



ANNUAL THREAT ASSESSMENT OF THE US INTELLIGENCE COMMUNITY

Office of the Director of National Intelligence

April 9, 2021

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INTRODUCTION

This annual report of worldwide threats to the national security of the United States responds to Section 617 of the FY21 Intelligence Authorization Act (P.L. 116-260). This report reflects the collective insights of the Intelligence Community (IC), which is committed every day to providing the nuanced, independent, and unvarnished intelligence that policymakers, warfighters, and domestic law enforcement personnel need to protect American lives and America's interests anywhere in the world.

This assessment focuses on the most direct, serious threats to the United States during the next year. The order of the topics presented in this assessment does not necessarily indicate their relative importance or the magnitude of the threats in the view of the IC. All require a robust intelligence response, including those where a near-term focus may help head off greater threats in the future, such as climate change and environmental degradation.

As required by the law, this report will be provided to the congressional intelligence committees as well as the committees on the Armed Services of the House of Representatives and the Senate.

Information available as of 9 April 2021 was used in the preparation of this assessment.

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FOREWORD

In the coming year, the United States and its allies will face a diverse array of threats that are playing out amidst the global disruption resulting from the COVID-19 pandemic and against the backdrop of great power competition, the disruptive effects of ecological degradation and a changing climate, an increasing number of empowered non-state actors, and rapidly evolving technology. The complexity of the threats, their intersections, and the potential for cascading events in an increasingly interconnected and mobile world create new challenges for the IC. Ecological and climate changes, for example, are connected to public health risks, humanitarian concerns, social and political instability, and geopolitical rivalry. The 2021 Annual Threat Assessment highlights some of those connections as it provides the IC's baseline assessments of the most pressing threats to US national interests, while emphasizing the United States' key adversaries and competitors. It is not an exhaustive assessment of all global challenges and notably excludes assessments of US adversaries' vulnerabilities. It accounts for functional concerns, such as weapons of mass destruction and technology, primarily in the sections on threat actors, such as China and Russia.

Beijing, Moscow, Tehran, and Pyongyang have demonstrated the capability and intent to advance their interests at the expense of the United States and its allies, despite the pandemic. China increasingly is a near-peer competitor, challenging the United States in multiple arenas—especially economically, militarily, and technologically—and is pushing to change global norms. Russia is pushing back against Washington where it can globally, employing techniques up to and including the use of force. Iran will remain a regional menace with broader malign influence activities, and North Korea will be a disruptive player on the regional and world stages. Major adversaries and competitors are enhancing and exercising their military, cyber, and other capabilities, raising the risks to US and allied forces, weakening our conventional deterrence, and worsening the longstanding threat from weapons of mass destruction.

The effects of the COVID-19 pandemic will continue to strain governments and societies, fueling humanitarian and economic crises, political unrest, and geopolitical competition as countries, such as China and Russia, seek advantage through such avenues as “vaccine diplomacy.” No country has been completely spared, and even when a vaccine is widely distributed globally, the economic and political aftershocks will be felt for years. Countries with high debts or that depend on oil exports, tourism, or remittances face particularly challenging recoveries, while others will turn inward or be distracted by other challenges.

Ecological degradation and a changing climate will continue to fuel disease outbreaks, threaten food and water security, and exacerbate political instability and humanitarian crises. Although much of the effect of a changing climate on US security will play out indirectly in a broader political and economic context, warmer weather can generate direct, immediate impacts—for example, through more intense storms, flooding, and permafrost melting. This year we will see increasing potential for surges in migration by Central American populations, which are reeling from the economic fallout of the COVID-19 pandemic and extreme weather, including multiple hurricanes in 2020 and several years of recurring droughts and storms.

The scourge of illicit drugs and transnational organized crime will continue to take its toll on American lives, prosperity, and safety. Major narcotics trafficking groups have adapted to the pandemic's challenges to maintain their deadly trade, as have other transnational criminal organizations.

