means to support its role as a global power. Russia will likely confront the United States and NATO through more frequent and more sustained deployments of naval and air forces close to international crisis areas and through regular flights with its strategic bombers.

Russia is developing more modern, professional and mobile forces capable of rapid offensive deployment in crises and local wars along the Russian periphery. Russia no longer has a large mobilization capacity at its disposal. Instead, the standing forces are being upgraded to achieve greater

strategic mobility inside Russia and to obtain sufficient regional superiority to engage in a limited offensive against Russia's immediate neighbours.

Russia's military operations during the Ukraine crisis clearly demonstrate that the Russian armed forces have developed quite successfully in accordance with in the 2008 defence reform and the subsequent 2010 military doctrine.

In the long term, Russia will highly likely continue to develop conventional military forces suited for deployment in local conflicts along Russia's borders. This will result in modern and flexible forces whose standard will likely be close to that of NATO. It is possible that, in the medium to long term, Russia will also prepare its forces for the risk of a military confrontation with NATO, though it is highly unlikely that Russia will have the intention to initiate a direct military confrontation with NATO as a whole.

The Baltic countries are the NATO member states most vulnerable to Russia's local military superiority and willingness to use military means in the post-Soviet space. It is, however, highly unlikely that Russia would launch a direct military aggression against the Baltic countries that could activate NATO's Article 5, making such an aggression an attack on NATO as a whole. However, it is possible that Russia may attempt to test NATO's cohesion by engaging in military intimidation of the Baltic countries, for instance with a threatening military build-up close to the borders of these countries and simultaneous attempts of political pressure, destabilization and possibly infiltration. Russia could launch such an intimidation campaign in connection with a serious crisis in the post-Soviet space or another international crisis in which Russia confronts the United States and NATO.

In the long term, Russia will lack sufficient capability to engage in large and coordinated combined offensive operations far from Russian territory, not least due to a limited strategic air and naval transport capacity.

There are no indications that Russia's conventional ground, naval or air force posture in Denmark's vicinity will increase significantly, either in the short or medium term.

However, the forces will be modernized, and it is highly likely that the quality of the air and ground forces will improve, in particular in terms of command and control, training and combat readiness. This improvement will be

in line with the general development of the forces all over western Russia.

The modernization of the forces will include surface-to-surface missiles that will highly likely be deployed in the Kaliningrad region within the next few years. Russia will highly likely present long-planned military modernizations in western Russia as a response to NATO activities and NATO presence in the Baltic countries and Poland and to the NATO missile defence in Europe.

Russia commands very capable military forces in western Russia, including airborne forces and special forces close to the border with the Baltic countries. These deployable forces are in a permanent state of readiness and have gained experience during operations at the Ukrainian border and inside Ukraine. Russia also has significant military capacity in the Kaliningrad region bordering Poland and Lithuania.

The Baltic Fleet has limited power projection capabilities and will only be able to deploy its naval infantry offensively in the region if reinforced with numerous warships and landing ships. Though the Baltic Fleet ranks lowest in priority among the four Russian fleets, a certain modernization of the Baltic Fleet naval forces will likely be initiated in the long term, for instance with the introduction of new submarines.

Russia mainly demonstrates its presence in the Baltic Sea region via air activities.

Russian air activities in the Baltic Sea region

In August 2007, President Putin ordered the resumption of the long-range aviation patrol flights with strategic bombers, which the Russian Air Force had only conducted on a few occasions since the Cold War.

It is highly likely that the political-strategic intentions are to demonstrate to the United States that the Russian strategic bombers are again a fully operational part of the Russian nuclear triad and a strategic deterrent to the United States. Besides strategic bombers, the nuclear triad comprises nuclear submarines and intercontinental ballistic missiles. The Russian strategic aviation patrol flights are also intended to demonstrate Russia's air power close to the Russian border areas. Also, the strategic aviation patrol flights are part of the general modernization of the Russian armed forces and part of the overall training of aircraft crews.

In 2011, the strategic bomber flights were extended to

include Denmark's vicinity in the Baltic Sea region. Since then, Russia has routinely conducted several annual strategic bomber flights over the Baltic Sea. Also, in recent years Russia has increased its overall air activities in the Baltic Sea region, involving collection aircraft and, to a lesser extent, tactical aircraft. This reflects an ongoing trend, with Russia generally improving air force and pilot capability to operate in its neighbouring region.

During the Ukraine crisis in the summer of 2014, there was increased Russian air activity in the Baltic Sea region, mainly as a consequence of an extensive Russian air exercise in the Baltic Sea region, the largest since 1991. Even though most flight patterns were familiar, some of the activities were of a more offensive character than observed in recent years and likely also involved simulated missile attacks by tactical aircraft against Danish territory.

The exercise was highly likely a direct response to Western military exercises and increased Western military presence in the Baltic countries, Poland and the Baltic Sea, and the more offensive character of elements in the exercise should likely also be seen in this context.

It is too early to assess whether future Russian military activities in the Baltic Sea region will continue to involve elements of an offensive character and whether routine activities are undergoing significant changes. However, it is possible that some elements of the new air conduct seen over the summer of 2014 will also be part of Russia's air activities in Denmark's vicinity in the years to come.

The Russian strategic aviation flights in the Baltic Sea region will highly likely continue. It is, however, equally likely that the nature of the Russian air activities will reflect the current state of political and military relations between Russia and the West. In this connection, Russia will likely conduct military activities close to NATO territory that carefully mirror NATO activities conducted in the Baltic countries, Poland and the Baltic Sea.

The next few years will likely see a minor increase in air activities involving tactical aircraft and collection aircraft in the Baltic Sea region. It is also possible that the number of aviation patrol flights with strategic bombers will increase. Still, the long-term trend for the strategic aviation patrol flights points towards a lower level of activity. Russia only has a limited number of operational strategic bombers that highly likely will not be replaced before 2025 to

2030. It is clear, however, that Russia's leadership may decide to increase strategic aviation activities for a limited period of time if this is assessed to be necessary from a strategic perspective. Similarly, Russia may decide to give higher priority to the Baltic Sea region at the expense of air activities in other regions, enabling sustained increased intensity for a number of years.

No increased direct threat against Danish territory
The Ukraine crisis has strained relations between Russia and NATO. Russia will continue to perceive NATO as a threat to the country's great power ambitions, in particular in the post-Soviet space. Russia will, however, not risk an open direct military confrontation with NATO but may attempt to intimidate the Baltic countries militarily, not least to test NATO's cohesion.

There are no clear indications suggesting that Russia currently constitutes an increased direct military threat to Danish territory. It is, however, as yet too early to predict the long-term consequences of the increased tension between Russia and the West and to estimate more precisely how Russia's military conduct will develop in the next few years.

THE MIDDLE EAST AND NORTH AFRICA

The Middle East and North Africa will remain fraught with instability. Authoritarian and radical Islamist forces are gaining ground following the so-called Arab Spring. The rivalry between Iran and Saudi Arabia will add fuel to other conflicts, particularly the conflicts in Syria and Iraq. Terrorist organizations such as al-Qaida and Islamic State in Iraq and the Levant (ISIL) will exploit the instability in the region.

The Middle East and North Africa remain in turmoil following the so-called Arab Spring. The situation is very dynamic and difficult to predict, as many circumstances impact on security policy development in the region. The growth of ISIL (also known as IS and Islamic State) together with the US-led coalition's air campaign against ISIL complicates the situation even further.

Of all the countries that have experienced uprisings, Tunisia is the only one showing signs of democratic development. In Egypt, Bahrain and Syria, the authoritarian trend is growing. The central authority is weakened or de facto absent in several countries. This power vacuum leaves room for militant Islamists on, for instance, the Sinai Peninsula in Egypt and in large parts of Syria and Libya. This also applies to Iraq, if for different reasons.

The fundamental political, social and economic problems that fuelled the uprisings in the region are still present and

have even grown in several places. The fight for political influence and resources in the Middle Eastern states often coincides with ethnic and religious divides, which serves to deepen the conflicts. In several cases, these divides transcend national borders, as in Syria and Iraq, threatening stability in the area stretching from Lebanon and Jordan to eastern Iraq.

In addition, the rivalry between, in particular, Iran and Saudi Arabia over regional influence is intense. This rivalry contributes to and is fuelled by the antagonistic relations between Shiite and Sunni Muslims. Iran and Saudi Arabia carefully monitor the changes in the region affecting their position of power. The power struggle between Iran and Saudi Arabia will continue in the coming years and contribute to maintaining regional tensions.

Counterterrorism efforts are once again high on the international agenda due to the growth of ISIL in Syria

Map of Syria and Iraq and the approximate growth of ISIL in September 2014

and Iraq. Iran and Saudi Arabia also consider ISIL a threat; however, this common enemy will not diminish the rivalry between the two countries.

ISIL exploits instability in Syria and Iraq
ISIL has taken control over large territories across Syria, declaring them a caliphate. The area stretches from central and western Iraq to the Aleppo province in Syria. ISIL wants to introduce a strict interpretation of sharia law. Leader of ISIL Abu Bakr al-Baghdadi has declared himself caliph in a bid to become sovereign in the Islamic world. He has called on all Muslims to obey this message and support the caliphate.

In the short term, ISIL will make efforts to consolidate and to expand the areas where it has established a presence in Syria and Iraq. ISIL aims to control the area between Beirut and Baghdad on the way to the dream of world dominance. The air campaign by the US-led coalition contributes to curb ISIL's offensive capabilities. However, ISIL holds a strong position, primarily in areas with a predominant Sunni Muslim population, and it exploits the instability in Syria and Iraq, making it difficult to defeat the organization. It is possible that ISIL will manage to take control over additional areas in Syria, but it is highly unlikely that it will be able to take control of Baghdad and Damascus or large non-Sunni Muslim areas.

ISIL has somewhere between 20,000 to 25,000 members in addition to tribes and other groups which have sworn allegiance to the movement. To an increasing number of people, ISIL's success in Iraq and Syria has served as a catalyst for joining the organization. Some have joined for fear of being killed because they live in areas dominated by ISIL, others have joined for opportunistic reasons, including financial gains, and finally some join for ideological reasons, for example foreign fighters travelling to the area from the Middle East and the West to fight for ISIL. The terrorist threat posed by ISIL will be discussed further in the chapter on terrorism.

In terms of funding, ISIL is the most self-financing of the armed groups in Syria and Iraq, and it is largely independent of external support. Its funding stems from looting, oil revenue, taxes, kidnap ransoms and donations from sympathizers in the Gulf.

Conflicts in Syria and Iraq affect the entire region
The Syrian conflict affects all of Syria's neighbours as well

as regional stability and the regional power balance. The outcome of the conflict extensively depends on foreign intervention or changes in the support provided to the opposing sides based on the great regional interests and underlying great power interests. Even though the conflict is far from resolved, the regime in Syria has survived the pressure to remove President Bashar al-Assad thanks to vital support from Iran, Hezbollah and Russia. ISIL's self-proclaimed caliphate has changed the dynamics in the area and removed focus from, in particular, Western demands to dislodge the Syrian president.

Iran will generally be wary of direct military engagement in the conflicts in Syria and Iraq, in part for fear of provoking a reaction from Saudi Arabia and the other Sunni Muslim states. In Iraq, Iran will primarily operate through the Iraqi Shiite militias which it supports by providing military assistance and arms. Threats against Shiite shrines in Iraq or the risk that the fighting might spill over into Sunni Muslim areas in Iran could, however, provoke a more direct Iranian reaction in the form of deployment of regular Iranian combat units.

Saudi Arabia will try to avoid being dragged into the conflict in Iraq. However, Saudi Arabia might become more actively involved in Iraq if the conflict spreads to the Saudi border areas. Increased Saudi involvement in Iraq is also a possibility should Iran opt for direct military engagement in Iraq.

Both Saudi Arabia and Iran oppose a division of Iraq. Their motives, however, diverge. Saudi Arabia opposes a division as it will lead to the formation of an Iraqi Shiite state that would border Saudi Arabia and be under significant Iranian influence. Iran opposes a division of Iraq as it would entail an independent Kurdish state under strong Western influence.

The issue of an independent Kurdish state has resurfaced as a result of the success of ISIL. Kurdish independence is a sensitive issue for Turkey, Iran and Syria because of the Kurdish minorities in these countries.

The Iraqi Kurds still disagree on the issue of independence. The Kurds' newly won control of the oil-rich areas around Kirkuk, the absence of Iraqi security forces in the northern part of Iraq and the influx of newer and more sophisticated weapons to the Kurdish militias have helped strengthen the position of the Kurds vis-à-vis the central government in Baghdad, though. The Iraqi Kurds will use this situation to seek greater political and financial independence.

SYRIA

The armed opposition is under increasing pressure. In the western, populous part of Syria, the Assad regime is making progress, and in the east the opposition is under pressure from ISIL. The insurgency against the Assad regime is far from defeated, though. Syria will be fraught with unrest, instability and porous borders, and militant Islamists will have operational room for manoeuvre in Syria. In the future, the Assad regime will be increasingly dependent on Iran, Hezbollah and Russia.

The conflict in Syria has evolved from an internal Syrian insurgency against a hard-pressed Assad regime into a conflict extensively determined by external factors, with the survival of the Assad regime decisively dependent on support from Iran, Hezbollah and Russia. The efforts by the international coalition against ISIL will strengthen the Assad regime for the time being but also, depending on the extent of the operation, the armed opposition. The situation is thus very dynamic.

