

STATEMENT FOR THE RECORD
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INTRODUCTION

Chairman Reed, Ranking Member Inhofe, and members of the committee, thank you for the invitation to provide the Defense Intelligence Agency's (DIA's) assessment of the global security environment and to address the threats confronting the Nation.

We are in an era of strategic competition. The United States faces challenges from competitors who are developing capabilities intended to challenge, limit, or exceed U.S. military advantage. These state and nonstate actors not only are developing such capabilities but also are selectively putting them into play globally and regionally. These capabilities span all warfighting domains and cross-geographic boundaries. They include more lethal ballistic and cruise missiles, growing nuclear stockpiles, and a range of gray zone measures such as ambiguous unconventional forces, foreign proxies, information manipulation, cyberattacks, and economic coercion. Such gray zone measures are below traditional combat thresholds and often afford plausible deniability, enabling actors to wage campaigns of aggression. Emerging advances in materials, high-performance computing, robotics, artificial intelligence (AI), and biotechnology will augment our potential adversaries' military and technological capabilities, posing additional challenges. China and Russia, in particular, are pressing ahead with advances in space and counterspace capabilities and using cyberspace to increase their operational reach into U.S. infrastructure. They are also using the COVID-19 environment to conduct information warfare to undermine Western governments, attack Coalitions and compel economic and political outcomes in their favor. Iran and North Korea seek to expand military capabilities and further their regional goals to threaten the United States and its allies. Although transnational terrorist groups have suffered significant losses, the terrorism threat persists, and we must remain vigilant to protect our interests and those of our allies.

DIA officers fulfill the critical mission of providing strategic, operational, and tactical Defense Intelligence to our warfighters, defense planners, policymakers, and the acquisition community. The foundational intelligence that DIA, our colleagues across the Defense Intelligence Enterprise, and our allies and foreign partners provide on foreign military capabilities helps to translate national policy into executable military action and to inform the joint force.

I am privileged to lead DIA. My hope in this hearing is to help Congress and the Nation better understand the challenges we face and to support this committee in identifying opportunities to respond to these challenges. Thank you for your continued confidence. Your support is vital to DIA.

COVID-19 Pandemic

Unclear Origins

The true origin of SARS-CoV-2, the virus causing COVID-19 that emerged in China, remains unclear. DIA and the IC continue to examine new information to determine whether the initial outbreak occurred naturally through contact with infected animals or was the result of a laboratory accident.

Pandemic Status, Instability, and Vaccine Development

The COVID-19 pandemic has spread across the globe and killed over 3.1 million people as of April 26, 2021. COVID-19 has brought ruin to families and communities on a wide scale, weakened economies, and disrupted political dynamics and internal stability. COVID-19 continues to challenge countries around the world, and it will do so until an effective vaccine regimen is widely applied. The spread of COVID-19 in any country is linked to the implementation of, and compliance with, mitigation measures. Worldwide estimates on the scope of COVID-19 infections vary greatly. Recent studies suggest that at least 10 percent of the world's population has been infected, giving some degree of immune protection, but between 55 and 80 percent would need to be immune through natural infection or vaccination to

halt the virus's spread. Several countries that had successfully slowed transmission are now reporting resurgences.

As of mid-March 2021, there are at least 263 candidate COVID-19 vaccines in development worldwide, with at least 81 in human clinical trials. Russia published interim Phase 3 clinical trial results for its Sputnik V COVID-19 vaccine, claiming almost 92 percent efficacy. Russia also delayed submission of its vaccine data to international regulators for independent review and restricted access to scientific reviewers making it mandatory for their data access requests to first go through a security review—a practice not seen in typical data request responses. Chinese vaccine manufacturers claim that their vaccines have demonstrated 50- to 79-percent effectiveness in protecting individuals against COVID-19 in clinical trials, but they have yet to publish results to corroborate these statements.

Threat Actors' Reactions

China still funds its military modernization programs despite the pandemic's economic impacts. Although Beijing has curtailed some foreign engagements, it has maintained a limited number of prominent engagements, almost certainly aimed at shaping international perceptions of its handling of COVID-19 and sustaining high-priority diplomatic and security outreach. Beijing also exploited its Belt and Road Initiative (BRI) network to broadly promote medical and vaccine diplomacy.

Russia's COVID-19 response, which provided minimal aid to individuals and small businesses while protecting large enterprises, probably exacerbates existing public grievances. Russia developed a vaccine, probably prevented widespread outbreaks among the military, and avoided an economic collapse. Russia's COVID-19 response promoted its international image through humanitarian assistance deployments, and by developing and marketing a vaccine. Moscow almost certainly will continue to discredit the West's response and present itself as a reliable humanitarian actor. Russia has extensively promoted Sputnik V, soliciting the interest of at least 50 countries.

COVID-19 has exacerbated North Korea's already weak economy, and despite regime denials of having any domestic COVID-19 cases, Pyongyang has implemented border closures, quarantines, lockdowns, and steep reductions in trade. North Korea's military probably has experienced some degradation in unit proficiency, but it probably can conduct most functions if ordered.

Iran has struggled to contain COVID-19 and has experienced multiple rounds of resurgence, which has exacerbated its deteriorating economy but had minimal impact on decisionmaking, operational planning, military readiness, and internal stability.

Initially, COVID-19 restrictions made it more difficult for violent extremist organizations (VEOs) to move fighters and limited the number of potential mass-casualty attack targets, but VEOs have since adapted their propaganda, and probably their operational efforts, to account for these restrictions.

The COVID-19 pandemic provided new opportunities, especially for Russia and China, to identify cybersecurity vulnerabilities and steal information. Foreign cyberthreat actors are also disrupting the health care sector by stealing data and conducting ransomware attacks.

CHINA

China poses a major security challenge and remains a long-term strategic competitor to the United States. Beijing views the international environment and China's relationship with Washington as increasingly adversarial and perceives a number of threats to its sovereignty and security. China continues its decades-long military modernization campaign and ultimately aims to achieve its goal, first articulated in 2017, of establishing a "world-class military"—essentially a military as strong as that of the United States. Looking forward, an increasingly capable and lethal Chinese joint force will almost certainly be able to hold U.S. and allied forces at risk at greater distances from the Chinese mainland. At the same time, the People's Liberation Army (PLA) probably will extend its operational reach worldwide to support China's global interests.

Leadership Views and Goals

In 2020, Chinese President Xi Jinping continued to consolidate power, providing Xi and the Chinese Communist Party added leverage to complete key military reforms. In October 2020, the party convened the Fifth Plenum of the 19th Chinese Communist Party Central Committee. The ensuing communique likely signaled Xi's singular political position within the party, declaring him the "core navigator and helmsman," an invocation not used since Mao Zedong. The plenum outlined broad economic and military goals with an emphasis on China's transition from an export-oriented economy to one driven by high-tech industries and domestic consumption. Beijing believes that China remains in "a period of important strategic opportunities."

Military Modernization

Chinese leaders characterize China's long-term military modernization program as essential to achieving great-power status. The party's new milestone to "basically" achieve military modernization by 2027, which was unveiled at the plenum, probably signals an intent to accelerate some modernization efforts to ensure that the PLA achieves its previously stated goals of completing military modernization by 2035 and transforming into a dominant military by 2049. A fully modern military likely means that by 2027, Beijing seeks to develop key capabilities and better posture for a conflict with any country it views as a threat, including the United States. The PLA frames its 2027 goal as necessary not only to safeguard China's national security and development but also to promote global stability and prosperity, assuaging concerns about its intentions and to present China as a global leader. However, the PLA clearly states that it needs to modernize to close gaps with stronger military powers and to deter and subdue separatist forces (primarily Taiwan), while protecting China's sovereignty and territorial integrity. China is pressing ahead with an ambitious military modernization agenda. The PLA modernization agenda focuses on developing and fielding advanced military capabilities in all warfighting domains—emphasizing long-range precision strike, air and maritime capabilities, cyberspace, electronic warfare,

space and counterspace capabilities, and enhanced strategic nuclear forces —while also restructuring the PLA into a combat-capable global joint force. The PLA seeks a force capable of winning a number of high-end regional conflicts, including the forcible unification of Taiwan, while dissuading, deterring, or defeating third-party military intervention. At the same time, we expect the PLA to expand its capability to carry out smaller operations globally to support China’s interests.

China continued funding its military modernization programs despite COVID-19’s economic impact.

Beijing announced in March that its official annual defense budget would grow 6.8 percent in 2021 to \$210 billion, which is about 1.4 percent of GDP.

The PLA Rocket Force continues bolstering its ballistic long-range land-attack and antiship missile capabilities, which gives it the ability to conduct precision strikes in the Western Pacific, the Indian Ocean, and the South China Sea from mainland China. China continued emphasizing hypersonic glide vehicles (HGVs) to counter ballistic missile defense systems, including the claim they deployed their DF-17 missile system with a conventionally armed HGV.

China is expanding and diversifying its nuclear arsenal. The Fifth Plenum communique in October 2020, specifically called for strengthening strategic forces and creating high-level strategic deterrence. Last year, we assessed that China had a nuclear warhead stockpile in the low-200s and projected it to at least double over the next decade. Since then, Beijing has accelerated its nuclear expansion and is on track to exceed our previous projection. PLA nuclear forces are expected to continue to grow with their nuclear stockpile likely to at least double in size over this decade and increase the threat to the U.S. homeland. China probably seeks to narrow, match, or in some areas exceed U.S. qualitative equivalency with new nuclear warheads and delivery platforms that at least equal the effectiveness, reliability, and/or survivability of some U.S. and Russian warheads and delivery platforms under development. The PLA continues to improve its pursuit of a nuclear triad, and increasing evidence indicates that Beijing seeks to keep a portion of its nuclear forces on a “launch-on-warning” posture.

China probably has the technical expertise to weaponize chemical and biological agents and numerous conventional weapons systems that could be adapted to deliver these agents. China has consistently claimed that it has never researched, produced, or possessed biological weapons. However, China has engaged in potential dual-use biological activities and maintains sufficient biotechnology infrastructure to produce some biological agents or toxins on a large scale. China has declared it once operated a small offensive chemical weapons program but maintains the program was dismantled. China's chemical infrastructure is sufficient to research, develop, and procure some chemical agents on a large scale.

China's space program—managed by the PLA—continues to mature rapidly and invest in improving space-based ISR, satellite communication, satellite navigation, and meteorological capabilities as well as human spaceflight and robotic space exploration. China has built an expansive ground support infrastructure to support its growing on-orbit fleet and related functions. China continues to develop multiple counterspace capabilities designed to degrade and deny an adversary's use of space-based assets during a crisis or conflict.

The PLA Air Force (PLAAF) continues fielding modern fighters, including the deployment of J-20 stealth fighters in September to China's border with India during their military standoff. The PLAAF is also extending the range and capabilities of its bomber force. The PLA Navy (PLAN) continues a robust shipbuilding program by constructing new submarines, cruisers, a range of other surface warships and a new class aircraft carrier. The PLAN is developing into a global force, gradually extending its ability to sustain operations beyond East Asia.

Military Reform and Technology Policy

Military reforms in 2020 focused on enhancing the PLA's ability to conduct joint operations, fighting high-intensity conflicts at greater distances from the Chinese mainland and strengthening the party's control over the military. In a probable sign of the PLA's confidence in the progress of reforms, the

Central Military Commission (CMC) issued a trial update to the PLA's joint doctrine in November that appears to codify warfighting reforms and will almost certainly improve the PLA's ability to conduct joint operations.

