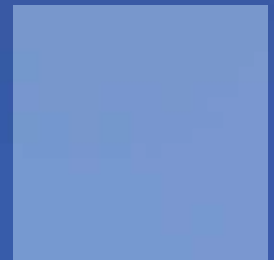
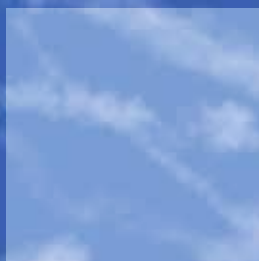
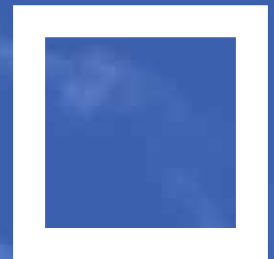
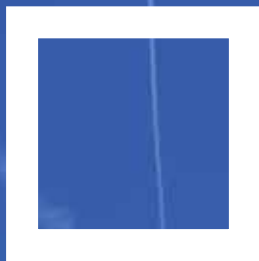


# INTELLIGENCE OUTLOOK 2024

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



DANISH DEFENCE  
INTELLIGENCE SERVICE

## THE OVERALL ASSESSMENTS OF THE THREATS TO DENMARK

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

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

# INTRODUCTION

The war in Ukraine has now lasted for almost three years, and its consequences are increasingly being felt here in Denmark. The threat of Russian sabotage has increased, especially against targets linked to Danish support for Ukraine, as has the threat of serious Russian cyber attacks.

We may also see Russia ramp up its threatening behaviour towards military aircraft and ships belonging to Denmark and other NATO countries. This entails a risk of misunderstandings and minor clashes both in the Baltic Sea and in the Arctic. At present, there is no threat of a regular military attack on Denmark, but as Russia keeps rebuilding its military power, the military threat to NATO will increase.

Russia's strong anti-Western sentiment means that new threats to Denmark have emerged, while existing ones remain. The war in Gaza, for example, has contributed to an increase in the number of successful and attempted terrorist attacks in Western Europe following a period of relative calm. The overall threat landscape facing Denmark is therefore more serious than it has been for many years.

Russia and China have moved closer together. The two countries fundamentally want to weaken the West in order to increase their influence on the world, challenging our Western democratic values and our adherence to international rules. For example, it is very clear that China is trying to acquire technology from the West through both legal and illegal means, such as espionage. China still relies on the West for trade and cooperation, which puts a damper on its anti-Western policy. However, China is increasingly preparing for a more direct confrontation with the West, for instance triggered by China's more aggressive conduct in its own region – especially towards Taiwan.

Since the Hamas terrorist attack on Israel last year, the risk of a major war in the Middle East has swayed back and forth. The conflict between Israel on the one hand and Iran, Hezbollah, Hamas and other militias on the other could continue at the current level of intensity, but it could also escalate if Iran tries to build a nuclear weapon and Israel tries to prevent this from happening. Syria is at a crossroads after insurgent groups have toppled the Assad regime in just 11 days. The collapse of the regime could have serious consequences for the stability in the country and the region.

The strong emotional reactions to the war in Gaza will be exploited by terrorists for a long time to come. There is no prospect of a solution to the many other conflicts in the Middle East and Africa that have fuelled Islamist terrorism for decades.

In INTELLIGENCE OUTLOOK, we give you an overview of these external threats and the security challenges facing Denmark.

INTELLIGENCE OUTLOOK is the Danish Defence Intelligence Service's annual contribution to the public debate on Denmark's security policy. It is therefore written for the knowledge and benefit of interested citizens as well as politicians, journalists and researchers.

Information cut-off date is 9 December 2024.

Enjoy your reading.



**Svend Larsen**

Acting Director of the Danish Defence Intelligence Service

# CONTENTS

03	INTRODUCTION
06	MAIN CONCLUSIONS
08	DENMARK IN A CHANGING SECURITY POLICY REALITY
14	THEME: ARMAMENT
16	RUSSIA
26	THEME: HYBRID MEANS
30	THEME: THE CYBER THREAT
32	THE ARCTIC
42	THEME: ESPIONAGE
44	CHINA
54	THEME: TRANSFER OF TECHNOLOGY
56	THEME: TERRORISM
60	HOT SPOTS IN THE MIDDLE EAST AND AFRICA
68	THEME: THREATS TO CIVILIAN SHIPPING
70	TERMS AND DEFINITIONS

**DENMARK IN A CHANGING SECURITY POLICY REALITY** 8

Russia and China share a common ambition to reduce Western influence on global politics.

**RUSSIA** 16

Russia is likely to become more willing to challenge NATO countries with its military means.

**THE ARCTIC** 32

The strategic importance of the Arctic has increased due to the tense relations between Russia, China and the West.

**THEME: HYBRID MEANS** 26

A number of states use hybrid means to weaken and undermine other states.

**THEME: ESPIONAGE** 42

Foreign states, especially Russia and China, spy on the Kingdom of Denmark and Danish interests.

**THEME: REARMAMENT** 14

The war in Ukraine has accelerated the need to increase and speed up weapons, ammunition and other military equipment production in a number of countries.

**THEME: THE CYBER THREAT** 30

State-sponsored hacker groups are continuously making attempts to compromise targets in Denmark. As a result, the cyber threat against Denmark has increased in 2024.

**CHINA** 44

China's support for Russia and aggressive approach to Taiwan are giving rise to an increasing number of conflicts with Denmark and the West

**THEME: TRANSFER OF TECHNOLOGY** 54

China, Russia and Iran are attempting to transfer technology from Western and other technologically advanced countries by both legal and illegal means.

**THEME: TERRORISM** 56

The war in Gaza and more recently the war in Lebanon have contributed to further radicalization of militant Islamist networks inside and outside Europe.

**HOT SPOTS IN THE MIDDLE EAST AND AFRICA**

The conflict between Israel and Iran has brought the Middle East closer to a regional war.

**THEME: THREATS TO CIVILIAN SHIPPING** 68

Conflicts can threaten the most important maritime trade routes between Europe and Asia, and piracy has resurfaced in the waters off the Horn of Africa.

# MAIN CONCLUSIONS

Russia and China are stepping up their cooperation and are spearheading a group of countries that are critical of the West's global influence, most notably Iran and North Korea. However, many countries avoid taking sides in order to pursue their own interests. The war in Ukraine is the main theatre of Russia's conflict with the West. At the same time, the political and economic competition between the United States and China is increasing.

Russia has ambitions to force a change in the European security order. The war in Ukraine will define European security, even beyond 2025. Russia will further intensify its use of hybrid means, including sabotage and malign influence campaigns. Furthermore, Russia is likely to become more willing to challenge NATO countries with its military means. Consequently, the military threat from Russia will increase over the coming years, even though there is no threat of a regular military attack on Denmark at present.

State-sponsored hacker groups are continuously making attempts to compromise targets in Denmark.

As a result, the cyber threat against Denmark has increased in 2024. At the same time, Danish private companies and public authorities are constantly falling victim to cyber attacks conducted by criminals and activists. Russia's increased willingness to take risks against NATO countries has raised the likelihood of Russia launching destructive cyber attacks.

Foreign states, especially Russia and China, spy on the Kingdom of Denmark and Danish interests. Denmark is an interesting espionage target due to its NATO membership, its extensive support for Ukraine and its status as a technologically advanced country.

The security tensions between Russia, China and the United States have also spread to the Arctic. The Arctic is a priority for Russia, and it will demonstrate its power through aggressive and threatening behaviour, which will carry along with it a greater risk of escalation than ever before in the Arctic. Russia will also seek to continue its military build-up in the region. However, the war in Ukraine is eating away at Russia's resources, making it difficult for the country to fulfil this ambition. Russia will

reluctantly continue to open the door to greater Chinese access to the Arctic. China will use this access to strengthen its role in the Arctic and to further its plans to build the capability for military operations in the Arctic.

China is providing decisive support for Russia's war efforts in Ukraine. In addition, China has employed increasingly coercive tactics against Taiwan and in the South China Sea, where its extensive territorial claims contravene the international law of the sea. China is preparing to be able to win a war over Taiwan and for being able to endure a confrontation with the West. At home, the Communist Party is tightening its grip on power and increasing its support for domestic industries at the expense of the competitiveness of foreign companies. At the same time, China is looking to transfer technology and knowledge from other countries, also through espionage. China's approach is increasing the possibility of more conflicts with Denmark and the West.

Conflicts in the Middle East and Africa have the potential to threaten European security. In the years

to come, the regions will remain marked by structural problems that worsen the living conditions of the populations and provide additional fertile ground for terrorism and incentivize migration. The wars in Gaza and Lebanon have temporarily halted the recent attempts to normalize relations between Israel and the Arab countries. Iran poses a more direct challenge to both Israel and the West, while regional powers such as Türkiye and Saudi Arabia are trying to maintain relations with the West, Russia and China at the same time to expand their strategic room for manoeuvre. Such attempts will weaken Europe's abilities to influence developments in its vicinity.

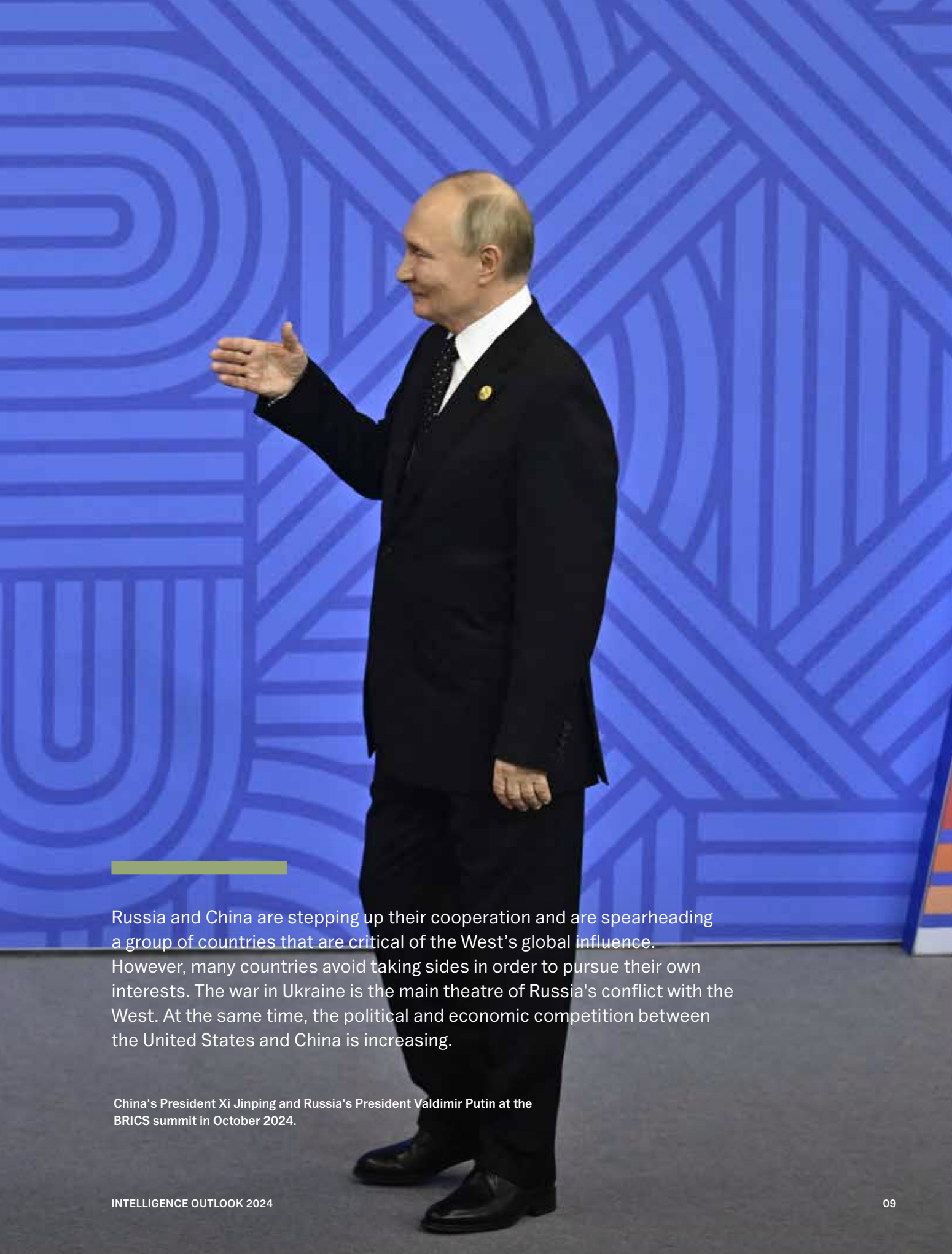
The terrorist threat in Europe has increased since 2022. This is due in part to the war in Gaza and more recently the war in Lebanon, which have contributed to further radicalization of militant Islamist networks inside and outside Europe. The war in Gaza will likely increase mobilization for such networks in the West also in the years to come.



# DENMARK IN A CHANGING SECURITY POLICY REALITY

**RUSSIA AND CHINA CHALLENGE THE WEST – EACH  
WITH SEPARATE APPROACHES AND END-GOALS**





---

Russia and China are stepping up their cooperation and are spearheading a group of countries that are critical of the West's global influence. However, many countries avoid taking sides in order to pursue their own interests. The war in Ukraine is the main theatre of Russia's conflict with the West. At the same time, the political and economic competition between the United States and China is increasing.

China's President Xi Jinping and Russia's President Valdimir Putin at the BRICS summit in October 2024.

■ A number of countries, including Russia and China, are critical of what they see as a Western-dominated world order. The two countries are challenging the established world order to different degrees and with different approaches and end-goals. However, they share a common ambition to reduce Western influence on global politics. Several countries, most notably Iran, are aligned with Russia and China in their ambition.

The West still stands united against Russia and China in defence of liberal democratic values and the ambition to preserve the rules-based world order.

Russia wants a world order in which the influence of states is primarily determined by their capability and willingness to exercise military power over others. China is willing to work within a rules-based world order to a greater extent than Russia is. However, it is also important to China to have more say on determining international rules than it believes it has had so far.

At the same time, several international rules and norms are under pressure or disappearing altogether. For example, there is increasing disagreement over the politics of international economic rules. In addition, the invasion of Ukraine is another example of the diminishing respect for the sovereignty and territorial integrity of other countries. International agreements on nuclear weapons are also expiring, and there is no prospect of them being renewed.

The war in Ukraine is the main theatre of Russia's conflict with the West. At the same time, the war has also magnified the global divide between Russia, China and several other countries on the one side and the West on the other. China is a decisive enabler of Russia's war efforts, while countries such as Iran and North Korea have also provided support for Russia's war, even though it is taking place on another continent outside their own spheres of interest.

The support from China, North Korea and Iran allows Russia to accelerate the build-up of its conventional forces, restoring its status as a military threat to NATO in the Baltic countries.

The strategic importance of the Arctic has increased due to the tensions between Russia and the West. Furthermore, the importance of China for Russia could expand China's room for manoeuvre in the Arctic, which in turn could further intensify great power competition and tensions in the region.

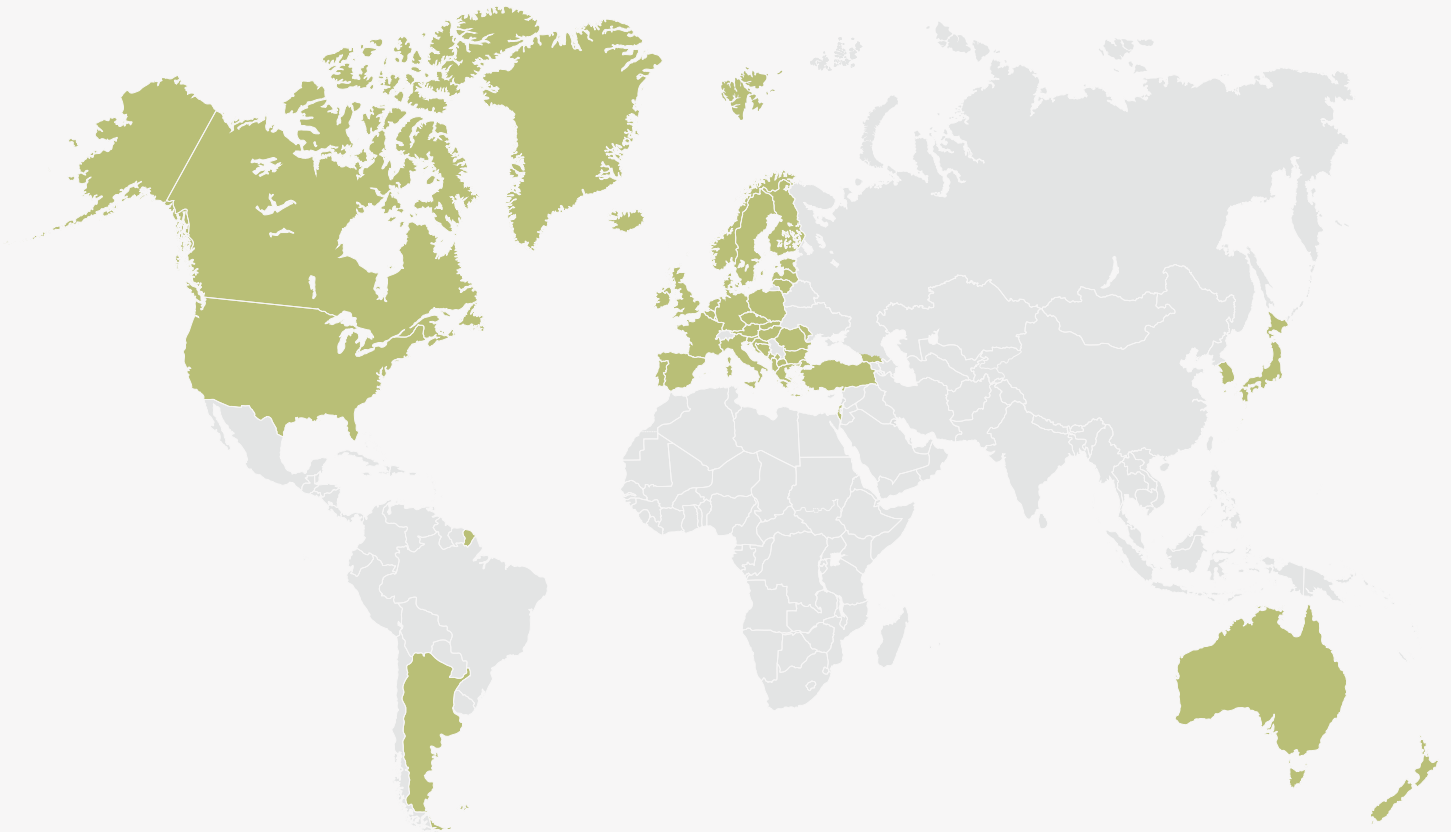
Regardless of the war in Ukraine, the competition between the United States and China will shape international relations. The competition for global political and economic influence between the two great powers will set the framework for the political, military and economic room for manoeuvre other countries have.