The conflict has lasted for almost four years, resulting in over 200,000 fatalities and some 9 million refugees and internally displaced persons. What started as peaceful protests against corruption, power abuse, and social and economic conditions has escalated into a full-blown civil war, first and foremost due to the Assad regime's heavy-handed reaction to the protests. The armed opposition has become increasingly radicalized and dominated by Islamist groups. As a self-fulfilling prophecy, the regime's accusations that the insurgency was instigated by foreign terrorists have now materialized in ISIL operating across Syria and Iraq.
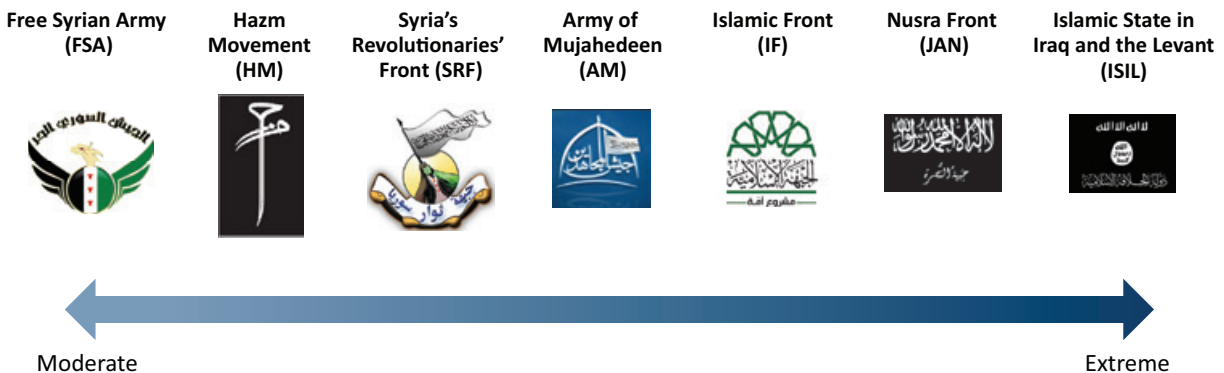
The military development

Despite support from Iran, Hezbollah and Russia, the regime seems incapable of gaining enough combat power to defeat ISIL or the armed opposition in the short term. The regime has deployed all of its troops and is forced to carefully prioritize its efforts. However, the regime is still militarily superior to the armed opposition and capable of defeating it in the areas where it chooses to focus its efforts. In this way, the regime has tightened control over key parts of the country. Still, the opposition has not been defeated and government forces are only making very slow and gradual progress, in some cases no more than temporary progress, and are suffering from heavy casualties and attrition.

The armed opposition, barring ISIL, is generally on the defensive and only capable of engaging in guerrilla-like warfare against the regime. Even increased arms deliveries and training would not significantly tip the military balance. Opposition cohesiveness and command and control are generally weak, and its offensive capabilities are limited.

The armed opposition comprises some 1,000 different groups, most of which are locally rooted and have very different objectives and political agendas. Opposition infighting is a regular phenomenon. And as the conflict progresses, the armed opposition is becoming increasingly dominated by Islamist groups. The below figure shows the major alliances between armed groups. The intensity of the blue colour reflects the overrepresentation of radical groups.

As a result of ISIL's success, the remaining armed opposition is under pressure from ISIL as well as the Assad regime. ISIL's consolidation in Syria has been far more detrimental to the armed opposition than to the regime. The regime's remaining military outposts in eastern Syria have also come under pressure, though, and many of them have been defeated by ISIL.

Free Syrian Army (FSA)	Hazm Movement (HM)	Syria's Revolutionaries' Front (SRF)	Army of Mujahedeen (AM)	Islamic Front (IF)	Nusra Front (JAN)	Islamic State in Iraq and the Levant (ISIL)

Moderate ←———————————————————————————→ Extreme

It is less likely that the regime and the rest of the armed opposition will be able to threaten ISIL's position in the northern and eastern parts of Syria in the coming six months. The air campaign by the US-led coalition contributes to curb ISIL's offensive capabilities, but ISIL will, on the other hand, consolidate its position and to some extent still be able to expand its presence in these parts of Syria.

There is a risk that the remaining armed opposition elements will be forced out of Aleppo. It is under pressure from both the regime and ISIL. Losing the parts of Aleppo currently under opposition control would constitute a major setback to the opposition.

Also, ISIL will make efforts to expand its presence to Damascus and other provinces. ISIL will find it difficult to be as successful in its efforts in the southern provinces of Syria as it has been in the eastern provinces due to the stronger presence of other opposition elements in the southern provinces.

No signs of politically negotiated solution
The political situation reflects the military situation. Pressure has eased on the Assad regime, and having made military progress, it is acting far more confidently. The advance made by ISIL is a welcome opportunity for the regime to break free of international isolation and assert itself as a necessary partner in the united fight against terrorism.

The groups under the Syrian National Coalition, however, are fraught with infighting and power struggles, and even if the coalition could successfully form an interim government, it would remain divided and weak.

The current military situation does not suggest that the Assad regime will enter into real negotiations with the opposition. Syria and its allies, however, are united in the ambition to keep the political process on track, primarily in a bid to demonstrate responsibility and avoid other types of international intervention. Consequently, the regime will likely make efforts to engage in negotiations with the tolerated part of the opposition.

Any potential progress in the political process will have limited or no effect on the battlefield as the political opposition generally has little influence on the armed opposition, and the Assad regime is intent on solving the conflict militarily. Thus, the chances of finding a political solution to the conflict seem slim in the short to medium term.

A changed Syria
Even though government forces have made progress in the central part of Syria, Syria as a state will be weakened by the conflict. With different ethnic or religious backgrounds, local war lords – opposition and Assad allies alike – are challenging the sovereignty of the state.

The Syrian state monopoly on power is diminishing as the Assad regime is shifting some tasks from the armed forces and security services to local defence militias, ethnic militias and other irregular forces. In addition, the regime's counter-insurgency efforts increasingly depend on foreign military units that are not under Syrian command.

The situation is even more complex for the armed opposition, which comprises a myriad of groups whose objectives diverge in the extreme. Internal disagreement and fighting between the various groups increase as the conflict drags on.

In addition, Syria's borders with its neighbouring countries are slowing dissolving. ISIL's caliphate straddles Syria and Iraq with no regard to existing borders. The border with the autonomous Kurdish region in northern Iraq is dissolving as a result of increased Kurdish control of the Kurdish-dominated areas, particularly in the north-eastern part of Syria. The border with Lebanon is already porous due to the involvement of Lebanese groups on both sides of the conflict as well as the Syrian conflict's spill-over effect on Lebanon.

It is likely that the Assad regime will survive, with or without President Bashar al-Assad. However, large parts of Syria will be beyond regime control, and militant Islamists will have operational room for manoeuvre.

Lebanon steers clear of the abyss
The conflict in Syria will continue to impact negatively on the security situation in Lebanon. Lebanon has become increasingly involved in the Syrian conflict following the 2013 announcement by Hezbollah leader Hassan Nasrallah that the movement's military wing was actively supporting the Assad regime in Syria. As a result of ISIL's ambition to extend its control to include Lebanon, Lebanon faces the risk of becoming further destabilized and the target of more terrorist attacks.

None of the leading political groups in Lebanon, including Hezbollah, are interested in a new civil war. So far, Lebanon

has managed to avoid widespread unrest between the different sections of the population. The formation of a broad coalition government in February 2014 following ten months of political deadlock has helped Lebanon avoid further involvement in the Syrian conflict.

In southern Lebanon, a fragile peace exists between Israel and Hezbollah. Neither Israel nor Hezbollah is interested in armed conflict, but the ceasefire between them reflects a fragile balance of power based on mutual threats of widespread destruction. Disarmament of Hezbollah is unlikely, even in the long term, and Hezbollah will continue to use its influence to counter any signs of Lebanon making peace with Israel.

IRAQ

ISIL's growth in Iraq magnifies the religious and ethnic fault lines and threatens to divide the country. In the short term, ISIL will remain a military threat, particularly in the Sunni-dominated areas in Iraq. The new Iraqi government will find it difficult to bridge the ethnic and religious gaps in the country.

In the short term, ISIL will remain a military threat, particularly in the Sunni-dominated areas in Iraq where ISIL is locally rooted and has the strongest foothold. In addition, ISIL controls large parts of eastern Syria that will serve as a base for continued support to the fighting in Iraq.

Iraqi Shiites and Kurdish militias are the spearheads in the fight against ISIL and other Sunni Muslim insurgent groups. With continued external support, these militias will be capable of fighting ISIL in the areas that are not dominated by Sunni Muslims.

The Iraqi security forces suffer from poor leadership and weak morale and will be dependent on international support as well as support from the Shiite and Kurdish militias. The Iraqi government forces' dependence on these militias will lead to further escalation of the conflict between the different ethnic and religious groupings in Iraq.

ISIL will seek to consolidate itself militarily and administratively in the Sunni-dominated areas north and west of Baghdad that have fallen under its control. Here, Iraqi government forces will find it difficult to dislodge ISIL without support from local Sunni Muslim tribes.

If the West continues its support to the Kurdish forces, ISIL will focus on maintaining control of Mosul in northern Iraq. In the Sunni-dominated Anbar province west of Baghdad, ISIL will seek to take control of key cities along the Euphrates River in a bid to link these cities with the areas it has seized inside Syria.

Similarly, ISIL will make efforts to take control of the Sunni-dominated areas in and around Baghdad and use these areas as a launch pad for further destabilization of the city. However, de facto control of Baghdad is unlikely.

Increased international military support to the Iraqi security forces and the Kurdish militias could prevent ISIL from achieving its military objectives.

ISIL is no threat to the bulk of the Iraqi oil production, which stems from the oil fields in the Shiite-dominated southern part of the country. However, ISIL likely aims to take control of a number of Kurdish oil fields, including the oil fields in Kurdish-controlled Kirkuk.

ISIL's fast conquests of large areas north and west of Baghdad during 2014 have been facilitated by years of political marginalization of Iraq's Sunni Muslim minority.

ISIL's military advance has been facilitated through close cooperation with a number of Sunni Muslim insurgent groups rooted in Saddam Hussein's old government and security structures. ISIL has also continuously managed to include several local Sunni Muslim tribes in the fighting against the Iraqi security forces and Shia Muslim militias through a mixture of persuasion and intimidation. However, the picture is not very clear-cut, and there are numerous examples in Iraq of local Sunni Muslim tribes choosing to fight alongside the Iraqi government.

Ethnic and religious discord

The new Iraqi government will, despite statements to the contrary, find it difficult to bridge the country's ethnic and religious gaps.

Iraqi politics will remain riddled with internal strife between

the various religious and ethnic parties that are more absorbed in pursuing their own interests and agendas than in strengthening national unity, making the continued fight against ISIL difficult.

Despite internal discord and power struggles, the Shiite bloc will remain a dominant factor in Iraqi politics. Sunni Muslims will extensively pursue their own local security and political interests and at the same time remain sceptical of the Shiite-led government in Baghdad. In spite of attempts by the autonomous Kurdish region in northern Iraq to have

greater sovereignty, the Kurds will remain divided over the issue of an independent Kurdish state.

In the medium term, the Iraqi state will remain weak, and government institutions, including the security apparatus and the legal system, will be riddled with corruption and nepotism. In much of Iraq, local militias and tribes will be a decisive power factor. Consequently, the security situation will be unstable and characterized by religious and ethnic divides in the medium term.

IRAN

There are no prospects of greater freedom under President Hassan Rouhani. A final agreement between Iran and the P5+1 countries (the United States, Russia, China, Great Britain, France and Germany) is less likely in the coming year. Supreme leader Ali Khamenei likely does not consider the economic sanctions against Iran a threat to the survival of the regime.

During his first year in office, President Rouhani has chosen to focus on strengthening Iran's foreign policy and the Iranian economy; it is a two-pronged strategy in which Khamenei has granted him some degree of autonomy.

On the foreign policy scene, Rouhani has focused on improving relations with the West, primarily through adopting an accommodating approach in the nuclear negotiations. Despite improved diplomatic relations with a number of Western countries, the economic sanctions have not been lifted. In addition, Rouhani has focused on improving relations with the Arab countries in the region. The diplomatic charm offensive has failed to produce the desired effect, and relations between the Persian, Shiite Iran and the Arab, Sunni-dominated Gulf States are still riddled with deep-seated mistrust. Saudi Arabia will continue to be the strongest opposer of Iranian influence in the region.

In terms of economy, Rouhani has removed a number of the government subsidies provided for food and energy products by former president Mahmoud Ahmadinejad. At the same time, with the approval of Khamenei, Rouhani has made efforts to strengthen the Iranian corporate sector at the expense of the Iranian Revolutionary Guard, which long dominated the Iranian economy.

On the other hand, Rouhani has focused less on improving freedom of speech, open access to social media and

protection of human and legal rights. These areas remain under strict control of the conservative wing spearheaded by Khamenei. The conservative wing has stated in no uncertain terms that Western norms and cultural values will lead to the undermining of Islamic rule in Iran.

Rouhani likely has no intentions of challenging Khamenei and the conservative wing in cultural and religious matters. Consequently, Iran will remain characterized by strong cultural, religious and political control, including oppression of dissidents.

A final nuclear agreement less likely

Despite more than a year of intense negotiations, Iran and the P5+1 countries (United States, Russia, China, Great Britain, France and Germany) still have not managed to reach agreement on Iran's nuclear programme.

It is less likely that Iran will be ready to make the concessions necessary to reach a final agreement in the nuclear negotiations in the year to come.