China recognizes the synergy between high-tech development and defense and seeks to lead the shift toward "intelligentized" warfare through a national strategy of "military-civil fusion" by reforming its organizations for research and development as well as those for developing strategy and doctrine. China continues investing heavily in new capabilities, particularly in AI, which could increase China's military and comprehensive national power. As of late 2020, Beijing is drafting new long-term goals for boosting scientific, technological, and economic strengths.

Military Exercises, Refrains From Nuclear Discussions

PLA exercises throughout 2020 likely focused on improving the PLA's capacity to fight and win wars through joint operations under realistic combat scenarios. The CMC's first order of 2020 was a training directive that emphasized the implementation of Xi Jinping's ideological framework and focused on preparing for conflict with "strong enemy opponents"—a euphemism for the United States—under combat-realistic conditions across all warfighting domains. This training order almost certainly codifies the PLA's benchmark for success as defeating the U.S. military. The PLA will likely continue these training and exercise themes through 2021.

For the third consecutive year, the PLA participated in Russia's annual strategic exercise, although likely on a smaller scale than in the past because of probable pandemic-related travel restrictions. China and Russia also conducted their second combined bomber patrol in December 2020, the first since the inaugural patrol in July 2019, and both countries probably view the patrol as messaging the West that their strategic relationship is deepening. China also signaled its continuing reluctance to participate in meaningful arms control and risk reduction discussions with the United States most recently rejecting

multiple U.S. invitations throughout 2020 to join nuclear discussions between the United States and Russia.

Territorial Issues and Coercive Actions

A number of perceived challenges to China's territorial integrity and internal stability drive Beijing's goals. Throughout 2020, Beijing took several actions to strengthen political control within China and assert its territorial claims around its periphery. Internally, Beijing passed a security law in July 2020 that severely undermined Hong Kong's autonomy and basic freedoms previously granted to Hong Kong residents. At the same time, Beijing continued a policy of forced assimilation of ethnic and religious minorities in Xinjiang and Tibet. China previously had sought to deepen economic ties with Taiwan while using military pressure to deter the island from achieving formal independence, but it has now likely hardened its position and is using military pressure tactics to coerce Taiwan into accepting China's unification agenda. Beijing pressured Taipei and conducted military operations near Taiwan and Taiwan-held islands, very likely to message increased displeasure with U.S.-Taiwan ties. For example, the PLA Air Force and PLA Navy conducted provocative transits and military exercises near Taiwan, including entering Taiwan's air defense identification zone and deliberately crossing the Taiwan Strait centerline—the median line of the strait that Beijing has generally respected but recently announced does not exist. In 2020, relations between China and India deteriorated as the military standoff along their disputed border intensified. The situation culminated in a June clash that resulted in the deaths of 20 Indian and four Chinese soldiers and the two countries coming closer to war than they have been in decades. In the South China Sea, China employed coercive approaches—such as using law enforcement vessels and maritime militias to enforce claims and advance interests—to deal with disputes in ways calculated to remain below the threshold of provoking armed conflict. In April, Beijing named 80 geographic features and announced two new administrative subdistricts covering disputed territory and maritime areas in the South China Sea. China also conducted a coercive survey operation, using a government

research vessel and multiple Chinese Coast Guard vessels, to follow a Malaysian hydrocarbon exploration vessel within Malaysia's exclusive economic zone. In August 2020, China test-fired multiple ballistic missiles that landed near Hainan and the Paracel Islands in the South China Sea. Further, China's Spratly Islands outposts are equipped with advanced antiship and anti-aircraft missile systems and jamming equipment, comprising the most capable land-based weapons systems deployed by any claimant in the South China Sea.

In the East China Sea, China named 50 geographic features and continued using maritime law enforcement ships and aircraft to patrol near the Senkaku Islands and challenge Japan's territorial claim to and administration of the islands.

Relations between China and Australia deteriorated in late 2020 with China restricting trade and engaging in high-profile diplomatic rows with Australia—including arbitrary detentions of Australian citizens—for supporting what China viewed as U.S.-led anti-Chinese measures. Effective 1 February 2021, China passed a law authorizing its coast guard ships to detain or forcibly evict foreign vessels in China's claimed jurisdictional waters, impacting both the East China Sea and the South China Sea.

China and North Korea

China continued its practice of maneuvering between sanctions enforcement and actions that it likely believes could destabilize North Korea and risk a conflict in which the PLA might operate near U.S. and allied forces. Further strengthening of ties between Beijing and Pyongyang probably stalled in 2020 because of North Korean concerns over COVID-19, and Beijing probably remains concerned about COVID-19's effects on regime stability in Pyongyang.

Global Presence

Beijing curtailed a number of foreign engagements due to COVID-19; however, it continued several prominent engagements across the globe almost certainly aimed at shaping international perceptions of its handling of the COVID-19 outbreak and sustaining high-priority diplomatic and security outreach.

China undertook a range of military missions including power projection, sea-lane security, counterpiracy, peacekeeping operations, and humanitarian assistance and disaster relief. For example, for the first time, the PLAAF expanded its global air operations to western and southern Africa, and PLAAF heavy-lift transport aircraft conducted the majority of PLA flights abroad to support military diplomacy and humanitarian assistance and disaster relief.

Beijing also exploited its BRI relationships and infrastructure to expand the Health Silk Road component of the BRI and promote vaccine and medical diplomacy, which Beijing could use to expand its presence and potentially advance defense ties.

China seeks to establish a more robust overseas logistics and basing infrastructure to allow the PLA to project and sustain military power at greater distances. China's leaders may assess that a mixture of models—including preferred access to commercial infrastructure abroad, exclusive PLA logistics facilities with pre-positioned supplies collocated with commercial infrastructure, and bases with stationed forces—most closely aligns with China's overseas military logistics needs. Beyond its base in Djibouti, China very likely is already considering and planning for additional PLA logistics facilities in several countries in Africa, Central and Southeast Asia, and the Middle East to support naval, air, and ground force deployments and probably has made overtures to countries in Africa and the Pacific Islands. The PLA's approach likely includes considering many different sites and outreach to many countries while expecting that only some will advance to negotiations for an infrastructure agreement, status of forces or visiting forces agreement, or basing agreement. In Latin America, China is expanding its military activity and presence. For example, the Strategic Support Force runs a tracking, telemetry, and command station in Argentina, and China may seek access agreements in South America to support its Antarctic presence.

China has increased its activities in the Arctic and Antarctic to increase its influence, legitimacy, and engagement. China's Arctic strategy highlights its icebreaker vessels and research stations as integral to

the strategy's implementation, and China used its first domestically built civilian icebreaker to complete Arctic and Antarctic expeditions in 2020.

The next 12 to 18 months will be extremely important for China broadly and Xi Jinping personally. Beijing probably will attempt to portray China as an increasingly powerful, stable, and prosperous state as it celebrates the 100th anniversary of the founding of the Chinese Communist Party (CCP). While holding the CCP up to the Chinese populace as the primary driver for China's success, Chinese leaders probably will continue to address a number of security challenges including the increasing competition with the United States, consolidating control over Hong Kong, solidifying its position in disputed regions, and increasing its ability to protect Chinese interests abroad.

RUSSIA

The Russian military is an existential threat to the United States and a potent tool designed to maintain influence over the states along its periphery, compete with U.S. global primacy, and compel adversaries who challenge Russia's vital national interests. Moscow continues to invest in its strategic nuclear forces, in new capabilities to enhance its strategic deterrent and that place the U.S. homeland at risk, and in capabilities that improve its conventional warfighting. The Kremlin's military strength is built on its survivable strategic nuclear forces and a conventional force largely postured for defensive and regional operations. Russia has a growing ability to project power with long-range precision cruise missiles and limited expeditionary capabilities. Military leaders are incorporating lessons from Russia's involvement in Syria into their training and exercises as they seek to develop a better-coordinated, joint force.

Leadership Perceptions and Gray Zone Measures

Moscow views the United States and NATO as the principal threat to Russian security, its geo-political ambitions, and the preservation of the ruling regime. Moscow employs a range of political, economic,

diplomatic, intelligence, societal and military activities below the threshold of direct conflict to compete with the West, and that is aimed at disrupting NATO's cohesion and its ability to formulate effective policies to counter Russian malign influence. Informational and influence operations offer the Kremlin cost-effective and deniable means to achieve its objectives. Moscow specifically targets NATO member states vulnerable to Russian influence—not only those with historical, cultural, or religious affinities to Russia but also those with issues of corruption, disaffected populations, or weak economies—to shape policies on key issues, such as NATO basing and transit rights or deployment of ballistic missile defense. Moscow also seeks to undermine NATO's commitment to collective defense.

Military Modernization

Russian forces are increasingly equipped with modernized systems across all services. President Vladimir Putin recently highlighted the development of fifth-generation fighters, state-of-the-art air and coastal defense missile systems, space and counterspace capabilities, new surface vessels and submarines, advanced tanks, modernized artillery, and improved military logistics. Moscow is restarting production of long-range missile delivery platforms like the Tu-160 and fielding ultra-quiet submarines like the Severodvinsk I class SSGN and its successor, the Severodvinsk II class SSGN *Kazan*—expected to enter service in 2021—both capable of carrying up to 32 Kalibr cruise missiles. Russia is also investing significant resources in the fielding of hypersonic weapons. In November 2020, Russia conducted a purportedly successful test launch of the Tsirkon anti-ship hypersonic cruise missile in the Arctic. Russia is also developing its counterspace capabilities by testing direct ascent and space-based Anti-Satellite (ASAT) weapon systems.

A prolonged economic recovery from the COVID-19 pandemic could constrain some defense expenditures, but Moscow almost certainly will continue to place a priority on modernizing its nuclear triad and military readiness. Russia claims to have upgraded 82 percent of its nuclear triad and is

developing several novel nuclear-capable systems designed to overcome ballistic missile defense systems and ensure that Russia can credibly inflict damage that would probably be unacceptable to the West. Russia is developing new ballistic missile submarines, arming its heavy bombers with high-precision cruise missiles, and upgrading its ICBMs. Russia has also already fielded some of the novel weapons systems announced by President Putin in 2018, including the ICBM-launched HGV and an air-launched ballistic missile. A new heavy ICBM, a transoceanic unmanned torpedo, and an intercontinental cruise missile—all nuclear-armed—may be fielded later this decade.

Russia is making progress in modernizing its conventional and nuclear command and control (C2) capabilities. During Russia's 2020 annual capstone military exercise, Moscow demonstrated an improved ability to pair UAV reconnaissance and conventional strike systems to increase lethality. Russia also advanced its use of automated C2 systems to speed command decisionmaking. In November 2020, President Putin highlighted efforts to maintain the C2 of strategic nuclear forces at the highest level, including the impending completion of a new highly survivable command center that can withstand attacks by nuclear forces.

Nuclear Policy and Arms Control

In 2020, the Kremlin released its first unclassified Nuclear Deterrence Policy, which is consistent with and expands on the topic of nuclear use outlined in Russia's 2014 military doctrine. Russia views nuclear weapons as deterrence and maintains the right to use such weapons in response to an existential threat. The document outlines the conditions under which Moscow would consider using nuclear weapons, including existential threats to its allies or to the Russian homeland from the threat of ballistic missiles, weapons of mass destruction, or massed conventional strikes.

Russia has a mixed record on arms control compliance, violating treaties it sees as overly constraining and adhering to those aligned with its strategic interests. Russia adheres to New START's central limits

and verification regimes, as the treaty allows Moscow to maintain relative strategic nuclear parity with the United States and avoid a costly arms race. By contrast, Moscow produced, tested, and fielded the SSC-8 ground-launched cruise missile with a range that the U.S. Government concluded was in violation of the Intermediate-range Nuclear Forces (INF) Treaty. Russian officials stated they consider the INF Treaty a relic of the Cold War and continue to support the SSC-8 program. In October 2020, Russia signaled its willingness to extend New START for 1 year, offering the U.S. a temporary bilateral freeze of nuclear arsenals to buy time to negotiate a follow-on strategic arms control framework. In February 2021, Russia and the United States agreed to extend the New Start Treaty for five years.