To a greater extent than during the Cold War period, relations between global and regional great powers are now defined by new and shifting alliances. Many countries move in and out of the groupings around the great powers and are reluctant to pick a side. Many of these countries manage to pursue their own interests in different directions at the same time. For example, a regional power such as Saudi Arabia can organize joint military exercises with China and sell large amounts of oil to the country without drawing criticism from the United States. At the same time, Saudi Arabia can also play an important role in Western energy policy and partner with the United States in its efforts to curb Iran's influence in the region. National interests can thus align with Western as well as Russian and Chinese interests at the same time.

Some countries seek closer technological and defence industrial cooperation with other peer countries. The defence agreement between the United States, the United Kingdom and Australia, called AUKUS, focusing on the exchange of military capabilities and defence technology research, is an example of such cooperation. This kind of cooperation is put in place to reduce supply chain vulnerabilities, which can be exploited by a strategic competitor or adversary. For example, countries want to secure raw materials for renewable energy sources and, in some cases, build the capabilities to produce military equipment, such as warships, themselves.

## UKRAINE DEFENSE CONTACT GROUP'S COLLECTIVE INTERNATIONAL SUPPORT FOR UKRAINE

Map of the West together with its allies and partners in Ukraine Defense Contact Group, which coordinates support for Ukraine.



### **China and Russia both want to divide the West**

Following Russia's invasion of Ukraine, many countries united and condemned the invasion at the UN, while the West also began to provide military support for Ukraine. Despite discussions and uncertainties about the obligations towards Ukraine, the West remains united against Russia. This has also prompted Sweden and Finland to join NATO, which has weakened Russia's position in the Nordic and Baltic region. In response, Russia is trying to divide the West to avoid facing a

strong unified economic and military bloc.

China is trying to stoke division in the EU countries and the United States over trade policy issues in which, for example, economic interests could speak in favour of greater engagement with China, while security interests call for de-emphasizing engagement with China. China's activities are aimed at making sure that it is going to play a leading role not only in its own region, but also globally.

**Russia and China have moved closer together**

It is becoming increasingly clear that China is the dominant party in its relationship with Russia. The war in Ukraine and the West's political and economic sanctions against Russia, in particular, have increased Russia's dependence on China. Consequently, China plays a key role in Russian exports and thus revenue. Furthermore, the sale of components by Chinese companies to Russia's defence industry is crucial to Russia's ability to sustain its war in Ukraine. Iran also plays an important role as a supplier of missiles and drones for Russia's war.

China is still not prepared to openly supply military equipment for Russia's war in Ukraine for fear of triggering extensive Western economic sanctions. China still believes that its relations with the West are important and will try to balance its foreign policy to maintain trade and scientific relations.

Cooperation between China and Russia is deepening and expanding. However, it will also be fraught with distrust because China and Russia have conflicting economic and political interests and ambitions, including in Central Asia and the Arctic. Consequently, it is highly unlikely that their relationship – even in the long term – will develop into a binding alliance with mutual security guarantees. As a result of its dependence on China, Russia will increasingly be forced to cater to Chinese interests, even in areas where Russia has previously been reluctant, such as Chinese presence in the Arctic.

China and Russia also cooperate on security issues together with India, Pakistan, several Central Asian countries, Iran and Belarus through the Shanghai Cooperation Organisation (SCO). The SCO is an example of China and Russia trying to find common security interests despite fundamentally diverging interests.

The BRICS cooperation is an example of an alternative to what many countries view as Western-dominated international organizations, such as the IMF and the World Bank. BRICS was founded by Brazil, Russia, India, China and South Africa (hence the acronym BRICS). BRICS is an economic and foreign policy forum through which member countries try to coordinate their policies on various policy areas without the participation of

Western countries.

Most recently, BRICS has expanded to include Iran, Egypt, Ethiopia and the United Arab Emirates. Most BRICS countries do not want to choose sides between the West and China and Russia. Türkiye is one of the countries showing interest in joining the expanded BRICS cooperation. The purpose of Turkish membership of BRICS would be for Türkiye to serve its interests outside the West, while maintaining its position as a NATO ally and an important trading partner for Western countries.

**Military armament is back on the agenda of great powers**

The war in Ukraine challenges Russia's defence industry to keep up with battlefield losses. Western sanctions have made it difficult for Russia to adjust its economy and the capacity of its defence industry to replace combat losses. Russia is purposefully trying to circumvent the sanctions in order to address supply chain and other challenges caused by the sanctions.

The United States, China and Russia have stepped up their military spending in order to be able to wage war against each other to a degree that has not been seen since the Cold War. China's preparations for a potential military conflict in the Western Pacific and the US reactions to these preparations are examples of this development. Over a number of years, China has significantly increased its military budget to expand its military capabilities.

In recent years, Russia has stepped up its nuclear threats. At the same time, the United States and Russia are modernizing their nuclear arsenals, and China is expanding its. The rearmament and Russia's occasional nuclear threats come at a time when the previous nuclear arms reduction agreements between the United States and Russia and other arms control agreements have in fact fallen away. The deep distrust between the United States and Russia means there is no prospect of them negotiating new agreements.

So far, China has not forged agreements with other nuclear powers to downsize its nuclear arsenal or any other arms control agreements, and it will likely continue to refrain from such agreements.



## IF CHINA AND RUSSIA BECOME ALLIES

China's economic interests in the West, in particular, will hamper the establishment of a formal alliance between China and Russia, which is therefore a highly unlikely possibility. However, the two countries have already developed unprecedented close cooperation, which has accelerated significantly, especially since the Ukraine war.

If, at some point, China realizes that the benefits of trade with the West no longer outweigh the political costs, China will be much more likely to see an overall advantage in entering into a closer and open partnership with Russia with a military dimension. It is highly likely that such a possibility will be in Russia's interest.

If the two countries forge even closer ties by establishing an alliance, it will pose significant security challenges for the West.

A deeper Chinese-Russian partnership could mean that the countries commit to lending each other military assistance. In that case, China would start supplying large quantities of military equipment and ammunition to Russia, no longer taking into account the risk of Western sanctions. If this were to happen, it would highly likely boost Russia's war efforts. Chinese support would also enable Russia to accelerate the modernization of its conventional military forces, enabling them to pose a threat to the West.

An even closer relationship between the two countries could also mean greater diplomatic and military cooperation, which could include joint technology development, large-scale coordinated military exercises and operations, or diplomatic activities to reduce Western influence. This would allow the two countries to put pressure on Western interests in such a manner that it would push Western resources to the max.

China does not believe it needs to enter agreements with the United States and Russia that would reduce its nuclear arsenal as long as their nuclear arsenals are significantly larger than China's. The lack of arms control agreements will make great power relations even more volatile.

### **Economic great power competition has global impact**

China continues its practice of subsidizing companies, giving them an advantage over Western competitors. Chinese industrial espionage also poses a threat to Western economic interests. In particular, US countermeasures to address this threat are a key driver in the development of the global economy. This also means that new technologies, industries and resources become the subject of economic competition and conflict.

China is preparing to cushion the economic consequences of a potential confrontation with the West and the United States, for example, triggered by a major conflict over Taiwan. Consequently, China is trying to make itself more independent and more resilient to potential Western sanctions and trade disruption.

The strategic rivalry between China and the United States has economic, political and security implications and has reshaped conditions for European powers. The two countries want market decoupling in a host of strategically important areas, especially in technological areas. As a result, they are increasingly restricting the ability of other countries to trade with China and the United States at the same time.

### **Great powers intervene in regional wars**

Great power competition also entails support for regional actors in the world's hot spots. In this way, the great powers are trying to strengthen relations with regional powers and thereby secure their own interests. This applies, for example, to energy policy interests in the Middle East. Potential tools include military support, sale of military equipment or other military capacity building. Russia's support for the Assad regime was an example of this. However, Russia has also ramped up its direct engagement on the African continent, using private military companies to pursue Russian interests. This approach will allow great powers to become directly engaged in an effort either to counter the influence of others or to secure their own interests. ■

## THEME: ARMAMENT

The war in Ukraine has accelerated the need to increase and speed up weapons, ammunition and other military equipment production in a number of countries. Thus, there is a race to expand production capacity in the defence industry, while securing the supply chains and processing of raw materials required for the production of ammunition, for example.

Russia has essentially undergone a restructuring of its economy to support its war efforts in Ukraine. As a result, Russia has managed to significantly increase its production of specialized military equipment and ammunition. For example, in 2023 and 2024, Russia was able to produce more artillery shells than all NATO countries combined.

The increase in global military production is also due to the evolution of the balance of power between China and the United States, in which China in particular is rearming. China's military spending has officially grown by 6-7% per year over the past five years. However,

in direct comparison in US dollars, China's military spending today is only about a third of that of the United States. But when taking into account factors such as currency, labour costs and other operating expenses, China's military spending is two to three times higher. When calculated in this way, China's real investment in military combat power each year is almost equal to that of the United States.

For Europe, armament is currently mainly about meeting Ukraine's specific defence needs to combat Russia, such as artillery ammunition, air defence and drones. But it is also about Europe's own capability to respond to the military threat posed by Russia. The increased demand for military equipment means that the defence industrial capacity has significantly grown. During 2023 and 2024, the Western defence industry significantly ramped up production, although the weapons and arms production capabilities are currently unable to meet demands.



When calculated in this way, China's real investment in military combat power each year is almost equal to that of the United States.

## NEED FOR ARMAMENT REFLECTED IN RISING GLOBAL MILITARY SPENDING

Annual change in %

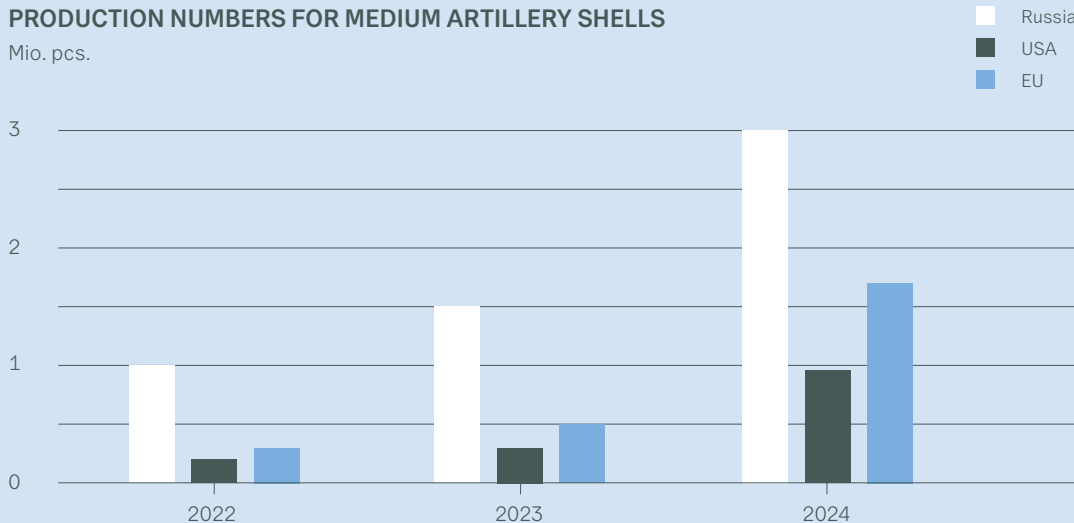


Source: SIPRI. 2022 prices

Global military spending increased by 6.8% from 2022 to 2023, with Russia and a number of European countries, including Ukraine, driving up global spending. China spent 6.0% more than in 2022, while the United States increased its spending by 2.3%. NATO countries as a whole increased their spending by 8.8%.

## PRODUCTION NUMBERS FOR MEDIUM ARTILLERY SHELLS

Mio. pcs.



Source: DDIS assessment based on open sources. / Note: 2024 reflects year-end figures for the United States and the EU.


Production figures for 152mm and 155mm artillery shells used in some of the most widely used Russian and Western artillery systems. The warring parties are trying to increase the production of artillery shells. It is likely that Russia is often firing around 10-20,000 shells a day.

# RUSSIA

THE MILITARY THREAT  
FROM RUSSIA TO NATO  
WILL INCREASE







Russia has ambitions to force a change in the European security order. The war in Ukraine will define European security, even beyond 2025. Russia will further intensify its use of hybrid means, including sabotage and malign influence campaigns. Furthermore, Russia is likely to become more willing to challenge NATO countries with its military means. Consequently, the military threat from Russia will increase over the coming years, even though there is no threat of a regular military attack on Denmark at present.



Russian soldiers parading through Moscow's Red Square in May 2024.  
Natalia Kolesnikova/AFP/Ritzau Scanpix

■ So far, strong anti-Western rhetoric has been Russia's weapon of choice against Western countries. Russia has now become increasingly aggressive in its use of hybrid tactics against the West. It is highly likely that Russia has carried out sabotage operations against targets in several Western countries – probably out of frustration that its threatening rhetoric towards Western countries has failed to deter them from intensifying their military support for Ukraine. Russia will likely adapt its sabotage operations according to how the country expects the West to respond.

Russia will likely attempt to sow fear and indecision in NATO countries to create uncertainty about the ability of NATO as a whole to respond rapidly and effectively to Russia's actions.

Russia will highly likely still be careful to avoid having its military activities trigger NATO's Article 5 on collective defence. At the same time, it is likely that Russia will gradually become more willing to use military force in the coming years to put pressure on or challenge NATO as a whole or individual NATO countries, also in the Baltic Sea region.

Russia's increased willingness to accept risk when confronting NATO countries will grow even further as its conventional military power continues to increase. This also means that the military threat from Russia will increase over the coming years, even though there is no threat of a regular military attack on Denmark at present. In particular, Russia will become more willing to use military force against NATO countries if it believes that NATO either is unable to maintain its military superiority, does not respond to Russia's military activities or no longer presents a united front.

### **Russia intends to continue the war in Ukraine in 2025**

Russia's numerical superiority in manpower and equipment will continue to define the war in Ukraine in 2025. Russia will remain willing to accept enormous casualties in return for only limited gains. The war efforts are the main priority in Russia's economic policy, and Russia will have the manpower and equipment to continue the war at a high level of intensity in the coming years. However, it will remain difficult for Russia to breach the Ukrainian defence

lines and continue its attacks to gain the decisive military advantage. This is because Russia has shown little improvement in carrying out large-scale and coordinated attacks on the ground. Instead, Russia is betting that it can wear down the Ukrainian forces with its superiority in numbers.

As long as the war lasts, Russia will continue its long-range attacks on Ukraine's infrastructure, especially its electricity and heating grids. This will put increased pressure on Ukraine's energy infrastructure, with the civilian population, in particular, feeling the effects.

Ukraine will continue to improve its ability to attack targets inside Russia with long-range weapons, forcing Russia to spend more resources on defence. Ukraine's attacks with long-range weapon systems may limit Russia's military options to some extent, but they will not have a significant impact on the outcome of the war.

### **The war in Ukraine will define the security situation beyond 2025**

As long as Putin is in power, Russia's terms for starting peace talks include Ukraine ceding all annexed territories to Russia, installing a pro-Russian government and giving up its efforts to join NATO and the EU.

Through bilateral security agreements, a number of NATO countries have guaranteed Ukraine long-term military and economic support. It is likely that Ukraine will continue to be able to defend itself in the long term. However, Ukraine will still require support, and even the smallest reductions in the level of support provided by the NATO countries could weaken Ukraine's defence capabilities, raising the likelihood that Russia will conquer large swathes of Ukrainian territory if Ukraine's ability to defend itself is weakened.

As Russia has far greater military and economic resources than Ukraine, it will be in a better position to continue a war of attrition. In addition, China's significant provision of military technology further enhances Russia's defence industrial base. Finally, support from North Korea in the form of soldiers and ammunition and Iran's deliveries of short-range ballistic missiles could have a major impact on Russia's ability to continue a war of

attrition. Russia will thus likely remain able to put sustained military pressure on Ukraine in an effort to force the country to cease its military cooperation with NATO and its rapprochement with the EU, while giving Russia the power to influence Ukraine's foreign and security policy. However, continued Western support for Ukraine means that the most likely outcome is that neither Russia nor Ukraine will gain a decisive military advantage, that the countries will not be able to negotiate a solution to the war, and that the fighting will continue with varying intensity in 2025.

### **Russia has ambitions to be a dominating power in a new world order**

Russia's strategic ambition is to weaken the global power and influence of the United States, the unity of Western countries and the rules-based world order. Instead, Russia wants a world order in which great powers and major regional powers can pursue their own interests with no regard for the interests of the United States and other Western countries, and in which the ability and willingness of great powers to use military force ultimately defines the rules of the game in international relations.

Russia has room for manoeuvre to pursue these ambitions, especially as China shares these ambitions and is willing to develop ever closer cooperation with Russia in this regard. In addition, Russia is expanding its relations with Iran in particular, but also with North Korea and a wide range of countries in the Middle East, Africa and Asia in an effort to cast itself as the leading power in a new world order that is turning its back on the West. However, with the collapse of the Assad regime in Syria, Russia loses a key ally in the Middle East and could find it difficult to maintain its air and naval bases in the country.

Russia considers the EU, NATO and, in general, the United States' security role in Europe as the main obstacles to re-establishing its dominance over smaller countries in its proximity. Consequently, it is an important goal for Russia to break down the security order that has existed in Europe since the end of the Cold War. Russia sees the war in Ukraine as a crucial step in realizing this ambition. At the same time, it is Russia's intention to weaken NATO by sowing discord among member states, including through the use of hybrid means.

### **Russia's military activities are likely to further increase the level of tensions in the Baltic Sea region**

Russia uses its military activities and behaviour to deter NATO countries from conducting military activities close to Russian territory, including the Kaliningrad region. It is likely that Russia's assertive behaviour targeting NATO military units, such as aircraft and warships, will further increase the level of tension in the region. Russia's approach already includes reckless manoeuvres at sea, mock attacks and jamming of communications and GPS signals of both civilian and military ships and aircraft. These activities could become increasingly aggressive in nature.

The accession of Sweden and Finland to NATO has weakened Russia's strategic position in the Baltic Sea region. The war in Ukraine has also meant that Russia has had to shift military capabilities from the Baltic Sea region to the war in Ukraine, weakening its overall strategic position in a region where Russia perceives all other countries, including Denmark, as hostile.

Russia will try to deter Sweden and Finland from allowing NATO to establish military infrastructure, such as supply depots, and deploy long-range weapon systems and nuclear weapons in the two countries. To this end, Russia will mainly employ sharp rhetoric against Sweden and Finland, which may also include nuclear threats.

Russia's military capability continues to be strong enough to strike targets throughout the Baltic Sea region. Depending on how the war in Ukraine evolves, Russia could, within two to five years, rebuild the military capability required to pose a credible military threat to NATO.

However, as long as the war in Ukraine continues, Russia will find it difficult to maintain a strong permanent presence in the Baltic Sea region. Instead, Russia is temporarily diverting resources from the war to conduct extensive exercise activities in the Baltic Sea aimed at demonstrating that it is still a military power to be reckoned with in the region.