Iran has been reluctant to compromise on a number of key issues such as Iran's uranium enrichment capabilities, its research into new nuclear technology and the duration of a potential final agreement.

Iran's participation in the negotiations is aimed at entering a final nuclear agreement that partly legalizes Iran's nuclear

programme in an international context and partly ensures Iran the possibility of continuing to expand the current nuclear programme. These objectives are not compatible with the demands made by the P5+1 countries. Their different positions in the negotiation are real and not mere negotiation tactics.

Iran's supreme leader Ali Khamenei, who still has the final say in the nuclear negotiations, is the primary cause for the country's lack of flexibility in key issues. Khamenei admits that the economic sanctions imposed on the country over the past few years have weakened the Iranian economy considerably. However, it is likely that Khamenei does not consider the sanctions a threat to the survival of the regime.

Iran's economic conditions can also widely be attributed to the economic policy pursued under ex-president Mahmoud Ahmadinejad. With the implementation of new economic reforms, the Iranian economy is showing signs of gradual

improvement, reducing the likelihood of decisive Iranian concessions in the nuclear negotiations.

In the continuing nuclear negotiations, Khamenei will still support the accommodating but non-committal line adopted by President Hassan Rouhani and Foreign Minister Javad Zarif.

Iran will remain interested in negotiations, not least in a bid to avoid further economic sanctions. As long as the nuclear negotiations continue, Iran will observe the temporary agreements that have already been made, which entail a partial freeze of the nuclear programme and the lifting of some of the sanctions.

Even if a final nuclear agreement were to be entered, its subsequent monitoring and implementation would likely prove difficult as Iran would challenge the content of the agreement as well as its interpretation.

EGYPT

The new regime in Egypt will make efforts to consolidate power, focusing less on the country's regional ambitions. The Egyptian population craves stability and economic progress, but the government will find it difficult to implement the reforms necessary to achieve this. The regime's intense campaign against the Muslim Brotherhood has also precluded reconciliation with the movement. Militant Islamists pose the biggest security threat to the regime.

The internal unrest seen in recent years has eroded Egypt's former role as a regional great power. Egypt will give priority to its role as leading actor in its regional area of interest, including towards Gaza and the growing terrorist threat from Libya. In general, Egypt will focus more on its internal affairs and security than on its regional ambitions, though.

The ambition harboured by numerous Egyptians to revolutionize the Egyptian society has been dampened and replaced by a strong wish for stability. They hope that the regime will be strong enough to handle the political chaos seen in recent years and to rebuild the weak economy. The Gulf States, such as Saudi Arabia, continue to provide external political and economic support to the regime, and the United States has resumed its support to the Egyptian armed forces. However, the new regime only represents a fragile stability, which is threatened by the weak economy as well as security problems.

With the election of ex-army chief and Minister of Defence

Abdel Fatah al-Sisi as Egypt's president, the military has strengthened its political as well as its economic power. The growing security problems have made the military appear as a pillar of stability in Egypt, and the military is widely given carte blanche to handle the country's security issues. The military also has great influence on government policy and the Egyptian economy and is poised for even stronger influence on the latter through a number of big contracts for key infrastructure projects.

However, the military's strengthened position in Egypt and its say in the economy may backfire as these factors could hamper al-Sisi's chance of implementing reforms aimed at stimulating the economy and creating increased openness and transparency. It is possible that al-Sisi's military backers may turn against him if he, in his role as president, proves incapable of delivering results and maintaining popular support.

In the short term, the regime's popularity will be jeopardized by its probable inability to improve living conditions for

the common Egyptian. In general, the country's social and economic problems will continue, regularly leading to strikes and civil unrest, particularly in the Egyptian cities.

The intense regime campaign against the Muslim Brotherhood seen since the 2013 ouster of then President Mohammed Mursi has prevented the prospect of reconciliation. The movement appears highly weakened; nevertheless, the regime likely fears that the Muslim Brotherhood would succeed in mobilizing its followers and regaining political power if the regime were to abandon its campaign.

The political wing of the Muslim Brotherhood will be banned from participating in the upcoming parliamentary election. Other Islamist parties will share its fate unless they adopt a cooperative stance towards the regime.

However, an Islamist win would create a breeding ground for renewed political instability.

In parallel with the regime campaign against the Muslim Brotherhood, groups of militant Islamists engaged in terrorism against the state have seen an influx of new members. Militant Islamists in the Sinai Peninsula and in the western part of Egypt along the porous border with Libya will continue to pose the biggest security problem for the regime in the short to medium term.

If the Egyptian regime fails to address such security issues, the rift between Islamists and secular liberal groups will deepen and promote religious violence against minority groups such as Christians and Shiites. Also, as a result of the security problems, foreign investors and tourists will widely steer clear of Egypt.

LIBYA

The political and security chaos in Libya will continue, and there are no short-term prospects of the democratic transition process being resumed. Developments constitute a growing threat to other states in the region as well as to Western interests.

Libya has been rife with unrest since the ouster of then leader Muammar Gaddafi in 2011. Changing government leaders have failed to consolidate state power and to establish effective and credible government forces. The Libyan central government is weak, leaving room for infighting between rival militant groups. Leading politicians and foreign diplomats are increasingly under attack.

Moreover, the gap between Islamists on the one side and secular and liberal groups collectively on the other has deepened. Over the summer of 2014, government buildings and key institutions in Tripoli fell under Islamist militia control, forcing the Libyan government to flee to the north-eastern port town of Tobruk near the Egyptian border. In eastern Libya, the Islamist militia Ansar al-Sharia

has consolidated and continues to expand its contact with other Islamist groups in the region.

The absence of a strong central government also impedes the authorities' ability to handle the growing terrorist threat emanating from militant Islamist groups and networks such as al-Qaida in the Islamic Maghreb, which are expanding their presence in the country. Groups like al-Qaida in the Islamic Maghreb use Libya as a base for regrouping and training efforts.

In the short term, unity will not be achieved across Libya's tribal, religious and regional divides, just as there are no prospects of the transition process being resumed.

TERRORISM

The terrorist threat from abroad against Denmark, the West and Western targets in local conflict areas is serious. Operational conditions for militant Islamists in the Middle East, Afghanistan and parts of Africa have improved. In the short term, the militant Islamists' intent to attack the West has increased following the bombings in Syria and Iraq by the international coalition. However, the bombing campaign has made it harder for foreign fighters from the West to establish contact with militant Islamist organizations and experienced attack planners in Syria. Still, a large number of westerners will travel to Syria and Iraq to take part in the conflict. In the future, the majority of these foreign fighters will return home, thus increasing the number of individuals in the West with experience from war zones. The number of returnees will likely grow over the next two to three years. Consequently, globally oriented militant Islamists will gain more direct access to the West, including Denmark. In the medium term, the outcome of the internal fighting in Syria and Iraq and the success of the coalition campaign will impact decisively on the number of returnees and the nature of the terrorist threat in the West.

The most serious terrorist threat to the West will still emanate from the Levant (see map) as the conflicts in Syria and Iraq link attack planners and bomb specialists with years of experience from other conflict areas, for example Afghanistan, to a large number of Western extremists travelling overseas. Although the coalition bombing campaign has made it harder for foreign fighters from the West to get access to terrorist organizations such as the al-Nusra front and Islamic State in Iraq and the Levant (ISIL), westerners will still travel to Iraq and Syria to fight.

Returned extremists pose a threat

Previously, al-Qaida and other militant Islamist groups found it difficult to establish contact with people having easy access to the West. Similarly, it was difficult for potential Western recruits to establish contact with al-Qaida. Since 2012, this barrier has diminished significantly as thousands of westerners have travelled to Syria and Iraq to fight alongside militant Islamist groups. However, the bombings in Syria will make entering Syria much more difficult.

Most foreign fighters travelling from Scandinavia to Syria and Iraq join ISIL. These fighters affiliated with ISIL pose a potential terrorist threat when they return from Syria and Iraq as they hold expertise earned from extensive training and combat. Some of these fighters have thus been infused with ideological schooling, skills and readiness to use violence, enabling them to launch minor attacks in the West, including kidnappings and beheadings – methods used by ISIL in Iraq and Syria. Next to ISIL, the al-Nusra Front is the group of choice for incoming Scandinavian extremists. Experienced attack planners affiliated with the al-Qaida senior leadership have joined the al-Nusra Front. They have been referred to as the Khorasan group and they pose a potential threat regarding the capability of launching large-scale attacks in the West out of Syria.

ISIL and al-Qaida

In 2003, ISIL was known as al-Qaida in Iraq and quickly became an official al-Qaida affiliate with ties to the al-Qaida's senior leadership. In 2011, the group expanded into Syria through Syrian al-Qaida affiliate the al-Nusra Front, which it helped establish. However, after falling out with the al-Nusra Front, al-Qaida in Iraq severed its ties with the group in 2013 and subsequently called itself Islamic State in Iraq and the Levant (ISIL). In 2014, following continued disagreements with the al-Qaida senior leadership, the group broke with al-Qaida and shortly thereafter announced the establishment of an Islamic caliphate, changing its name to Islamic State. In 2014, through its self-proclaimed caliphate and its conquests in Iraq and Syria, the group positioned itself as the most notorious terrorist organization. Despite its great ideological similarities with al-Qaida, it now also competes with al-Qaida for recruits, funds and prestige.

Returning foreign extremists with Arab and African backgrounds also pose a threat to national security in their home countries, for example Morocco, Tunisia and Kenya, where large groups of young men return from fighting in Syria, Iraq and Somalia.

Militant Islamism spreads through local conflicts

Militant Islamism spreads when ISIL and al-Qaida and its official regional affiliates cooperate with local groups in carrying out insurgency and establishing Islamic states. A number of political conflicts in the region facilitate militant Islamist growth. Large parts of North Africa remain unstable and, at the same time, the conflicts in Syria and
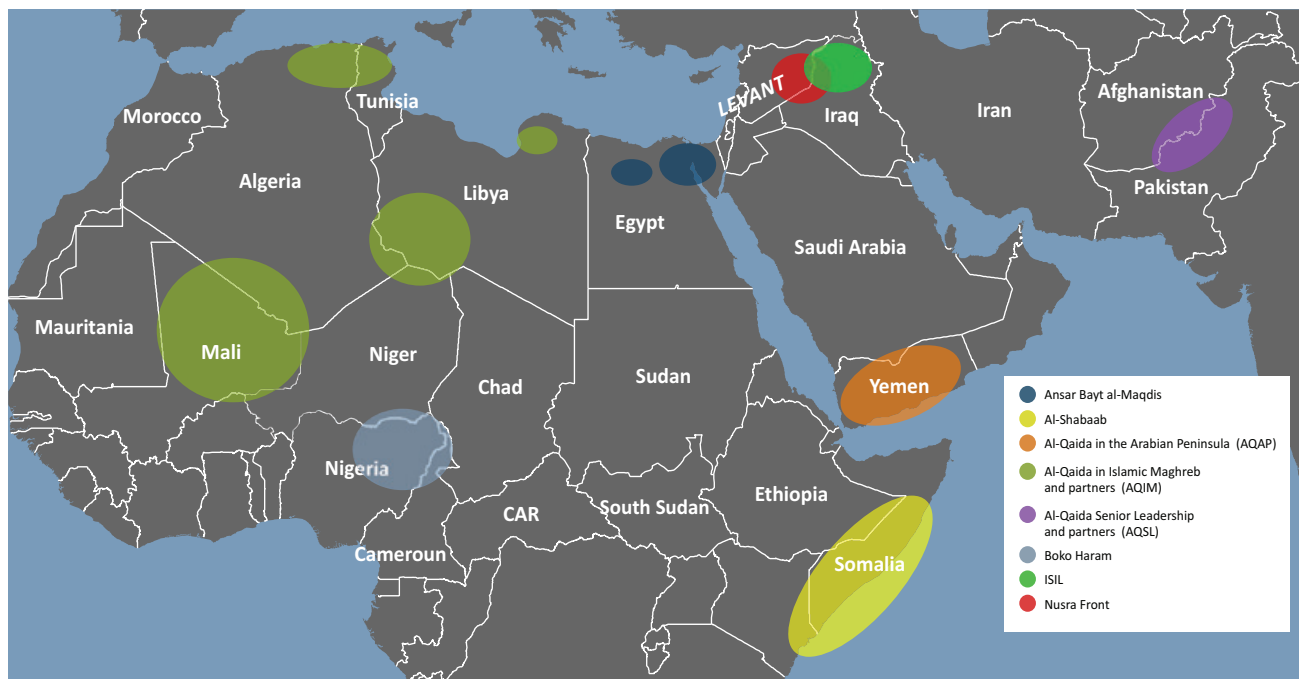
Map of key militant Islamist groups in Africa, the Middle East and South Asia

Iraq have provided militant Islamists with a safe haven. In Afghanistan and Pakistan, reduced international presence has given militant Islamists renewed room for manoeuvre, which will likely continue beyond 2014.

In Syria and Iraq, the al-Nusra Front and ISIL pose a threat to targets in the West. As a result of their extremist ideology and their extensive terrorist capabilities, they pose a persistent threat to security in the Middle East as well as in the West. Both groups have close ties to militant Islamists across the Middle East, enabling them to plan and launch large-scale and complex attacks in the entire region. The al-Nusra Front and ISIL have already launched multiple attacks against targets in Lebanon that relate to their fighting in Syria.