Russia's use of the military grade nerve agent Novichok in a 2018 assassination attempt on UK soil and the August 2020 Novichok poisoning of Russian opposition leader Aleksey Navalny indicate Russia retains an undeclared chemical weapons program. In June 2020, the U.S. Government noted continued concerns regarding Russian activities related to the Biological Weapons Convention (BWC) stating available information does not allow the U.S. to conclude that Russia has fulfilled its BWC Article II obligation to destroy or to divert to peaceful purpose BW items specified under the BWC's Article I of its past BW program. The U.S. also has concerns that Russia's pharmaceutical-based agents program is for offensive purposes.

Regional Issues and Low Intensity Conflict

The Kremlin's need to remain the preponderant security provider in what it calls the "near abroad" has probably grown as Moscow's economic hold over the region becomes more precarious in the face of external actors with greater financial resources, such as China. However, Georgian, Ukrainian, and Azerbaijani security cooperation with NATO partners and other external backers reflects an increasingly challenging environment for Russia to exert security dominance. Furthermore, Moscow's decisions to avoid direct intervention in the Nagorno-Karabakh war and a limited response to the mass protests in

Belarus, suggest the Kremlin is evolving its tactics for maintaining control in the former Soviet space in response to increased attempts by outside parties such as China, the West and Turkey to gain influence in the region. The Russian-brokered ceasefire brought an end to the fighting in Nagorno-Karabakh, while also strengthening Russia's military and economic influence in the region. There are now troops on the ground in all three countries in the South Caucasus and Russia is likely to benefit from and continue to exert influence through the opening of transportation and communication ties between Armenia and Azerbaijan. In both the South Caucasus and Central Asia ensuring its primacy probably will depend on a mix of dominating the regional arms trade market, reinforcing existing bilateral military ties, advancing regional security integration, and offering modest accommodation to external security actors on Moscow's terms.

Since 2008, Russia has undermined Georgia's sovereignty and territorial integrity by occupying 20 percent of Georgian territory and campaigning internationally for diplomatic recognition of the occupied Georgian territories of Abkhazia and South Ossetia as "independent states." Russia maintains military bases in both of the occupied Georgian regions and deploys Russian border guards to patrol within occupied areas and along administrative boundary lines, denying its obligation under a 2008 ceasefire agreement to withdraw its troops to pre-conflict positions.

The conflict in eastern Ukraine is now in its eighth year, and Russia continues to oppose Kyiv's pursuit of its own geostrategic orientation and Euro-Atlantic integration. Russia and Ukraine agreed to a comprehensive ceasefire in the Donbas on 27 July 2020 that reduced the level of violence for almost six months, but the ceasefire began to fray in January and in April Russia deployed extensive forces to Crimea and the Ukrainian border, ostensibly for exercises but likely as part of its ongoing campaign to pressure Ukraine to acquiesce to Kremlin demands. The prospects for a near-term resolution are dim, and the presence of Russian-led forces in eastern Ukraine remains a viable coercive tool for the Kremlin even if Moscow decides to choose to deescalate its conventional military posture. On the Crimean

Peninsula, in addition to recent deployments, Moscow continues to enhance its long-term military posture to deter Western naval and air operations, project military power in the region, and signal its resolve to retain the peninsula.

Global Presence and Priorities

Moscow continues to develop and advance global engagements to acquire access, basing and overflight for power projection; challenge U.S. freedom of maneuver; access energy resources; enable diplomatic influence; and advance arm sales. Moscow provides military, diplomatic, and economic support to Syria, including a pledged \$1 billion for Damascus' economic recovery. Russia seeks to facilitate the Asad regime's reintegration into international organizations, bolster the regime's international legitimacy, and garner international support for Syria's reconstruction. The Kremlin likely calculates that its enduring presence in Syria will ensure its sway over the Asad regime and bolster Russian regional influence and power projection capability. Russia and Turkey continue to maintain a constructive relationship despite divergent foreign policy objectives. The prospect of weakening NATO's southern flank and fraying alliance unity has influenced Moscow to negotiate repeatedly with Ankara to secure ceasefires in Syria, Libya, and the disputed territory of Nagorno-Karabakh.

Russia seeks to expand its security influence in Africa through military cooperation and with the use of Russian private military companies. Russia uses arms sales, training, and bilateral defense agreements to establish lasting relationships on the continent, including with historic partners such as Algeria and Angola. To enhance its power projection capabilities and increase its regional advantage, Moscow continues to pursue military bases, air, and naval access agreements in Africa, such as a desired naval logistics facility in Sudan.

Russia views Asia as an emerging center of international power, wealth, and influence and seeks to benefit from potential investment and trade agreements, undercut Washington's regional security

alliances, and quietly impede Beijing's ability to establish regional hegemony. Moscow uses energy contracts, arms sales, and professional military education to market itself as an alternative military partner and bolsters its regional presence with ship and strategic bomber visits and combined military exercises.

Moscow and Beijing have significantly expanded security ties since 2014, which is exemplified by China's participation in Russia's last three annual capstone exercises and their July 2019 inaugural combined bomber patrol over the Sea of Japan, followed by a second combined bomber patrol in December 2020. Russia and China postponed other exercises for 2020, likely because of the COVID-19 global pandemic, but they will resume bilateral defense activities in 2021. Russia conducts joint exercises with China as part of a broader effort to deepen defense cooperation and to strengthen the Russia-China relationship as a counterbalance to the United States.

The Kremlin's engagement with Pyongyang centers on the preservation of regional stability and promotion of Russia's status on the peninsula. Russian officials, including President Putin, periodically engage with their North Korean counterparts—Putin had his first meeting with Kim Jong Un in 2019. Russia has advocated for a comprehensive and negotiated settlement, and it opposes the use of force. Moscow agreed to United Nations (UN) sanctions against Pyongyang in 2017 but sometimes skirts compliance because of business interests and a fear of destabilization of the North Korean regime. Russia coordinates its North Korea-related diplomacy with China, including a bilateral "Road Map" for peace.

In the Western Hemisphere, Russia focuses on strengthening military ties with its traditional regional partners Cuba, Nicaragua, and Venezuela by offering training, arms sales, and weapons maintenance support. Moscow has simplified port visit agreements with Nicaragua and Venezuela, and it has conducted strategic bomber visits to both countries since 2013, ensuring its ability to demonstrate its

regional presence. The Kremlin has supported disputed Venezuelan President Nicolas Maduro with the deployment of strategic air defense systems and military trainers. Russian engagement with other Latin American governments remains modest, but the Kremlin seeks opportunities to engage with them to erode U.S. influence in the region.

Moscow views the Arctic as a security and economic priority as it seeks to exploit Arctic natural resources and develop the Northern Sea Route as a major international shipping lane. Russia is refurbishing Soviet-era airfields and radar installations, constructing new ports and search-and-rescue centers, and building up its fleet of nuclear- and conventionally-powered icebreakers. Russia is also expanding its network of air and coastal defense missile systems, thus strengthening its antiaccess/area-denial capabilities over key portions of its Arctic maritime zone.

Moscow's interests in Antarctica are primarily scientific, with 10 Russian scientific research stations on the continent, half of which operate year-round, and Russia has plans to improve this network. Moscow is also expanding its fishing activities there and, alongside China, has blocked international environmental conservation efforts to limit fishing in the area. Russia operates three satellite communications facilities in Antarctica and plans to construct another.

Over the next year, Russia may seek to build on the February 2021 extension of the New START treaty with new bilateral cooperation on select issues that meet Russian strategic interests, such as talks on strategic stability. However, Moscow's probable pessimism about an improvement in bilateral relations, coupled with well-ingrained perceptions of U.S. hostility, likely will drive the Kremlin to sustain existing efforts to modernize its military and blunt U.S. international interests, while using non-military means such as information operations to enflame domestic discord in the West and tension in the transatlantic alliance. The Kremlin likely will seek to avoid provoking Washington, but may do so if it perceives U.S. interference in Russian domestic politics or other threats to Russian strategic interests.

NORTH KOREA

North Korea poses a serious challenge to the United States and our allies—in particular, South Korea and Japan. Since 2017, Pyongyang has not conducted a nuclear or long-range missile test as it pursued diplomatic engagement in an effort to soften international support for sanctions; however, it has not abandoned these programs. Since mid-2019, it has tested dozens of missiles, including three types of new short-range ballistic missiles (SRBMs), a new submarine-launched ballistic missile (SLBM), and land attack cruise missiles (LACMs). North Korean leader Kim Jong Un continues to emphasize the importance of North Korea’s weapons program for its self-defense. Amid the economic hardships of COVID-19 mitigation and natural disasters, North Korea displayed at the October 2020 military parade multiple new conventional weapons; an unprecedented number of ballistic missile launchers; and new, larger SLBMs and ICBMs. Missile advances, particularly in short and medium range systems and increasingly designed to evade missile defenses, have raised the threat to Japan and U.S. forces deployed there. Tokyo has responded with plans to bolster missile defenses at sea as well as an ongoing consideration of standoff capabilities.

Despite continued resource shortages and aging equipment, North Korea’s large conventional military, consisting of ground, air, naval, and special operations forces, constitutes a major threat to South Korea and U.S. Armed Forces based in South Korea. North Korea’s conventional strike capability is concentrated primarily in massed fire from artillery units and special operations forces and, less effectively, attacks by fighters and bombers. The Korean People’s Army (KPA) lacks the overall capability to reunify the Korean Peninsula or support a sustained conflict, but it is capable of conducting a full range of armed provocations, executing lethal, limited-objective attacks, and mounting a credible defense of its territory. With its large artillery and infantry force forward deployed, the KPA can mount an attack on South Korean and U.S. Armed Forces with little or no warning. New conventional systems displayed in their October 2020 parade, including a tank, surface-to-air missiles, and a coastal defense

cruise missile launcher, showcased a continued interest in modernizing its military force. North Korea is also currently in the process of modifying one of its submarines, probably to carry SLBMs.

North Korean leadership likely views maintaining stability and expanding its strategic nuclear and missile deterrents as essential to ensuring regime security and as an enabler of coercive military threats and actions. Pyongyang retains a stockpile of nuclear weapons. In September 2017, North Korea conducted its sixth and largest nuclear test at Punggye claiming it was a “successful hydrogen bomb test for an ICBM,” and in May 2018 claimed it dismantled the Punggye nuclear test site.

North Korea, which is not a member of the Chemical Weapons Convention, probably has a chemical warfare (CW) program with up to several thousand metric tons of CW agents and the capability to produce nerve, blister, blood, and choking agents. North Korea probably could employ CW agents by modifying a variety of conventional munitions, including artillery, rockets, and ballistic missiles along with unconventional, targeted methods such as the 2017 assassination of Kim Jong Un’s brother, Kim Jong Nam. North Korea has a dedicated, national-level effort to develop a biological weapons (BW) capability and has developed and produced BW agents, and may have weaponized them for use. North Korea probably has the capability to produce sufficient quantities of biological agents for military purposes upon leadership demand. Though a signatory to the Biological Weapons Convention (BWC), in 1990 North Korea submitted a null BWC Confidence Building Measure (CBM) report and has since then failed to provide a CBM report.