### **PUTIN'S AMBITION FOR A SLAVIC-ORTHODOX COMMUNITY**

Putin regularly claims that Russia will once again be the core country of a community consisting of Russians, Ukrainians and Belarusians. Putin insists that Russia, in its role as the cultural framework structure and state-carrying nation for this Slavic-Orthodox community, is obliged to fight what he perceives as encroaching Western power. Putin also believes that the Slavic-Orthodox community will give Russia the strength required to oppose the West.

Putin does not necessarily expect that the new community will absorb all areas inhabited by Ukrainians and Belarusians. Putin's end goal will probably be the creation of a political and cultural space in which Russia will be free to dominate the security policy of Ukraine and Belarus and in which Western democratic and liberal principles have no place. Finally, Putin probably believes that, based on this community, Russia will have better opportunities to reassert its control over other smaller neighbouring countries that Russia considers to be in its sphere of influence due to their history.

Putin likely does not see the Baltic States as part of the Slavic-Orthodox community, but rather as a highly strategic area that Russia should dominate.

### **Russia has embarked on an ambitious military build-up**

The Putin regime has launched an ambitious plan for restoring Russia's conventional armed forces, which is accompanied by increased militarization of the Russian society. At the same time, Russia is implementing military reforms to streamline the planning, deployment and command of its military forces. Russia's goal is to ensure that its conventional forces are able to win a short-notice conventional war against NATO in Russia's western border areas and that they can be deployed against neighbouring countries that are militarily inferior.

Russia has started to build a large number of new, mainly ground military units, but it will take some years before all these units are fully operational. This build-up also includes new units in the Baltic Sea region as well as the north-west of the country as a reaction to Swedish and Finnish NATO accession.

The Putin regime is committed to providing the armed forces and the defence industry with the necessary resources, regardless of the cost to the Russian economy. Russia's defence industry has been able to significantly increase its capacity to refurbish its vast stocks of old military equipment. Russia has also significantly increased its production of ammunition, long-range missiles and drones, which include components from China, North Korea and Iran. Russia's defence industry is likely unable to further increase its production capacity without additional external support or domestic policy initiatives.

In the longer term, however, it will be difficult for Russia to mobilize resources to fully replace equipment lost in the war in Ukraine. In addition, it will be particularly challenging to provide sufficient combat equipment for the new units. If the intensity of the war in Ukraine continues at its current pace, Russia will struggle to rebuild its conventional military capabilities to pre-invasion levels.







## RUSSIA'S MILITARY BUILD-UP IN ITS WESTERN BORDER AREAS

Russia is rearming its conventional armed forces with the goal of being able to win a war against NATO in the country's western border areas. On the map, there is an illustration of where the forces are, and which unit types are involved.

Cruise missiles launched by strategic bombers from Russian Airspace are capable of striking targets in most of Europe. The circle shows the approximate range of air-launched cruise missiles if they are launched from within the Russian mainland.



### MILITARY FORCE BUILD-UP

-  Infantry
-  Heavy armoured battalion
-  Submarines
-  Warships
-  Fighter jets
-  Strategic bombers

**Russia has several options to challenge NATO countries with a more threatening military behaviour**

So far, Russia has refrained from direct military action against NATO countries, even though they have significantly increased their military support for Ukraine. It is highly likely that Russia does not want to provoke a military conflict with a NATO country and risk triggering Article 5 of the alliance, provided that NATO is united and its military power is superior to Russia's.

However, Russia will be able to challenge NATO countries with military means. These might include reckless and threatening manoeuvres against civilian shipping and aviation and against military aircraft and warships belonging to NATO countries, both in waters and airspace close to NATO countries and further away. Russia could also deliberately violate the territorial borders of NATO countries with military aircraft and warships. Such short-term violations are likely intended to send a strong threatening message to the target countries as well as make it difficult for them to respond quickly.

In addition, Russia could conduct military exercises close to the borders of NATO countries, especially close to the Baltic countries, but also along the border with Finland. Such exercises would likely be relatively limited in scope, but Russia could act out aggressive scenarios in its exercises to send a clear signal to potential target countries that Russia has the military means to threaten them. In connection with such exercise activities, Russia could leave behind some of its forces on high alert, flexing its military muscle close to the borders of target countries to emphasize its threat for an extended period of time.

Russia will also be able to carry out jamming over large geographical areas in connection with its military activities without regard for ship and aircraft communications and GPS signals and use offensive electronic warfare means against NATO countries' military units.

Finally, it is possible that Russia will allow warships to escort tankers from the so-called Russian shadow fleet transporting sanctioned oil exports through Danish waters. If this happens, it will increase the level of tension.



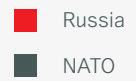
Russia has also significantly increased its production of ammunition, long-range missiles and drones, which include components from China, North Korea and Iran.

Should Russia prove more willing to pursue an aggressive military approach towards NATO ships and aircraft, it could raise the risk that lower levels in Russia's military decision-making hierarchy or individual units misinterpret and overreact to the responses of NATO units and thus to NATO member states.

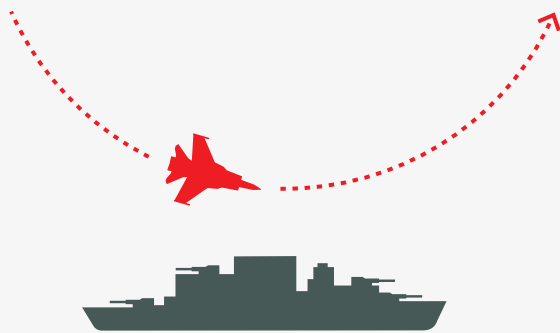
**Russia will be willing to use military force against neighbouring countries with inferior military capabilities**

Russia is likely to remain willing to use military force in situations in which Russia's leadership believes it can achieve strategic gains without risking a direct military conflict with the United States and NATO, especially against neighbouring non-NATO countries with inferior military capabilities. However, it is less likely that Russia will be able to launch major military operations against other neighbouring countries as long as most of its conventional forces are deployed in Ukraine.

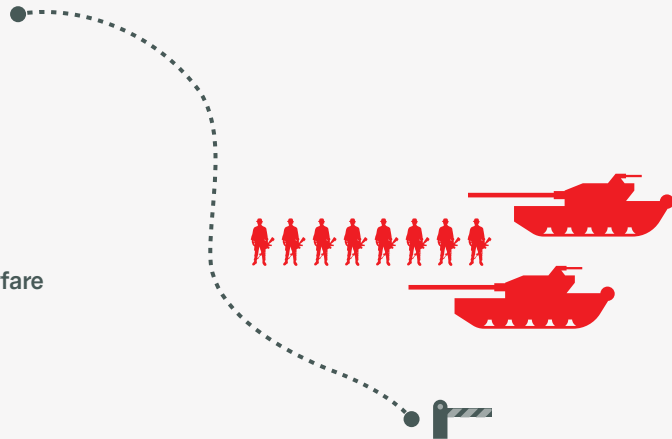
# RUSSIA'S OPTIONS TO USE MILITARY MEANS



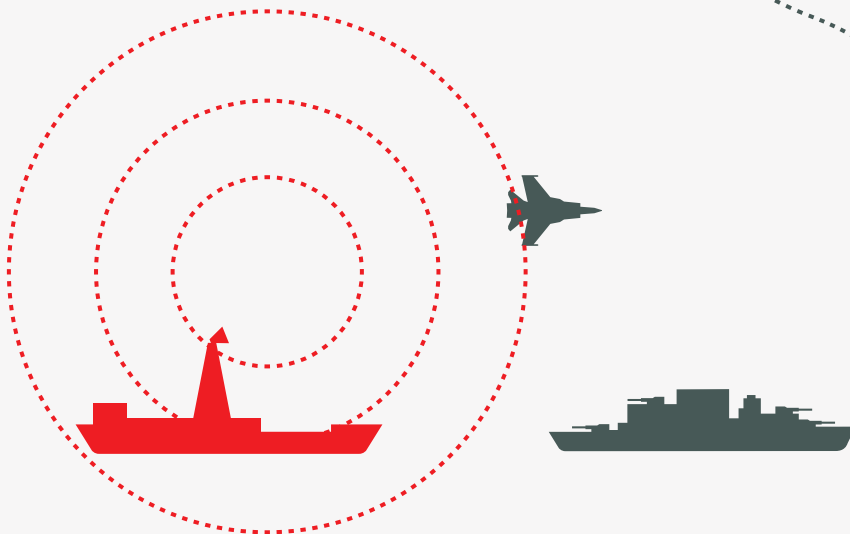
Threatening manoeuvres, for example close flybys



Military exercise activities with aggressive posture close to the borders of NATO countries



Jamming and other types of electronic warfare



**Russia will continue its nuclear threats**

Russia emphasizes its ability to deter the United States and NATO by keeping its strategic nuclear forces on high alert. Russia has also conducted several nuclear weapons exercises during the war in Ukraine to demonstrate its nuclear weapons capability, including its tactical nuclear weapons capability.

However, Russia has wound down its use of explicit threats of nuclear weapons use in the war in Ukraine, probably because it has concluded that repeated nuclear threats weaken the credibility of Russia's nuclear deterrence. However, it is highly likely that Russia will continue to make occasional threats of nuclear weapons use in the war in Ukraine and against Western countries in an attempt to deter the West from allowing Ukraine to use certain donated weapons to hit targets inside Russia.

**Putin's decisions are shaped by both rational considerations and misconceptions**

All power in Russia is concentrated in the hands of Putin, and Putin alone makes the decisions on how Russia should respond to very critical situations in the war in Ukraine and the conflict with the West,

including the criteria for nuclear weapons use. Consequently, predictions about the circumstances under which Putin will use nuclear weapons cannot be based solely on Russia's nuclear doctrines.

Putin's decisions are based on both rational strategic considerations and misconceptions about the intentions of Western countries. He is surrounded by a narrow circle of people from the security apparatus and military leadership who share his anti-Western stance, the so-called 'siloviki'. The advice given to Putin by this circle is likely to confirm and reinforce his views.

This could increase Putin's inclination to respond to perceived threats with risk-taking and threatening behaviour, making it more difficult to accurately predict how Russia will react in highly tense situations. Thus, the risk could arise that Russia will use tactical nuclear weapons against targets in Ukraine if Putin assesses that the war is developing in a way that seriously threatens the existence of the Russian state and his own position of power.

**No viable threats to Putin's regime in the coming years**

The Putin regime is based on an elite that controls the power apparatus, all other social institutions and the economic sectors of the Russian society. There is no real opposition to the regime, political repression is widespread and growing, and the population is politically apathetic, including towards the war in Ukraine. Consequently, it is highly unlikely that a civil opposition that is strong enough to threaten the Putin regime will emerge outside the power elites in 2025 or within the next few years.

After the presidential election in March 2024, Putin appointed an economic technocrat as Minister of Defence, probably to streamline the operations of the armed forces and defence industry and to reduce corruption, but otherwise made few personnel changes. The few changes in leadership positions will therefore not change Russia's political course.

**TACTICAL NUCLEAR WEAPONS**

Russia's nuclear arsenal consists of strategic nuclear weapons and smaller nuclear weapons, often called tactical nuclear weapons. Strategic nuclear weapons typically have an explosive yield that is ten times more powerful than the bombs dropped on Hiroshima and Nagasaki in 1945. Tactical nuclear weapons are much smaller, typically with an explosive yield around one-tenth that of these bombs. Tactical nuclear weapons are designed for battlefield use and are delivered by fighter aircraft and short-range missiles.



### **Russia's long-term economic prospects are deteriorating**

The high cost of the war in Ukraine and the build-up of its conventional forces have weakened the prospects for Russia's long-term economic development.

Russia has largely adapted its economy to the war in Ukraine, which has enabled it to significantly increase its production of military equipment and ammunition in particular. The total Russian expenditure on the armed forces and the war in Ukraine has reached a very high level and is likely to increase further. So far, this has led to very low unemployment rates and significant growth in real wages.

Russia's military build-up is largely driving the Russian economy. This also means that slowing down military production would lead to a significant slowdown in the country's economic growth. However, the sharp increase in military spending has also contributed to inflation, which could put pressure on the regime to cut its other spending and limit private consumption. Thus, it will be more difficult for the regime to maintain its message to the Russian population that the war will have no impact on living standards. This could lead to growing public scepticism about the direction taken by the regime, though there are no signs of this so far.

Russia is increasingly seeking to conceal key economic statistics, making it more difficult to verify the official figures presented by the Russian authorities about the country's economic growth or state finances, for example. It is highly likely that Russia is deliberately distorting the figures it presents to peddle the narrative that the Russian economy is strong.

The Russian economy relies heavily on trade with China and on oil exports. However, this revenue is vulnerable because Chinese and foreign companies and banks have become more cautious about trading with Russia due to the threat of sanctions. The threat of sanctions also makes it difficult for Russia to convince a wide range of countries to commit to more long-term and comprehensive trade cooperation. ■

## THEME: HYBRID MEANS

A number of states use hybrid means to weaken and undermine other states, especially their cohesion and ability to make effective decisions, for example by creating fear and insecurity in society and among decisionmakers. However, states can also use hybrid means to influence the political processes and decisions of other states in ways that are favourable to their own national interests.

Hybrid means include political, economic, informational and military tools, which can be used in coordination to maximize their impact.

Influence campaigns, destructive cyber attacks, sabotage operations against critical infrastructure, GPS jamming of ships and aircraft, and aggressive manoeuvres in the air and at sea are among the many types of hybrid means that can be used as part of hybrid tactics. All of these tools can be combined with aggressive political rhetoric, military threats and military force build-up.

Hybrid activities are usually kept below the threshold of armed conflict.

Many countries have the capabilities to use hybrid means. Russia is the most aggressive in using its hybrid toolbox, but China also uses hybrid means.

### **Russia's use of hybrid means is centrally coordinated**

Russian state authorities coordinate which countries to target with hybrid means. Hybrid operations involve a host of public authorities, but private actors may also participate in the activities. Russian intelligence services play a key role in the use of the most offensive and high-risk hybrid means. Russia often tries to conceal its role in hybrid activities in order to make it harder for the targeted countries to respond effectively.

In addition to the direct impact that Russia and other countries can achieve through use of hybrid means, the mere threat and fear of hybrid attacks creates a need for self-protection. Thus, for Western countries, being prepared to detect and counter hybrid attacks ties up a lot of resources.

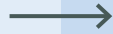
Russia's war against Ukraine has demonstrated how Russia uses hybrid means both in the run-up to and during a direct military conflict. Prior to the invasion, Russia had already been using hybrid means against Ukraine, notably influence campaigns and cyber attacks, in order to destabilize the country.

### **RUSSIA IS PREPARING SABOTAGE AGAINST CRITICAL SUBSEA INFRASTRUCTURE IN THE EVENT OF WAR**

It is highly likely that Russia is regularly revising its plans for sabotage attacks against critical subsea infrastructure in the event of an escalating conflict or war with NATO.

In coastal waters such as the Danish inland waters, Russia will be able to attack subsea infrastructure using all types of vessels. It is also possible to damage cables and pipelines by dragging an anchor, trawler net and similar equipment across them. In the North Atlantic, attacks on subsea infrastructure require specialized vessels. Russia's arsenal includes research vessels and submarines capable of mapping the infrastructure and specialized submarines and drones capable of attacking the infrastructure.

ACTOR

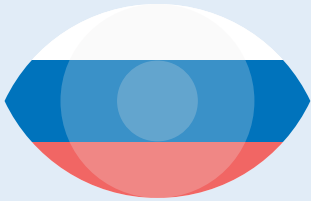


MEANS



TARGET

RUSSIA



JAMMING OF  
GPS SIGNALS

INTERRUPTIONS  
OF ENERGY SUPPLY

WEAPONIZATION  
OF MIGRATION FLOWS

MILITARY FORCE  
BUILD-UP

INFLUENCE  
CAMPAIGNS

CYBER ATTACKS

AGGRESSIVE  
INTELLIGENCE  
OPERATIONS

SABOTAGE AGAINST  
INFRASTRUCTURE

AGGRESSIVE POLITICAL  
RHETORIC, INCLUDING  
MILITARY THREATS

WESTERN COUNTRIES AND NATO



### **Russia has become more willing to use hybrid means in the West**

During the war in Ukraine, Russia has demonstrated an increased willingness to take risks and readiness to use offensive hybrid tools in Western countries, as evidenced by Russian sabotage operations against targets in the West. Russia is likely continuously planning and preparing sabotage operations against selected targets in Denmark and other European countries. Authorities in, for instance, the Baltic countries, Poland and Germany are investigating a number of individuals linked to the planning of sabotage operations by Russian intelligence services against, among other things, military infrastructure and equipment.

Russia is also preparing for sabotage operations that could be launched ahead of a military conflict with NATO. The purpose of pre-war sabotage is to incapacitate military forces, equipment and infrastructure supporting, for instance, Denmark's capability to defend itself ahead of a military conflict between NATO and Russia.

### **Russia channels migration flows**

Russia has also weaponized migration flows from, for instance, the Middle East to stir unrest in Western countries. Russia has thus channelled a flow of migrants over its border crossings into Finland – with the likely intent to stir political unrest in Finland. In response, Finland has closed its border crossings with Russia indefinitely.

Similarly, Russia's close ally Belarus has facilitated migrant flows from, for instance, the Middle East to its Western neighbouring countries, notably Poland.

### **Russia uses influence campaigns to break international isolation**

Russia has also increased its willingness to take risks in terms of using hybrid means other than sabotage. Influence campaigns have long played a key role in Russian efforts to sway the West, and the threat from Russian influence campaigns against Western countries will likely intensify.

Denmark, the Faroe Islands and Greenland are not a specific priority target for Russian influence

### **CHINA USES ITS INTELLIGENCE SERVICES FOR INFLUENCE PURPOSES**

China uses its intelligence services, among others, for influence operations. For instance, international media outlets have reported, with supporting evidence, that a Chinese intelligence officer bribed Belgian parliamentarian Frank Creyelman to sow discord and manipulate media presentation of issues that are politically sensitive to China. While in the Flemish Parliament, Creyelman voted against resolutions that criticized China's persecution of minorities in Xinjiang. It is highly likely that Creyelman also tried to incentivize local journalists to write pro-China stories.

campaigns. However, Russia will likely also include Denmark, the Faroe Islands and Greenland in its influence campaigns targeting the EU, NATO or the wider Western world.

The overall aim of Russia's influence campaigns is to sow division and uncertainty in Western countries as a way of undermining their unity against Russia. Also, Russia uses the campaigns to erode the support for Western sanctions against Russia and spark criticism of the Western support for Ukraine.

Russia is working to influence political processes and public opinion in Western countries with the help of Western politicians and public opinion makers who see Russia in a positive light. Russia is trying to establish contacts to Western politicians on both ends of the political spectrum, in particular at the extreme ends. Russia is also using social media platforms to spread narratives to corrode public trust in political processes and established media outlets.

Russia is constantly looking for new ways to adjust its influence campaigns in an attempt to break its isolation by the West.