Emerging and disruptive technologies, as well as the proliferation and permeation of technology in all aspects of our lives, pose unique challenges. Cyber capabilities, to illustrate, are demonstrably intertwined with threats to our infrastructure and to the foreign malign influence threats against our democracy.

ISIS, al-Qa'ida, and Iran and its militant allies continue to plot terrorist attacks against US persons and interests, including to varying degrees in the United States. Despite leadership losses, terrorist groups have shown great resiliency and are taking advantage of ungoverned areas to rebuild.

Regional conflicts continue to fuel humanitarian crises, undermine stability, and threaten US persons and interests. Some have direct implications for US security. For example, the fighting in Afghanistan, Iraq, and Syria has direct bearing on US forces, while tensions between nuclear-armed India and Pakistan remain a concern for the world. The iterative violence between Israel and Iran, the activity of foreign powers in Libya, and conflicts in other areas—including Africa, Asia, and the Middle East—have the potential to escalate or spread.

The 2021 Annual Threat Assessment Report supports the Office of the Director of National Intelligence's transparency commitments and the tradition of providing regular threat updates to the American public and the United States Congress. The IC is vigilant in monitoring and assessing direct and indirect threats to US and allied interests. As part of this ongoing effort, the IC's National Intelligence Officers work closely with analysts from across the IC to examine the spectrum of threats and highlight the most likely and/or impactful near-term risks in the context of the longer-term, overarching threat environment.

CHINA'S PUSH FOR GLOBAL POWER

The Chinese Communist Party (CCP) will continue its whole-of-government efforts to spread China's influence, undercut that of the United States, drive wedges between Washington and its allies and partners, and foster new international norms that favor the authoritarian Chinese system. Chinese leaders probably will, however, seek tactical opportunities to reduce tensions with Washington when such opportunities suit their interests. China will maintain its major innovation and industrial policies because Chinese leaders see this strategy as necessary to reduce dependence on foreign technologies, enable military advances, and sustain economic growth and thus ensure the CCP's survival.

- Beijing sees increasingly competitive US-China relations as part of an epochal geopolitical shift and views Washington's economic measures against Beijing since 2018 as part of a broader US effort to contain China's rise.
- China is touting its success containing the COVID-19 pandemic as evidence of the superiority of its system.
- Beijing is increasingly combining its growing military power with its economic, technological, and diplomatic clout to preserve the CCP, secure what it views as its territory and regional preeminence, and pursue international cooperation at Washington's expense.

Regional and Global Activities

China seeks to use coordinated, whole-of-government tools to demonstrate its growing strength and compel regional neighbors to acquiesce to Beijing's preferences, including its claims over disputed territory and assertions of sovereignty over Taiwan.

- China-India border tensions remain high, despite some force pullbacks this year. China's occupation since May 2020 of contested border areas is the most serious escalation in decades and led to the first lethal border clash between the two countries since 1975. As of mid-February, after multiple rounds of talks, both sides were pulling back forces and equipment from some sites along the disputed border.
- In the South China Sea, Beijing will continue to intimidate rival claimants and will use growing numbers of air, naval, and maritime law enforcement platforms to signal to Southeast Asian countries that China has effective control over contested areas. China is similarly pressuring Japan over contested areas in the East China Sea.
- Beijing will press Taiwan authorities to move toward unification and will condemn what it views as increased US-Taiwan engagement. We expect that friction will grow as Beijing steps up attempts to portray Taipei as internationally isolated and dependent on the mainland for economic prosperity, and as China continues to increase military activity around the island.
- China's increasing cooperation with Russia on areas of complementary interest includes defense and economic cooperation.

Beijing will continue to promote the Belt and Road Initiative (BRI) to expand China's economic, political, and military presence abroad, while trying to reduce waste and exploitative practices, which have led to international criticism. China will try to increase its influence using "vaccine diplomacy," giving countries favored access to the COVID-19 vaccines it is developing. China also will promote new international norms for technology and human rights, emphasizing state sovereignty and political stability over individual rights.