Despite international sanctions, North Korea will continue to modernize and increase the survivability, lethality, and diversification of its missile force, shifting to solid-propellant systems that can be prepared for launch more rapidly than their existing liquid-propellant systems. Since May 2019, North Korea conducted multiple launches of three types of developmental solid-propellant SRBMs and displayed dozens of new launchers which will enable Pyongyang to rapidly prepare and execute large salvo attacks

on targets throughout South Korea. The October 2020 parade also featured eight road-mobile ICBM launchers, the most North Korea has ever displayed. As North Korea continues its pursuit of more advanced ICBM capabilities, it will pose a greater threat to targets in North America.

North Korea's economy and national energy and transportation infrastructure support national defense considerations, but the systems are poorly constructed and deteriorating. In recent years, Pyongyang has made progress on hydroelectric power, and improving power generation to help improve the economy remains a leadership goal. However, North Korea continues to experience chronic electricity shortages. North Korea continues to expand the world's largest underground facility program, designed to conceal and protect leadership, C2 assets, weapons of mass destruction (WMDs), ballistic missiles, military forces and assets, warfighting supplies, and defense industries. North Korea possesses extensive indigenous capabilities for defense industrial output, but it uses illicit foreign procurement for some components and technology.

North Korea continues to violate international sanctions by illicitly importing refined petroleum and exporting commodities such as coal. Since 2018, North Korea has acquired refined petroleum in excess of the amount allowed under United Nations Security Council (UNSC) sanctions through vessels using illicit ship-to-ship transfers and direct deliveries of petroleum using third-country tankers. Evading sanctions has stabilized North Korea's fuel supplies and prices, though acute shortages still affect civilian, industry, and military operations. It has also allowed a continued flow of revenue that has historically funded its nuclear and ballistic missiles programs. Pyongyang shows no sign of ceasing conventional arms exports—an important source of foreign currency for North Korea's weapons programs—despite UNSC sanctions. North Korea remains an arms supplier to a small group of countries, including Iran, Syria, and Uganda. Others, such as Sudan, have agreed in recent years to end arms cooperation with Pyongyang. Given past customer interest and Pyongyang's need for foreign currency, North Korea almost certainly continues to offer some missile technologies and expertise to countries of

concern. In September, the U.S. sanctioned additional entities associated with North Korea's ballistic missile-related cooperation with Iran.

North Korea's cyber program is relatively sophisticated. Pyongyang uses this capability to conduct espionage and generate currency through criminal enterprises, such as hacking for hire and theft of cryptocurrencies. Revenue gained from these operations probably supports weapons development.

North Korea's external relationships do not appear to significantly contribute to its defense establishment or boost military readiness. International sanctions against North Korea probably dampened potential partners' interest in expanding ties. Internal efforts, such as border tightening, by North Korea to mitigate the spread of COVID-19 probably also hindered foreign engagement in 2020. Pyongyang's only formal defense agreement is with China: the 1961 Sino–North Korean Treaty of Friendship, Cooperation, and Mutual Assistance. Russia, which provided substantial military assistance and equipment to North Korea during the Soviet Era, has largely curtailed its defense relationship with North Korea.

We expect North Korea will continue its nuclear, missile, and military modernization efforts this year. We expect the Kim regime will initially avoid provoking the United States or undermining potential diplomatic engagement as it gauges the new U.S. administration's policy approach to North Korea. Pyongyang probably would then seek to justify actions it is planning by using U.S. pressure or joint U.S. military exercises with South Korea as a pretext for testing an ICBM, SRBM, LACM or SLBM, demonstrating a massed SRBM, long-range artillery, or multiple rocket launcher volley; conducting a cyberattack; or possibly detonating another nuclear device—in order to demonstrate North Korean strength and resolve. Such actions would probably also depend on Kim's calculation of how much pressure he must put on the United States and South Korea to accede to his diplomatic position.

IRAN

Iran is the primary state challenger to U.S. interests in the Middle East because of its sophisticated military capabilities, broad proxy and partner networks, and periodic willingness to use force against U.S. and partner forces. Iran's national security strategy aims to ensure continuity of clerical rule, maintain internal stability, secure its position as a dominant regional power, and achieve economic prosperity. Tehran employs a complex set of diplomatic, military, and security capabilities, including unconventional forces that recruit and train partners and proxies to achieve its objectives and conventional forces that can impose high costs on adversaries. We assess that Iran will seek to avoid escalation with the United States while it evaluates the direction of U.S. policy toward Iran and the status of the U.S. presence in the region—especially the prospects for U.S. withdrawal and the potential for escalation. Iran probably will continue to focus on unconventional proxy attacks or minimally deniable actions, such as cyberoperations, rather than overt conventional retaliation as it seeks to counter Western pressure.

The January 2020 death of Iran's Islamic Revolutionary Guard Corps Qods Force (IRGC-QF) commander, Qasem Soleimani, degraded Iran's relations with its array of partners and proxies in the region because he was the primary interlocutor with many regional groups. Tehran is increasing partner and proxy engagement to maintain regional networks, facilitate attacks against U.S. personnel, regional partners and interests, and guarantee long-term regional influence. Key partners such as Iraqi Shia militia groups Asaib Ahl al-Haq and Kataib Hizballah have reaffirmed their commitment to partner with Iran following the appointment of Soleimani's long-time deputy, Esmail Ghani, as the new IRGC-QF commander. Ghani is more likely than Soleimani to delegate responsibilities, including to his deputy Muhammad Hejazi.

Iran has implemented economic strategies to circumvent sanctions through worldwide outreach. Iran also continues to reduce its performance of commitments under the Joint Comprehensive Plan of Action (JCPOA) and is stockpiling low-enriched uranium at its Natanz and Fordow enrichment facilities. As of

September 2020, Iran planned to build an underground facility near its Natanz site to replace the Iran centrifuge assembly center destroyed in a July 2020 explosion. As of April 2021, Iran had stockpiled over 14 times the amount of low-enriched uranium allowed under the JCPOA. Tehran also announced it began enriching uranium to 60-percent levels, and was conducting research and development with advanced centrifuges in excess of the JCPOA limits. Iran has claimed it is willing to reverse these steps if Europe provides additional sanctions relief or the United States returns to full performance of sanctions-related commitments under the nuclear deal.

As the conflicts in Iraq and Syria evolve, Iran is focusing its efforts on bolstering the capabilities of partners and proxies to maintain strategic depth and options to counter the United States, Israel, and Saudi Arabia. Tehran has used its relationships to challenge a continued U.S. presence in the region and encourage a U.S. military drawdown. Iran seeks to derail Israel's normalization of relations in the region, using a combination of threats from its proxies and partners with diplomatic outreach.

Throughout the region, Tehran works with Lebanese Hizballah—its most important substate partner—to project power and bolster regional Shia militants' capabilities. Iran acts as Hizballah's primary patron, and their strategic interests rarely diverge. In Iraq, Iran seeks to preserve Iran-backed elements of the Iraqi government and maintain the institutionalization of the Popular Mobilization Forces to ensure Iranian-aligned Shia militia groups maintain military and political influence. Iran remains capable of influencing the frequency and intensity of attacks by these groups against U.S. interests in Iraq. In October 2020, Tehran ordered Iran-aligned Shia militia groups to pause attacks after a period of increased rocket attacks and IEDs against U.S.-contracted convoys. However, militants have renewed attacks since late 2020—including some of the largest rocket barrages against U.S. facilities in years—and have announced their intent to continue attacks as recently as mid-February 2021.

In Syria, Iran is trying to secure a lasting military and economic presence while managing continued Israeli strikes on Iranian interests. Iran will continue assisting Syrian President Bashar al-Asad to reassert

control over the country, while competing with Moscow to secure economic opportunities and long-term influence in Syria. In Yemen, Iran continues to support the Huthis with weapons and advisers to pressure the Saudi-led coalition and to facilitate increasingly complex and long-range attacks against Saudi Arabia.

Iran has continued these regional activities despite the reimposition of U.S. sanctions pursuant to the U.S. exit from the JCPOA, which has impeded Tehran's access to traditional government funding streams, including oil exports, causing the economy to contract and government revenues to decline. The oil price war between Saudi Arabia and Russia, combined with COVID-19, has exacerbated the effect of sanctions on Iran's already deteriorating economy, resulting in rising inflation and currency depreciation. Tehran's 2020 defense budget remains in line with pre-sanction totals, but Tehran's fiscal uncertainty very likely will prevent it from fully funding its planned expenditures.

Iran's primary area of military collaboration with Russia, China, and North Korea will be arms purchases, primarily from Russia and, to a slightly lesser extent, China. These purchases probably will reflect Iran's military modernization priorities—missile, naval, UAV, and air defense forces—but Iran may also pursue more robust air power and electronic warfare (EW) capabilities based on lessons learned from recent conflicts.

Iran's military strategy aims to ensure the regime's survival and achieve regional dominance. Iran's conventional military strategy is based on deterrence and an ability to retaliate against adversaries. If deterrence fails, Iran would seek to demonstrate strength and resolve and to impose a high cost on its adversaries. With the largest missile force in the Middle East and an inventory of ballistic missiles capable of striking targets 2,000 kilometers from Iran's borders, Tehran has repeatedly demonstrated its willingness to use missiles.

Iran continues to increase the lethality, reliability, survivability, and accuracy of its ballistic missile force, including SRBMs with increasing range and antiship capability, underground ballistic missile launchers,

and MRBMs with accuracy and warhead improvements. In recent years, Iran has unveiled several LACMs that could complicate missile defense, mobile air defense systems, and antiship cruise missiles for aircraft and subsurface platforms. Iran continues to work on space launch vehicles with boosters that could be capable of ICBM ranges if configured for that purpose. Tehran also aspires to build, launch, and operate satellites in space, and it has launched some experimental satellites into orbit.

Iran routinely uses its naval forces to monitor U.S. and allied naval operations off its coast, including near the Strait of Hormuz and occasionally engages in dangerous and unprofessional interactions.

Iran is a party to the Chemical Weapons Convention (CWC) and the Biological and Toxin Weapons Convention (BWC), but since 2018, the United States has found Iran to be noncompliant with its CWC obligations and is concerned Iran is pursuing central nervous system-acting chemicals for offensive purposes.

During the next year, Tehran probably will respond to potential additional U.S. pressure with reversible nuclear-related actions, deniable partner and proxy attacks, or cyberoperations. This probably will be in an attempt to demonstrate strength while allowing Iran to retain international support as it attempts to foster relationships around the globe. We expect Iranian leaders will seek to avoid provoking Washington or undermining potential diplomatic engagement with a new U.S. administration.

SOUTH AND SOUTHEAST ASIA

Afghanistan

Following the signature of a peace agreement between the United States and the Taliban in February 2020, violence in Afghanistan remains elevated as talks have stalled. The United States-Taliban agreement called for a prisoner exchange between the Taliban and Afghan government in Kabul and provided for the initiation of peace negotiations between these parties. Following a protracted delay due to disagreements over the exchange, Afghan Peace Negotiations (APN) formally began on 12

September 2020, but by mid-November the Taliban and Afghan government had not finalized procedures or a negotiating agenda, signaling slow progress and a diminishing likelihood that the APN will result in any extended ceasefire or reduction in violence in 2021.

The Taliban continues to apply military pressure on the Afghan government and the coalition.

Throughout 2020, the Taliban conducted high-profile attacks, assassinations against government officials, district center overruns, and offensives near three provincial capitals such as the October attacks near Lashkar Gah. Afghan public concern over the peace process has grown because of the increase in attacks, targeted killings, and kidnappings of civilians. The increase has fueled public skepticism about the negotiations and fears of a possible return to civil war following the withdrawal of foreign forces.

The Afghan national defense and security forces (ANDSF) face systemic logistical problems and corruption that limit the force's ability to sustain military operations. ANDSF capabilities very likely will continue to degrade in 2021 resulting in territorial losses throughout the year.