In Syria, the international coalition is currently bombing al-Nusra Front and al-Qaida planners responsible for preparing terrorist attacks in the West. It is likely that these planners will try to speed up their plans for small-scale attacks in response to the bombings. However, the bombing campaign has made it harder for attack planners to continue their preparations for large-scale attacks in the West. The risk of large attacks in the West depends on whether the coalition succeeds in taking out the key individuals in the attack planning network.

In the short term and despite the coalition bombing campaign, the groups will likely continue to focus on regional adversaries. Following the coalition bombings, ISIL and the al-Nusra Front have, on several occasions, publicly expressed their intention to launch terrorist attacks against Western targets, just as ISIL has beheaded kidnapped westerners. This reflects an increasing interest among these groups and their sympathizers in attacking targets in the West as well as Western local targets. As a result of their extensive network in the West and the al-Nusra Front's affiliated attack planners, the risk of terrorist attacks in the West has likely increased.

Al-Qaida in the Arabian Peninsula has a strong presence in Yemen, and the weak central government will find it difficult to halt the organization's activities. Numerous global militant Islamists consider al-Qaida in the Arabian Peninsula the spearhead of al-Qaida's global fighting, although it mainly poses a regional terrorist threat. Nevertheless, in its English-language propaganda, the group also calls on sympathizers in the West to launch individual attacks, and it is highly likely that the group continuously plans attacks on targets in the West.

In North Africa, militant Islamists are expanding their presence, particularly in Libya and Egypt. Al-Qaida in the

Islamic Maghreb and other local groups use Libya and, to a lesser extent, other countries in the region to set up training camps, procure arms and facilitate personnel as well as build alliances and provide financial and other types of support across the North African countries. The situation in Libya thus has an impact on the terrorist threat level in all of North and West Africa, including in Egypt, where the militant Islamist group Ansar Bayt al-Maqdis is improving its operational capabilities and reach despite government efforts to neutralize the group.

Militant Islamist groups in North Africa will first and foremost fight the local governments, but several groups are likely also planning attacks on Western interests in the region. In Nigeria, Boko Haram has stepped up its number of attacks in 2014 in the northern and north-eastern part of the country against a wide range of national Nigerian targets in a bid to destabilize the country ahead of the 2015 presidential election. It is less likely that militant Islamist groups in North and West Africa will launch attacks on targets outside the region.

In East Africa, al-Shabaab still remains capable of launching attacks on targets across the entire region. The group primarily pursues a national and regional agenda, although foreign Islamists try to steer al-Shabaab in a more global direction. Consequently, attacks on Western targets in the region will likely primarily be launched in an attempt to harm the local African governments.

In Pakistan and Afghanistan, al-Qaida cooperates with local militant groups, including the Haqqani Network, warlord Gul Bahadur in North Waziristan and the Mullah Nazir Group in South Waziristan, and receives funding from foreign donors. Al-Qaida is also present in Pakistani cities such as Peshawar and Karachi, from where it sends fighters to Afghanistan and produces propaganda material. Al-Qaida in Pakistan and Afghanistan are thus closely linked to local actors and do not launch independent operations. It is likely that the al-Qaida leadership will remain based in Pakistan, from where it will exploit the improved operational conditions in Afghanistan that are likely to arise as a result of the redeployment of international forces from Afghanistan.

Terrorist threat increasingly unpredictable
So far in 2014, militant Islamist groups in the Middle East, South Asia and parts of Africa have seen a strengthening. Locally, regionally and to some extent internationally, the terrorist threat has become more unpredictable as global militant Islamists increasingly act independently of the al-Qaida senior leadership, which is left weakened by years of antiterrorist efforts.

The weakening of the al-Qaida senior leadership and the appearance of numerous new local conflict areas have prompted the emergence of important militant Islamist groups that are not officially affiliated to al-Qaida. This has happened in Syria, Iraq, Mali, Libya, Afghanistan, Pakistan and Egypt. Examples include ISIL in Syria and Iraq and Boko Haram in Nigeria.

The al-Qaida senior leadership, however, is no longer responsible for the planning, funding and execution of terrorist attacks against the West and Western interests. Though the leadership is vital to the formulation of a global militant Islamist ideology, the planning of attacks and other decisions are often made locally. Consequently, it has become increasingly difficult to predict and counter attacks.

THE ARCTIC

The competition for legal rights to the Arctic seabed will be intensified in the coming years. Russia continues to pursue the UN track and cooperate on issues related to the Arctic, but the cooperative track will be put under strain internally in the Russian leadership should Russia be unable to reach its key objectives through this strategy. Russia appears increasingly determined to pursue its strategic interests more rigorously, even when this is to the detriment of relations with the West. This could also prove to be the case in the Arctic. However, long-term development in the Arctic region will likely be more characterized by cooperation and competition than by conflict and confrontations. China's primary interests in the Arctic are the shorter shipping lanes and access to natural resources; however, Chinese investments in the Arctic, including in Greenland, will generate Chinese political and strategic interests in the Arctic region.

As signatories to the 2008 Ilulissat Declaration, the five Arctic coastal states, the Kingdom of Denmark, Norway, Russia, Canada and the United States, have all agreed that they will pursue their interests in the Arctic within the confines of international law and norms. In fact, cooperation and competition have been the dominating trends since the declaration was signed.

Several circumstances suggest that the coastal states in the Arctic region will continue their cooperation and solve potential disputes among the states in a peaceful manner, certainly regarding access to the Arctic region. Preliminary geological examinations indicate that the prospects for raw material extraction beyond the coastal states' current economic zones are moderate. Also, the expected overlaps between the claims of the coastal states will likely be limited and mainly of symbolic importance, notably around the North Pole. Consequently, the coastal states have no weighty economic arguments for having disputes over exploitation rights to the seabed.

However, there are numerous indications that the competition to secure exploitation rights to the seabed and to control access to the region could be intensified in the future, as Russia is increasingly determined to take steps to pursue its national interests in the Arctic region even at the expense of international cooperation.

RUSSIA IN THE ARCTIC REGION

In the course of its foreign policy, Russia seems increasingly willing to pursue strategic interests more rigorously, even when this has a negative impact on the Russian economy and on its relations with the EU and the United States.

Russia's annexation of Crimea and destabilization of Ukraine are recent and clear illustrations of this. Russia's conduct in Ukraine and the post-Soviet space are not necessarily indications of similar aggressive behaviour in other places in the world, although it is likely that increasing Russian determination to take unilateral actions to reach its strategic objectives at the expense of international relations could also extend to the Arctic, for instance in the form of an increased Arctic presence.

Russia is in the process of expanding its presence in the Russian region of the Arctic, including the establishment of a more formal Arctic command structure, highly likely a new Arctic brigade in the Murmansk area and the expansion of the paramilitary and civil infrastructure along the entire North East Passage. These measures will mainly address the border service and the search-and-rescue corps, both of which will get new stations and benefit from renovation of a number of airfields, both on the mainland and on the islands in the Arctic Ocean. These upgrades indicate an increasing Russian focus on the Arctic region.

In the past few years, hardliners in the Russian leadership have increased their influence on the country's foreign and security policy, including on Russia's Arctic policy. This puts pressure on the more moderate forces in the Russian leadership, who are proponents of the current cooperative policy in the Arctic region.

In the next few years, anti-Western sentiments will likely grow stronger among the Russian political leadership, occasionally reflecting on Arctic issues such as the exploitation rights to the seabed and the control of the North East Passage.

In the coming years, disputes between Russia and the West on other issues may prompt Russia to take on a more assertive role as a great power by increasing its military activity and presence in the Arctic. Russia remains the strongest of the

Arctic nations in terms of military capabilities in the region. During the Ukraine crisis, however, the Russian leadership has emphasized its cooperative stance on the Arctic.

Claims revolve around identity rather than economy
Russia's fundamental interest in maintaining peace and stability in the Arctic region is twofold: Russia has ambitions to develop the North East Passage into a key strategic and commercially successful sea lane, and secondly Russia needs to attract investments in order to develop the energy production in the country's extensive Arctic regions. Still, Russia may not be as accommodating in its Arctic policy as could be expected considering the country's economic interests.

Russia's focus on the parts of the Arctic region that already belong to Russia is mainly concerned with exploitation of resources. In contrast, when it comes to Russia's new and as yet unresolved claims on the seabed, these are largely rooted in Russia's self-perception as an Arctic power. Even though it is highly likely that Russia, like other coastal states, hopes that increased control of the northernmost, partially disputed areas will translate into long-term economic profit, this part of Russia's Arctic strategy is more dominated by political and identity-related considerations. Russia considers itself a leading power in the Arctic, mainly because of its geographical location. This self-perception is not only manifest in the Russian leadership but is also shared by the Russian population.

Even though jeopardizing its Arctic cooperation would not serve Russia's economic interests, Russia will likely be prone to pursue its national objectives in the Arctic at the expense of international cooperation in the region should the Russian leadership's political strategic objectives in the Arctic not be satisfied by the current political course.

Intensified competition for seabed resources
In the context of exploitation rights to the seabed, the Arctic coastal states, including Denmark, will move towards a more intense phase as the countries submit their claims to the UN Commission on the Limits of the Continental Shelf (CLCS) and receive the commission's recommendations.

The UN CLCS is expected to conclude on Russia's Arctic claim in 2016 or 2017, and the Russian leadership clearly expects the UN CLCS to agree with the Russian claims.

Should the recommendations go against Russia's ambitions, pressure from parts of Putin's inner circle will likely intensify against the current accommodating Arctic policy. This could further motivate Russia to pursue national objectives and lead both to Russian criticism of the UN CLCS and attempts to circumvent the recommendations.

Even if the recommendations generally were to be in favour of Russia, there is a risk that Russia would choose to regard the commission's recommendations as a final ruling in favour of Russia and thus incorporate them into its Arctic policy.

This may pose a challenge to Denmark, as Denmark's claims will not be processed until the mid-2020s and as they will highly likely overlap to some extent with the Russian claims. Consequently, for a period of 8 to 10 years, the situation will be unresolved.

CHINA IN THE ARCTIC REGION

Over the past few years, China has significantly intensified its focus on the Arctic, including Greenland, particularly on the new opportunities unfolding when transit via the Arctic sea lanes becomes profitable. This is particularly relevant in the context of the North East passage north of Russia.

Due to China's geographical location, the route to, for instance, northern Europe via the North East Passage will be shorter and thereby cheaper, depending, of course, on the potential additional costs of obligatory payments for Russian ice-breaking assistance to commercial ships, etc.
It is also important to China that the Arctic shipping lanes will offer more and safer transport routes for China's import of natural resources, reducing the vulnerability to unforeseen closures of transportation routes.

Furthermore, China's interest in the Arctic also involves access to the region's natural resources. China craves energy and minerals to support its massive and ever increasing industrial production and seeks to invest in natural resource extraction projects in most parts of the world to strengthen its security of supply of strategically vital natural resources.

China is also interested in gaining influence on developments in the Arctic region in a bid to prevent the Arctic states from having exclusive influence over the region. Like a number of other countries, China obtained permanent observer status on the Arctic Council in May 2013, and China will slowly try to increase its influence in the Arctic.

### Chinese interest in natural resources in Greenland

The Arctic and Greenland are not among the foreign policy focal points of the Chinese leadership. China's interest in Greenland is mainly an indirect consequence of China's strategy to establish access to natural resources to ensure the country's economic growth and thus the Communist Party's grip on power.

Parallel to the strategy for natural resources and growth, a number of Chinese companies and investment banks have shown an interest in investing in Greenland, particularly in the field of raw materials, including iron, copper, and uranium, but also rare earth elements. Some rare earth elements constitute key components in the development and production of high-tech products within the defence industry, greentech, and civilian IT technology such as mobile phones. The Chinese Ministry of Land and Resources regards all these resources to be of strategic importance; however, this does not entail that potential Chinese investments in Greenland are a direct part of a state-controlled plan whose exclusive focus is on Chinese involvement in Greenland.

Investments may lead to political pressure

Traditionally, China's commercial and strategic interests are closely intertwined due to the Communist Party's dominating role in the society and economy. Consequently, Chinese political and strategic interests in the Arctic will likely grow in parallel with China's expanding economic involvement in the region. Thus, a commercial transaction with a Chinese business or a Chinese state-owned enterprise could potentially turn political, involving the Chinese government, whose conduct will be based mainly on political interests.