China will remain the top threat to US technological competitiveness as the CCP targets key technology sectors and proprietary commercial and military technology from US and allied companies and research institutions associated with defense, energy, finance, and other sectors. Beijing uses a variety of tools, from public investment to espionage and theft, to advance its technological capabilities.

Military Capabilities

China will continue pursuing its goals of becoming a great power, securing what it views as its territory, and establishing its preeminence in regional affairs by building a world-class military, potentially destabilizing international norms and relationships. China's military commitment includes a multiyear agenda of comprehensive military reform initiatives.

- We expect the PLA to continue pursuing overseas military installations and access agreements to enhance its ability to project power and protect Chinese interests abroad.
- The PLA Navy and PLA Air Force are the largest in the region and continue to field advanced long-range platforms that improve China's ability to project power. The PLA Rocket Force's highly accurate short-, medium-, and intermediate-range conventional systems are capable of holding US and allied bases in the region at risk.

WMD

Beijing will continue the most rapid expansion and platform diversification of its nuclear arsenal in its history, intending to at least double the size of its nuclear stockpile during the next decade and to field a nuclear triad. Beijing is not interested in arms control agreements that restrict its modernization plans and will not agree to substantive negotiations that lock in US or Russian nuclear advantages.

- China is building a larger and increasingly capable nuclear missile force that is more survivable, more diverse, and on higher alert than in the past, including nuclear missile systems designed to manage regional escalation and ensure an intercontinental second-strike capability.

Space

Beijing is working to match or exceed US capabilities in space to gain the military, economic, and prestige benefits that Washington has accrued from space leadership.

- We expect a Chinese space station in low Earth orbit (LEO) to be operational between 2022 and 2024. China also has conducted and plans to conduct additional lunar exploration missions, and it intends to establish a robotic research station on the Moon and later an intermittently crewed lunar base.

- The PLA will continue to integrate space services—such as satellite reconnaissance and positioning, navigation, and timing (PNT)—and satellite communications into its weapons and command-and-control systems to erode the US military’s information advantage.

Counterspace operations will be integral to potential military campaigns by the PLA, and China has counterspace-weapons capabilities intended to target US and allied satellites.

- Beijing continues to train its military space elements and field new destructive and nondestructive ground- and space-based antisatellite (ASAT) weapons.
- China has already fielded ground-based ASAT missiles intended to destroy satellites in LEO and ground-based ASAT lasers probably intended to blind or damage sensitive space-based optical sensors on LEO satellites.

Cyber

We assess that China presents a prolific and effective cyber-espionage threat, possesses substantial cyber-attack capabilities, and presents a growing influence threat. China’s cyber pursuits and proliferation of related technologies increase the threats of cyber attacks against the US homeland, suppression of US web content that Beijing views as threatening to its internal ideological control, and the expansion of technology-driven authoritarianism around the world.

- We continue to assess that China can launch cyber attacks that, at a minimum, can cause localized, temporary disruptions to critical infrastructure within the United States.
- China leads the world in applying surveillance systems and censorship to monitor its population and repress dissent, particularly among ethnic minorities, such as the Uyghurs. Beijing conducts cyber intrusions that affect US and non-US citizens beyond its borders—such as hacking journalists, stealing personal information, or attacking tools that allow free speech online—as part of its efforts to surveil perceived threats to CCP power and tailor influence efforts. Beijing is also using its assistance to global efforts to combat COVID-19 to export its surveillance tools and technologies.
- China’s cyber-espionage operations have included compromising telecommunications firms, providers of managed services and broadly used software, and other targets potentially rich in follow-on opportunities for intelligence collection, attack, or influence operations.

Intelligence, Influence Operations, and Elections Influence and Interference

China will continue expanding its global intelligence footprint to better support its growing political, economic, and security interests around the world, increasingly challenging the United States’ alliances and partnerships. Across East Asia and the western Pacific, which Beijing views as its natural sphere of influence, China is attempting to exploit doubts about the US commitment to the region, undermine Taiwan’s democracy, and extend Beijing’s influence.