Competitor objectives in Afghanistan vary. China's strategic objectives in Afghanistan include regional stability, combatting militants in Afghanistan, and safeguarding Beijing's economic and infrastructure investments. As of October, China had continued to engage both the Afghan government and the Taliban in an effort to promote an "Afghan-led" and "Afghan-owned" reconciliation process accompanied by an orderly and responsible withdrawal of foreign troops from the country. Russia's strategic objective in Afghanistan very likely is to block spillover of instability into Central Asia.

Violent extremist organizations, including ISIS-Khorasan and Al-Qa'ida in the Indian Subcontinent (AQIS), continue to operate in Afghanistan, although both groups have suffered setbacks over the past year.

ISIS-Khorasan has shifted to a model of operating in clandestine cells following the loss of all of its controlled territory in 2019 and 2020 and the death or capture of a number of senior leaders. The group

likely has about 500 members in its guerilla network spread throughout Afghanistan, with most of its forces clustered in Nangarhar, Kunar, and Kabul Provinces. ISIS-Khorasan currently focuses attacks against the Government of Afghanistan, religious minority sects, and the Afghan population. In 2021, ISIS-Khorasan likely will conduct attacks in Kabul and sustain low-level attacks against Afghan forces in Nangarhar and Kunar Provinces.

AQIS, al-Qa'ida's South Asia affiliate, has only a marginal role in the Taliban-led insurgency in Afghanistan. By the end of 2020, AQIS very likely was weaker than previous years because there was little discernible activity out of the group, comprising fewer than 200 members throughout South Asia with the majority located in Afghanistan. Throughout 2021, AQIS very likely will be unable to conduct terrorist attacks. Instead, the group will bolster its relationship with the Taliban.

Pakistan

The Pakistani military continues to execute counterterrorism operations against militant groups that pose a threat to Pakistan. Along the Afghanistan-Pakistan border, the military remains engaged in counterinsurgency operations and border management efforts, including installing border fencing, camera surveillance, and checkpoints. These efforts have been successful in reducing violence from some anti-Pakistan militant, terrorist, and sectarian groups in Pakistan. However, we assess these groups remain capable of conducting mostly small-scale attacks and occasional high-profile attacks. Tehrik-e-Taliban Pakistan—an anti-Pakistan militant group—was weakened by leadership losses, but recently announced its reunification with two splinter groups to bolster its capabilities. While Pakistani intelligence continues to provide material support and safehaven to the Taliban, Islamabad continues to support Afghan peace efforts, encouraging the Taliban to engage in dialogue with the Afghan Government.

Pakistan's relations with India continue to remain tense since New Delhi's August 2019 revocation of India-administered Kashmir's semiautonomous status and the February 2019 anti-Indian militant attack in India-administered Kashmir. During the year, tensions with India probably will remain elevated, and concerted efforts by both sides to fully implement the February 25, 2021 ceasefire will be necessary to reduce tension along the Line of Control.

Pakistan perceives nuclear weapons as key to its national survival, specifically to counter the threat from India's growing conventional force superiority, and likely will increase its nuclear stockpile in 2021. To that end, Pakistan continues to modernize and expand its nuclear capabilities by conducting training with its deployed weapons and testing developmental missiles.

India

Throughout 2020, Prime Minister of India Narendra Modi's government pursued an assertive foreign policy aimed at demonstrating India's strength and its perception as a net provider of security in the Indian Ocean Region. In the first months of the COVID-19 pandemic, New Delhi played a leading role in delivering medical equipment to countries throughout South Asia, Africa, and the Middle East, facilitating the evacuation of Indians and other South Asians from virus hotspots.

India hardened its approach towards China following a deterioration in bilateral relations that followed Chinese efforts to take Indian-claimed territory along the disputed Line of Actual Control border beginning in the summer of 2020. In response to the June clash between Indian and Chinese troops, and the deaths of 20 Indian and four Chinese soldiers, New Delhi responded by deploying an additional 40,000 troops, artillery, tanks, and aircraft to the disputed border, occupying strategic mountain passes in disputed territory, and sending Indian Navy ships to shadow Chinese ships in the Gulf of Aden. India also implemented economic measures meant to signal resolve against China, including banning Chinese mobile phone apps in India and taking steps to use trustworthy vendors of telecommunications

equipment for its future 5G networks. New Delhi strengthened security relationships with partners in the Indo-Pacific, concluding logistical support agreements with Australia and Japan, enhancing maritime information sharing with the United States, and participating in the meeting of the Quadrilateral foreign ministers. Although negotiations between military and diplomatic officials resulted in a mid-February agreement to withdraw troops from contested territory around Pangong Lake, New Delhi is likely to maintain its stance against Beijing into 2021, raising the risk of future military confrontation or miscalculation.

India also maintained an assertive approach on its border with Pakistan, refusing to engage in diplomatic dialogue absent Pakistani action to end support to anti-Indian militant groups. Tensions remain high in the aftermath of the 2019 Pulwama terrorist attack and subsequent military reactions, and the Modi government's August 2019 action to curtail Jammu and Kashmir's autonomy by revising the Indian constitution. Indian Army units along the Line of Control border periodically conducted artillery strikes targeting suspected militant camps and Pakistan Army positions throughout the year. India and Pakistan announced a ceasefire agreement in late February 2021, but any high-profile militant attacks by suspected Pakistan-based groups will likely elicit an Indian military response that could escalate to military confrontation.

New Delhi is continuing to pursue a wide-ranging military modernization effort encompassing air, ground, naval, and strategic nuclear forces with an emphasis on domestic defense production. It will continue its longstanding defense relationship with Russia because of the large amount of Russian-origin equipment in India's inventory and Moscow's willingness to assist New Delhi in strengthening its domestic defense industry. India continued to develop its own hypersonic, ballistic, cruise, and air defense missile capabilities, conducting approximately a dozen tests since September.

India has a growing number of satellites on orbit and is expanding its use of space assets, likely pursuing offensive space capabilities to boost the role space assets play in its military strategy. It conducted a successful ASAT missile test in March 2019, and has since announced plans to define further the role of ASAT weapons in its National Security Strategy. New Delhi also seeks to build space expertise with the formation of its Defence Space Agency and through space warfare exercises, such as IndSpaceEx held in July 2019.

Burma

On 1 February 2021, the Burmese military overthrew the democratically elected National League for Democracy government and declared a one-year state of emergency. International responses have been either negative or viewed the coup as an internal issue; the impacts will likely slow or eliminate Western and some Asian investment in Burma. Internal stability continues to erode as the Civil Disobedience Movement continues a general strike severely impacting the transportation, banking and medical sectors of Burma. On 14 March, the military imposed martial law in six industrial districts after protesters razed several Chinese and Taiwanese factories, transferring security from the police to the military and increasing the chance of a harsher crackdown. We have seen no indication the military will return to the barracks despite international and protestor pressures. As of mid-April, the military continues to quell mass protests in urban centers and is facing renewed skirmishes with ethnic armed organizations on the border with Thailand; over 730 protesters have been killed, most by gunshot.

MIDDLE EAST

The United States continues to face a variety of security challenges in the Middle East and will be increasingly challenged for influence in the region by Russia, Iran, and China. Traditional drivers of unrest—authoritarian leaders, civil conflict, ungoverned spaces, insufficient economic opportunity, and corruption—which are compounded by terrorism, hybrid military threats, and Iranian activity, were

exacerbated in 2020 by the COVID-19 pandemic and low oil prices. The perception of waning U.S. political and military involvement in the Middle East is changing regional dynamics, leading partners to sign normalization agreements with Israel and emboldening U.S. adversaries.

Syria

After nearly ten years of civil war, the Syrian regime and its opponents have reached an uneasy stalemate, and the front lines are likely to remain mostly static during the next 6 months. Damascus is building relationships with local tribes in the east to foment unrest, weaken the U.S. relationship with tribes, and conduct deniable attacks on coalition and Syrian Democratic Forces. The operations of Islamic State of Iraq and ash-Sham (ISIS) in Syria declined in 2020 as the group suffered from leadership losses and focused on avoiding counter-terrorist (CT) pressure and addressing financial burdens.

Proregime forces are engaging in skirmishes with opposition fighters in the Idlib Province, but we have not seen any significant geographic changes since a Russia-Turkey ceasefire went into effect in March 2020. Damascus probably will not resume a major offensive without explicit political and military support from Russia, judging from Damascus' previous reluctance to directly engage the Turkish military in sustained combat. Hayat Tahrir al-Sham, formerly al-Qa'eda's official Syrian affiliate, remains in control of Idlib Province, which is also home to ISIS, Hurras al-Din, al-Qa'eda's official Syrian affiliate, other foreign jihadist groups, and over three million civilians.

The Syrian opposition almost certainly is no longer capable of posing a threat to the regime and instead seeks to defend its remaining areas of control in northern Syria and maintain Turkish support. Turkey's direct military support to the opposition in early 2020 solidified Ankara's control over the opposition and strengthened the military influence of mainstream opposition groups at the expense of extremists.

Since Turkey's incursion into northeastern Syria in October 2019, Turkish-supported opposition groups (TSOs) continue to skirmish with Syrian Democratic Forces (SDF) along the new, largely-static frontlines.

While the SDF blames Turkey and the TSOs for military escalation against the northeast, civilian casualties, and for restricting water access to northeast Syria, Turkey blames the People's Protection Units, a component of the SDF, for conducting attacks in Turkish-controlled areas that have killed civilians. Over 70,000 civilians remain displaced by the incursion. Turkey's activities in northeastern Syria have included restoring select infrastructure, conducting patrols and road checks, clearing mines and IEDs, and conducting kinetic attacks described as "counterterrorism raids" against SDF-held areas. Moscow almost certainly will maintain a long-term military and economic presence in Syria, affording it access to natural resources and continued use and expansion of its military presence. Moscow seeks to normalize relations between the international community and Damascus with the goal of encouraging outside investment and reconstruction efforts, while also mitigating the impact of U.S. sanctions on the Assad regime.

Iran remains committed to securing its strategic interests in Syria, including ensuring regime stability and preserving access to Levant-based partners and proxies, particularly Hizballah. Iranian-backed forces remain critical force multipliers for proregime operations across Syria and holding territory in the east. Iranian officials also intend to wield influence in post-conflict Syria, particularly through reconstruction contracts and a permanent military presence.

Hizballah's primary objectives in Syria are to maintain security along the Lebanon-Syria border, stage for a potential conflict with Israel, and preserve resupply nodes from Iran.

Iraq

Iraqi Prime Minister Mustafa al-Kadhimi probably will face obstacles implementing reforms because of entrenched political interests and insufficient resources. Kadhimi faces a confluence of crises including COVID-19, popular protests, economic shocks, a continuing ISIS insurgency, and increased Shia militia attacks against U.S. interests. Low oil prices and OPEC production cuts triggered by the COVID-19

pandemic are placing additional strains on Iraq's economy, exacerbating longstanding socioeconomic challenges such as corruption and the government's inability to provide services. Furthermore, Iraq's high youth unemployment—which helped to fuel the recent protest movement—will pose a major challenge to the country's political stability in 2021. The protests decreased in the first half of 2020, primarily because of COVID-19 restrictions, and intensified last August despite Kadhimi's call for early elections planned for late 2021.