**China uses influence to shape the policy of other countries**

China is trying to influence public opinion and political decision-making processes in Western countries. Its attempts to influence public opinion are mainly focused on projecting an image of China as responsible and as a powerful alternative to the United States, as well as on influencing international views on issues of critical importance to China, such as Taiwan,

Hong Kong, Xinjiang and Tibet. In addition, China is trying to sow division among European countries to avoid unified EU criticism of China and to weaken Europe's partnership with the United States.

China carries out influence campaigns by means of Western politicians and opinion formers and by disseminating propaganda and false narratives on social media platforms. Furthermore, China facilitates covert financial support to organizations and political parties that pursue a pro-China policy or influence political decisions in a direction favourable to China.

**RUSSIAN INTELLIGENCE SERVICES ARE PLANNING SABOTAGE OPERATIONS IN EUROPE**

Russian intelligence services use intermediaries, among others, to recruit assets online to carry out tasks related to espionage and sabotage in return for payment. Consequently, the perpetrators do not always realize that they are working for a Russian intelligence service.



INTELLIGENCE SERVICE



INTERMEDIARY



PERPETRATORS

## THEME: THE CYBER THREAT

State-sponsored hacker groups are continuously making attempts to compromise targets in Denmark. As a result, the cyber threat against Denmark has increased in 2024. At the same time, Danish private companies and public authorities are constantly falling victim to cyber attacks conducted by criminals and activists.

### **Russia's increased willingness to take risks has increased the cyber threat**

Denmark is facing a threat landscape with a real risk of destructive cyber attacks. Russia has long had the capability to conduct destructive cyber attacks and has also used these capabilities against Ukraine in particular, both before and since the invasion in 2022. Russia's increased willingness to take risks against NATO countries has raised the likelihood of Russia launching destructive cyber attacks.

However, in the current situation, it is less likely that Russia is intent on launching destructive cyber attacks against Denmark in which the purpose is to create serious and far-reaching consequences for critical societal functions.

The consequences of destructive cyber attacks can be very different depending on the target and nature of the attacks. The most frequent destructive cyber attacks use so-called wiper malware that is designed to delete, overwrite and encrypt software or data beyond recoverability. Deleted data could have a serious impact on not only the initial victim but also society at large, for instance if it leads to disruption of essential societal services.

The consequences of destructive cyber attacks depend to a great degree on the purpose of the attack. Ukraine has been hit by several large-scale destructive cyber attacks against its critical information infrastructure – the likely purpose being to destroy specific systems or disrupt services within Ukraine.

The purpose of destructive cyber attacks may also be to send a signal to the targeted victim and the

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

The threat from cyber attacks is outlined by the Centre for Cyber Security (CFCS) in its annual national threat assessment, *The cyber threat against Denmark*. This assessment provides an in-depth analysis of the threat from cyber attacks that serve a wide range of purposes and describes the nuances of the different threats.

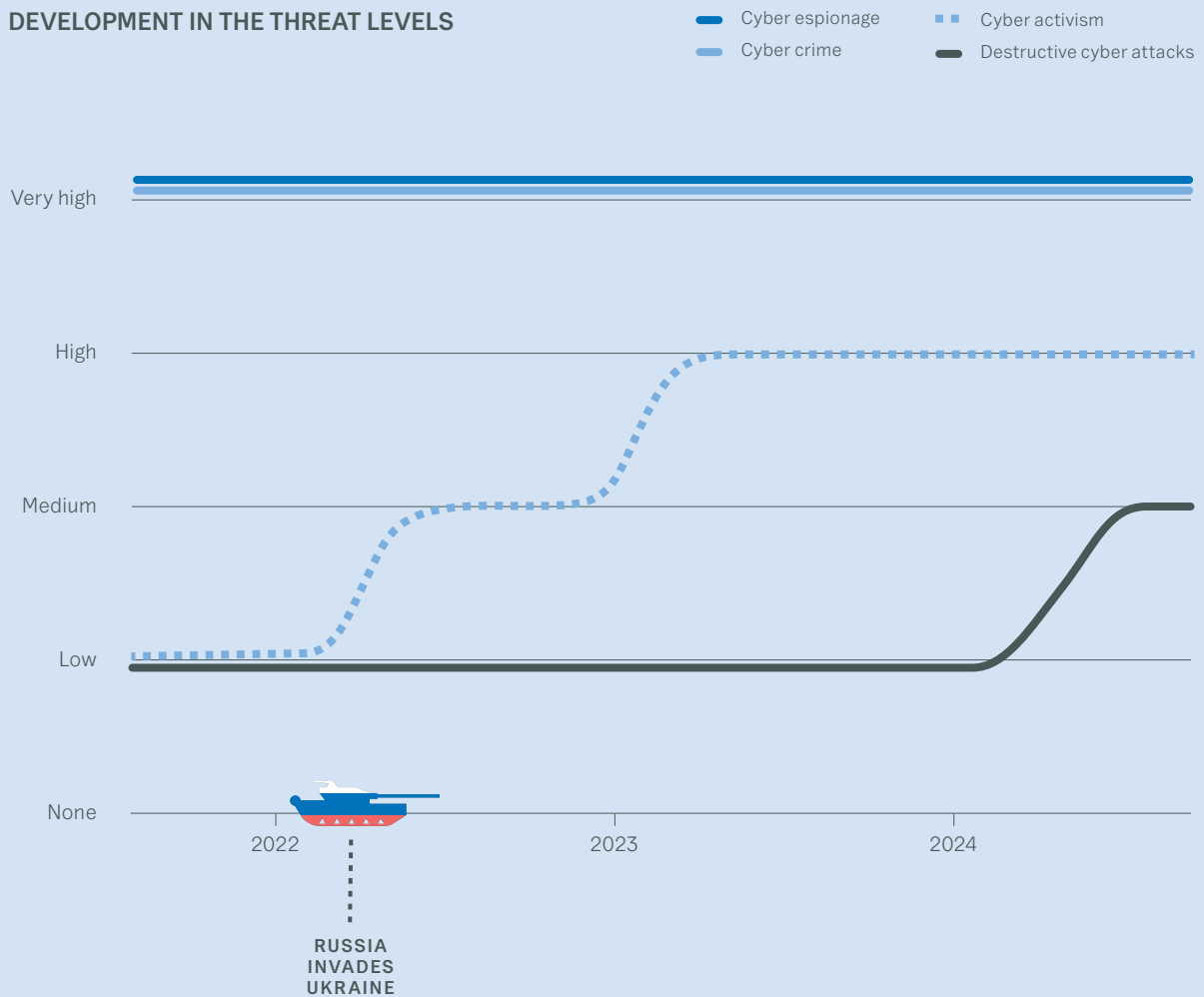
In the 2024 assessment, the CFCS sets the threat from cyber espionage and cyber crime at the highest threat level: VERY HIGH. These two threats are the most active cyber threats against Denmark. The threat from cyber activism is set at the threat level HIGH while the threat from destructive cyber attacks is set at the threat level MEDIUM. The threat from cyber terrorism remains at the lowest level possible: NONE.

### **THE THREAT LEVEL FOR DESTRUCTIVE CYBER ATTACKS RAISED TO MEDIUM**

In June 2024, the Danish Defence Intelligence Service raised the threat level for destructive cyber attacks from LOW to MEDIUM. The decision to raise the threat level was based on Russia's likely increased appetite for risk in using destructive hybrid tactics against European NATO member states. The CFCS assesses that Russia's appetite for risk also includes destructive cyber attacks.

The threat assessments are available at [www.cfcs.dk](http://www.cfcs.dk)

## DEVELOPMENT IN THE THREAT LEVELS



surrounding society. Should Russia, in its current situation, decide to launch a destructive cyber attack against Denmark, the motive would likely be to create fear and put pressure on Danish society and decision-makers. Thus, the primary aim with this type of destructive cyber attack is not the immediate impact on the targeted IT systems. Also, it means that the threat is directed at several, very different targets in society as the function of the target is not as important as the symbolic value of the attack.

Danish targets will continue to fall victim to cyber activism, including, in particular, DDoS (Distributed Denial of Service) attacks by pro-Russian cyber activists against websites and internet-facing services. These attacks support the interests of the Russian government, and some of the cyber activists are likely linked to the Russian state.

### China also has capabilities to launch destructive cyber attacks

China has extensive cyber capabilities and is directing them against Denmark to steal knowledge. China also has the capability to launch destructive cyber attacks. However, in the current situation, it is highly unlikely that China is intent on launching such attacks against Danish targets.

Tensions over Taiwan continue to rise, which likely has implications for China's cyber activities. US authorities have assessed that Chinese state-sponsored hackers have compromised targets in the transport, wastewater and energy sectors on the US mainland and on the US Pacific Island of Guam with the aim of launching destructive attacks in the event of a conflict. In this case, Guam will be vital to US military support for Taiwan.

# THE ARCTIC

## RUSSIA WANTS TO MAINTAIN ITS MILITARY POSITION OF STRENGTH IN THE ARCTIC

---

The security tensions between Russia, China and the United States have also spread to the Arctic. The Arctic is a priority for Russia, and it will demonstrate its power through aggressive and threatening behaviour, which will carry along with it a greater risk of escalation than ever before in the Arctic. Russia will also seek to continue its military build-up in the region. However, the war in Ukraine is eating away at Russia's resources, making it difficult for the country to fulfil this ambition. Russia will reluctantly continue to open the door to greater Chinese access to the Arctic. China will use this access to strengthen its role in the Arctic and to further its plans to build the capability for military operations in the Arctic.







Russian paratroopers on exercise.  
Vectorkel/ Shutterstock

■ The strategic importance of the Arctic has increased due to the tense relations between Russia, China and the West. In recent years, both Russia and the United States have expanded their military capabilities in the region, where China is also seeking to establish a military presence in the future. Russia has a longer coastline and better infrastructure in the Arctic than other coastal states, making it easier for Russia to maintain a larger permanent military presence that extends into the Arctic Ocean.

The Arctic is of great military and strategic importance to the great powers in the event of war. The Arctic Ocean is an attractive location for deployment of nuclear ballistic missile submarines. Here, the submarines can remain hidden under the ice, and, in the event of war, they can strike most of North America, Europe and Russia. At the same time, the shortest path by air between North America and Russia is over the North Pole, making it highly likely that other ballistic missiles would also have to travel over the North Pole on their way to their targets in the event of war.

Most of Russia's nuclear ballistic missile submarines are deployed to bases in the Arctic. These submarines are crucial to Russia's capability to carry out a nuclear retaliatory strike against the United States, which is at the heart of Russia's ability to deter the United States from attacking Russia.

For the United States, the Arctic serves as the first and most important early warning line. US radar capabilities at Pituffik Space Base (formerly known as Thule Air Base) in Greenland are intended to provide early warning and detection of enemy missiles to give the United States the possibility to respond.

China also has strategic interests in the Arctic and wants to be able to operate submarines in the Arctic Ocean. Consequently, China is preparing its ability to be militarily present in the Arctic. Some of China's research activities in the Arctic are aimed at providing China with this very capability. The same applies to China's efforts to increase its surveillance by means of satellites passing over the North Pole.

### The Arctic is a high priority for Russia

Russia still has far-reaching plans for its entire Arctic region in both the military and civilian spheres. Russia is the largest military power in the region and wants to maintain that position. However, Finland's and Sweden's NATO membership and the increased Western presence in the Arctic and North Atlantic are challenging Russia's military strategic superiority in the region.

Russia thus wants to prioritize its conventional armed forces, deploy new units and expand the military infrastructure on the Kola Peninsula along the border with Finland. Russia will seek to continue the modernization of its forward operating bases on Arctic islands and maintain its air and naval forces in the Arctic.

Russia wants control over the waters north of the Russian mainland. Russia already limits the right of passage to a greater extent than what is allowed under the UN Convention on the Law of the Sea, and it is possible that Russia wants control of the waters all the way to the North Pole. In its updated maritime doctrine from 2022, Russia allows itself to use all means available to defend its interests in the waters north of the country, including military force.



Consequently, Russia will act more aggressively and in ways that carry a greater risk of escalation than has previously been the case in the Arctic.

Russia will seek to deter other countries from threatening its position in the Arctic, making it highly likely that Russia will react aggressively to Western military activities near the Russian Arctic, such as exercises and freedom of navigation operations

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

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



designed to demonstrate that Russia has no right to restrict navigation of international ships in the Arctic. Consequently, Russia will act more aggressively and in ways that carry a greater risk of escalation than has previously been the case in the Arctic.

Finally, Russia's economy relies on the extraction of natural resources in the Arctic. At present, the Arctic accounts for approximately one tenth of Russia's gross domestic product, and Russia is planning new major oil and gas projects that will further increase the region's economic importance. However, Russia will have difficulties realizing these plans without foreign investment and assistance in the purchase of sanctioned equipment. Chinese support will be essential for Russia's ability to realize significant parts of its plans.

### **The war in Ukraine challenges Russia's Arctic plans**

Russia's ability to achieve its military objectives in the Arctic depends on the development of the war in Ukraine, as it is putting a heavy strain on Russian military and economic resources.

If the war in Ukraine continues at the same intensity as now, it will severely limit Russia's capability to carry out a massive build-up of its military capabilities in the Arctic. In addition to the economic cost of the war, Russia has assigned and lost many of its qualified personnel and much of its specialized military equipment to its efforts in Ukraine. It is highly unlikely that Russia will be able to fulfil its military armament and modernization plans in the Arctic over the next three to five years.

Nevertheless, rearmament in the Arctic remains a priority for Russia, as it could risk losing its military superiority in the region if Western countries were to increase their military presence.

Russia's presence and operational capabilities in the Arctic have historically been strong. This is due to both the civilian infrastructure built to support economic development and the military installations that Russia has expanded over the past decade. These include the permanent military bases along the coast and the

forward operating bases that provide a line of defence in the Arctic Ocean for Russia. Although the bases are for defence purposes, they can also be used in connection with attacks. For example, fighter jets taking off from the bases will be able to attack the Pituffik Base in Greenland and Western ships in large parts of the Arctic Ocean at short notice.

As long as the war in Ukraine continues, Russia will likely focus on military solutions that only expand its military potential in the region to a limited extent, but are cheaper or easier to implement, such as capabilities for surveillance and for jamming the communications of ships and aircraft.

### **Russia wants to demonstrate its Arctic power even though the war in Ukraine weighs on the country**

Russia believes that signs of weakness in the Arctic will be perceived as an opportunity to capitalize on its preoccupation with the war in Ukraine. Consequently, Russia continues to prioritize the establishment of a military presence in the Arctic while carrying on with its ballistic missile submarine patrols, occasional surface ship patrols and strategic bomber patrol flights. Russia is able to continue such activities as these capabilities are not affected by the war in Ukraine as much as the other armed forces are.

Russia will likely also use other means to demonstrate its power and assert its regional superiority. Russia's willingness to take risks, which has been evidenced by the use of hybrid tactics against Western countries, could also come to play a significant role in the Arctic.

Such confrontational steps on the part of Russia could include close flybys of Western naval vessels or mock attacks on Western ships and aircraft. They could also include strategic bomber flights near the Western Arctic states. Such demonstrations of force can also take place in areas over which Russia has no jurisdiction under international law. For example, during a Russian naval exercise in 2024, a Russian warship fired warning shots at a Norwegian fishing vessel. The incident occurred in Norway's Exclusive Economic Zone, but in an area where Russia had pre-announced live firings.

If Russia eventually is able to devote more resources to pursuing a strategy of rearmament in the Arctic, it will likely continue and possibly expand its aggressive stance as part of the Russian perception of a protracted conflict with the West.

Also, a stronger Russia will likely not be willing to engage in political negotiations and solutions that do not fully serve Russia's interests, such as the issue of the future delimitation of the continental shelf between Russia and the Kingdom of Denmark.

### **The North Atlantic is also important for Russia**

As part of its control of Arctic waters, Russia also monitors activity along parts of the North Atlantic, especially the waters between Greenland, Iceland and the UK, the so-called GIUK gap, with both civilian and military ships and by other means such as aircraft and satellites. Russia wants to ensure that its own submarines can pass through the gap undetected while Western submarines will not be able to without being detected.

Russia is mapping and monitoring the areas for military planning purposes, including building the capability to conduct sabotage operations against submarine cables and underwater infrastructure in the run-up to and during an armed conflict with NATO. In the event of such a conflict, Russia's military ambition would be to delay and disrupt supply lines between the United States and Europe by means of submarines passing through the GIUK gap.

### **Russia still wants to talk about Arctic cooperation**

So far, Russia's interests have been best served by keeping the Arctic as a low-tension region, allowing Russia to modernize and build up its military capabili-

ties in the region without triggering an arms race with the West. Russia has also been able to access foreign investment and know-how on the extraction of oil, gas and minerals, prompting Russia to mainly pursue a cooperative course so far.

However, security tensions have spilled over into the Arctic and have put a halt to almost all international cooperation in the Arctic involving Russia. As a result, Russia is now willing to take riskier steps in the Arctic and has become more assertive and confrontational. Nevertheless, Russia will continue to talk about the need to keep the Arctic as a low-tension area and ensure cooperation in the region – an approach that will allow Russia to criticize the West for its refusal to cooperate with Russia in the region and for harming the Arctic environment and living conditions for the indigenous people in the Arctic.

Russia will likely continue to try to divide the Western Arctic countries over the issue of how to address Russia's stance in the Arctic. Russia hopes that this approach will pave the way for limited bilateral cooperation between Russia and one or more Arctic countries. This is part of Russia's general attempt to divide Western countries over the issue of their collective relationship with Russia.

Although Russia has threatened to withdraw from the Arctic Council, it is less likely to actually follow through on its threat. This is because the work of the Arctic Council rests on unanimity and Russia is therefore guaranteed influence on Arctic matters despite the fact that the other members are now members of NATO. Russia therefore still believes that the Arctic Council has a role to play.



As part of its control of Arctic waters, Russia also monitors activity along parts of the North Atlantic, especially the waters between Greenland, Iceland and the UK, the so-called GIUK gap.