Over the past few years, China has in several cases used its economic power and market domination as a direct political lever against other countries in connection with issues that China finds to be of vital national interest. These issues include territorial disputes, the status of Tibet and the legal rights of human rights activists in China. Targets of this strategy include Japan, the Philippines, Norway, France and the United Kingdom. In 2010, China thus delayed the export of rare earth elements to Japan in response to a diplomatic dispute, taking advantage of its market domination within rare earth elements as a political lever against Japan. Similar situations may possibly occur in an Arctic context.
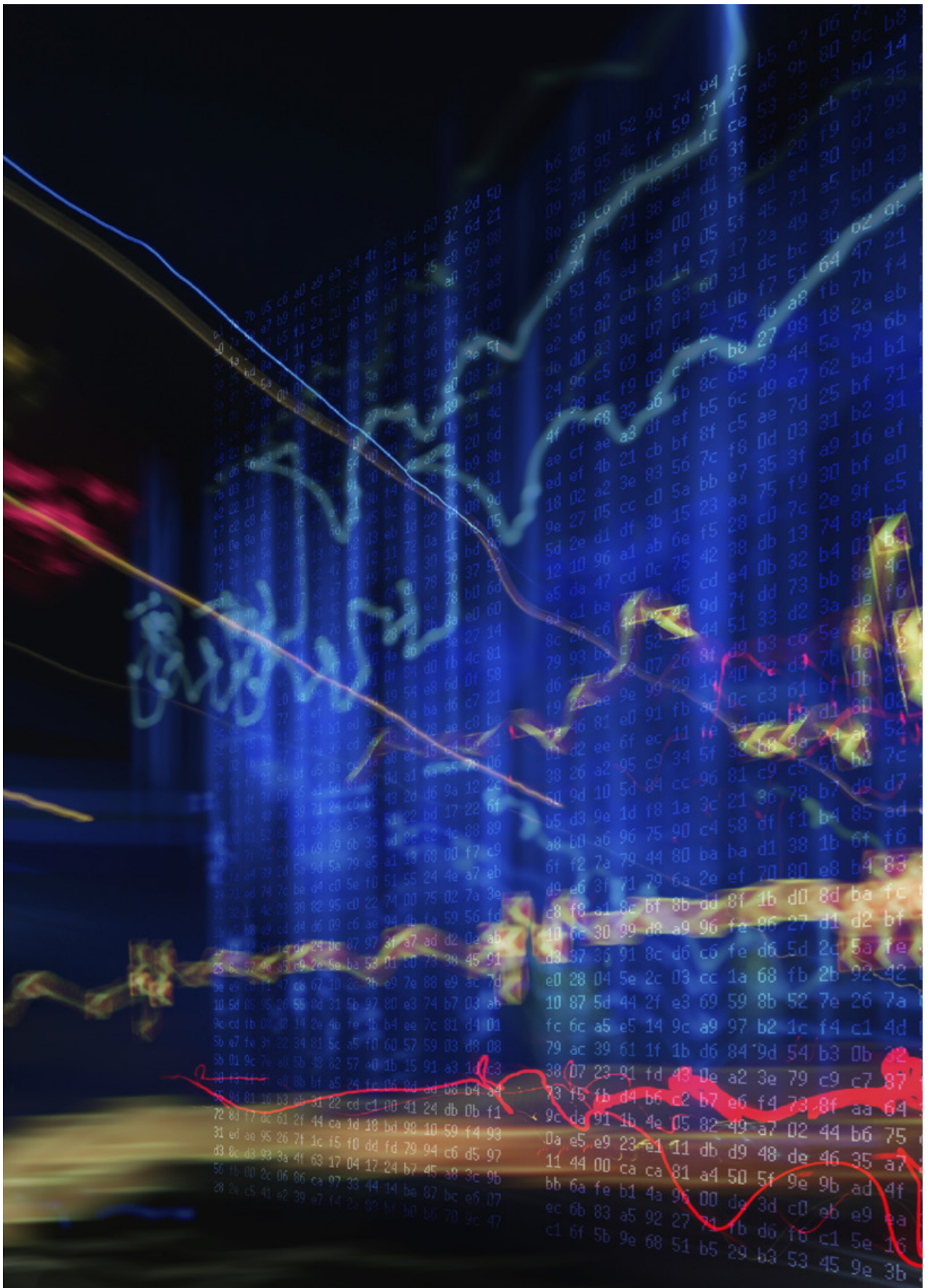
CYBER THREATS AND CYBER ESPIONAGE

Danish authorities and companies continue to be exposed to extensive and increasing cyber espionage from state-sponsored actors. Cyber criminals and politically motivated hackers, so-called hacktivists, pose a minor threat to Danish interests. The technological development has brought about a changed risk pattern, increasing the need for security measures and preparedness.

Espionage against Danish state institutions and companies continues to pose the most serious threat against Denmark in the cyber realm. The most severe threats are those of state or state-sponsored attacks in the form of Advanced Persistent Threats (APT).

The APT groups are very active and use a wide range of methods to compromise their targets. Compromising government targets is a means used to collect information that may be used as leverage during foreign policy negotiations. The groups also exploit the Internet to conduct espionage and steal Danish intellectual property and business secrets, such as business plans, research results and technical know-how.

The threat originates mainly from states that use the information to support their own economic, military and social development.

State-sponsored cyber espionage
In 2013 and 2014, APT groups have caused several critical cyber attacks. The attacks have targeted both public authorities and private companies of considerable size and importance to Denmark.

Globally, the APT groups often collect data from IT systems belonging to companies that develop advanced electronics, telecommunications and IT security as well as companies within the pharmaceutical, defence and aviation industries. Furthermore, certain APT groups attempt to gain access to both governmental and non-governmental organizations.

Cyber espionage is thus a method employed on par with other forms of espionage. Cyber espionage is cheap and effective, and the information can be collected over great distances and via third countries, making it extremely difficult to attribute the activity to a certain actor.

It is highly likely that cyber espionage will increase.

Attacks on infrastructure important to society
Denmark has not yet been exposed to cyber attacks that have caused extensive damage or disruption of

APT – The greatest threat in cyberspace
Advanced Persistent Threat (APT) is a particularly advanced, targeted and persistent form of hacker attack. An APT attack requires an organization with sufficient financial resources and specific technical information on the targets that the organization aims to compromise. Thus, APT groups need extensive planning and significant resources to gain access to a specific network.

The purpose of APT attacks is espionage, including industrial espionage. The groups have varying motivations. These include collecting information that is of political and strategic interest and the results of research and development conducted by Danish and foreign companies.

The malicious actors are persistent and often work on the chosen espionage target for years. They may seek to obtain access in a number of ways and, once access is gained, they may operate undetected for a long time. If the victim discovers and terminates their access, the malicious actors will work actively to compromise the network again.

the Information and Communication Technology (ICT) infrastructure or the associated physical infrastructure, including the energy and water supply and industrial control systems. It is highly unlikely that the Danish ICT infrastructure will be exposed to a targeted, destructive cyber attack in the short to medium term.

Hacker tools freely available online
Private individuals and small hacktivist groups will continue to pose a threat to Denmark, Danish citizens and Danish interests. Their motives are often either financial or political. Easy online access to tools that, for instance, can launch a Distributed Denial of Service (DDoS) means that hackers do not need to have particular technical prerequisites to disrupt or damage Danish websites and servers. Moreover,

it is still possible for individuals with particular technical skills to access large public and private organizations that fail to maintain strong security awareness.

The threat posed by individuals and criminal groups is directed against Danish citizens and companies. Citizens risk that their personal information is stolen and abused, and companies can be hit, not least financially, by commercially sensitive information being stolen.

The threat from hacktivists is primarily directed against public and private organizations, where hacktivists try to attract public attention to a given matter. This can be achieved, for example, by website defacement or by disrupting access to websites through DDoS attacks.

Both cyber crime and political activism will continue to be a normal part of online activities.

Low threat from terrorist cyber attacks

Militant Islamists regard traditional terrorist attacks as their method of choice. Some militant Islamists are likely capable of launching simple cyber attacks, including DDoS. It is likely that terrorists will improve their ability to use the Internet as an attack platform. However, their main focus will still be on the use of social media for propaganda purposes in the short to medium term.

Hacking represents a growing risk

With the constant development in technology, risk patterns continue to change. This is due to the year by year rapid increase in the number of devices connected to the Internet. The development of Internet connected devices such as phones, televisions and systems that control access to buildings, lighting and heating, etc. makes it likely that, globally, some 25 to 50 billion units will be connected to the Internet in 2020.

Mobile devices are access points for hackers

Organizations are increasingly dependent on the ability of employees to access information stored on internal networks via their mobile devices. To criminals and state-sponsored hackers, mobile devices have become a key access point for attacks. This is illustrated by the significant amount of malware specifically designed to target the operating systems of smartphones and tablets.

Malicious actors capable of compromising mobile devices have the ability to track the position of the device or

activate functions such as the microphone and camera without the user being aware of this.

Even if known vulnerabilities are removed from mobile devices, it is likely that new vulnerabilities will emerge when new functionalities are added.

Data on the online devices reveal a great deal about the users and their habits. Such devices may provide access to homes and workplaces, contain information on the user's health and provide access to information about personal finances and other confidential matters. The vast amounts of personal information offer a deep insight into a person's life and can be exploited by malicious actors.

The insider threat

It is not only the technology in itself that poses challenges. As equipment with Internet connectivity becomes cheaper, more people will use it and they will become more versatile in using it .This poses a risk that is closely linked to the insider threat. This threat emanates from employees, who intentionally or unintentionally compromise security in their workplace. In this context, the unintentional threat poses a special challenge.

Should employees violate company security policies when using their IT equipment, the risk of outsiders gaining access to the company's internal network, and the information stored there, will increase. At the same time, malicious actors are perfecting their skills at posing as legitimate recipients of sensitive information, thus gaining access to information from restricted networks, confidential conversations, and videos and photos of the workplace, colleagues and business partners.

Supply chain threat

There is a rising awareness of the so-called supply chain threat, where malware or remote-controllable components are built into hardware and software during production so that they can be activated by malicious actors via the Internet.

This may enable malicious actors to monitor, terminate or control a process via the Internet. Supply chain threats may be found in any link in the production chain. Many hardware and software components have become complex to the point where even major international companies and government organizations find it difficult to protect themselves against supply chain threats.

WEAPONS OF MASS DESTRUCTION

The threat from proliferation of weapons of mass destruction is growing. A number of countries maintain or strengthen their capabilities to develop weapons of mass destruction and associated means of delivery. However, Syria's handover of its declared chemical weapons stockpile is a major step forward. Furthermore, negotiations with Iran on its nuclear programme are still ongoing.

Chemical and biological weapons continue to pose a threat, but especially the capability to produce nuclear weapons is a source of increasing international concern. Contrary to international agreements, a number of countries are currently developing weapons of mass destruction and ballistic missiles suited for the delivery of these weapons.

Reduced threat from Syrian chemical weapons
The threat from Syria's chemical weapons programme has been markedly reduced in the past few years following Syria's handover of its declared chemical weapons stockpile and dismantling of declared production facilities. Still, it is highly likely that minor parts of Syria's chemical weapons programme remain undeclared, making it likely that Syria can still use chemical weapons on a small scale.

The handover of Syrian stockpiles of chemical warfare agents was concluded in late June 2014. In relation to the initial declaration, Syria now only needs to destroy a number of small chemical facilities related to the chemical weapons programme before having fulfilled its obligations to the Organisation for the Prohibition of Chemical Weapons.

Iran maintains capacity despite negotiations
Since the autumn of 2013, Iran has participated in intensive negotiations on the country's nuclear programme with the P5+1 group (the United States, Russia, China, Great Britain, France and Germany) under the Joint Plan of Action (the JPA). As mentioned in the section on Iran, it is less likely that Iran will be ready to give the concessions required for a new deal.

The JPA sets limits on Iran's stockpiles of enriched uranium hexafluoride (UF6) gas, while the nuclear programme essentially is left intact. The stockpiles of enriched UF6 gas and the levels of enrichment are significant in regard to how long it would take for Iran to produce a uranium-based nuclear weapon. This requires uranium enriched to 90 per cent, so-called weapons-grade uranium.

Iran likely wishes to obtain the capacity for rapid production of nuclear weapons should the Iranian leadership decide to initiate production of such weapons. The JPA does not

limit this ambition. Even though Iran observes the terms of the JPA, this would not significantly increase the amount of time it would take for Iran to produce a nuclear weapon, should the Iranian leadership decide to do so.

However, the JPA does provide the international community with an early warning of a possible Iranian decision to produce and test nuclear weapons. The earlier warning is a result of daily inspections of Iran's enrichment facilities by the International Atomic Energy Agency under the JPA that provide early detection if Iran were to start enriching uranium to weapons grade.

In the past 10 years, Iran has accumulated considerable nuclear expertise. The JPA does not limit this expertise. As a party to the Treaty on the Non-Proliferation of Nuclear Weapons, Iran has a right to develop a civilian nuclear programme. However, in the last 10 to 15 years, Iran has repeatedly concealed activities that are relevant only for the production of nuclear weapons.

Iran continues to develop its ballistic missiles
Iran is capable of striking targets in south-east Europe with its ballistic missiles. Iran's ballistic missile programme is one of the most advanced in the Middle East, and according to Iranian media the country tested a new type of ballistic missile as recently as in February 2014.

North Korea still has ambitions to develop nuclear weapons
North Korea is capable of detonating a nuclear device in the very short term should the North Korean leadership decide to take such a step. During the winter and spring of 2014, there was considerable activity on the site where North Korea conducted its three nuclear tests. Parallel with this activity, the North Korean leadership has repeatedly threatened to conduct yet another nuclear test.

North Korea is also in the process of developing a nuclear weapon that can be delivered by a ballistic missile and continuously attempts to increase the range of its missiles. In the long term, North Korea will likely be able to develop operational ballistic missiles capable of striking NATO territory. Since the autumn of 2013, the site of the

Ballistic missiles
Ballistic missiles have long ranges and high velocity in their terminal phase. They are relatively imprecise and thus best suited for delivery of weapons of mass destruction. Defence against ballistic missiles is more than, for instance, bombers. Consequently, the probability of a successful ballistic missile attack is higher and thus poses a greater threat.

North Korean ballistic missile tests has been expanded and prepared for use, and North Korea has tested missile motors at the site. Consequently, it is possible that North Korea will test a ballistic missile or launch a space rocket in the short term. Progress made in space rockets can often be transferred to ballistic missiles due to technological similarities.

Increased reserves of plutonium and enriched uranium
The restart of the Yongbyon nuclear reactor in 2013 will, in the short term, enable North Korea to increase its stockpile of plutonium that may be used for nuclear weapons production. The reactor was made inoperative and sealed in 2007.