Kadhimi probably will continue to make incremental progress to reduce militias' influence and illicit activities, which almost certainly will elevate tensions between Baghdad and the militias. Since 2020, Kataib Hizballah and other Iran-backed militias have threatened Iraqi government and security officials that they perceive to be supporting the United States or activities against militia interests. In 2020, there was a significant increase in the threat to U.S. interests in Iraq from Iran-backed Iraqi Shia militias seeking to secure a U.S. drawdown. The surge was fueled in part by the January 2020 strike that killed IRGC-QF Commander Qasem Soleimani and Popular Mobilization Committee (PMC) Chief of Staff Abu-Mahdi al-Muhandis and the perception that political efforts to remove U.S. forces were stagnating. Since late 2019, Iran-backed Iraqi Shia militias have conducted more than 300 attacks against U.S. interests, resulting in 4 U.S. fatalities and approximately 25 other casualties. In early 2020, militia-linked front groups also began claiming both indirect fire and IED attacks on U.S. interests, probably to obfuscate the involvement of Iran-backed groups.

Iraqi security forces (ISF) probably will maintain counter-ISIS operations absent coalition support for at least 1 year, although coordination among the various ISF elements probably will be inconsistent and units will be unlikely to fully employ their organic ISR, judging by the operations undertaken during the last year. Throughout 2020, ISF has demonstrated its ability to conduct effective counter-ISIS operations independently, but it still seeks support from coalition forces when its own capabilities are insufficient, according to advisers.

Finally, the Kurdistan Regional Government (KRG) almost certainly will continue to suffer from several systemic weaknesses, including Kurdish dynastic rule, challenges paying government salaries, and a bifurcated and partisan command and control over its security forces. In August, the KRG saw protests against their handling of COVID-19, exacerbating discontent over the KRG's failure to reach a budget agreement with Baghdad and the negative ramifications for the Kurdish economy. Separately, since late September, the Kurdistan Democratic Party has accused Iran-backed Iraqi Shia militias of carrying out one UAV and two rocket attacks that landed near Erbil International Airport. The attacks probably prompted the Kurds to continue shifting security forces to focus on Shia militia threats instead of ISIS.

ISIS in Iraq and Syria

In Iraq, ISIS probably has taken advantage of changes in its operating environment to mitigate coalition gains during the past year. ISIS has exploited the COVID-19 pandemic and coalition force consolidation to increase its freedom of movement. The group increased its attack frequency and conducted some complex operations, including targeted killings and attacks on military facilities. Still, we are not seeing the large-scale suicide or car bombings that were the hallmark of ISIS's predecessor, al-Qa'ida in Iraq. ISIS remains most prevalent in Iraq's rural and mountainous areas where small cells use the difficult terrain for a safehaven to evade counterterrorism pressure and to launch attacks. The group also operates in seams created by the lack of coordination and intelligence sharing between Iraq's many security force organizations. ISIS seeks to shape the environment in its favor by exploiting sectarian tension and Sunni grievances over security, hostile behavior of Shia militias in Sunni areas, and displaced Sunnis' inability to return to their homes.

In Syria, consistent coalition-supported counterterrorism pressure and numerous leadership losses probably have diminished ISIS's insurgent capabilities. The group's operations declined during 2020 while the organization focused on moving personnel to avoid counterterrorism operations and

generating revenue to pay its high-administrative burdens by seizing oil shipments and kidnapping officials for ransom. ISIS depends on clandestine cells in undergoverned rural areas in eastern and southern Syria to intimidate the local population and target local security forces and coalition interests. Its presence in internally displaced persons (IDPs) camps in the northeast enables ISIS to recruit and indoctrinate locals, mask and relocate its fighters and supporters, and avoid scrutiny from local security elements. The coalition-supported SDF continues to detain approximately 10,000 ISIS fighters, including over 2,000 non-Iraqi and non-Syrian foreigners, largely in makeshift detention centers. Poor living conditions and other factors have contributed to riots in some of the facilities.

Forced Displacement Persists in Iraq and Syria

Millions of Iraqis and Syrians displaced by nearly a decade of armed conflict will be unable to return home in 2021, exacerbating strains on their host communities and hindering postconflict recovery in the wake of the Defeat ISIS campaign. More than half of Syria's preconflict population remains displaced, including nearly 6.6 million internally displaced persons within Syria and 5.6 million registered refugees throughout the Middle East and Turkey. Fighting in northwestern Syria displaced nearly 1 million people in the spring of 2020 alone. Renewed fighting between Syrian regime and Syrian opposition forces in this conflict probably would compel hundreds of thousands of civilians to flee toward the Turkish border and likely trigger another humanitarian crisis. Another Turkish incursion in northern Syria would also likely displace hundreds of thousands of civilians, as witnessed in 2018 and 2019. In Syria, refugees returning from abroad were minimal in 2020, almost certainly because of widespread and credible fears of forced conscription, retaliation by Damascus, and the country's abysmal economic conditions. In Iraq, returning IDPs slowed considerably in 2020 because of persistent governance and security shortfalls—1.3 million people remained displaced at year's end. Throughout 2021, the slow return of displaced populations will undoubtedly exacerbate tensions with host communities both inside and outside of Iraq and Syria,

which are struggling to mitigate the economic fallout from the COVID-19 pandemic. Tens of thousands of Iraqi and Syrian IDPs with perceived ties to ISIS face especially high barriers to reintegration. The continued displacement and social marginalization of these IDPs probably will allow ISIS to reconstitute some of its manpower and operational capacity.

Lebanon

In Lebanon, the sharply declining economy, antigovernment protests, COVID-19, and the August Beirut Port explosion have further weakened Lebanon's security, sparking sporadic riots and public clashes with security forces. Security and economic problems almost certainly will worsen in the next year without the passage of much-needed government reforms, and resource constraints will limit the Lebanese Armed Forces' ability to maintain internal security and counter Sunni extremist threats. Hizballah is watching for threats from the United States and Israel and preparing to respond if needed. In November, Hizballah's Secretary General publicly called for allies to be prepared to respond aggressively to any American or Israeli actions, though he did not clarify the type of action that would prompt a response.

Egypt

Egyptian President AbdelFattah ElSisi's public and elite support probably will wane in 2021 as his administration continues to suppress dissent. Since September 2019, ElSisi has faced the highest level of popular discontent and criticism from his inner circle since his rise to power in 2013. Cairo has successfully contained these protests primarily through large-scale arrests, cracking down on press freedoms, and continuing the state of emergency in place since 2017. Egypt remains focused on the development of the Grand Ethiopian Renaissance Dam that it sees as an existential threat given that 97 percent of Egypt's fresh water comes from the Nile. Cairo will be closely watching Ethiopian steps if a second impoundment, or fill, takes place in summer 2021.

Yemen

In 2020, the Iranian-backed Huthis sustained a high tempo of UAV and missile attacks against Saudi Arabia and made considerable gains in areas under control of the Saudi-led coalition. The Huthis consolidated their control across northwestern Yemen and are currently threatening Marib City, the Yemeni government's last military and economic stronghold in the north. The Huthis are growing increasingly confident, and they are now seeking a negotiated settlement with the Saudi-led coalition that more closely reflects the realities on the ground and their military successes. Although the Yemeni government has made minor efforts to monitor the spread of COVID-19 and provide medical aid to some governorates, Yemeni leadership lacks both the cohesion and the fiscal resources to implement effective countermeasures to deal with the pandemic. At the same time, the Huthis have downplayed the effects of the virus and covered up the number of cases. In the coming year, it is very likely Yemen will continue to face health and economic struggles, worsening an already dire humanitarian crisis.

AFRICA

Many African nations face economic, social, political, demographic, and environmental pressures that contribute to security challenges and strain states' ability to mitigate them. Persistent internal conflicts in countries such as Libya and Somalia, the August 2020 coup in Mali, and disputed elections in several countries all highlight longstanding instability factors on the continent. Africa remains an active venue for great power competition with China and Russia expanding influence and relationships through security cooperation, provision of aid, and economic expansion. As of 2019, China had signed BRI agreements with over 40 African countries. Beijing intends for the BRI to create a redundant network of supply routes that bypass maritime chokepoints, maintain domestic economic growth, and establish connectivity with the Chinese mainland. Terrorism also remains an active threat, as al-Qa'ida and ISIS-aligned terrorist groups expand their influence and reach in some regions despite facing setbacks

elsewhere in Africa. Al-Qa'ida's affiliate, al-Shabab, poses a particularly strong terrorist threat in East Africa. COVID-19 has emerged in-virtually all countries across the continent. Africa's generally younger population appears to be less afflicted by the virus so far although this observation may be impacted by inadequate testing and detection. The spread of COVID-19 in Africa and the appearance of another probably more transmissible variant in South Africa puts more strain on many states with limited health systems and those experiencing economic hardship and instability.

North Africa

Libya's unresolved conflict and terrorist networks' persistent presence in North Africa are the region's greatest security challenges. Forces aligned with the former Libyan Government of National Accord (GNA) and the self-described Libyan National Army (LNA) forces had been at an impasse in central Libya since June 2020 when GNA-aligned forces drove the LNA back from Tripoli, ending its 14-month campaign to seize the capital. Both sides agreed to a UN-brokered cease-fire in October 2020, and on 5 February 2021, the UN-mediated talks resulted in an interim executive authority charged with forming a unity government and conducting elections in December 2021. The new Government of National Unity (GNU) took power in March 2021. The military impasse and ongoing dialogues probably will prevent large-scale conflict from reemerging in the next 6 months. However, the GNU will struggle to overcome key sticking points, including the future role of the LNA commander, broad buy-in to the distribution of political power, and oil revenue disbursement.

Turkey probably will seek to strengthen its influence in Libya during the next year. Turkish military support to the GNA, in particular UAVs and air defense systems, was instrumental in preventing LNA-aligned forces from capturing Tripoli. Although the LNA has received military support from Russia, including advanced fighter aircraft and air defense systems through the Kremlin-linked private military company Vagner, Russia will probably reprioritize engaging with the new unity government to secure its

influence in Libya. The decades-long conflict in Morocco, Western Sahara, has recently flared, posing a threat to North African stability. In November 2020, Moroccan forces cleared protesters blocking a crossing in the zone separating Moroccan-controlled and Polisario-controlled territory in the former Western Sahara for the first time since the 1991 cease-fire, prompting Polisario to declare an end to the ceasefire. Polisario, which is supported by Algeria and several other countries, fields a small force that is ill equipped to retake Western Sahara from the much larger and more modern Moroccan military. Neither Morocco nor Algeria seek war, but a miscommunication between their forces runs the risk of conflict between two of Africa's strongest militaries. Finally, Tunisia's economic crisis, which has worsened as a result of measures to combat COVID-19, has ignited protests across the county that could threaten Tunisian stability.

The threat to U.S., Western, and local interests in North African countries from both al-Qa'ida in the Lands of the Islamic Maghreb (AQIM) and ISIS may be at its lowest point in a decade, following the June 2020 killing of AQIM emir Abdelmalek Droukdal by French special forces and the September 2020 death of ISIS-Libya leader Abu Muadh al-Iraqi during an LNA operation. AQIM probably still is able to tap into facilitation networks in North Africa to support Jamaat Nusrat al-Islam wal-Muslimin (JNIM) in the Sahel, where attacks have steadily risen since 2017. ISIS-Libya suffered numerous setbacks from both U.S. and local counterterrorism pressure, and it probably will struggle to reconstitute its network if this pressure continues. ISIS-inspired attacks still remain a threat in North Africa.

West Africa and Sahel

Terrorist threats in West Africa continue to expand throughout the Sahel and Lake Chad Basin as security forces struggle to make sustainable counterterrorism gains while addressing competing sources of internal political and social instability. The 18 August military coup in Mali and episodes of postelection violence in Guinea and Cote d'Ivoire in the fall of 2020 have exacerbated an already

tenuous security situation, further challenging the capacity of regional governments to adapt to increasing threats. In the past year, ISIS-West Africa and Boko Haram have continued attacks in Nigeria and into Cameroon and Chad. In the Sahel, the al-Qa'ida-affiliated group JNIM and ISIS in the Greater Sahara continued their attacks in Burkina Faso, Mali, and Niger and threatened to expand into the coastal countries.