### THE RUSSIAN NORTHERN FLEET IS OF GREAT IMPORTANCE IN THE EVENT OF CRISIS OR WAR

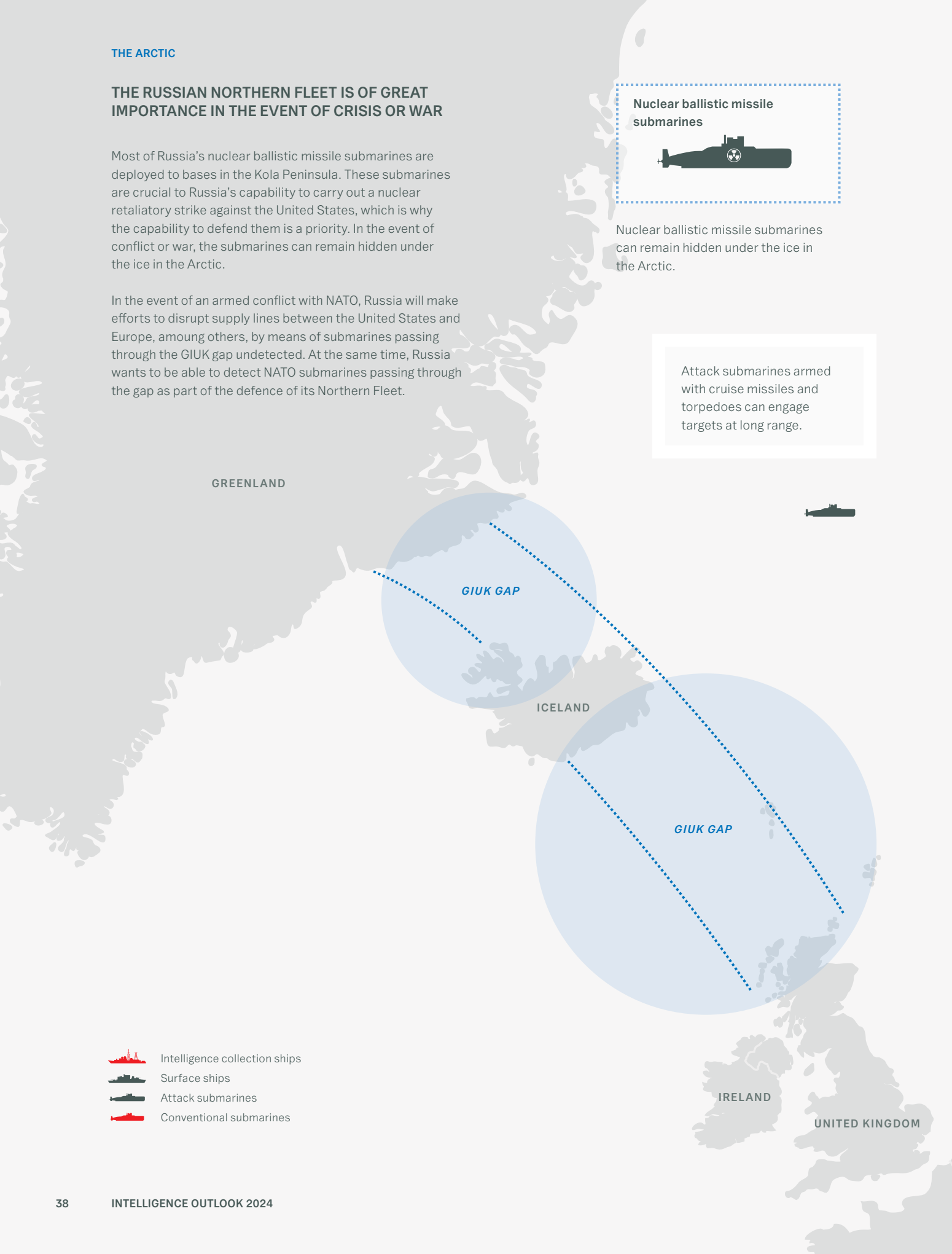
Most of Russia's nuclear ballistic missile submarines are deployed to bases in the Kola Peninsula. These submarines are crucial to Russia's capability to carry out a nuclear retaliatory strike against the United States, which is why the capability to defend them is a priority. In the event of conflict or war, the submarines can remain hidden under the ice in the Arctic.





In the event of an armed conflict with NATO, Russia will make efforts to disrupt supply lines between the United States and Europe, among others, by means of submarines passing through the GIUK gap undetected. At the same time, Russia wants to be able to detect NATO submarines passing through the gap as part of the defence of its Northern Fleet.



Nuclear ballistic missile submarines can remain hidden under the ice in the Arctic.

Attack submarines armed with cruise missiles and torpedoes can engage targets at long range.



-  Intelligence collection ships
-  Surface ships
-  Attack submarines
-  Conventional submarines

Intelligence collection ships monitor NATO ships and aircraft.

Surface ships armed with missiles can fire at NATO ships and aircraft at long range.

Smaller submarines armed with torpedoes are intended to be used against NATO submarines and surface ships if they are heading towards Russia.

COASTAL MISSILE DEFENCE

Coastal missiles are intended to defend military bases at the Kola Peninsula in the event of a NATO attack, in which NATO forces have been able to get past the Russian forces in the North Atlantic Ocean.

NORWAY

SWEDEN

FINLAND

KOLA PENINSULA

Were Russia to withdraw from the Arctic Council, it would probably try to establish an alternative, competing cooperation forum that would include Russian-friendly or neutral non-Arctic states. This could give non-Arctic states, especially China, which has major economic interests in the region, new opportunities to influence developments in the Arctic.

#### **China will be allowed increased access to the Arctic by a hard-pressed Russia**

China will continue to exercise its leverage on Russia to gain more influence in the Arctic and greater access to the region. Russia needs Chinese investment but does not want non-Arctic states to gain influence in the Arctic. In particular, China's goal of building the capability for military operations in the Arctic is inconsistent with Russian national interests.

However, China is increasingly becoming Russia's only partner regarding the development of the Arctic. Consequently, as the pressure mounts on Russia, it will highly likely be forced to gradually give China increased access to the Russian Arctic and the Arctic in general. China is aware that Russia is wary of allowing it increased influence in and access to the Arctic, a concern that China seems to be taking into consideration to some extent.

Against this background, the two countries are also taking steps towards closer military cooperation in the Arctic. In the summer of 2024, Russia and China conducted a joint patrol flight north of the Bering Strait from a Russian airbase for the first time. According to the Chinese coast guard, a Chinese coast guard vessel conducted a joint naval patrol with a Russian coast guard vessel in the Arctic Ocean in the autumn.

Russia and China have also stepped up Arctic research cooperation. In 2024, Russian researchers participated in China's annual Arctic expedition with the icebreaker Xuelong 2. In addition, the expedition called on two Russian ports.

Since the Russian invasion of Ukraine, China has not made any major investments in the Russian Arctic, likely for fear of being hit by Western sanctions. At the same time, however, Russia will only come under increasing economic pressure and become

more dependent on China over time, significantly improving China's negotiating position towards Russia.

#### **China will use the Arctic to strengthen its global position**

China has ambitions to increase its influence in the Arctic and to establish itself as a global great power. Cooperation with Russia will help China achieve its goals in the Arctic, and China's research activities in other Arctic countries and the central Arctic Ocean aim to support this ambition.

China wants to build the capability for military operations in the Arctic in the long term, i.e. within the next ten years. China supports this ambition through its extensive icebreaker programme, which has increased China's presence and data collection in the Arctic. In the summer of 2024, three Chinese research icebreakers were active in the Arctic, the highest number ever.

It is likely that China's extensive Arctic research is part of its strategy of so-called military-civilian fusion, and that the data collected by China in the Arctic Ocean can be used for military planning purposes. This also applies to Chinese research activities and stations in other Arctic countries, including Greenland, where China continues to show interest in securing a presence and conducting research projects.

China still has strong and long-term economic interests in the Arctic, including securing access to maritime transport routes and natural resources.

China wants to use Arctic sea routes to reduce its dependence on shipping through the Suez Canal and the Strait of Malacca. In addition, Arctic sea routes can shorten transport time for goods to and from Europe. For example, the route north of Russia is approximately 14 days faster than the traditional route via the Suez Canal, provided that the weather is good and that there is sufficient pilot and icebreaker assistance available.

China also wants to secure access to Arctic natural resources, especially oil and natural gas. This is part



of China's strategy to diversify its energy imports and secure cheap energy for its industry and population. However, access to deep-sea mineral deposits and fisheries resources also play a role for China. ■



## IF RUSSIA ANNEXES PARTS OF THE ARCTIC OCEAN

The UN has approved most of Russia's submission on the extended continental shelf in the Arctic Ocean. The final delimitation between Russia, the Kingdom of Denmark and Canada will be negotiated once the UN has processed the other applications. Russia continues to follow the UN process, probably because the UN process serves its interests and because Russia in other contexts relies on the influence that it gains through the UN. It is thus highly unlikely that Russia will withdraw from the UN Convention on the Law of the Sea and introduce national legislation that would turn large areas of the Arctic Ocean into Russian territory.

Nevertheless, if Russia starts to enforce sovereignty over the sea north of Russia in violation of the UN Convention on the Law of the Sea, it would have serious consequences for the security situation in the Arctic and create a high risk of armed clashes. Such a scenario is possible, for example, if Russia were to find itself in a situation in which it wants control of the territory and does not want to wait for the lengthy negotiation process to be completed.

The Kingdom of Denmark, Canada and the West in general will not recognize such a de facto annexation but will continue to regard the areas in the Arctic Ocean as international. This could lead to clashes between Danish or other Western ships or aircraft navigating in international waters or airspace and Russian ships or aircraft defending what they would view as Russian territory.

## THEME: ESPIONAGE

Foreign states, especially Russia and China, spy on the Kingdom of Denmark and Danish interests. Denmark is an interesting espionage target due to its NATO membership, its extensive support for Ukraine and its status as a technologically advanced country.

It is likely that Denmark's upcoming membership on the UN Security Council and its EU presidency will temporarily increase the espionage threat to Denmark. During this period, Denmark will have access to more information and be involved in making decisions that a number of foreign states would like to influence in a direction aligned with their own best interests.

China and Russia conduct espionage by using human sources and electronic collection, such as interception of telecommunications. In addition, the two countries use cyber espionage. Both countries have significant capabilities within these intelligence gathering methods.

Both Russia and China are trying to gain access to information about political processes, foreign, security and defence policy and military capabilities. China also spends a lot of resources on stealing knowledge and technology from both public institutions and private companies in other countries, including Denmark.

### **China and Russia seek to recruit assets in Europe online**

Chinese intelligence services most often recruit and direct human sources from China rather than using deployed intelligence officers. The intelligence services use social media to recruit assets, sometimes offering them high-paying assignments or attractive jobs. Subsequently, the intelligence services can offer the prospective target a trip to China, where the recruitment attempt takes place. China not only uses its intelligence services for espionage, but in some cases also draws on civilian individuals and networks, including party organs, private companies and civilian

groups such as Chinese communities outside China. China's national intelligence law requires that all Chinese citizens, upon demand, must provide information to the Chinese state.

Following the expulsion of Russian intelligence officers working under diplomatic cover at Russian embassies in a number of European countries, the task of spying on Europe has become increasingly difficult for Russia. As a result, Russia is increasingly trying to recruit assets via social media. These assets do not necessarily realize that they are working for a Russian intelligence service. One of the methods is to offer them money in exchange for performing different tasks. Some of the tasks may seem harmless or at best be characterized as a petty crime and very simple to perform, such as photographing or filming places or activities of interest to Russia. However, other tasks can be designated as blatantly criminal, such as burglary, and require more planning.

### **Russia also conducts espionage in preparation for sabotage activities**

Following the war in Ukraine, Russia's need to gather intelligence about Denmark has likely become more urgent. The pursuit of intelligence comes at a time when Russia is demonstrating an increased willingness to take risks when it comes to using hybrid tactics, such as sabotage against Denmark's support for Ukraine's military efforts.

It is highly likely that Russia is conducting espionage against targets related to Denmark's support for Ukraine's military efforts. For example, information on the amount and type of donated equipment, which could give Russia advantages on the battlefield in Ukraine. Russia also spies on civilian and military critical infrastructure. This espionage is carried out in preparation for physical sabotage or destructive cyber attacks. Russian espionage also contributes to Russia's planning and preparation of military operations in the event of an escalating conflict.

## CHINESE INTELLIGENCE SERVICES WANT POTENTIAL ASSETS TO TRAVEL TO CHINA

Chinese intelligence services want to incentivize individuals to travel to China by offering them attractive jobs. In China, the intelligence services will seek to recruit them as assets.



The target is contacted in the country of residence with a lucrative offer.



The target travels to China to work, participate in a conference, solve a task or something similar.



Once the target is in China, the actual recruitment attempt takes place.

# CHINA

## CHINA'S SUPPORT FOR RUSSIA EXACERBATES TENSIONS WITH THE WEST



---

China is providing decisive support for Russia's war efforts in Ukraine. In addition, China has employed increasingly coercive tactics against Taiwan and in the South China Sea, where its extensive territorial claims contravene the international law of the sea. China is preparing to be able to win a war over Taiwan and for being able to endure a confrontation with the West. At home, the Communist Party is tightening its grip on power and increasing its support for domestic industries at the expense of the competitiveness of foreign companies. At the same time, China is looking to transfer technology and knowledge from other countries, also through espionage. China's approach is increasing the possibility of more conflicts with Denmark and the West.



Chinese military helicopters off the Chinese mainland on 4 August 2022 prior to extensive military exercises around Taiwan. Hector Retamal/AFP/Ritzau Scanpix

### ■ China supports Russia's war efforts and strengthens cooperation

China is by far the biggest and most important supplier of raw materials, components and machine parts that support Russia's war in Ukraine and the Russian economy in general. Without China's support, Russia will find it difficult to sustain its war efforts if Western support for Ukraine continues. China's support for Russia thus has a significant impact on Europe's security. Consequently, these factors combined will put additional strain on China's relations with Denmark and other Western countries.

China sees Russia as its only significant partner in the strategic competition with the United States. Consequently, China continues to strengthen its strategic and military cooperation with Russia despite strong Western criticism and sanctioning of Chinese companies that bypass sanctions against Russia. In general, China also provides diplomatic support for Russia, but it has nevertheless taken some diplomatic initiatives which, in Russia's view, conflict with Russian interests. For instance, China has repeatedly warned against the use of nuclear weapons and other types of weapons of mass destruction in connection with Russia's invasion of Ukraine.

However, China is looking out for its own interests first and foremost. This means, among other things, that China is taking advantage of the circumstances to buy cheap oil and gas from Russia and obtain other concessions from Russia. It also means that China is reluctant to openly supply assembled military equipment to Russia due to its continued need for economic and scientific collaboration with Western countries.

### China is preparing for a potential confrontation with the West

China is trying to maintain its relation with the West and will be careful not to jeopardize it. However, China is increasingly prioritizing national security over economic concerns and is preparing for a potential confrontation with the West, for instance triggered by a fiercely intensified trade war or a major conflict over Taiwan.

China is therefore trying to reduce its dependence on foreign countries and increase its resilience to potential Western sanctions and interruption of trade. China is drawing lessons from the West's economic sanctions against Russia over its war in Ukraine and from Russia's countermeasures. China is also working intensely to free itself from reliance on foreign technology, such as computer chips. China is making an extensive effort to transfer technology from technologically advanced countries, including Denmark, in support of this objective.

China is the world leader in an increasing number of especially new scientific and technological fields. Over the last 20 years, China has significantly increased its investments in research and development from 0.6% to 2.4% of GDP, bringing Chinese investments on a par with those of technologically advanced countries. China especially invests in new technologies, including artificial intelligence and quantum technology, that can be used for both civilian and military purposes.

In the longer term, this will provide military advantages to China and challenge Western economic positions of strength. Artificial intelligence can be used, among other things, for warfare with unmanned vehicles such as drones. Quantum technology has the potential to be used for detection of submarines that are undetectable with existing technology. Quantum technology can also be used to develop computers with computing power that far exceeds the capabilities of today's computers.

In China's view, the United States is making efforts to curb China's economic development and prevent it from assuming its rightful position as the dominant power in East Asia. China sees US alliances and partnerships in the region as a key element in these efforts, in particular the US alliances with South Korea, Japan, the Philippines and Taiwan, with which the United States has a security cooperation, but also the US security cooperation with Australia and the United Kingdom (AUKUS) and the cooperation between the United States, Australia, India and Japan (also known as Quad). Even if China is by far the most important trading partner to its neighbours in the region, many of the countries maintain close military ties to the United States, as they have little confidence in China.

China also views NATO's increased focus on East Asia and the close relations between the United States and European countries with concern. Consequently, China is trying to drive a wedge between the United States and Europe. In some cases, China is also trying to sow discord between European countries in order to prevent Europe from presenting a united front, for instance as regards the EU's attempts to mitigate the risks of cooperation with China. China favours countries that support Chinese viewpoints financially and diplomatically, for instance Hungary and Serbia.

### **China is preparing for a possible war over Taiwan**

China views Taiwan as an indisputable part of China, and reunification with Taiwan is thus one of the key political goals of the Communist Party – a goal that Xi Jinping has reiterated.

China thus continues to work for reunification by all means below the threshold of war and will pursue this goal with patience. At the same time, China is preparing its military for being able to win a war against Taiwan, and has set 2027 as the year when the military must be ready for this. The target date has been set to promote military development and does not mean that China has decided to invade Taiwan in 2027. China is rapidly expanding its military, in particular with capabilities allowing it to fight a war against the United States in the western Pacific. In China's vicinity, the Chinese military is roughly on a par with the US military.

At the same time, China is increasing its pressure and military presence around Taiwan and is holding large-scale military exercises, most recently when the new Taiwanese president was inaugurated in May 2024. The large-scale exercises are intended to send the message that China will not accept challenges to its One China policy. At the same time, they provide an opportunity for China to train different military scenarios, create a new normal in the area in which China has an expanded military presence as well as challenge the presence of the United States in the region. In addition, the exercises make it harder to provide warning, as they are difficult to distinguish from preparations for actual acts of war. Also, China uses extensive resources on influence campaigns and espionage against Taiwanese political and military targets. Also, China has toughened the already harsh rhetoric towards President Lai.

Thus, there are no prospects of Beijing and Taipei resuming informal diplomatic ties under the new president.

Despite growing tensions, a war over Taiwan is less likely within the next five years. One of the reasons for this is that China would not be certain of winning such a war, and a potential defeat could weaken the Communist Party's grip on power. In addition, China is well aware that a war would have serious diplomatic and economic consequences. Deterrence on the part of the United States and its allies will thus significantly impact China's decision-making, as will the threat of economic sanctions, despite China's efforts to reduce its vulnerability to sanctions.

However, China's calculus could change if Taiwan were to declare its independence, or if China no longer regarded US deterrence as credible. Consequently, the risk of war increases as China's military capabilities continue to grow. This risk is one of the reasons why foreign direct investment in China has fallen to the lowest level in 25 years.