- Beijing has been intensifying efforts to shape the political environment in the United States to promote its policy preferences, mold public discourse, pressure political figures whom Beijing believes oppose its interests, and muffle criticism of China on such issues as religious freedom and the suppression of democracy in Hong Kong.

RUSSIAN PROVOCATIVE ACTIONS

Moscow will continue to employ a variety of tactics this year meant to undermine US influence, develop new international norms and partnerships, divide Western countries and weaken Western alliances, and demonstrate Russia's ability to shape global events as a major player in a new multipolar international order. Russia will continue to develop its military, nuclear, space, cyber, and intelligence capabilities, while actively engaging abroad and leveraging its energy resources, to advance its agenda and undermine the United States.

We expect Moscow to seek opportunities for pragmatic cooperation with Washington on its own terms, and we assess that Russia does not want a direct conflict with US forces.

- Russian officials have long believed that the United States is conducting its own “influence campaigns” to undermine Russia, weaken President Vladimir Putin, and install Western-friendly regimes in the states of the former Soviet Union and elsewhere.
- Russia seeks an accommodation with the United States on mutual noninterference in both countries' domestic affairs and US recognition of Russia's claimed sphere of influence over much of the former Soviet Union.

Regional and Global Activities

We assess that Moscow will employ an array of tools—especially influence campaigns, intelligence and counterterrorism cooperation, military aid and combined exercises, mercenary operations, assassinations, and arms sales—to advance its interests or undermine the interests of the United States and its allies. We expect Moscow to insert itself into crises when Russian interests are at stake, it can turn a power vacuum into an opportunity, or the anticipated costs of action are low. Russia probably will continue to expand its global military, intelligence, security, commercial, and energy footprint and build partnerships with US allies and adversaries alike—most notably Russia's growing strategic cooperation with China—to achieve its objectives.

- We assess that Russia's Federal Security Service (FSB) organized the assassination of a Chechen separatist in a Berlin park in 2019 and tried to kill opposition activist Aleksey Navalnyy inside Russia in 2020 with a fourth-generation chemical agent.
- In the Middle East and North Africa, Moscow is using its involvement in Syria and Libya to increase its clout, undercut US leadership, present itself as an indispensable mediator, and gain military access rights and economic opportunities.
- In the Western Hemisphere, Russia has expanded its engagement with Venezuela, supported Cuba, and used arms sales and energy agreements to try to expand access to markets and natural resources in Latin America, in part to offset some of the effects of sanctions.
- In the former Soviet Union, Moscow is well positioned to increase its role in the Caucasus, intervene in Belarus if it deems necessary, and continue destabilization efforts against Ukraine while settlement talks remain stalled and low-level fighting continues.

- Since 2006, Russia has used energy as a foreign policy tool to coerce cooperation and force states to the negotiating table. After a price dispute between Moscow and Kyiv, for example, Russia cut off gas flows to Ukraine, including transit gas, in 2009, affecting some parts of Europe for a 13-day period. Russia also uses its capabilities in civilian nuclear reactor construction as a soft-power tool in its foreign policy.

Military Capabilities

We expect Moscow's military posture and behavior—including military modernization, use of military force, and the integration of information warfare—to challenge the interests of the United States and its allies. Despite flat or even declining defense spending, Russia will emphasize new weapons that present increased threats to the United States and regional actors while continuing its foreign military engagements, conducting training exercises, and incorporating lessons from its involvement in Syria and Ukraine.

- Moscow has the wherewithal to deploy forces in strategically important regions but the farther it deploys from Russia, the less able it probably will be to sustain intensive combat operations.
- Private military and security companies managed by Russian oligarchs close to the Kremlin extend Moscow's military reach at low cost, allowing Russia to disavow its involvement and distance itself from battlefield casualties. These proxy forces, however, often fail to achieve Moscow's strategic goals because of their limited tactical proficiency.