During 2013, the building holding North Korea's uranium enrichment centrifuges was expanded to twice its original size. If this expansion is an indication of a similar expansion of the North Korean centrifuge programme, the enrichment capacity will exceed North Korean needs for enriched uranium for the country's yet incomplete nuclear power reactor. Thus, a possible reason for the expansion could be that North Korea wishes to produce weapons-grade uranium for nuclear devices.

North Korea's capability to use centrifuges for uranium enrichment increases the risk of proliferation of technology and systems that are essential for developing weapons of mass destruction. Actually, North Korea likely once exported a plutonium production reactor to Syria. The reactor was bombed in 2007. The willingness to export such systems and the relative ease of hiding a uranium enrichment centrifuge programme are therefore a problem for the international community's efforts to limit the proliferation of weapons of mass destruction.

Increasingly easy access to technology and information
Due to globalization and growing international trade, the control of trade in products that in addition to their civilian use can also be used in weapons of mass destruction and their means of delivery, the so-called dual-use products, has become increasingly difficult.

Iran, Syria and North Korea continue to purchase products abroad that are subject to sanctions and export control. Strict enforcement of export control and sanctions hamper these countries' purchases of dual-use products in the West. Consequently, their purchases increasingly take place in Asia. Parallel to this, general technological development and the knowledge and skills of researchers and students mean that it has gradually become easier for a number of countries to develop technology that may be used in weapons of mass destruction.

PIRACY

The threat from piracy in the waters off the Horn of Africa has declined to a very low level and will remain low in the short term, provided that the recommended best management practices are adopted by merchant ships to counter piracy and that the international coalition's pressure on the pirate groups is maintained. Pirates and al-Shabaab are not directly cooperating. In the Gulf of Guinea, civilian shipping comes under attack regularly. The threat will remain present in the short to medium term, even though the affected countries in the Gulf of Guinea have taken measures to improve maritime security.

Horn of Africa: low activity level, but still a threat

In the past few years, the threat from piracy in the waters off the Horn of Africa has dropped markedly. However, the threat from piracy has not been eliminated entirely even though large merchant ships have not been hijacked since May 2012. The Somalia-based pirates still have the intent and capacity to launch attacks on civilian shipping. Consequently, the pirates remain a threat to civilian shipping in the short to medium term, although it is possible they will look for suitable onshore targets in the short term due to the lack of easy targets in the Indian Ocean.

The key reasons for the very low piracy activity level are the merchant ships' adoption of best management practices, notably the use of armed security guards, and the coalition's anti-piracy operations at sea. The land-based anti-piracy operations launched by the Puntland maritime police forces in northern Somalia have increasingly hampered pirate operations along the coast and on shore.

The future capability of the pirate groups to hijack new merchant ships depends on their ability to change their modus operandi to counter the best management practices adopted by shipping companies and the anti-piracy operations introduced by the international coalition. Despite several attempts, the pirate groups have so far proven incapable of changing their modus operandi, though. Consequently, the current very low piracy activity level will highly likely be sustained in the short term, provided that the pressure on the pirates is maintained.

There is likely some level of cooperation between certain pirate groups and al-Shabaab in areas where both groups are present. However, cooperation between the two parties is not systematic or organized. In addition, there are major conflicting interests between the groups as a result of their different activities, lifestyles and motives.

Al-Shabaab controls large territories in southern and central Somalia. The group members are also present in several areas in northern and central parts of the country, including the Galmudug region where the group controls the traditional pirate stronghold of Harardheere. For further information on al-Shabaab, see the chapter on African Trouble Spots.

Map showing the piracy-infested areas in the waters off the Horn of Africa and West Africa

West Africa: regular attacks on civilian shipping

Piracy will remain a serious threat in the Gulf of Guinea in the short to medium term. The measures implemented in the Gulf of Guinea did not lead to a decline in attacks in 2013 and, also, there are no indications that the number of attacks will fall in 2014.

Even though the littoral states in the area, notably Nigeria, have taken steps to improve maritime security, civilian shipping is still regularly exposed to attacks, partly due to the slow process of establishing effective maritime security measures as the regional governments focus on addressing other issues. Rather, the process is driven forward by pressure from and involvement of the international community, commercial companies and international non-governmental organizations.

Among the countries in the Gulf of Guinea, Nigeria and Ghana seem most willing to improve maritime security, but the results are still limited or will take a long time to materialize. Nigeria has the best conditions for providing maritime security in the region. In fact, so far in 2014, Nigeria has developed and improved its maritime security capabilities. Also, Nigeria has continuously made its cooperation with other counties and international partners public. But, so far, the measures have not reduced the number of attacks against civilian shipping, and it is less likely that such a reduction will be achieved in the short to medium term.

The security situation in Nigeria is under strong pressure from the terrorist group Boko Haram, particularly in the northern part of the country, where a state of emergency has been declared in three federal states. The efforts to combat Boko Haram have gained local, regional and international focus, forcing the government and its security forces to give higher priority to its antiterrorism efforts in the northern part of Nigeria than to the threat to civilian shipping in the Gulf of Guinea. Consequently, Nigeria's military budgets are under strain, thus further impeding a satisfactory upgrade of maritime capabilities.

Ghana has also improved its maritime security efforts in the regional area of interest and intends to provide further capacity build-up. As the threat from piracy in the waters off Ghana is limited in comparison to the threat in the waters off Nigeria, the measures will have limited effect on the overall threat assessment for the Gulf of Guinea.

The threat is detrimental to the regional economy, and the countries are losing revenue as several international companies consider the risk too high, thus lowering their activity level in the region. Consequently, the countries near the Gulf of Guinea, in particular, Nigeria, have an interest in combating the threat to civilian shipping or as minimum demonstrating their determination to improve maritime security. So far, this has not translated into effective measures.

CHINA

China's foreign policy focuses on strengthening China's economic clout and political influence in the Asia-Pacific region and on its relations with the United States. The objective of the modernization programme for the People's Liberation Army is to promote China's ambitions for increased strategic influence in the Asia-Pacific region. In the long to very long term, China will enhance its global engagement, although domestic issues and internal stability will remain top priorities for the Chinese leadership.

A key element in China's foreign policy is to strengthen its influence in the neighbouring countries in the Asia-Pacific region by means of economic integration with China. This is mainly achieved through bilateral investment agreements on regional infrastructure projects that are negotiated between China's major investment banks and China's less affluent neighbouring states.

In 2013 and 2014, the Chinese leadership has been particularly supportive of Chinese investments in regional infrastructure between China and countries in Central and Southeast Asia. The leadership aims to establish two transport corridors leading from China to Europe, the so-called silk routes. One route is land-based and stretches from China's western provinces through Central Asia and beyond, while the other route is maritime and sets off from China's southern provinces before passing through the straits of Southeast Asia.

The purpose of investing in infrastructure projects is to facilitate and expand trade with the EU, to promote further expansion of China's access to energy and natural resources, and to accelerate the economic development of, in particular, China's western provinces.

China and the United States compete for influence in Asia
China's neighbouring countries and Taiwan are likely to attract Chinese investments while at the same time forming or strengthening security and defence alliances with the United States in order to balance China's growing
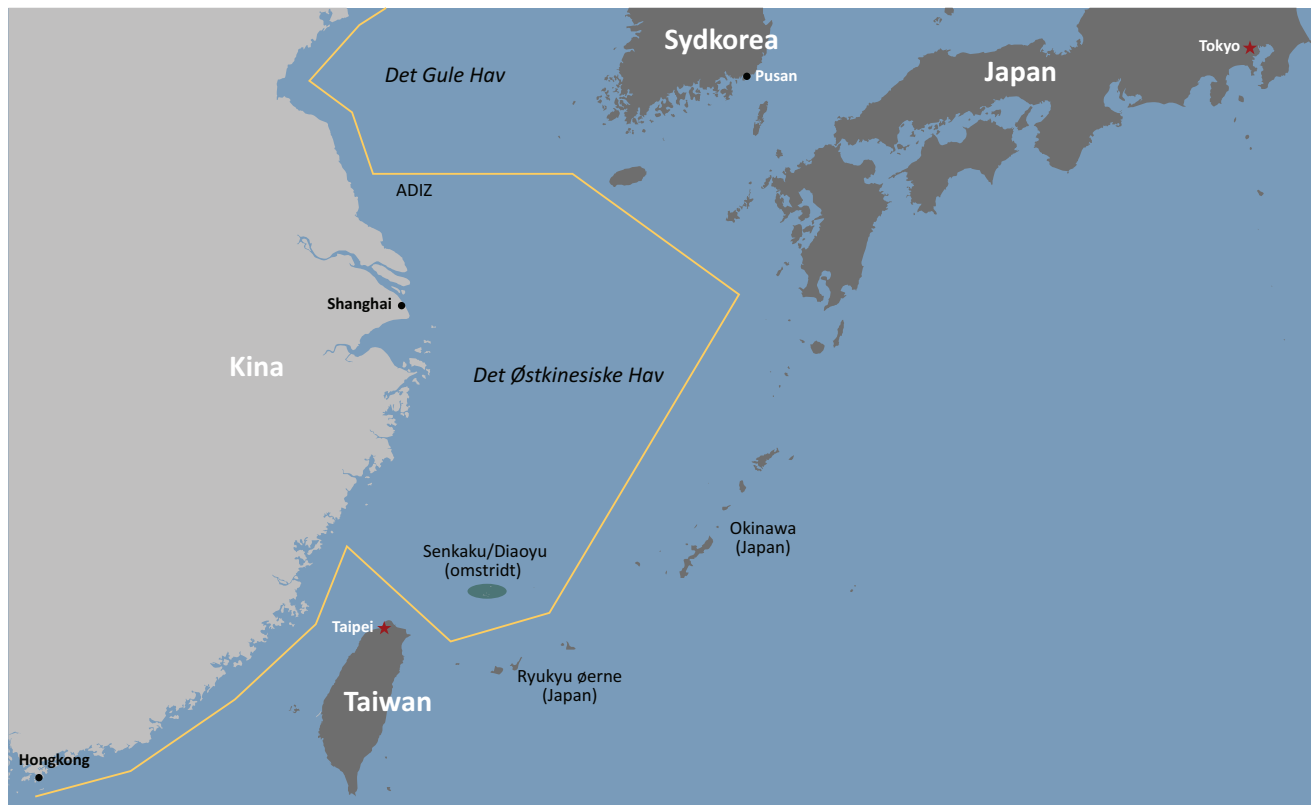
Map showing China's Air Defence Identification Zone – ADIZ

influence in the region. China, on the other hand, will seek to weaken the regional influence of the United States.

Lingering historical resentment towards Japan and the perception that the United States is illegitimately seeking to contain the rise of China have generated popular support among the Chinese public in favour of China playing a more assertive role in the East China Sea and the South China Sea. However, it is highly unlikely that China will initiate an armed conflict with the United States or its allies, either in the short or long term. After all, stable trade relations with the United States and Japan are of crucial importance to China.

China will, however, highly likely exploit its increasing economic clout and military presence in the East China Sea and the South China Sea in order to claim Chinese sovereignty over disputed sea territories and islands. China will continue to address the territorial disputes with, in particular, Japan, the Philippines and Vietnam bilaterally and without any interference from the United States or the Association of South-East Asian Nations.

China expands ties with Russia

China's and Russia's strategic interests converge when it comes to countering US influence globally as well as in the two countries' neighbouring areas. However, it is highly unlikely that the two countries will forge an actual strategic alliance against the United States or its allies in the Asia-Pacific region.

Since early 2013, China and Russia have promoted their strategic partnership by increasing the number of leadership visits and exchanges. The two countries have forged several cooperation agreements and signed a long-awaited agreement on natural gas supply from eastern Russia to China. The signing of this agreement was partly triggered by Russia's deteriorating relations with the United States and the EU following the crisis in Ukraine. The gas supply corresponds roughly to one quarter of China's current annual gas consumption.

At the same time, China and Russia are further expanding their strategic partnership through the Shanghai Cooperation Organisation, which both countries view as an important forum for discussions on economic development in Central Asia and on countering what they perceive as terrorism, separatism and extremism in the region.

In the long term, the scope of Chinese investments in Central Asia could possibly result in direct tensions between China and Russia, as Russia perceives Central Asia to be part of the Russian sphere of interest.

The military to support China's regional influence

Continuous reforms and professionalization of the People's Liberation Army (PLA) are intended to underpin China's ambitions of enhanced strategic influence in the Asia-Pacific region, China's objective being to achieve military superiority in local and regional conflicts. Special focus is on deterring the United States from military intervention in China's regional area of interest and on the dispute with Japan over the Senkaku/Diaoyu Islands. Consequently, reforming the PLA navy and air force is a top priority for the Chinese leadership, and in 2013 China established an Air Defence Identification Zone (ADIZ) to control parts of the airspace over the East China Sea.

Parallel to these measures, the Chinese leadership has enhanced the Communist Party's control over the PLA. The creation of China's National Security Committee in 2013 aimed to centralize the overall coordination and management of the Chinese security and defence policy around China's President Xi Jinping. This will likely strengthen China's ability to pursue long-term strategic security and defence policy goals as well as its ability to deal with domestic as well as foreign crises under time pressure.

China increases its global engagement

In the long to very long term, China's foreign policy principle of non-interference will highly likely gradually recede into the background in favour of a more pragmatic foreign policy.

The Chinese leadership will intensify its engagement in international affairs of strategic importance to China, particularly in Central Asia and the Middle East. This effort is primarily made to secure China's access to energy, food and natural resources, to protect Chinese nationals abroad and to ensure that China's international trade maintains access to the global shipping lanes.