Regional security efforts, such as the G5 Sahel Joint Force and the Multinational Joint Task Force in the Lake Chad Basin, have made little progress during the past year in curbing terrorist activity and expansion because of resource constraints, operational shortcomings, and financial shortfalls. These shortcomings—and the longstanding instability in the region—present opportunities for Russia and China to increase influence through expanded foreign military sales, counterterrorism training, and other security assistance initiatives.

East Africa

East Africa remains at risk for instability, as political volatility, violent extremist organizations, and great power competition for access and influence strain the region's already fragile security environment. China's military base in Djibouti, located near the Bab el Mandeb maritime choke point, extends the reach of China's armed forces and reflects their growing influence, while Russia continues to pursue a logistics facility on the Red Sea coast. Almost 2 years into a transition to civilian-led democracy, Sudanese banks are preparing to reestablish ties with international financial entities now that Sudan's designation as a State Sponsor of Terrorism has been rescinded, even as Khartoum hosts an influx of regional refugees and continues to diversify defense partnerships, including a planned Russian naval facility in Port Sudan. In preparation for the June 2021 national elections, Ethiopia is struggling to balance the ethnic, humanitarian, and political impacts of its late-2020 military offensive in Tigray. Negotiations between Egypt, Ethiopia, and Sudan regarding the Grand Ethiopian Renaissance Dam

remain a source of regional tension as they remain at an impasse. Kenya and Somalia are locked in a dispute over their maritime boundary, including before the International Court of Justice. Kenya also continues to prioritize border security to curtail the spread of extremism and instability from Somalia. In Somalia, the January 2021 repositioning of U.S. troops will hinder Somalia's already limited ability to combat al-Shabaab and assume security responsibilities. President Farmajo's decision to remain in office beyond his 8 February 2021 mandate and resistance to resolve the election impasse with the opposition and some Federal Member States risks additional conflict.

Al-Qa'ida-affiliated al-Shabaab poses the most severe terrorism threat in East Africa. The group has the capability to conduct high-profile attacks across the region, actively targets U.S. and regional forces, and exploits Somalia's political turmoil and security gaps. The group's estimated 5,000 to 10,000 members control wide swaths of territory in southern Somalia, aided by the freedom of movement resulting from the government's inability to effectively secure its territory. ISIS-Somalia remains active with an estimated 150 to 300 fighters, but it has struggled to attract recruits and expand its operations because of pressure from al-Shabaab, Somali forces, and U.S. airstrikes.

Central and Southern Africa

Internal and regional conflicts persist in Central Africa despite ongoing international peacekeeping operations and bilateral security cooperation efforts. In the eastern Democratic Republic of the Congo (DRC), numerous armed groups, including an ISIS-aligned branch, routinely target the DRC government, security forces, and civilians, threatening the fragile administration of President Felix Tshisekedi. Despite recent efforts to enhance regional security coordination, longstanding tensions between Burundi, Rwanda, and Uganda threaten to undermine the delicate security environment and efforts to counter armed groups throughout the Great Lakes region. The Vagner Group continues to advance Russian influence in the Central African Republic (CAR) by training government troops and providing security

assistance. The Internet Research Agency and Africa Back Office political strategists tailor elections interference operations in an attempt to promote pro-Russian candidates, including most recently in the CAR.

A fledgling ISIS insurgency expanded in northern Mozambique in 2020, with militants capturing critical locations in an oil-rich province and threatening U.S. economic interests in the region. Following a failed 2019 Russian intervention, Mozambique sought expanded counterterrorism security support from private South African and European companies. In Zimbabwe, allegations of rampant human rights violations and abuses under President Emmerson Dambudzo Mnangagwa evidence the fragility of the country's political system and economy. Dire economic conditions in neighboring South Africa—exacerbated by COVID-19 and political infighting—limit President Matamela Cyril Ramaphosa's ability to follow through on key security sector reforms.

LATIN AMERICA

Latin American countries, including Chile, Colombia, Haiti, and Peru experienced periodic outbreaks of popular unrest in 2020, and this trend is likely to continue because of sustained discontent over deteriorating socioeconomic conditions, which COVID-19 has exacerbated. Cuba, Nicaragua, and Venezuela continue to reject democratic values, creating a permissive environment for China, Russia, and Iran to attempt to gain influence. Since 2017, 19 of the 24 countries in the region that recognize China have memorandums of understanding to participate in China's BRI and benefit from Chinese financing, infrastructure development, and trade. Trade relations between China and Latin America, particularly with South America, will continue to grow and are driven by Chinese demand of natural resources, concessionary Chinese financial terms, and established trade patterns in the region despite COVID-19.

Venezuela

Disputed President Nicolas Maduro continues to hold on to power with support from the Venezuelan military and key partners such as China, Iran, and Russia, which almost certainly mitigates the economic effects of international sanctions. Cuba provides Venezuela broad diplomatic and military support, and Havana's security services have assisted the disputed regime in developing its military doctrine, professionalizing its service members, and politicizing the rank-and-file. Two years after Juan Guaido declared himself interim president, Venezuela has settled into a relatively stable political standoff despite an ever-worsening socioeconomic situation. In December, Guaido and the main political opposition parties boycotted legislative elections that Guaido and the international community labeled as fraudulent. Guaido's periodic calls for nationwide marches have failed to draw many participants. Venezuelan military leaders remain publicly steadfast in their support for Maduro regardless of outreach from the political opposition.

Cuba

The Cuban government's principal focus almost certainly remains sustaining itself amid a severe economic downturn worsened by COVID-19. The military, through its network of commercial and financial subsidiaries, is a dominant force in the economy and is responsible for preserving stability. Cuba is a signatory to China's BRI, and Havana's strategic relationship with Russia has remained strong in recent years, with Russian investment in key Cuban economic sectors. Cuba's overseas medical program—recently bolstered by high demand from other countries to combat COVID-19—almost certainly will remain a source of hard currency for the Cuban government.

Role and Effect of Transnational Organized Crime in the Region

Criminal networks will continue to pose a direct threat to the Homeland and challenge governance and stability in Latin America. The pandemic has sparked new problems as criminal actors seek to profit from

overburdened governments, soaring unemployment, and security forces faced with new instability challenges. Some armed groups and drug trafficking organizations in the region enforced lockdown restrictions and increased recruitment during the pandemic.

Mexico remains the source of nearly all heroin and methamphetamine seized in the United States, and a transit route for most of the cocaine available in the country. Moreover, Mexican cartels take advantage of uneven precursor chemical controls in Mexico to manufacture deadly drugs, such as fentanyl, inside Mexico and smuggle them into the United States. These Mexican and international criminal organizations present a clear threat to Mexico and the Mexican government's ability to address illicit drug production and synthesis. The proliferation of fentanyl, the leading substance involved in drug overdose deaths in the United States, in tablets produced from precursor chemicals largely trafficked from China, demonstrate a substantial threat to the Western Hemisphere.

Competition over lucrative drug production areas and smuggling corridors has led to record violence levels. Longstanding disputes over drug trafficking routes and other illicit revenue sources, including mining and extortion, remain a challenge for Central and South America.

Refugee and Illegal Immigrant Strains on Regional Security

Migration within and from Latin America is likely to continue to surge this year. Following a slowdown in 2020—due to Latin American migration enforcement efforts and COVID-19 mitigation measures—the pandemic's severe economic and social fallout has now exacerbated the region's endemic governance and security challenges. Renewed migration will almost certainly strain humanitarian resources and security forces in host and transit countries that are also struggling to cope with the pandemic's socioeconomic effects. Economic losses were particularly severe in many Latin American countries that host the bulk of the region's 5.5 million Venezuelan refugees and migrants. At the onset of the pandemic, the economic downturn drove tens of thousands of migrants to return to Venezuela, but

population movements reversed after neighboring Colombia began easing lockdowns. The disputed Venezuelan regime has failed to control COVID-19's spread and mitigate widespread shortages of food, fuel, and basic goods—trends that are likely to drive steady emigration from Venezuela in 2021.

Mexican and Central American migrant flows to the United States probably will continue to accelerate in 2021 as economic damage from the pandemic, two severe hurricanes and drought worsen longstanding poverty, food insecurity, poor governance, and high crime rates.

Chinese, Russian, and Iranian Presence and Security Influence in the Region

Over the past year, China modestly increased its security presence and influence in Latin America and probably will look for new opportunities in 2021. The presence of China's telecommunication giant, Huawei, in Latin America's major markets will ensure the company plays a prominent role in 5G deployment in the coming years expanding China's influence through use of Huawei's 5G network and the availability of the company's AI surveillance technology. China has taken advantage of the pandemic to send medical equipment or technical assistance to nearly every country in the region. Many regional militaries still view the United States as the security partner of choice but are receptive to increasing Chinese engagement, especially those receiving donated equipment and free professional military education.

Russia values its security engagement and influence in Latin America with its historical partners—Cuba, Nicaragua, and Venezuela—while maintaining broad regional outreach through bilateral relationships and international fora. Russia remains Venezuela's primary military partner. Russia has helped Venezuela circumvent oil sanctions and conduct disinformation campaigns. Russia has issued loans to Cuba so the island can maintain its Soviet-era military equipment. Similarly, Russia assists Nicaragua through technical cooperation, which allows Nicaragua to refurbish and repair its Soviet-era armor and artillery. Tehran seeks to leverage its recent sales with Venezuela to expand Iran's regional footprint in Latin America.

TRANSNATIONAL THREATS

TERRORISM

Islamic State of Iraq and ash-Sham

In 2020, ISIS remained the preeminent Salafi jihadist group, sustained more than a dozen insurgencies globally, and expanded its footprint in Africa. Despite substantial leadership losses and other setbacks last year, ISIS probably is rebuilding its ability to direct attacks in the West, judging from recent ISIS-related arrests in Europe. Nevertheless, ISIS probably will remain unable to direct a mass-casualty attack against the U.S. homeland in 2021 and instead will continue using the Internet to attempt to enable or inspire attacks worldwide.

ISIS has relied on its branches in Africa, the Middle East, and South Asia to wage insurgencies, gain territorial control, and demonstrate their global reach through instructing its branches to attack U.S. and other Western interests. These branches pose a persistent threat within their respective operating areas to U.S. and other Western interests. ISIS expanded its presence in central, eastern, and southern Africa while enduring personnel losses in northern Africa and territorial setbacks in Afghanistan. In 2021, ISIS's regional prospects probably will largely depend on the level of counterterrorism pressure focused on the group and the level of support that branches receive from ISIS core.

Al-Qa'ida

Al-Qa'ida's appeal to Salafist jihadists has waned since ISIS's emergence in 2014, and this dynamic is unlikely to change in 2021. During the past year, counterterrorism pressure has eliminated parts of al-Qa'ida's senior leadership. Overall emir Ayman al-Zawahiri remains in hiding, while a handful of Iran-based al-Qa'ida leaders oversee al-Qa'ida's network.

Al-Qa'ida gives priority to fighting regimes in the Middle East and Africa, and most of its affiliates will sustain their local and regional focus in 2021. Last year, al-Qa'ida exploited instability in Africa, particularly Mali and Somalia to expand its regional operations and develop stronger networks.

Al-Qa'ida is unlikely to direct mass-casualty attacks in the U.S. homeland or against U.S. facilities in 2021. However, online communication between al-Qa'ida in the Arabian Peninsula and the 2019 Pensacola attacker underscores the relative ease of al-Qa'ida enabling attacks over the internet and its ability to capitalize on opportunities to target the U.S. homeland or other Western countries.