WMD

We assess that Russia will remain the largest and most capable WMD rival to the United States for the foreseeable future as it expands and modernizes its nuclear weapons capabilities and increases the capabilities of its strategic and nonstrategic weapons. Russia also remains a nuclear-material security concern, despite improvements to physical security at Russian nuclear sites since the 1990s.

- Moscow views its nuclear capabilities as necessary to maintain deterrence and achieve its goals in a potential conflict against the United States and NATO, and it sees a credible nuclear weapons deterrent as the ultimate guarantor of the Russian Federation.
- Russia is building a large, diverse, and modern set of nonstrategic systems, which are capable of delivering nuclear or conventional warheads, because Moscow believes such systems offer options to deter adversaries, control the escalation of potential hostilities, and counter US and allied troops near its border.

Cyber

We assess that Russia will remain a top cyber threat as it refines and employs its espionage, influence, and attack capabilities.

- Russia continues to target critical infrastructure, including underwater cables and industrial control systems, in the United States and in allied and partner countries, as compromising such infrastructure improves—and in some cases can demonstrate—its ability to damage infrastructure during a crisis.

- A Russian software supply chain operation in 2020, described in the cyber section of this report, demonstrates Moscow's capability and intent to target and potentially disrupt public and private organizations in the United States.
- Russia is also using cyber operations to defend against what it sees as threats to the stability of the Russian Government. In 2019, Russia attempted to hack journalists and organizations that were investigating Russian Government activity and in at least one instance leaked their information.
- Russia almost certainly considers cyber attacks an acceptable option to deter adversaries, control escalation, and prosecute conflicts.

Intelligence, Influence Operations, and Elections Influence and Interference

Russia presents one of the most serious intelligence threats to the United States, using its intelligence services and influence tools to try to divide Western alliances, preserve its influence in the post-Soviet area, and increase its sway around the world, while undermining US global standing, sowing discord inside the United States, and influencing US voters and decisionmaking. Russia will continue to advance its technical collection and surveillance capabilities and probably will share its technology and expertise with other countries, including US adversaries.

- Moscow almost certainly views US elections as an opportunity to try to undermine US global standing, sow discord inside the United States, influence US decisionmaking, and sway US voters. Moscow conducted influence operations against US elections in 2016, 2018, and 2020.

Space

Russia will remain a key space competitor, maintaining a large network of reconnaissance, communications, and navigation satellites. It will focus on integrating space services—such as communications; positioning, navigation, and timing (PNT); geolocation; and intelligence, surveillance, and reconnaissance—into its weapons and command-and-control systems.

- Russia continues to train its military space elements and field new antisatellite (ASAT) weapons to disrupt and degrade US and allied space capabilities, and it is developing, testing, and fielding an array of nondestructive and destructive counterspace weapons—including jamming and cyberspace capabilities, directed energy weapons, on-orbit capabilities, and ground-based ASAT capabilities—to target US and allied satellites.

IRANIAN PROVOCATIVE ACTIONS

Iran will present a continuing threat to US and allied interests in the region as it tries to erode US influence and support Shia populations abroad, entrench its influence and project power in neighboring states, deflect international pressure, and minimize threats to regime stability. Although Iran's deteriorating economy and poor regional reputation present obstacles to its goals, Tehran will try a range of tools—diplomacy, expanding its nuclear program, military sales and acquisitions, and proxy and partner attacks—to advance its goals. We expect that Iran will take risks that could escalate tensions and threaten US and allied interests in the coming year.