PLA presence is already growing outside of China's neighbouring area. Illustrative of this is the contribution of a Chinese naval force to combat piracy in the waters off the Horn of Africa since 2009. In 2014, China also contributed an estimated 400 troops to the peacekeeping

mission of the UN in Mali and a frigate to escort chemical weapons out of Syria.

The leadership prioritizes China's domestic issues
Even though the Chinese leadership intensifies its engagement in international affairs in the long to very long term, domestic issues will force the leadership to refrain from taking on a role in global foreign politics matching that of the United States. The Communist Party's continued political monopoly is a key priority whose preservation mainly requires constant high economic growth and domestic stability.

China is facing major and extremely difficult challenges. Fundamental issues include rampant corruption and lack of discipline among party cadres, a growth model that has resulted in mounting economic inequality, an increased debt burden among the local governments and increasing environmental pollution. The Chinese leadership has taken the initiative to counter these issues by launching an extensive anti-corruption campaign and an ambitious 2020-agenda involving market-oriented reforms of China's economic growth model and debureaucratization of the public sector.

In addition, the Chinese leadership will highly likely focus on handling local protests and preventing further terrorist attacks that are associated with the unrest in the western Xinjiang province. Unrest in the province is rooted in a widespread feeling of marginalization and lack of religious and political rights among the local Muslim Uighurs.

AFGHANISTAN AND PAKISTAN

Map of Afghanistan and Pakistan with location of North Waziristan

AFGHANISTAN

How the situation will unfold in Afghanistan in the next couple of years is uncertain. Politically, the presidential election has created deep fissures between the most important power brokers. The cohesion of the Afghan government can be weakened by these dividing lines. Despite this, the Afghan government has made military progress, and there are budding signs of discord among insurgents. In any event, the development in Afghanistan depends on whether the coalition government between the election winner Ashraf Ghani and loser Abdullah Abdullah proves durable and on continuous economic support from Western countries.

The 2014 Afghan presidential election laid bare the strengths and weaknesses of the Afghan society that have emerged since the fall of the Taliban in 2001. On the one hand, the Afghan population, including a growing civil society, is committed to democratic change of power, refusing to follow the Taliban's call for an election boycott.

But accusations of massive electoral fraud and recount of votes, weak institutions, concentration of power in the hands of former president Karzai and strong provincial

power brokers delayed the final decision between the two presidential candidates Ashraf Ghani and Abdullah Abdullah and weakened the democratic legitimacy of the presidential election. The coalition government between election winner Ashraf Ghani and loser Abdullah Abdullah is fragile. Thus, it is uncertain how the situation will unfold in Afghanistan over the next few years.

Coalition government or collapse

The new coalition government will be the pivot of

developments over the coming years. In the absence of strong institutions, it is vital that the major power brokers participate in the coalition government. Power brokers have a great say in local politics, economy and security and represent key parts of the Afghan community. Their support is decisive to the ability of the Afghan government to resist Taliban attempts at usurping power.

The situation is balancing on a knife's edge. On the one hand, it is possible that the distrust between the power brokers following the presidential election is too deep to render the coalition government durable. This distrust may nudge a process in which regional power brokers increasingly turn away from the Afghan state. Such a weakening of the central power in Kabul could also impact negatively on the cohesion of the Afghan security forces. Ultimately, the situation may result in the collapse of the Afghan national government and confrontation across ethnic divides.

On the other hand, it is possible that international pressure can preserve the involvement of the key power brokers in the national coalition government. Ashraf Ghani's acceptance of power-sharing, abolishment of the strong concentration of power in the presidency, and delegation of authority to the provinces may pave the way for a more sustainable coalition government that will know how to exhaust the possibilities that have emerged following the success of the Afghan security forces.

Militarily, the Afghan national government and the Afghan security forces have been somewhat successful. Illustrative of this success are the security forces' increased operational pace, their improved cohesion and planning, and their increasingly effective command and control structure. Morale and recruitment efforts have not declined despite high casualty figures. So far in 2014, the Afghan security forces have thus successfully defeated the Taliban in many small-scale engagements around the country. They are, however, challenged in holding on to captured terrain. Also, the security forces find it difficult to pursue a long-term strategy.

Taliban insurgency less intensive
The Taliban controls large areas in southern and, in particular, eastern Afghanistan and in the Pashtun enclaves in northern and western Afghanistan. Despite this position of strength, the past year has been a disappointment to the Taliban. The insurgent group has been unable to sustain

the intensity of the insurgency, and the overall number of attacks has dropped between 2013 and 2014. The Taliban effort in southern Afghanistan has yet to produce results, and the attempts to frustrate the presidential election failed. Still, the insurgents have stepped up the number of attacks in Kabul, as attacks launched in the capital carry strong propaganda value. The number of attacks launched in Kabul will likely increase over the next few years.

Over the next two years, the Taliban will less likely enter into a peace agreement with the Afghan national government, attempting instead to obtain military success and progress on the battlefield. It is, however, likely that the Taliban leadership will grow increasingly positive towards a negotiated solution should the Taliban prove unable to defeat the Afghan security forces militarily.

In addition, signs are emerging of simmering rifts among Taliban members who disagree on the future military and political course. Also, the redeployment of the international forces has diluted the Taliban's combat morale as the Taliban propaganda and incentives were extensively rooted in fighting the foreign enemy. Involuntary involvement in local power struggles is also a strain on the Taliban.

Al-Qaida cooperates with local insurgents
Al-Qaida's presence in Afghanistan is weakened following the war on terror in recent years, and the terrorist group has limited impact on the insurgency in Afghanistan. Al-Qaida is mainly present in the eastern provinces, where it has formed close cooperative ties with local insurgent groups. Al-Qaida in Afghanistan comprises some 200 fighters and has close contacts with al-Qaida in Pakistan. The future operational conditions for al-Qaida in Afghanistan will depend on the security deal that is to form the framework for NATO's post-2014 effort. In the short to medium term, al-Qaida will try to consolidate further in eastern Afghanistan. Al-Qaida's future presence in Afghanistan will also depend on factors such as the Taliban's acceptance of the group, developments in Pakistan and the extent to which foreign militant Islamists find attractive battle and training areas in, for instance, the Middle East and North Africa.

Pakistan awaits developments in Afghanistan
Pakistan carefully balances its support for the Taliban and other insurgent groups that operate from Pakistani safe havens into Afghanistan. Pakistan would not like to see an escalation of the conflict in Afghanistan as this would

impact negatively on the security situation in Pakistan. The Pakistani government likely fears that Taliban success in Afghanistan has the potential to create instability in South and Central Asia and to facilitate the setting up of terrorist safe havens. It is thus likely that Pakistan will sit on the fence and await developments in Afghanistan. Also, Pakistan will likely use diplomacy to try to make the Afghan national government take Pakistani interests into consideration.

Western aid vital

Afghanistan has seen significant modernization and urbanization since the fall of the Taliban in 2001. The country's economy is still underdeveloped, though. As a consequence, for years to come, the Afghan national government will not be able to raise sufficient taxes to finance the Afghan security forces and provide basic services to the Afghan population. International aid to Afghanistan is thus vital to the survival of the Afghan national government.

PAKISTAN

Pakistan will remain a safe haven, training base and hub for militant Islamists in the medium term and will continue to be fraught with terrorist attacks against military authorities and civilians. In the medium term, militant Islamists will continue to constitute a serious terrorist threat to the West and Western interests in Pakistan. The stability of Pakistan is of key significance to the entire region but in particular to Afghanistan and India.

In the summer of 2014, the Pakistan Armed Forces carried out a large-scale military operation in North Waziristan in the Pakistani tribal areas. The operation targeted militant Islamists who have for years used the town of Miranshah as their headquarters for terrorist planning and as a hideaway and transit camp for incoming fighters. The operation was part of the attempt to fight Pakistan's numerous militant organizations. Prior to the operations, many militants had likely fled Miranshah for other tribal areas in Pakistan, Pakistani cities and across the porous border into Afghanistan.

The military and political pressure on Pakistani Taliban and the internal friction have caused the movement to fragment into smaller local units that are fraught with infighting. In November 2013, Pakistani Taliban appointed Mullah Fazlullah new leader, and he was quick to refuse any kind of peace negotiations with the government.

Nevertheless, other local Pakistani Taliban leaders initiated individual negotiations, resulting in the withdrawal of the strongest group in Pakistani Taliban, the Mehsud tribe. This left the movement significantly weakened. Still, Pakistani Taliban became involved in the largest attack against an international target in Pakistan since 2007 when it participated in the June 2014 attack against Karachi Airport. This attack was one of the factors that triggered the military operation in Miranshah.

In the short to medium term, it is highly unlikely that Pakistan will be successful in purging the country of militant Islamists. Local insurgent and terrorist groups are still very active in all parts of Pakistan. Many of these groups are affiliated with large political organizations in Pakistan that have access to significant resources and political influence.

The al-Qaida senior leadership is still present in Pakistan despite being under pressure from drone attacks and Pakistani military operations in the tribal areas. Pakistan's extensive militant Islamist network sympathizes with al-Qaida. It protects, finances and assists the al-Qaida senior leadership, enabling it to keep up its presence in Pakistan.

Pakistan wary of Indian influence in Afghanistan

The continued presence of militant Islamist groups in Pakistan continues to put a strain on Pakistan's relations with its neighbours. Since the 1990s, Pakistan has supported insurgent groups in Afghanistan to ensure Pakistani influence in Afghan politics. Pakistan is particularly keen to ensure that Afghanistan does not become an ally of India. An escalation of the conflict in Afghanistan would impact negatively on the security situation in Pakistan, increasing the likelihood that Pakistan will likely first and foremost try to secure its interests in Afghanistan by diplomatic means.

AFRICAN TROUBLE SPOTS

Though many African countries have seen economic growth and change towards democracy, Africa is still fraught with numerous conflicts, and militant Islamist groups are gaining ground in many African countries. Though some African countries have improved their military capacities, Africa will remain dependent on international support to handle conflict resolution and peacekeeping efforts in the medium term.
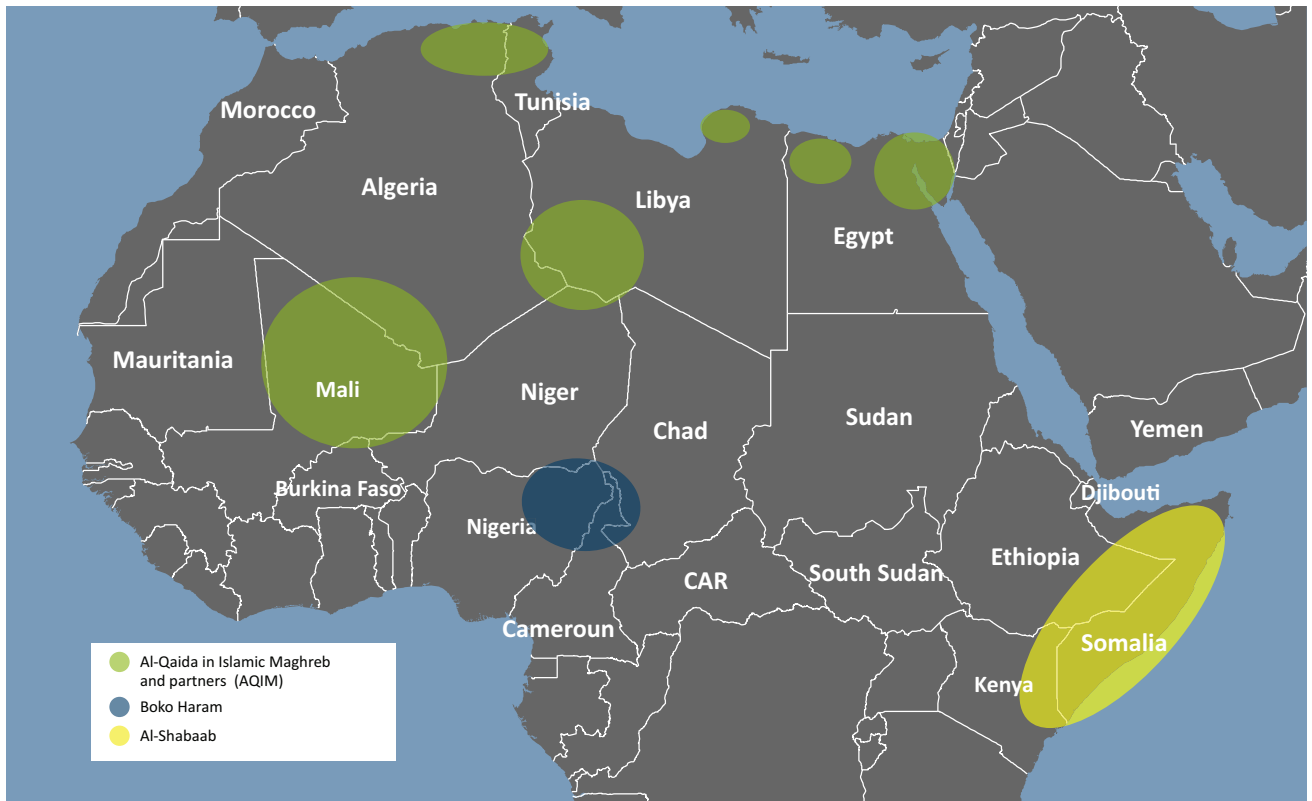
Map of key militant Islamist groups in Africa

Africa is the continent with the deepest poverty and the greatest gap between rich and poor. However, some countries are seeing economic growth and change towards democracy. Suppression of political dissent and political instability prevent a peaceful and stable development of the region, though.