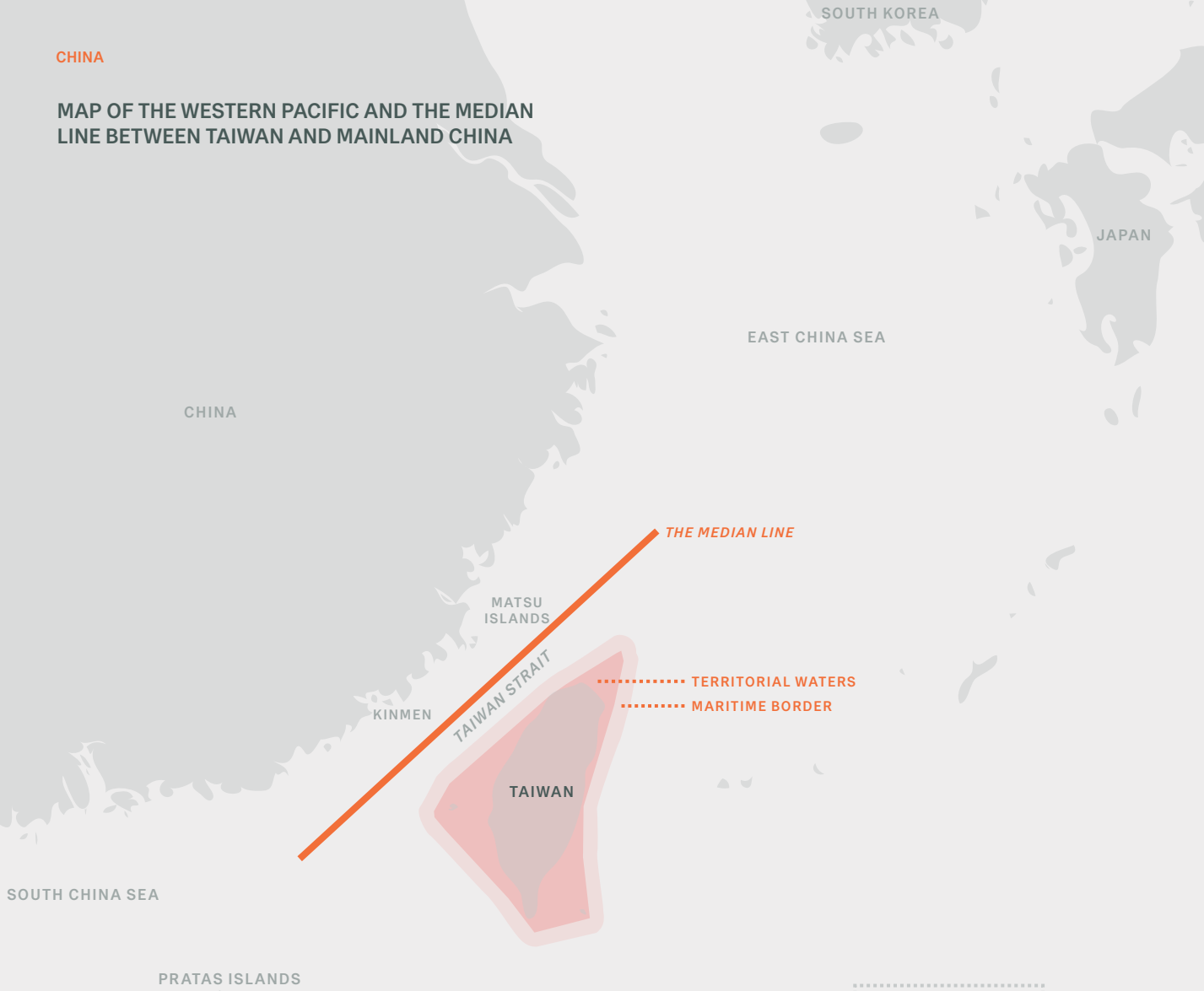
China could also choose less radical options over a full-blown invasion, such as a blockade of Taiwan or seizure of control of one or more of the Taiwanese-controlled islands in the Taiwan Strait. Actions like these would be smaller steps towards reunification that would also test the reactions of the United States and the West, such as sanctions. However, such military steps would also entail a significant risk of escalation into an all-out war that would draw in the United States.

### **China's aggressive conduct in the South China Sea is aimed at promoting its extensive territorial claims**

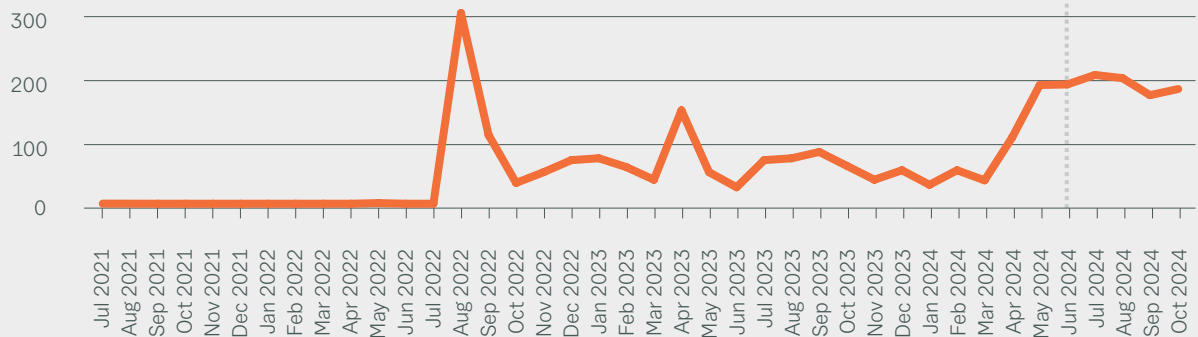
China is making extensive claims in the South China Sea on the basis of its so-called Ten-Dash Line (previously known as the Nine-Dash Line), which conflicts with the internationally recognized Philippine and Vietnamese sea borders, in particular. China is building artificial islands on reefs in the sea with airstrips and other military installations in order to promote its territorial claims and expand its military reach in the area. In an effort to enforce its Ten-Dash Line, China is trying to intimidate nations that oppose its territorial claims with means that are below the threshold for conventional military actions.

CHINA

MAP OF THE WESTERN PACIFIC AND THE MEDIAN LINE BETWEEN TAIWAN AND MAINLAND CHINA



CHINA'S MONTHLY FLIGHTS OVER THE MEDIAN LINE



Source: Taiwan's Ministry of National Defense

The chart shows the monthly Chinese flights over the median line between China and Taiwan. Following US House Speaker Nancy Pelosi's visit to Taiwan in August 2022, China has

repeatedly crossed the median line. Since the May 2024 inauguration of Taiwan's new president, the number of flights has been at a constant high level.





## IF WAR BREAKS OUT OVER TAIWAN OR IN THE SOUTH CHINA SEA

A major war over Taiwan is unlikely in the short term. However, if China decides to start such a war, drawing in the United States, it would in all likelihood have serious consequences and fundamentally change the conditions of Danish security policy. The ability and commitment of the United States to contribute to Europe's security would diminish. The increased tensions in the Taiwan Strait alone and the risk of war are changing the regional security dynamics in East Asia and are pushing South Korea and Japan closer together.

Something that could trigger a war is if China gets the impression that the United States and its allies will not come to Taiwan's defence and are unwilling to bear the huge economic consequences that an economic decoupling from China would entail. Xi Jinping could perceive such a situation as a historic opportunity to complete the mission of reuniting Taiwan with the motherland.

If China invades Taiwan, and Western countries impose wide-ranging sanctions on China, the economic consequences would be immense. China accounts for 15% of EU trade with the outside world and is thus the EU's second-most important trading partner behind the United States, which accounts for 17%. The economic consequences of a decoupling would, however, be far greater than implied by this number, as China and Taiwan are both crucial links in global production and supply chains and would be difficult to replace. It would take several years for Danish and other companies to find alternative suppliers and develop products that are currently exclusively or primarily manufactured in China and Taiwan. For instance, China extracts and processes the greater part of the rare earth elements that are

essential components of wind turbines, among other things. China is also the world's largest producer of green technology such as solar panels and electric car batteries. Consequently, a conflict would have a negative impact on the progress of the green transition.

In addition, Taiwan produces the majority of the world's advanced computer chips, which are essential components in a wide range of products. It would take a number of years before these chips could be replaced by chips produced elsewhere. Supply disruption would thus have wide-ranging negative consequences for the world economy.

In addition, the Taiwan Strait is a key shipping route, with 40% of the world's container cargo passing through it. Consequently, a conflict would, in addition to seriously affecting the global economy, also have a serious impact on Denmark as a global maritime and trading nation. The Faroe Islands and Greenland would also be affected, as a large part of their exports go to China and other East Asian countries.

China's aggressive conduct in the South China Sea carries the risk of accidents and misunderstandings that could lead to an unintended military conflict. However, such a conflict is less likely. Should a conflict still arise, it could have consequences for Danish merchant ships navigating in the waters through which one third of global shipping passes. In addition, there is a small risk of a further escalation that could draw in the United States, potentially triggering a major war with similar consequences as a war over Taiwan. In the wake of the many clashes between China and the Philippines in 2024, the United States has stated that it is considering escorting Philippine ships in the area, increasing the risk of clashes between US and Chinese vessels and thereby a further escalation.

### ISLANDS AND REEFS CONTROLLED BY CHINA

- ..... The Philippines' exclusive economic zone in the South China Sea
- China's Ten-Dash Line
- Disputed reefs and islands under Chinese control
- Reefs contested by the Philippines and China



## CHINA SHARPENS ITS FOCUS ON SECURITY

### 2014

- New security areas identified: space, deep sea, internet, the Arctic and Antarctic
- National Security Commission established

### 2015

- Policy plan for increased industrial and technological independence adopted

### 2016

- 15 April designated as National Security Education Day

### 2017

- Detention and surveillance of minorities in Xinjiang
- New, extensive National Intelligence Law adopted

### 2020

- Security law used to suppress Hong Kong protests
- Total surveillance during the COVID-19 pandemic

### 2021

- Regulatory crackdown on tech companies
- Data Security Law puts foreign companies at risk of being charged with espionage

### 2022

- The Global Security Initiative aims to spread China's view of international security

### 2023

- Wide-ranging changes to China's Anti-Espionage Law
- China's intelligence service launches public account on social media platform WeChat

Since early 2023, China's aggressive conduct in the South China Sea has been directed at the Philippines in particular. During the course of 2023 and 2024, China has used blockades, water cannons and collisions to deny Philippine vessels access to reefs that are within the Philippine economic exclusive zone, in particular Second Thomas Shoal, Scarborough Shoal and Sabina Shoal. This has resulted in multiple collisions between Chinese and Philippine ships, and there have been at least three incidents in which Philippine crew members have been injured in connection with reef resupply missions. China will likely continue to increase its presence gradually in the South China Sea and push out other nations from the areas to which China lays claim.

China wants to exploit the vast natural resources in the South China Sea, particularly fish, oil and gas. In the event of a crisis or conflict in the area, China

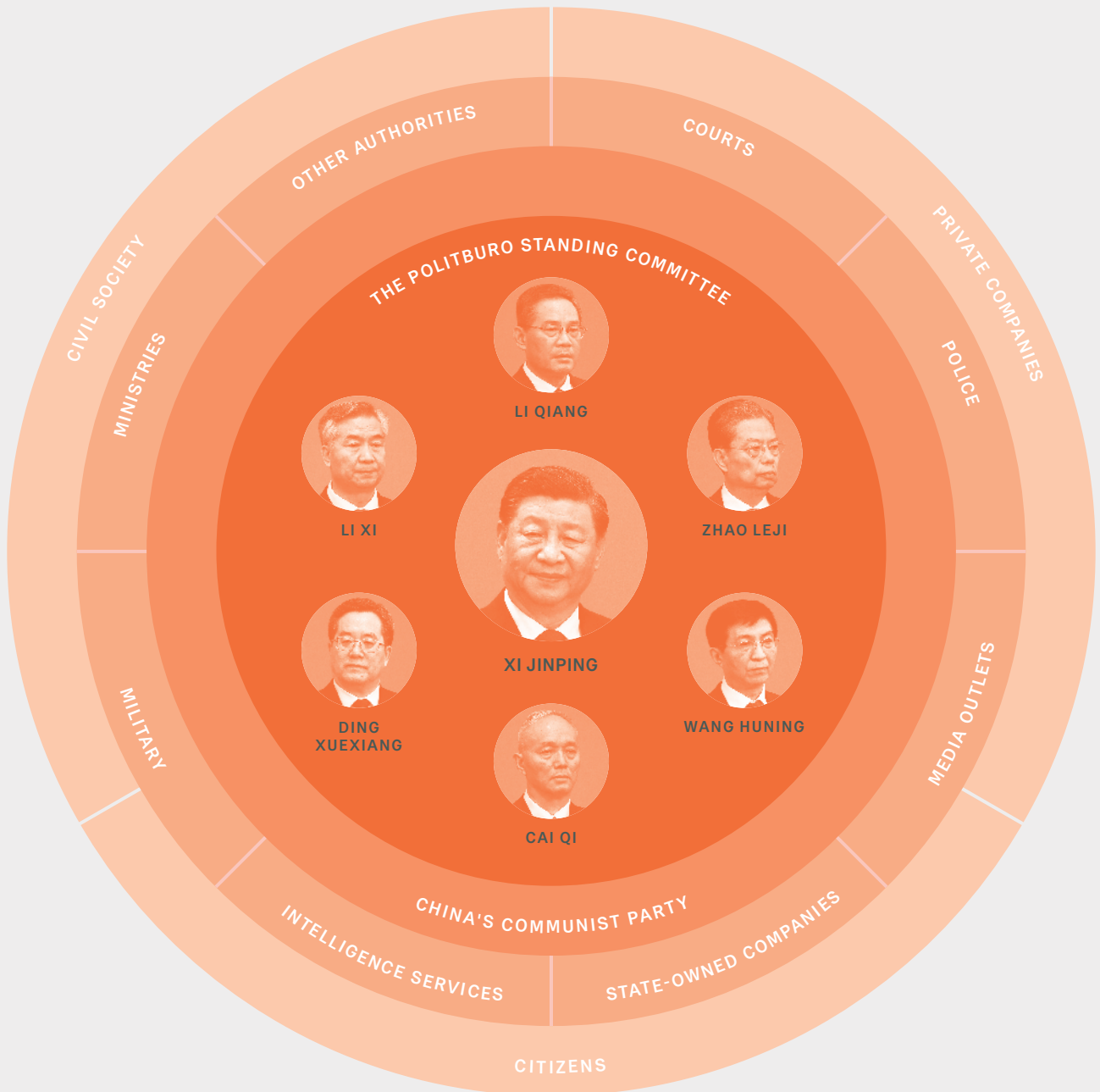
would also want to control the entry to the South China Sea. Large parts of global trade pass through the waters, including on Danish-flagged vessels. A major armed conflict could thus have serious consequences for Danish shipping companies and for the world economy in general.

### **China's increasingly authoritarian trajectory reduces predictability and increases tensions with other countries**

Since Xi Jinping took over in 2013, he has tightened his grip on power and is now the most authoritarian leader that China has had since the passing of Mao in 1976. Most of the party's top leadership have worked closely with Xi Jinping in the past and shown their loyalty to him. The consolidation of power around Xi Jinping makes China less predictable and increases the risk of China acting on an inadequate decision-making basis.

**CHINA'S COMMUNIST PARTY WIELDS BOTH THE EXECUTIVE, LEGISLATIVE AND JUDICIARY POWER IN CHINA**

The circle illustrates that the Politburo Standing Committee is the highest and most central political organ in the Chinese Communist Party and thus in China. Unlike parties in Western countries, China's Communist Party wields the executive, legislative and judiciary power and also has a tight grip on the Chinese economy and civil society.



At the same time, the Communist Party has tightened its grip on the state and civil society and strengthened its presence in private companies. China also seeks to control and influence Chinese citizens living abroad and use them to promote Chinese interests. For this task, China uses both its intelligence services and party organs. These efforts potentially threaten the rights of individuals of Chinese descent residing in Denmark and other countries. China's increasing authoritarianism and strong focus on economic and military security are met with resistance in Western countries and lead to steadily increasing tensions with Denmark and other Western countries.

Over the past decade, China has moved down a path on which the Communist Party is increasingly setting the direction for the Chinese economy and decides which technological areas and sectors of the economy to prioritize. Since 2021, China's property market has been hit by large price drops caused by a price bubble and years of over-investment in the sector. This has translated into greater uncertainty and economic pessimism among average Chinese citizens. As a result, the Communist Party is directing even more investment from the property sector to priority industries such as electric cars and green technology. China's export of subsidized goods makes it difficult for Western companies to compete and exacerbates the already tense economic relations between China and Denmark and other Western countries.

China is the world's largest trading nation and ranks as the biggest trading partner for most countries in the world. China has proven willing to use the economic power which comes from this position to pressure and penalize other countries. For instance, China penalized Lithuania for allowing the establishment of a Taiwanese Representative Office in the country in 2021. According to China, the use of the word "Taiwan" violates the One China policy and goes against the established norm of using the word "Taipei" (the capital of Taiwan) for this type of office. China also imposed economic sanctions on Norway for awarding the Nobel Peace Prize to Chinese dissident Liu Xiaobo.

### **China wants to reshape the international order**

China is gradually trying to reshape the international order to assume a dominant role in its region and in the world. For small countries like Denmark, the world

order that China wants, in which large countries are increasingly able to impose their will without regard to international laws and rules, presents a number of challenges.

China also has an interest in undermining liberal values that challenge China's political system. This is the case as regards China's oppression of minorities in Xinjiang, in which China is trying to suppress criticism from other countries. This approach to international politics challenges Danish and Western interests.

China is also making concerted efforts to increase its global influence through the UN as well as other newer organizations in which China plays a leading role, including, in particular, the Shanghai Cooperation Organisation and BRICS. China will likely try to make these organizations more significant by adding more collaboration areas and increasing the number of members in order to strengthen China's global power.

Through the Belt and Road Initiative (BRI), China is investing in strategic infrastructure such as ports, roads, energy, telecommunications and raw materials in many parts of the world. The projects often supply energy and raw materials for the Chinese economy, and Chinese companies are responsible for building the infrastructure. The cooperation and investments give China influence, in particular in less economically developed countries that receive large investments. The BRI cooperation will likely remain a key priority for China despite declining investment levels in recent years.

China has also begun playing the role of mediator in international conflicts. For instance, China contributed to an agreement to normalize diplomatic relations between archrivals Iran and Saudi Arabia in 2023. China buys large amounts of oil from both countries and thus has an interest in reducing tensions. In 2024, the two rivaling Palestinian organizations Hamas and Fatah forged an agreement in Beijing with China in a mediating role. Also, in 2024, China and Brazil prepared a proposal for the elements of a peace agreement for Ukraine. China is taking initiatives like these because it wants to be regarded as an impartial player working for international peace and security and as a credible partner for countries in the Middle East, Africa and elsewhere. This involvement is thus a means for China to increase its influence. ■

# THEME: TRANSFER OF TECHNOLOGY

China, Russia and Iran are attempting to transfer technology from Western and other technologically advanced countries by both legal and illegal means.

China's efforts pose the biggest threat to Danish research, innovation and technology. These efforts cover many different technologies but focus particularly on China's strategic priority industries, including military technology and Danish strengths such as quantum and biotechnology.

China has a strategy for military-civilian fusion that aims to harness civilian scientific and technological progress for military purposes. As a result, research cooperation with China and Chinese investments in civilian areas that have potential military applications

could ultimately end up contributing to China's military technology development. China's wide-ranging efforts and the close interaction between civilian and military sectors make it difficult for open and democratic countries to address the threat, as there are also significant benefits from investments and research cooperation with Chinese actors.

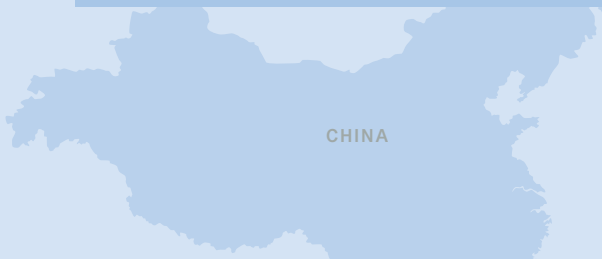
Russia, in particular, is trying to transfer foreign technology to its defence industry in an effort to reduce the country's deep reliance on Western-produced components. Iran has also repeatedly appropriated Western technology from captured equipment which it has used as a basis for its own production and development.