- Iran sees itself as locked in a struggle with the United States and its regional allies, whom they perceive to be focused on curtailing Iran's geopolitical influence and pursuing regime change.
- Tehran's actions will reflect its perceptions of US, Israeli, and Gulf state hostility; its ability to project force through conventional arms and proxy forces; and its desire to extract diplomatic and economic concessions from the international community.
- With regards to US interests in particular, Iran's willingness to conduct attacks probably will hinge on its perception of the United States' willingness to respond, its ability to conduct attacks without triggering direct conflict, and the prospect of jeopardizing potential US sanctions relief.
- Regime leaders probably will be reluctant to engage diplomatically in talks with the United States in the near term without sanctions or humanitarian relief or the United States rejoining the Joint Comprehensive Plan of Action (JCPOA). Iran remains committed to countering US pressure, although Tehran is also wary of becoming involved in a full-blown conflict.

Regional Involvement and Destabilizing Activities

Iran will remain a problematic actor in Iraq, which will be the key battleground for Iran's influence this year and during the next several years, and Iranian-supported Iraqi Shia militias will continue to pose the primary threat to US personnel in Iraq.

- The rise in indirect-fire and other attacks against US installations or US-associated convoys in Iraq in 2020 is largely attributed to Iran-backed Iraqi Shia militias.
- Iran will rely on its Shia militia allies and their associated political parties to work toward Iran's goals of challenging the US presence and maintaining influence in Iraqi political and security issues. Tehran continues to leverage ties to Iraqi Shia groups and leaders to circumvent US sanctions and try to force the United States to withdraw through political pressure and kinetic strikes.
- Although Tehran remains an influential external actor in Iraq, Iraqi politicians, such as Prime Minister Mustafa al-Kadhimi, will attempt to balance Baghdad's relations with Iran and the United States in an effort to avoid Iraq becoming an arena for conflict between the two countries.

Iran is determined to maintain influence in Syria.

- Iran is pursuing a permanent military presence and economic deals in Syria as the conflict winds down there. Tehran almost certainly wants these things to build its regional influence, support Hizballah, and threaten Israel.

Iran will remain a destabilizing force in Yemen, as Tehran's support to the Huthis—including supplying ballistic and cruise missiles as well as unmanned systems—poses a threat to US partners and interests, notably through strikes on Saudi Arabia.

Tehran remains a threat to Israel, both directly through its missile forces and indirectly through its support of Hizballah and other terrorist groups.

Iran will hedge its bets in Afghanistan, and its actions may threaten instability. Iran publicly backs Afghan peace talks, but it is worried about a long-term US presence in Afghanistan. As a result, Iran is building ties with both the government in Kabul and the Taliban so it can take advantage of any political outcome.

Military Capabilities

Iran's diverse military capabilities and its hybrid approach to warfare—using both conventional and unconventional capabilities—will continue to pose a threat to US and allied interests in the region for the foreseeable future.

- Iran demonstrated its conventional military strategy, which is primarily based on deterrence and the ability to retaliate against an attacker, with its launch of multiple ballistic missiles against a base housing US forces in Iraq in response to the January 2020 killing of Iranian Islamic Revolutionary Guard Corps Qods Force (IRGC-QF) Commander Qasem Soleimani. Iran has the largest ballistic missile force in the region, and despite Iran's economic challenges, Tehran will seek to improve and acquire new conventional weaponry.
- Iran's unconventional warfare operations and network of militant partners and proxies enable Tehran to advance its interests in the region, maintain strategic depth, and provide asymmetric retaliatory options.
- The IRGC-QF and its proxies will remain central to Iran's military power.

Attacks on US Interests and the Homeland

We assess that Iran remains interested in developing networks inside the United States—an objective it has pursued for more than a decade—but the greatest risk to US persons exists outside the Homeland, particularly in the Middle East and South Asia.

- Iran has threatened to retaliate against US officials for the Soleimani killing in January 2020 and attempted to conduct lethal operations in the United States previously.
- During the past several years, US law enforcement has arrested numerous individuals with connections to Iran as agents of influence or for collecting information on Iranian dissidents in the United States,

and Iran's security forces have been linked to attempted assassination and kidnapping plots in Europe, the Middle East, and South Asia.