Militant Islamist groups on the rise
Generally, the terrorist threat against Western interests in East Africa has grown over the past year. In East Africa, al-Shabaab has stepped up attacks in and outside Somalia despite being under military pressure. Al-Shabaab was responsible for a number of the terrorist attacks launched in the first six months of 2014 in neighbouring Kenya. In addition, local Kenyan terrorist networks have seen a strengthening, launching several attacks inside Kenya.

In northern and western Africa, militant Islamist groups are also on the rise. Al-Qaida in the Islamic Maghreb and its local affiliates favour countries like Libya, Niger and Mali as locations for training and as sources of weapons and fighters for militant Islamist groups all over the region, as it is an objective of Al-Qaida in the Islamic Maghreb to attack local as well as regional targets.

In northern Nigeria, Boko Haram has carried out a number of terrorist attacks against civilian and military targets. Boko Haram mainly constitutes a threat against national Nigerian targets and only secondarily against Western interests in the country. The group has also been known to attack neighbouring Cameroun, Chad and Niger.

External support still vital

In the medium term, Africa will continue to depend on international support to handle conflict resolution and peacekeeping efforts. The ability of the continent to handle its own conflicts has been strengthened, however, as several countries have increased their military capacities to contribute to local peace and stabilization efforts. These efforts are hampered by a lack of coordination, equipment and personnel, though.

Also, many of the African contributors often have their own interests at stake in the conflicts they try to resolve; that fact frequently seems to deepen the distrust and raise questions about the neutrality of the contributing countries.

Poor governance a root cause of conflict

In many African countries, poor governance contributes to paving the way for internal conflicts. African governments typically favour certain groups at the expense of others, thus deepening tensions between the different groups. Political suppression, corruption and uneven access to power and resources generate social and political dissatisfaction that can be exploited by political leaders to mobilize certain groups.

Religious and ethnic affiliations strengthen the rivals' intransigence and deflect attention from the political roots of the conflicts, making it even harder to forge sustainable solutions. In the Central African Republic, the conflict between Muslim rebel groups and Christian militias has thus escalated into a religious conflict between Muslims and Christians. Sudan's year-long internal conflicts and the newly rekindled conflict in South Sudan are also examples of how political rulers exploit existing religious and ethnic tensions in conflicts revolving around the distribution of power and resources.

SOMALIA

Al-Shabaab still constitutes a serious terrorist threat – nationally as well as regionally. The military offensive launched in March 2014 has failed to decisively weaken al-Shabaab. The federal government's resolve is challenged by clan interests, power struggles and corruption. Moreover, clan disputes will continue to be a source of unrest.

Attacks against Western interests will highly likely increase as Western countries enhance their presence in Somalia. In addition, al-Shabaab has stepped up its attacks against those of Somalia's neighbours that contribute militarily to the African Union Mission in Somalia. So far in 2014, al-Shabaab has launched a number of terrorist attacks in Kenya, often assisted by local terrorist networks, and a single large attack in Djibouti. In a regional context, al-Shabaab thus constitutes an increasing threat.

Despite the success of the African Union Mission in Somalia and Somali federal forces in putting sufficient military pressure on al-Shabaab for it to relinquish control over key cities and areas, al-Shabaab destabilizes most of southern and central Somalia, and the movement is increasingly focused on launching terrorist attacks in and outside Somalia, including against Western targets.

Al-Shabaab attacks against the African Union Mission in Somalia and the Somali federal government are a daily occurrence. In the Somali capital of Mogadishu, al-Shabaab specifically targets government buildings and individuals affiliated with the government. So far in 2014, the group has also intensified its attacks against Western interests in Mogadishu.

Al-Shabaab leader Ahmed Godane was killed in a US drone attack in September 2014. Al-Shabaab has subsequently appointed Ahmad Umar new leader of the organization. Godane's death will likely spark internal unrest in the organization. It is highly likely that al-Shabaab will try to retaliate the killing of Godane and continue to constitute a serious terrorist threat in East Africa.

Military offensives fail to decisively weaken al-Shabaab

In March 2014, the African Union Mission in Somalia and the Somali national security forces launched an offensive to dislodge al-Shabaab from a number of areas in southern and central Somalia. The offensive has resulted in key military progress and the recapture of key cities from al-Shabaab over the spring of 2014 and since the renewal of the offensive in August 2014.

It is less likely that the Somali federal government and the national security forces will be capable of establishing political and security control in areas that are recaptured by

the African Union Mission in Somalia. Al-Shabaab will thus be able to win back parts of the lost territory fairly quickly.

The military forces do not have the capacity required to defeat al-Shabaab. Despite the forces' success in depriving al-Shabaab of control over key cities, the organization still controls large areas and key trade routes. Also, al-Shabaab has managed to avoid casualties by launching ambushes rather than engaging in direct military confrontations.

Corruption and clan interests impede political progress
The deep-seated mutual distrust and competition between the different clans will continue to fuel political instability and impede real political progress. The resolve of the federal government is thus challenged by clan interests, personal power struggles and pervasive corruption.

Since late 2013, these factors have encouraged political disputes and growing discontent with President Hassan Sheikh Mohamoud, which have translated into a weakening of the government. Also, they have served to shift the government's focus away from key political missions such as the establishment of a federal state, an overhaul of the constitution and preparations for elections that are to be held by 2016 at the latest.

Decentralization provides incentive for conflict
From 2013 to 2014, the federal government has forged a series of agreements with regional rulers on the establishment of new transitional regional state administrations in the southern and central part of the country. These agreements may constitute a positive political step towards the establishment of a Somali federal state.

Still, the agreements may spark increasing unrest as different clans will vie for influence in a future federal state. The risk of conflict is exacerbated by the fact that the regional rulers only rarely enjoy wide support in the areas to which they lay claim and are challenged by other powerful clan leaders and competing state initiatives. Moreover, al-Shabaab may profit from these conflicts by securing support from clans that feel sidelined in the process.

MALI

Failure of the peace negotiations between the government and rebel groups would reflect in an increase in the general terrorist threat against Western interests in North and West Africa in the short term, as militant Islamists are once again poised to expand their influence in northern Mali.

Despite the presence of international military forces, militant Islamists maintain a significant capability to launch attacks, mainly directed against the Malian Army and the United Nations Stabilization Mission in Mali. Both Al-Qaida in the Islamic Maghreb and one of its splinter groups, al-Murabitoun, have access to battle-seasoned fighters with years of experience gained from fighting in the area. Also, they have access to large amounts of arms, ammunition and explosives. Many of these arms stem from Libya, which has also been used as a militant safe haven in connection with the 2013 French military intervention in northern Mali.

The Malian forces have pulled out of the northern part of Mali, and despite the efforts of the European Union's Training Mission to Mali, the Malian Army will highly unlikely be able to establish security and stability in the northern part of the country without external support in the short to medium term. In northern Mali, security is thus upheld by rebel groups. In areas where the rebel groups are incapable of upholding security, this task falls to the United Nations Stabilization Mission in Mali and the French Operation Barkhane. The international security forces are faced with major instability in the wake of rebel infighting and operations launched by militant Islamists.

Militant Islamist presence in northern Mali
Militant Islamists, including Al-Qaida in the Islamic Maghreb and al-Murabitoun, are still present in northern Mali and in many adjacent border areas. Their short-term objective is to uphold their presence in the area, while their medium-term goal is to re-establish control over northern Mali. For years, militant Islamists have been present in northern Mali, setting up close ties with the local population, ties on which they base their presence in the area.

The geographical location of northern Mali in the central Sahel region, connecting North, West and Central Africa, provides favourable conditions for militant Islamists. Old trade routes connect northern Mali, Algeria, Libya, Tunisia

and Egypt with the countries along the African west coast as well as with Niger, Burkina Faso and Nigeria.

Northern Mali is rife with smuggling activities, activities in which several militant Islamist groups are likely either directly or indirectly involved. The area also provides easy access to North Africa, West Africa and Central Africa, and the groups can easily connect across these countries. The militant Islamists do not want the Malian authorities or other actors to establish control over northern Mali.

The overall threat from terrorism against Western interests in North and West Africa would likely increase if the militant Islamist groups were to regain unimpeded access to northern Mali.

Government hard-pressed to create trust in the north
Rebel groups in northern Mali are still a major challenge in the context of uniting the country. These groups comprise several factions such as the two Tuareg groups National Movement for Liberation of Azawad and Haut Conseil pour l'Unité de l'Azawad as well as the Arab Mouvement Arabe de l'Azawad. The unstable security situation makes it hard to win the trust of the Malian population, which is a prerequisite for the government to succeed in its

efforts to secure broad backing in the northern part of the country. However, the Malian government has succeeded in stabilizing southern Mali following the 2013 democratic elections.

In the Malian capital of Bamako, the political situation is the key source of unrest. The population is frustrated with the government's lack of political initiatives. Consequently, continued stability hinges on the government's ability to show resolve as well as visible economic and social initiatives. If successful steps are not taken to combat poverty and redistribute resources, increasing social and political instability in Mali will likely ensue in the short to medium term. Increased instability could improve the militant Islamists' scope of re-exerting their influence on events in northern Mali.

The government's potential failure to forge an agreement acceptable to the rebel groups and the population in southern and northern Mali would undermine the security and political progress that has after all taken place in Mali since early 2013. Such a development would once again boost the influence of the militant Islamists in northern Mali.

SOUTH SUDAN

In the short term, it is less likely that South Sudan President Salva Kiir and rebel leader Riek Machar will find a solution to the conflict in South Sudan. Since December 2013, rebel fighting has destabilized the political and security situation in South Sudan. The conflict potential between Sudan and South Sudan has, however, decreased as both countries are focused on internal problems.

It is less likely that South Sudan President Salva Kiir and rebel leader Riek Machar will agree on a political solution to the conflict in the short term as both drag their feet in cooperating to obtain a politically sustainable solution to the conflict in South Sudan. The rivals have repeatedly broken truces and failed to observe or implement agreements already entered. Also, negotiations between the two camps have often reached a deadlock despite regional attempts at conciliation.

Since December 2013, the security situation in South Sudan has strongly deteriorated. The international community and regional actors alike threaten to introduce sanctions against both Kiir and Machar in an attempt to force them to engage in dialogue and cooperation and to reduce

civilian casualties. The UN effort in South Sudan, whose Danish contribution includes the senior mission leader and a small number of Danish UN observers, has yet to result in more effective cooperation between the belligerent parties, which continue the armed fighting in the country undeterred.

Three failed attempts at truces between the rivals have already been made during the first six months of 2014. Mutual accusations of truce violations have contributed to tense relations between the parties. The conflict has also divided the country along ethnic lines, either in support of Kiir and, by extension, the Dinka tribe, or in support of Machar and, with him, the Nuer tribe.

The rebel forces comprise a number of scattered groups that are more or less loyal to Machar, who thus does not have full control over the different rebel elements. Fighting between rebel forces and government forces is concentrated in the north-eastern part of South Sudan.

It is possible that the conflict will deepen social unrest in the short term, as it has worsened the living conditions for many South Sudanese, who are also threatened by famine. In July 2014, South Sudan once again celebrated its independence from Sudan in the midst of political chaos.

Internal problems ease tensions
Relations between South Sudan and Sudan are still soured by unresolved issues, not least in relation to the negotiations on the final border demarcation and final decision on the affiliation of the disputed Abyei enclave. Still, the current conflict potential between the two countries is defused, as both are fully focused on their domestic political, economic and security problems.

Still, it is possible that tensions between South Sudan and Sudan may resurface, resulting in armed clashes in the short to medium term. Both countries accuse each other of supporting rebel groups on the other's territory. Nevertheless, in March 2014, both countries committed to resume the efforts and cooperation to withdraw forces from the border area and to set up joint monitoring and control of the border area. These are necessary steps forward in the cooperation between the two parties; in the short term, these steps may serve to significantly improve security in the border area.

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.

This 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.

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:

Below is the scale of probability the DDIS applies

Highly unlikely	Less likely	Possible	Likely	Highly likely
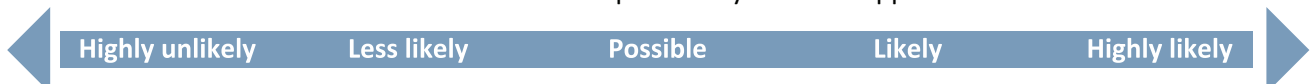
Degrees of probability

- **Highly unlikely.** We do not expect a certain development. Such a development is (almost) not a possibility.
- **Less likely.** 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
- 10 years and beyond   Very long term

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 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 attacks against the United States in 2001 and the planned attacks against transatlantic flights from London in August 2006.

Front page
Left: Istock Photo: Silhouette of armed fighters in Syria
Right: Istock Photo: Visualization of security access concept with biometrics technology
Bottom: Istock Photo: Demonstrations and rioting in central Kiev, Ukraine, January 2014

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Istock Photo: Russian nuclear icebreaker heading to the North Pole through pack ice

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Istock Photo: Visualization of hacker attack on information data server

Page 42
Photo: Danish Defence: Danish soldiers embarking a Danish Airforce C130J Hercules in Kabul airport en route to Helmand province, Afghanistan, June 2009

Page 46
Forsvarsgalleriet.dk: Danish Airforce Hercules crew on UN MINUSMA mission in Mali, March 2014.
Photographer: Lars Skjoldan