Islamic Jihad Organization

The Islamic Jihad Organization (IJO)—Lebanese Hizballah's primary overseas attack unit—is very unlikely to attack the U.S. homeland in 2021 in retaliation for the January 2020 death of IRGC-QF commander Qasem Soleimani. If Hizballah retaliates, the group is likely to use less provocative retaliatory means, such as carrying out attacks against U.S. interests in the Middle East. Hizballah probably will not direct an IJO attack unless Hizballah or Iran faced what they perceived as an existential threat.

The IJO will remain an integral element in Iran's threat network, and Hizballah almost certainly will maintain it to deter what it perceives as foreign aggression—particularly from Israel and the United States. This year, we expect that the IJO will continue to focus on recruiting and training new members, refining its capabilities and improving its operational security to prevent future arrests and disruptions.

Racially/Ethnically Motivated Violent Extremist (RMVE)

Transnational RMVE organization members and supporters operate across borders primarily in North America and European countries. Transnational RMVE organizations are attracting recruits and spreading their ideology online, and they probably will expand their global reach and pose a persistent threat to U.S. and other Western interests in 2021. RMVEs and RMVE-inspired lone actors are capable of

vehicle rammings, knife attacks, shootings, arson, and bombings using rudimentary explosives. In 2021, we expect RMVE organizations to attempt procurement of more sophisticated weapons and expand their paramilitary training capabilities, particularly through recruiting current and former military members. Like ISIS and al-Qa'ida, RMVE transnational organizations use encrypted messaging applications and other media to recruit and train new members and plot attacks, obscuring our insight into their activities. Attacks and disrupted plots this past year include plots against U.S. military personnel.

CYBERSPACE

The United States will increasingly face advanced, persistent, and sophisticated malicious cyber activities emanating from a wide array of state and non-state actors. The scope and complexity of threats will vary, including compromise of our critical infrastructure and military technology and targeting of U.S. social media to spread disinformation and incite public discord. Adversarial malicious cyber operations are also increasingly difficult to observe and attribute. We are particularly concerned with adversaries probing and exploiting our military and intelligence networks, sustained targeting of military social media to manipulate our personnel and monitor movement of U.S. forces, and attempts to compromise the U.S. defense-industrial base in order to steal weapons systems technology.

Over the last five years, strategic competitors Russia and China integrated sophisticated cyberattack capabilities into military operations to gain a crucial advantage during a military crisis or conflict. In addition, Moscow, Beijing, and Tehran are increasingly using social media to shape narratives and sow disinformation. We project that Russia and China will use AI to develop autonomous cyber weapon systems to optimize offensive cyber operations. Furthermore, the worldwide acceptance of Huawei's 5G wireless standard could provide China insight into our military operations abroad. North Korea and Iran—although less capable than Russia or China—will use cyberspace to pursue regime goals and

asymmetrically respond to perceived threats. Iran in particular has increased ransomware operations and targeting of industrial control systems to disrupt critical infrastructure.

Recent cyberoperations serve to remind us that foreign actors continue to exploit our networks when they can. The 2020 cyberoperation against a U.S.-based IT firm was conducted by Russia's Foreign Intelligence Service (SVR) for seemingly traditional espionage activity. This compromise exposed approximately 18,000 customers worldwide including enterprise networks across U.S. federal, state and local governments; critical infrastructure entities; and other private sector organizations. The intrusion demonstrated complex planning and tradecraft that exploited lapses in oversight of the software developers and a lack of emphasis on overall security. Mainly federal agencies and private sector entities were affected.

SPACE AND COUNTERSPACE

China and Russia both see space as integral to winning modern wars and have reorganized their militaries to better incorporate space operations and counterspace capabilities.

Beijing's goal is to become a broad based, fully capable space power. Chinese military writings state that space is an important element of military power and that achieving space superiority is required to control the land, sea, and air domains, which will ultimately affect the outcome of wars. China's rapidly growing space program is second only to the United States in the number of operational satellites.

Beijing's space strategy is part of a comprehensive plan to expand its national power, global status, and influence. China's space program supports both civil- and military-related interests, including strengthening its science and technology sector, international relationships, and military modernization efforts. Beijing is pursuing its interests across a wide array of technologies and development of space-related systems. A key component of China's space strategy includes developing counterspace capabilities to deter adversaries from engaging in a conflict or attacking China's space platforms. China

will attempt to hold U.S. space assets at risk while using its own space capabilities to support its military objectives and overall national security goals.

Russia views its space program as a longstanding example of its leadership on the international stage. The program is a source of national pride. Moscow has concluded that gaining and maintaining supremacy in space has a decisive impact on the outcome of future conflicts and is developing counterspace systems to hold U.S. and allied space assets at risk. Russia considers U.S. dependency on space to enable power projection as a vulnerability it can exploit during conflict. Concurrently, Russia pursues counterspace weapon systems that can deny, damage, and defeat U.S. space-based systems in order to reduce U.S. military effectiveness and control conflict escalation if deterrence fails.

Looking forward, a number of factors will drive change in the space domain. Longstanding barriers to space access—technological and financial—are falling and more countries and commercial firms are participating in space construction, launch, exploration, and human spaceflight. Currently, there are over 3,300 satellites owned by more than 50 countries that provide services to vast populations around the globe, and the number of satellites is expected to grow. Approximately 20,000 additional objects—at least 10 cm in size, but many much larger—are tracked and catalogued in Earth orbit. This debris includes derelict spacecraft, upper stages of space launch vehicles and remnants from explosions or collisions. These space objects are increasing in number, particularly in low Earth orbit, and the collision risk to space operations is quickly growing. Finally, improvements to sensors and advanced AI—allowing for more automated tasking, data gathering, processing and dissemination of information on space objects—are expected to enhance competitor states' space capabilities.

NUCLEAR WEAPONS

The number of states with nuclear weapons has grown since the end of the Cold War, and countries with mature nuclear weapons programs are increasing the numbers/capabilities of their existing

arsenals. Some countries are modernizing their legacy stockpiles by incorporating advanced technologies to penetrate or avoid missile defense systems. We also have observed countries developing nuclear weapons with smaller yields, improved precision, and increased range for military or coercive use on the battlefield.

Russia and China probably will significantly expand their nuclear warhead stockpiles over the next decade. The anticipated expansion in Moscow's stockpile is primarily driven by growth in nonstrategic nuclear weapon inventories. Russia probably possesses 1,000 to 2,000 nonstrategic nuclear warheads and approximately 1,400 warheads for strategic systems. Last year, DIA projected that China would at least double its nuclear warhead stockpile, estimated to be in the low-200s, over this decade. Since then, Beijing has accelerated its nuclear expansion and is on track to exceed our previous projections for the likely stockpile size by the end of this decade. Other nations such as Pakistan, North Korea, and India continue to advance their nuclear programs, though the programs are not as complex as in Russia and China.

The proliferation of dual-use, WMD-applicable goods, knowledge, and technology will continue to enable the development or production of additional nuclear weapon and delivery systems that present a direct threat to U.S. and allied interests by complicating U.S. force projection capabilities, countering Western missile defense systems, and improving adversarial targeting capabilities. Multiple specialized procurement networks enable this proliferation. These commercial and state-sponsored entities remain resilient and adaptable in the face of a vast international architecture of sanctions, export controls, and other prohibitions limiting the purchase or transfer of certain WMD-applicable goods to specific countries/entities. Such efforts directly support the advancement, development, expansion, and survivability of WMD capabilities around the world.

FOREIGN INTELLIGENCE

The DoD is facing an extremely sophisticated global foreign intelligence threat from an increasing number of state and non-state actors that are becoming more complex and diverse. Although our primary intelligence adversaries—such as China, Russia, and Iran—compose a large portion of these threats, the rapid development of globally available and affordable advanced technologies is accelerating the capabilities and number of actors posing intelligence threats to DoD interests.

Adversaries are increasing their use of technologies—such as AI, big data analytics, cloud computing, advanced unmanned and autonomous systems, and wearable electronics—in ways that substantially diminish our advantage in multiple domains, enabling them to gain near-real-time tracking and observation of DoD personnel and activities. Global proliferation of surveillance technologies, coupled with AI, offers governments the ability to automate monitoring capabilities to surveil more people, more often. More than 90 countries globally have enhanced their surveillance systems using Smart City/Safe City platforms, including AI technology (75 countries) and facial recognition systems (88 countries). Chinese companies including Dahua, Hikvision, Huawei, and ZTE have emerged as global leaders in developing Smart/Safe City systems, a market expected to surpass \$2.4 trillion by 2025. As of 2019, these companies had provided AI surveillance capabilities to at least 63 countries, with Huawei providing 80 percent of the surveillance technology.

China and Russia have become particularly adept at using multiple vectors to gain access to or manipulate the DoD supply chain to enable data exploitation, sabotage, and subversion. These vectors include using laws and regulations to access proprietary or commercial data stored within adversaries' national borders, embedding intelligence officers within commercial organizations, embedding undisclosed software in third-party products, attempting to exploit access or influence through certain foreign investments, using prime and subcontractors to access the DoD, influencing technology

standards to dominate markets, and white labeling/rebranding products to obfuscate their country of origin or supply chain.

Russia, China, and Iran also use multiple avenues to collect on U.S. R&D of emerging and disruptive technologies, primarily to support their own domestic military R&D efforts, developing counters, and threatening to undermine the DoD's future advantages on global battlefields. In addition, our intelligence adversaries use multiple methods to collect information on DoD critical infrastructure, probably to inform options for aggressive actions.

ADVANCED TECHNOLOGY

China and Russia very likely will remain the potential U.S. adversaries most likely to develop new military capabilities using emerging and disruptive technologies. Both of these nations view the development of these technologies as a race in which leaders in a technology area could potentially develop military capabilities that outpace their adversaries. During any period in the next 20 years, different nations may take lead in one or more fields and seek to develop military capabilities and concepts to capitalize on perceived advantages. Technological breakthroughs likely will foster many new weapons, warfighting tools, and concepts that will change the character of warfare.

China's science and technology (S&T) ecosystem is a multipronged, whole-of-government system that incorporates S&T development from both the commercial and military sectors. China's military-civil fusion strategy, which emphasizes the open sharing of S&T resources and transfer of technology between civilian and defense industries, intentionally blurs the distinction between these supply chains. Beijing's ongoing high levels of focus on and investment in emerging and disruptive technology research and acquisition very likely will present the greatest threat to U.S. technology superiority. China has already reached peer or near-peer levels in many research areas and aspires to be the world leader in emerging and disruptive technologies by 2030 to 2035 to sustain its economic growth and to develop

military capabilities that outpace those of the United States. China is highly advanced in quantum key distribution and is among the leaders in AI, high-performance computing, quantum information sciences, biotechnology, and advanced robotics. Beijing's long-term strategy of rapid, indigenous S&T development of cutting-edge technology, combined with licit and illicit foreign technology acquisition, very likely has positioned China at the forefront of numerous scientific fields.

In contrast, Russia more narrowly focuses its research efforts on technologies to match, counter, or offset perceived advantages of the United States and other potential adversaries. Despite the Russian defense industry's massive size and capability to produce large numbers of weapons, and efforts to increase development of indigenous capabilities, Russia is challenged both organizationally and technically to produce the high-tech subcomponents required for advanced weapons because of severe funding, resource, and infrastructure constraints on the country's S&T sector.

CONCLUSION

The National Defense Strategy observes that the military environment is defined by rapid technological change and challenges from adversaries in every operating domain. Defense Intelligence must focus on the entire spectrum of conflict and across all warfighting domains to detect and correctly characterize key foreign developments and inform our Defense decisionmakers with timely, relevant insight.