- Iran probably can most readily target US interests in the Middle East and South Asia because it has assets and proxies in the region with access to weapons and explosives.

Nuclear Breakout

We continue to assess that Iran is not currently undertaking the key nuclear weapons-development activities that we judge would be necessary to produce a nuclear device. However, following the US withdrawal from the JCPOA agreement in May 2018, Iranian officials have abandoned some of Iran's commitments and resumed some nuclear activities that exceed the JCPOA limits. If Tehran does not receive sanctions relief, Iranian officials probably will consider options ranging from further enriching uranium up to 60 percent to designing and building a new 40 Megawatt Heavy Water reactor.

- Iran has consistently cast its resumption of nuclear activities as a reversible response to the US withdrawal from the JCPOA and messaged that it would return to full compliance if the United States also fulfilled its JCPOA commitments.

Since June 2019, Iran has increased the size and enrichment level of its uranium stockpile beyond JCPOA limits. Since September 2019, Iran has ignored restrictions on advanced centrifuge research and development and restarted uranium enrichment operations at the deeply buried Fordow facility. In January, Iran began to enrich uranium up to 20 percent and started R&D with the stated intent to produce uranium metal for research reactor fuel, and in February, it produced a gram quantities of natural uranium metal in a laboratory experiment.

Cyber, Intelligence, Influence, and Election Interference

Iran's expertise and willingness to conduct aggressive cyber operations make it a significant threat to the security of US and allied networks and data. Iran has the ability to conduct attacks on critical infrastructure, as well as to conduct influence and espionage activities.

- Iran was responsible for multiple cyber attacks between April and July 2020 against Israeli water facilities that caused unspecified short-term effects, according to press reporting.

Iran is increasingly active in using cyberspace to enable influence operations—including aggressive influence operations targeting the US 2020 presidential election—and *we expect Tehran to focus on online covert influence, such as spreading disinformation about fake threats or compromised election infrastructure and recirculating anti-US content.*

- Iran attempted to influence dynamics around the 2020 US presidential election by sending threatening messages to US voters, and Iranian cyber actors in December 2020 disseminated information about US election officials to try to undermine confidence in the US election.

NORTH KOREAN PROVOCATIVE ACTIONS

North Korean leader Kim Jong Un may take a number of aggressive and potentially destabilizing actions to reshape the regional security environment and drive wedges between the United States and its allies—up to and including the resumption of nuclear weapons and intercontinental ballistic missile (ICBM) testing.

- We assess that Kim views nuclear weapons as the ultimate deterrent against foreign intervention and believes that over time he will gain international acceptance and respect as a nuclear power. He probably does not view the current level of pressure on his regime as enough to require a fundamental change in its approach.
- Kim also aims to achieve his goals of gaining prestige, security, and acceptance as a nuclear power through conventional military modernization efforts, nuclear weapon and missile development, foreign engagement, sanctions-evasion, and cyber capabilities.

Military Capabilities

North Korea will pose an increasing threat to the United States, South Korea, and Japan as it continues to improve its conventional military capabilities, providing Kim with diverse tools to advance his political objectives or inflict heavy losses if North Korea were attacked.

- Pyongyang portrayed a growing and more diverse strategic and tactical ballistic missile force during its January 2021 and October 2020 military parades.

WMD

North Korea will be a WMD threat for the foreseeable future, because Kim remains strongly committed to the country's nuclear weapons, the country is actively engaged in ballistic missile research and development, and Pyongyang's CBW efforts persist.

- Despite announcing an end to North Korea's self-imposed moratorium on nuclear weapons and ICBM testing in December 2019, Kim thus far has not conducted long-range missile testing and has left the door open to future denuclearization talks with the United States. Kim may be considering whether to resume long-range missile or nuclear testing this year to try to force the United States to deal with him on Pyongyang's terms.

Cyber

North Korea's cyber program poses a growing espionage, theft, and attack threat.