## MANY PEOPLE AND ORGANIZATIONS PLAY A ROLE IN CHINA'S TECHNOLOGY TRANSFER

Party organs, government organizations, universities and companies in China **identify requirements** for technology transfer and development in the research and technology fields.



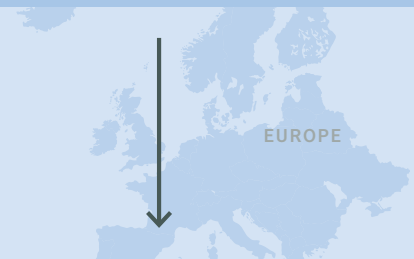
**These entities activate actors abroad** in an attempt to transfer technology and knowledge to China. Actors abroad include Chinese companies, hacker groups, organizations for Chinese people residing abroad, investors and intelligence services.



The actors help specialists and companies to get **established in China** through talent programmes, research partnerships and joint ventures with Chinese companies. Hacker groups and intelligence services steal knowledge and technology from Western companies and research institutions.



The actors **map overseas resources** in the science and technology field in order to recruit specialists and sources, invest in companies or compromise the IT structure of companies.



## METHODS FOR TRANSFER OF TECHNOLOGY



### EXCHANGE AND ATTRACTION OF FOREIGN SCIENTIFIC TALENTS

China, Russia and Iran all use exchange of students and scientists as a way of transferring knowledge. There are many Chinese students and scientists in Western countries in particular, especially in scientific and technical fields. China awards scholarships mainly to students in sectors of strategic priority, and scholarships from the China Scholarship Council, for example, require students to return to China. China also uses talent programmes to attract scientists with Chinese as well as foreign backgrounds.



### RESEARCH PARTNERSHIPS

China sees research partnerships as important means of knowledge transfer. China thus actively participates in a wide range of research projects, including mega projects such as the fusion energy project International Thermonuclear Experimental Reactor (ITER) and the Large Hadron Collider (LHC) nuclear physics project.



### CYBER ESPIONAGE

China, Russia and Iran use cyber espionage to steal knowledge and technology. However, China's cyber espionage efforts in particular are difficult to counter due to their sheer scale. For instance, the United States has accused China of being behind a number of cyber espionage attempts against research institutions, think tanks, NGOs and the US defence industry.



### INVESTMENTS IN ESTABLISHED AND START-UP COMPANIES

China in particular uses investment strategically to gain technology and information, especially in sectors deemed strategically important. Investing in foreign countries is a way for states to gain access to technology and expertise otherwise subject to restrictions, such as sanctions or export control regimes. Indications are that China is increasingly focusing on start-up companies which are not always covered by the foreign investment screening laws of Denmark and other countries.



### HUMAN SOURCES

The countries also transfer knowledge and technology through traditional espionage tradecraft, through which intelligence services recruit company and university employees to steal knowledge that can be used to build research centres and industries. There are examples of espionage incidents and convictions concerning transfer of technology in a number of countries across the world. In Germany, for instance, three individuals were charged with transferring military technical knowledge that could be used in warships to China.



### TECHNOLOGY TRANSFER REQUIREMENTS FOR FOREIGN COMPANIES

Historically, China's key instrument to facilitate transfer of technology has been its requirement that foreign companies enter into joint ventures with Chinese companies in order to be allowed to invest in China. In recent years, however, this has become a less important mechanism for transferring technology.

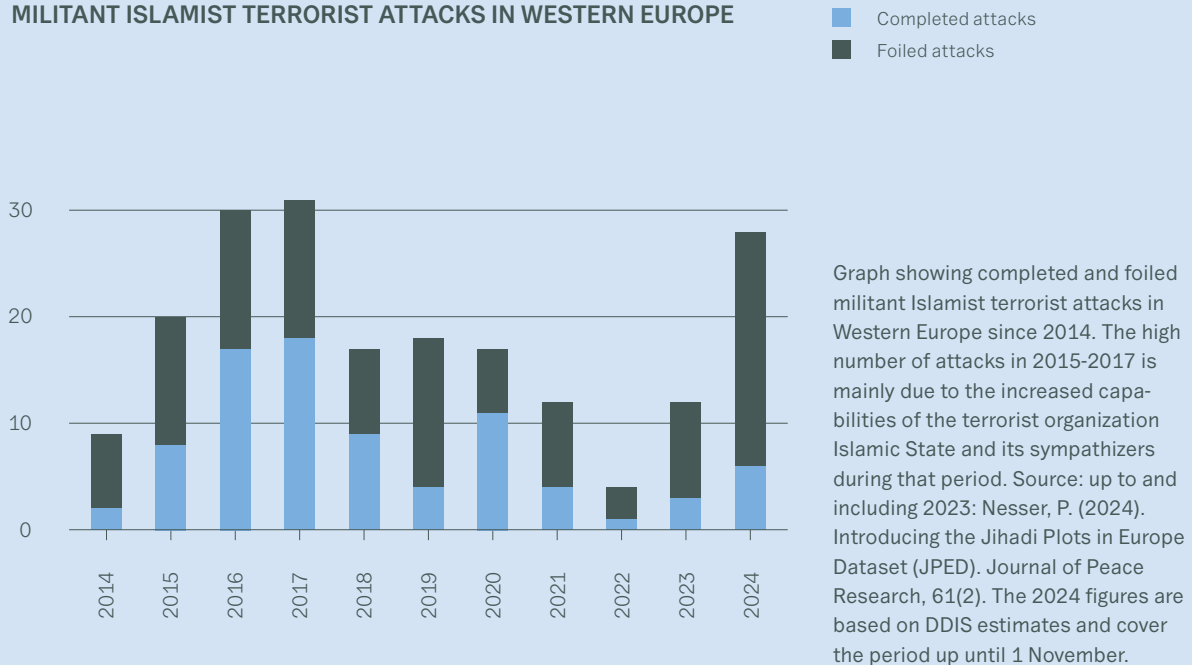
# THEME: TERRORISM

The terrorist threat in Europe has increased since 2022. This is due in part to the war in Gaza and more recently the war in Lebanon, which have contributed to further radicalization of militant Islamist networks inside and outside Europe. The number of completed and foiled terrorist attacks within Western Europe in 2023 and 2024 has increased, reversing the generally downward trend seen since 2017. However, the number of fatalities in 2024 is significantly lower than in previous years, the likely reason being that most of the attacks launched in 2024 used simple means, including knives. In 2023, priority targets for terrorists included individuals and locations in the West linked to Quran desecrations. In 2024, the terrorist groups have had an increased focus on the war in Gaza.

## Terrorist groups attempt to support attacks in Europe

Groups like Islamic State have the capability to launch coordinated high-casualty attacks close to Western Europe. However, terrorist groups will still find it difficult to launch large-scale coordinated attacks in Western Europe, as the access to arms and materials to produce explosives is more restricted, among other things. Western European authorities are generally also successful in uncovering and countering plots involving major groups of individuals and networks. In the past few years, Islamic State has made several attempts to remotely direct terrorist attacks in Europe through encrypted messaging apps.

### MILITANT ISLAMIST TERRORIST ATTACKS IN WESTERN EUROPE





In 2023 and 2024, the Islamic State subgroup in Afghanistan, ISKP, in particular, repeatedly mobilized, called on and directed individuals to launch terrorist attacks in Europe. In 2024, ISKP orchestrated spectacular attacks in Iran and Russia, for instance, and likely represents the most deadly terrorist threat to Europe at present. In the coming years, there is a risk that Islamic State and other terrorist groups in Syria will be able to exploit the sudden power vacuum triggered by the collapse of the Assad regime in late 2024 to grow stronger again. This entails the risk that Islamic State in Syria could re-establish itself as a serious terrorist threat to Europe.

In the years to come, terrorist groups will continue to use online platforms to recruit and facilitate attacks, mobilizing lone actors or small groups of individuals in and near Europe into carrying out simple attacks on their own. It is highly likely that terrorists will try to attack soft targets, using simple means such as vehicles and knives.

Most terrorist attempts in Europe will emanate from lone actors or small groups. Also, it is possible that, in the future, terrorist groups or networks will try to recruit individuals to carry out attacks in return for payment.

### **The war in Gaza is a key driver for terrorism**

Several terrorist attacks and terrorist attack attempts in Europe in 2024 seem to have been motivated by the war in Gaza. Since October 2023, terrorist groups such as Islamic State, al-Qaida and their sympathizers have increasingly called for attacks against the West to avenge the war in Gaza. Developments in Gaza are frequently exploited in propaganda campaigns to call for attacks in, for instance, Europe. The propaganda paints the West in general as a party to the conflict, but the propaganda also explicitly targets Jews. The war in Gaza and the recent war in Lebanon reinforce the militant messages of terrorist groups and sympathizers, as the intensive media coverage of the wars evokes strong emotional reactions.

Since October 2023, Islamic State and al-Qaida have intensified their focus on attacking Jewish and Israeli targets globally, including in Europe. The war in Gaza will likely be a top focal point in the propaganda of militant Islamists and in their choice of terrorist attack

### **ASSESSMENT OF THE TERRORIST THREAT TO DENMARK**

In its March 2024 publication *Assessment of the Terrorist Threat to Denmark*, the Centre for Terror Analysis (CTA) assesses that the terrorist threat to Denmark remains at the level of SIGNIFICANT. Cases of perceived insults to Islam and the conflict between Israel and militant groups in Palestine have exacerbated the terrorist threat to Denmark within the current threat level. In 2023, several threats to Denmark emanated from actors abroad, especially lone actors and small groups of sympathizers with links to established militant Islamist groups operating in Europe or its neighbouring regions. However, the threat picture remains affected by the presence of militant Islamists in Denmark who may become inspired by calls for attacks in militant Islamist propaganda or via transnational contacts online.

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

targets in the West and elsewhere for many years. In the years to come, the war in Gaza will likely increase mobilization and radicalization to the same or even greater extent than did the purported violations of Islam such as the Cartoon Crisis and desecrations of the Quran. However, the heightened terrorist threat in the West and against Western targets abroad from the likes of Islamic State is still fuelled by a general anti-Western sentiment. A case in point is an attack that killed three Spanish tourists in Afghanistan in May 2024.

### **Terrorist groups will strengthen their foothold in Africa**

In recent years, Africa has provided the most fertile breeding ground for terrorist groups affiliated with Islamic State and al-Qaida. In 2023, terrorist groups in sub-Saharan Africa were responsible for approx. 60% of the total number of victims of terrorism worldwide.

These groups, which operate in the Sahel region and in the Horn of Africa, will have ample opportunities to recruit and expand their activities in several countries in the coming years. Consequently, the terrorist groups may pose a more serious terrorist threat to Western interests in the future.

So far, militant Islamist groups in Africa have attracted very few Western foreign fighters compared to Islamic State's self-proclaimed caliphate in Syria and Iraq ten years ago. However, foreign fighters from the West will likely trickle in to join terrorist groups operating in Africa as the groups expand their foothold and control of territory. As a result, the ties between terrorist groups operating in Africa and networks of individuals operating in the West will potentially strengthen and could ultimately also increase the terrorist threat in Europe in the coming years.

**Right-wing extremists exploit popular platforms to promote their ideology and call for terrorist attacks**

Right-wing extremists also pose a terrorist threat. Right-wing extremists in the West will, to a large extent,

continue to cultivate digital communities in which extremist views, manifestos and attack videos are disseminated. In these forums, perpetrators of right-wing extremist terrorist attacks in the West are praised for their attempts to spark what they see as a racial war. There is a persistent threat from lone actors, in particular, who are incited and encouraged to carry out similar attacks. Radicalization of right-wing extremists joining forces in networks no longer takes place only in the dark corners of the web. Today, common social media platforms and messaging services also factor into radicalization despite attempts by these platforms to minimize extremist content.

The violent riots in the United Kingdom in the summer of 2024 indicated that right-wing extremist individuals and networks, among others, are capable of spreading and disseminating misinformation and disinformation on the internet as a means of mobilizing violence against ethnic and religious minorities. In the coming years, right-wing extremists in the West will likely use single events to incite violence and possibly terrorism against different minority groups.



**IF SECURITY COLLAPSES IN PRISONS AND CAMPS HOLDING ISLAMIC STATE MEMBERS IN NORTH-EASTERN SYRIA**

More than 50,000 men, women and children are detained in the Kurdish-run prisons and camps in north-eastern Syria for suspected links to Islamic State.

In its effort to regain power, Islamic State wants to launch attacks on these facilities to free its members. It is possible that the collapse of the Assad regime will give the group more room to manoeuvre and enable it to carry out a large-scale prison break in the short term, i.e. within two years.

Over the past years, there has been some uncertainty about how long the United States will maintain its military presence in Syria.

If the US-led coalition withdraws from north-eastern Syria, it could also allow a resurgence of Islamic State in the area, increasing the risk of terrorist attacks against prisons and camps.

If Islamic State successfully frees thousands of its members, the group would be able to stage attacks against the security forces, civilians and possibly Western targets in Syria, Iraq and several neighbouring countries. Consequently, Islamic State escapees with Western backgrounds would be able to head towards Europe, resume contact with networks based in Europe and instruct their contacts to launch attacks on European soil, ultimately increasing the terrorist threat in Europe.

## TERRORIST GROUPS ARE QUICK TO EXPLOIT CONSUMER TECHNOLOGIES

A great deal of technology designed for ordinary consumers may potentially be used for terrorism purposes.

AI increasingly provides opportunities for terrorists to easily and quickly produce propaganda that incites violence and contributes to recruitment, in both increased quantities and high quality. AI-generated propaganda may enable terrorists to circumvent existing social media censorship mechanisms. In the future, high-quality fake videos, images and audio clips, so-called deepfakes, may become a tool for terrorists to produce propaganda.

Modern encryption solutions have also improved the ability of terrorist groups to remain anonymous when using internal communications or transferring money. Authorities have a hard time gaining insight into donations and terrorist financing through, for instance, cryptocurrency.


In addition, the wide use of drones in the war in Ukraine has inspired terrorist groups and their sympathizers to focus on the use of drones to carry out reconnaissance and attacks and collect drone footage for propaganda purposes. In the future, the combination of multiple technologies, such as AI and drones, could enable technology to automatically detect and select targets without human intervention.






# HOT SPOTS IN THE MIDDLE EAST AND AFRICA

EUROPE'S WAR-RIDDEN SOUTHERN  
NEIGHBOURING REGIONS



Conflicts in the Middle East and Africa have the potential to threaten European security. In the years to come, the regions will remain marked by structural problems that worsen the living conditions of the populations and provide additional fertile ground for terrorism and incentivize migration. The wars in Gaza and Lebanon have temporarily halted the recent attempts to normalize relations between Israel and the Arab countries. Iran poses a more direct challenge to both Israel and the West, while regional powers such as Türkiye and Saudi Arabia are trying to maintain relations with the West, Russia and China at the same time to expand their strategic room for manoeuvre. Such attempts will weaken Europe's abilities to influence developments in its vicinity.



A drone is downed in northern Israel in August 2024.  
Jalaa Marey/AFP/Ritzau Scanpix

■ The 7 October 2023 Hamas terrorist attack came at a time when the Middle East seemed to be moving into a more peaceful period. Instead, the Hamas attack and Israel's military response triggered a wave of armed conflicts stretching from Gaza over Lebanon to the waters off Yemen. The development has also brought regional adversaries Israel and Iran to the brink of an all-out regional war. There is still a risk that retaliatory attacks and misunderstandings could escalate the situation.

### **Iran is increasingly challenging Israel and the West**

The strained relations between Iran and Israel will drive tensions in the Middle East, even after the wars in Gaza and Lebanon and the collapse of the Assad regime in Syria. For many years, the conflict has played out as a shadow war between Israel and Iran's partners in what Iran calls the axis of resistance, which includes among others Hezbollah in Lebanon, the Houthi movement in Yemen, Hamas in Gaza and a number of pro-Iranian militias in Iraq.

Since the 7 October 2023 Hamas terrorist attack and Israel's military response in Gaza, Iran's proxies have launched multiple missile and drone attacks in support of Hamas in Gaza while Israel has attacked targets in Yemen, Lebanon and Syria. Hezbollah's rocket attacks on northern Israel have displaced thousands of Israelis from the border area, prompting Israel to launch a large-scale offensive against Hezbollah in Lebanon in the autumn of 2024.

In 2024, the shadow war also escalated into direct confrontations between Iran and Israel. Iran attacked Israel for the first time ever in April 2024 with several hundred drones and missiles in response to an attack on an Iranian consulate in Syria. Iran and Israel have since mounted direct attacks on each other's sovereign territories again.

Iran's missile attacks on Israel are clear examples of Iran's increased willingness to challenge Israel directly. This is partly due to the increasing dominance of radical forces over key political and military institutions in Iran that are outside the scope of parliamentary control.

### **IN IRAN, THE SUPREME LEADER HAS THE FINAL SAY**

In 2024, reformist Masoud Pezeshkian won Iran's presidential election. Still, Supreme Leader Ayatollah Ali Khamenei and his inner circle of conservative and radical hardliners will have the final say on key foreign policy and security decisions. However, Pezeshkian will be able to have an impact on Iran's foreign policy in certain areas. For instance, the new Iranian president may be able to convince Khamenei to revive nuclear negotiations with the United States in exchange for sanctions relief.

Iran's increased cooperation with Russia and China makes it less vulnerable to Western criticism and sanctions. Iran has long delivered drones to Russia's war in Ukraine and continues to expand its military cooperation with Russia. For instance, Iran has begun to deliver short-range ballistic missiles to Russia.

The development means that the Tehran regime will be less constrained by political considerations towards Europe, as evidenced by the active targeting by Iranian intelligence services of Iranian exile groups and individuals deemed a threat by the Iranian regime, for instance in Denmark.

Also, Iranian intelligence services have increased their focus on Israeli and Jewish targets and interests in Europe following the intensified conflict between Iran and Israel.

**The wars in Gaza, Lebanon and Syria will characterize the Middle East for many years**

Israel's military campaigns in Gaza and Lebanon have significantly weakened Hamas and Hezbollah, leaving large areas in ruins that will take years to rebuild. In Lebanon, the development could exacerbate the deep internal division, which has already prevented the formation of a new government since 2022. Also, the war may mobilize a new generation of Hezbollah fighters who will continue to pose a threat to Israel.

The wars in Gaza and Lebanon have contributed to an atmosphere of hostility against Israel among the populations throughout the region. Consequently, Israel's existing cooperation with the regimes in the neighbouring Arab countries is under pressure, making

it harder for the United States to sway countries such as Saudi Arabia to also normalize relations with Israel. At the same time, Iran is making efforts to strengthen ties with the Gulf countries to avoid political isolation but also to curb Israel's influence in these countries.

However, Iran has lost its closest state ally after insurgent groups toppled the Assad regime in Syria. Assad's fall limits Iran's opportunity to rebuild Hezbollah's military capabilities in Lebanon, weakening Iran's and the axis of resistance's deterrence vis-à-vis Israel. Iran is now faced with a number of difficult choices as to its future strategy towards Israel, its relations with the West and the country's nuclear programme.

**IRAN'S MOST IMPORTANT CARDS IN THE REGION**

The conflict between Israel and the Iranian-led axis of resistance has played out on multiple fronts in 2024. The axis of resistance comprises militant groups in Gaza, Lebanon, Yemen, Iraq and Syria, among others.



**HAMAS (GAZA)**

---

Founded: 1987  
 Religion: Sunni Islam  
 Iranian influence: Low  
 Number of fighters: 9.000-12.000

The 7 October 2023 Hamas terrorist attack on Israel triggered the war on Gaza.



**HEZBOLLAH (LEBANON)**

---

Founded: 1982  
 Religion: Shia Islam  
 Iranian influence: High  
 Number of fighters: 20.000-50.000

The fighting between Hezbollah and Israel gradually intensified in 2024.




**HOUTHİ MOVEMENT (YEMEN)**

---

Founded: 1994  
 Religion: Zaydism (one of the branches of Shia Islam)  
 Iranian influence: Moderate  
 Number of fighters: 10.000-30.000

The Houthis have attacked vessels in the waters off Yemen since November 2023. The Houthis have also launched direct attacks on Israel.



**THE ISLAMIC RESISTANCE IN IRAQ (IRI)**

---

Founded: 2023  
 (active since 2000s under other names)  
 Religion: Shia Islam  
 Iranian influence: High  
 Number of fighters: 40.000-70.000

The IRI is a group of pro-Iranian militias that has launched attacks on Israel and US targets in Syria, Iraq and Jordan since the autumn of 2023.

### Iran likely capable of developing nuclear weapons in less than two years

Iran has rapidly expanded its nuclear programme since the United States withdrew from the international nuclear deal in 2018 and reintroduced economic sanctions against Iran. It is likely that Iran can now, in less than a week, produce enough enriched weapons-grade uranium for a nuclear warhead, which would have taken about a year under the 2015 nuclear deal. However, Iran is likely a few years away from being able to produce an operational nuclear weapon.

Israel continues to warn that it will intervene if the international community fails to convince Iran to halt its nuclear programme. Still, Israel is less likely to launch a large-scale attack on Iran's nuclear programme in the short term. Such an attack would dramatically escalate the conflict between the two countries. However, the risk of an Israeli attack will increase if Israel believes an Iranian nuclear weapon is imminent.

### Fragile neighbouring regions create uncertainty for Europe

The war in Gaza clearly demonstrates that unresolved conflicts in Europe's vicinity have the potential to threaten European security, both inside and outside of Europe. Several completed and foiled terrorist attacks in Europe in 2024 have been motivated by Israel's war against Hamas in Gaza.

The Iranian-backed Houthi movement has similarly used the war in Gaza as justification for its drone and missile attacks on Israeli and Western merchant shipping in the waters off Yemen. The numerous attacks have forced shipping companies, including Danish companies, to avoid the Bab al-Mandeb Strait off Yemen's coast and take a detour of thousands of kilometres around the southern tip of Africa.

The Houthis will likely continue to pose a threat to international shipping in the short term. Their attacks on merchant shipping serve two purposes: to increase their popularity in the region and to demonstrate their military strength against their enemies in civil war-stricken Yemen.



At the same time, several of the most fragile countries will continue to be fraught with armed conflicts, typically leading to further economic decline, unemployment and poor health.

The unexpected offensive launched by insurgent groups in Syria in November 2024 led to the collapse of the Assad regime in just 11 days. The development heralds a new and unpredictable phase in the long-standing conflict, which could have negative repercussions for the regional stability, strengthen terrorist groups and incentivize increased migration towards Europe.

Several countries in Africa and a few in the Middle East are among the world's poorest and most fragile countries. They struggle with massive debts and soaring inflation rates, poor infrastructure, and water and food shortages. Climate change will only exacerbate these problems in the future. Drought is already forcing farmers in, for instance, Iraq to migrate to larger cities where unemployment is already high.

At the same time, several of the most fragile countries will continue to be fraught with armed conflicts, typically leading to further economic decline, unemployment and poor health. These are all drivers that push people to seek a better life in other countries, and they also mean that the migratory pressure towards Europe will remain high.

### New partnerships weaken Western influence

Russia and China will continue to challenge Western influence in the Middle East and Africa. While China's interests are mainly centred on securing access to the region's energy and natural resources, Russia also seeks diplomatic support that can counter attempts by Western countries to isolate Russia politically. However, with Assad's fall, Russia has lost a key ally,



and it is uncertain whether Russia can maintain its strategic bases in Syria under a new rule. Russia's support for coup plotters in Mali, Burkina Faso and Niger has enabled these countries to replace Western troops with Russian mercenaries in the fight against terrorism. Ultimately, this may weaken the ability of Western countries to counter terrorist threats emanating from the region.

The United States will maintain a strong military presence in the Middle East. In addition to its permanent bases in, for instance, Qatar, Bahrain and Kuwait, the United States has the capability to rapidly deploy additional troops to the region. In 2024, in an effort to counter the threat from Iran and the axis of resistance, the United States regularly deployed additional aircraft carriers to the Middle East.

Nevertheless, several countries in the region are now less certain that the United States will maintain its role as a regional security guarantor in the next several years. This is due in part to the fact that the ambition of the United States to increase focus on the strategic competition with China has reduced its interest in maintaining military involvement in conflicts in the Middle East and troops on long-term missions, among other things.

In 2024, the United States and Iraq initiated negotiations on the US military presence in Iraq following pressure from anti-US hardliners in the Iraqi government. US activities in Iraq and Syria are closely intertwined, and reduced US engagement in Iraq may thus also affect the security situation in north-eastern Syria. Here, the Kurdish YPG militia remains dependent on Western support to continue its fight against Islamic State and maintain security in the camps and prisons holding members of the terrorist organization.

The Arab Gulf states see a greater need to diversify their diplomatic efforts and trade relations between different partners – basically a way to hedge their bets for a changing world order. For Saudi Arabia, its cooperation with the United States does not exclude a deepening of its relations with China.

The same holds true of Türkiye. Although the country is an important NATO member, it is showing interest in joining the expanded BRICS cooperation that aims to counterbalance the West's political and economic influence in the world. At the same time, Türkiye is seeking to strengthen its relations with both Russia and China, for instance through procurement of and cooperation on certain weapons systems. ■



## IF ISRAEL ATTACKS IRAN'S NUCLEAR PROGRAMME

A large-scale Israeli attack on Iran's nuclear programme would not only have serious consequences for the two countries, it could also trigger an all-out regional war with implications for the rest of the world.

Iran's first response would be to launch a military attack on Israel, which would likely be stronger than the previous Iranian drone and missile attacks on Israel in April and October 2024. US military bases in the Middle East could also become targets of retaliation as Iran would probably hold the United States partly responsible.

Consequently, the potential for escalation is high. Even though the United States does not want to see an escalation of the crisis, the United States could find itself in a situation in which it would have to side with Israel in a war against Iran due to

political considerations. As a result, the United States may temporarily reduce its security-political engagement in Europe.

An all-out regional war would also have a negative impact on the global economy. The price of oil would likely increase, especially if Iran blocks international shipping through the Strait of Hormuz, given that about a fifth of the volume of the world's oil trade passes through the Strait.

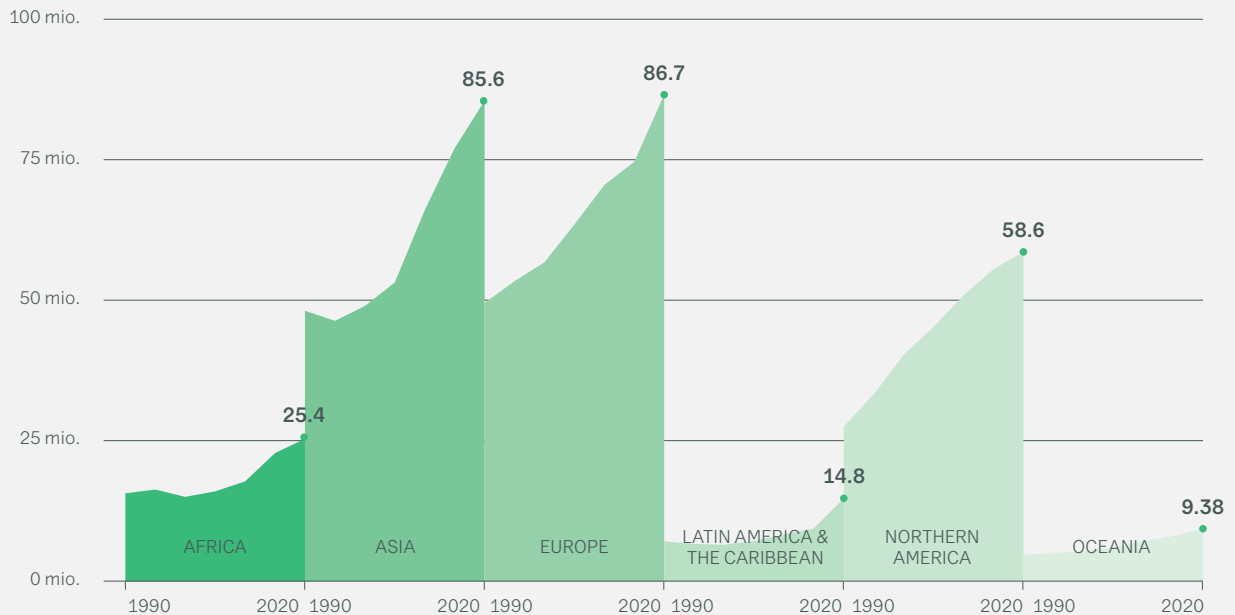
At the same time, an Israeli attack on the Iranian nuclear programme could prompt Iran to change policy and launch a programme specifically aimed at nuclear weapons development. This could ultimately trigger a nuclear arms race in the region in which Saudi Arabia would also try to develop its own nuclear weapons.

### MIGRATION TOWARDS EUROPE

- People flee or migrate for many reasons, and many relocate within their own country or region. However, the likelihood of people migrating increases or decreases with the number of conflicts.
- The increased conflict level in Europe's vicinity stretching from Sahel across the Middle East to Ukraine will increase the risk of large uncontrolled migration flows in the years to come.
- Large inflows of refugees and migrants could overwhelm migration systems in host countries. They could also have major economic costs and deepen political divisions among communities that are already affected by large inflows of migrants.
- So far, the war in Gaza has not triggered a wave of migration towards Europe. The population has mainly been forcibly displaced internally in Gaza, although more than 100,000 Palestinians have managed to flee to Egypt.
- In Lebanon, Israel's major offensive against Hezbollah has forced more than one million people from their homes. Due to the destruction in large parts of the country, many of the internally displaced people remain unable to return home. The situation could potentially trigger new migrant flows towards Europe.
- The same could happen in Syria, where the country's ethnic and religious minorities are facing an uncertain future following the collapse of the Assad regime.

### THE NUMBER OF INTERNATIONAL MIGRANTS IS INCREASING GLOBALLY, BUT THE INCREASE IS HIGHEST IN EUROPE AND ASIA

1990-2020



Source: UN DESA 2021

**FRAGILE STATES AT HIGHER RISK OF OUTBREAKS OF ARMED CONFLICT**

Several of the world's most fragile states are suffering from wars, while populations in other fragile states are facing an increased risk of crisis and conflicts. Poor living conditions and internal division create a breeding ground for militant groups, allowing them to exploit the frustration of the populations.

Islamic State maintains its foothold in countries such as Syria and Afghanistan, where there are areas outside government control.

SYRIA

AFGHANISTAN

MALI

NIGER

BURKINA FASO

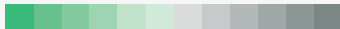
SUDAN

YEMEN

In recent years, several fragile states in the Sahel region have been affected by a series of coups d'état and civil wars.

The Houthi movement has long exploited internal divisions in the civil war-stricken Yemen to expand its own influence.

VERY STABLE



VERY FRAGILE

Source: The Fund for Peace

## THEME: THREATS TO CIVILIAN SHIPPING

### Conflicts in critical hubs could threaten European energy security

In the coming years, European energy security and economic prosperity will remain dependent on energy from the Middle East and trade with the growing economic hubs in Asia. A staggering 90% of all goods and raw materials traded worldwide are shipped by sea.

Several of the major maritime trade routes between Europe and Asia pass through narrow stretches of water, creating maritime chokepoints where shipping is particularly vulnerable to conflicts and adverse activities. Merchant ships could become collateral victims of attacks as well as targeted by states or militant groups that benefit from disrupting global supply chains.

### Pirates exploit conflicts in and around fragile coastal regions

Piracy poses a particular threat to the maritime shipping in the Gulf of Guinea and the waters off the Horn of Africa. Pirates exploit the fact that weak coastal states lack the capability to maintain maritime security in their adjacent waters.

Pirates benefit from instability in conflict and war zones where military resources are dedicated to conflict management efforts rather than maritime patrol missions. For instance, piracy off the Horn of Africa escalated in late 2023 at the same time that the Houthis started attacking international maritime shipping off the waters of Yemen.

A circular inset map highlighting the Gulf of Guinea region, showing the coastlines of West Africa and the Gulf of Guinea. The text "GULF OF GUINEA" is written in blue capital letters below the map.

GULF OF GUINEA

### THE GULF OF GUINEA

Piracy in the Gulf of Guinea was at a low level for the third consecutive year in 2024. However, it is likely that pirates will regularly continue their attempts to kidnap crew members from vessels navigating in the region. The most recent attack in May 2024 indicates that pirates retain the capability and intent to kidnap crews.

### THE RED SEA

By the end of 2023, more than 10% of global trade was shipped through the Red Sea between the Suez Canal and the Bab al-Mandeb Strait. However, as a result of the Yemeni Houthis' attacks on maritime shipping in and around the Bab al-Mandeb Strait, many Western shipping companies, including Danish ones, have opted for a longer route around the southern tip of Africa. This could ultimately undermine the competitiveness of Western shipping companies vis-à-vis, for example, Chinese companies, which have not been targeted by Houthi attacks to the same extent as their Western counterparts.

## THE HORN OF AFRICA

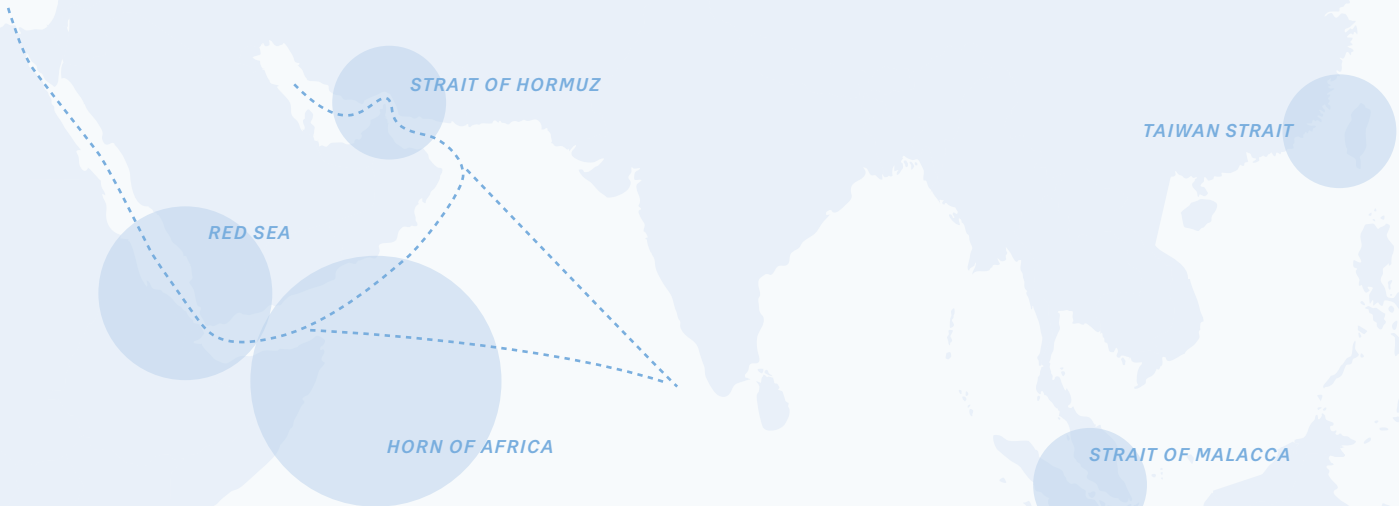
Piracy has resurfaced in the waters off the Horn of Africa. For the first time since 2017, a vessel was hijacked in the autumn of 2023, and Somali pirates have repeatedly attacked larger merchant vessels. The security procedures on the vessels and international naval anti-piracy operations have likely lowered the success rate of pirates. However, the threat is real, and the Somali pirates have yet again demonstrated their capability and intent to attack international maritime traffic.

## THE STRAIT OF HORMUZ

Around one-fifth of global trade in oil and liquified natural gas passes through the Strait of Hormuz. Iran uses its military capabilities to disrupt shipping through the Strait as a foreign policy tool against, in particular, Israel and the United States. Iran has previously seized and detained foreign merchant ships in and around the Strait of Hormuz and could do so again.

## THE TAIWAN STRAIT

Around 40% of the world's container fleet passes through the Taiwan Strait. A potential military conflict over Taiwan could disrupt maritime traffic in the Strait and likely also interrupt or upset a significant part of the trade between the countries in the region.



## THE STRAIT OF MALACCA AND THE SOUTH CHINA SEA

Around a third of the world's containerized cargo and more than 70% of China's gas and oil imports pass through the Strait of Malacca between Indonesia, Malaysia and Singapore. In the event of an escalating conflict between notably China and other South Asian states, the parties may attempt to deny their adversaries access to the major sea routes through the Strait of Malacca and the South China Sea.

## TERMS AND DEFINITIONS

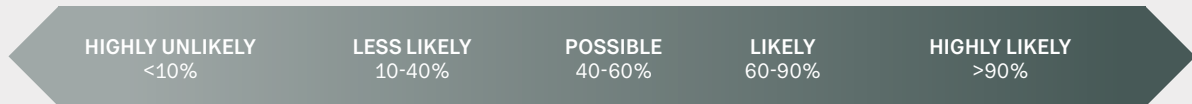
To provide a common framework of reference, we have prepared a brief outline of the special terms and definitions used in **INTELLIGENCE OUTLOOK**.

### Degree of certainty in assessments

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

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

We apply the probability scale shown below:



### TIME FRAMES

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



Israel's air defence system shoots down rockets launched from Lebanon.  
David Cohen/Zuma/Ritzau Scanpix



Danish Defence Intelligence Service  
30 Kastellet  
DK-2100 Copenhagen

Phone: +45 3332 5566  
[www. fe-ddis.dk](http://www.fe-ddis.dk)