- Pyongyang probably possesses the expertise to cause temporary, limited disruptions of some critical infrastructure networks and disrupt business networks in the United States, judging from its operations during the past decade, and it may be able to conduct operations that compromise software supply chains.

- North Korea has conducted cyber theft against financial institutions and cryptocurrency exchanges worldwide, potentially stealing hundreds of millions of dollars, probably to fund government priorities, such as its nuclear and missile programs.

TRANSNATIONAL ISSUES

COVID-19 PANDEMIC AND DISEASES

The COVID-19 pandemic has disrupted life worldwide, with far-reaching effects that extend well beyond global health to the economic, political, and security spheres. We expect COVID-19 to remain a threat to populations worldwide until vaccines and therapeutics are widely distributed. The economic and political implications of the pandemic will ripple through the world for years.

The pandemic is raising geopolitical tensions, and great powers are jockeying for advantage and influence. States are struggling to cooperate—and in some cases are undermining cooperation—to respond to the pandemic and its economic fallout, particularly as some governments turn inward and question the merits of globalization and interdependence. Some governments, such as China and Russia, are using offers of medical supplies and vaccines to try to boost their geopolitical standing.

The economic fallout from the pandemic is likely to create or worsen instability in at least a few—and perhaps many—countries, as people grow more desperate in the face of interlocking pressures that include sustained economic downturns, job losses, and disrupted supply chains. Some hard-hit developing countries are experiencing financial and humanitarian crises, increasing the risk of surges in migration, collapsed governments, or internal conflict.

- Although global trade shows signs of bouncing back from the COVID-19-induced slump, economists caution that any recovery this year could be disrupted by ongoing or expanding pandemic effects, keeping pressure on many governments to focus on internal economic stability. In April, the International Monetary Fund estimated that the global economy would grow 6 percent this year and 4.4 percent in 2022. This year's forecast is revised up 0.5 percentage points relative to the previous forecast, reflecting expectations of vaccine-powered strengthening of activity later in the year and additional policy support in a few large economies. The global growth contraction for 2020 is estimated at 3.3 percent.
- The resurgence in COVID-19 infections early this year may have an even greater economic impact as struggling businesses in hard-hit sectors such as tourism and restaurants fold and governments face increasing budget strains.
- The effects on developing countries—especially those that rely heavily on remittances, tourism, or oil exports—may be severe and longer lasting; many developing countries already have sought debt relief.
- The economic fallout from the COVID-19 pandemic, along with conflict and weather extremes, has driven food insecurity worldwide to its highest point in more than a decade, which increases the risk of instability. The number of people experiencing high levels of acute food insecurity doubled from 135 million in 2019 to about 270 million last year, and is projected to rise to 330 million by yearend.

The COVID-19 pandemic is prompting shifts in security priorities for countries around the world. As militaries face growing calls to cut budgets, gaps are emerging in UN peacekeeping operations; military training and preparedness; counterterrorism operations; and arms control monitoring, verification, and compliance. These gaps are likely to grow without a quick end to the pandemic and a rapid recovery, making managing

conflict more difficult—particularly because the pandemic has not caused any diminution in the number or intensity of conflicts.

COVID-19-related disruptions to essential health services—such as vaccinations, aid delivery, and maternal and child health programs—will increase the likelihood of additional health emergencies, especially among vulnerable populations in low-income countries. As examples, the pandemic has disrupted HIV/AIDS treatments and preventative measures in Sub-Saharan Africa, as well as measles and polio vaccination campaigns in dozens of countries. World populations, including Americans, will remain vulnerable to new outbreaks of infectious diseases as risk factors persist, such as rapid and unplanned urbanization, protracted conflict and humanitarian crises, human incursions into previously unsettled land, expansion of international travel and trade, and public mistrust of government and health care workers.

CLIMATE CHANGE AND ENVIRONMENTAL DEGRADATION

We assess that the effects of a changing climate and environmental degradation will create a mix of direct and indirect threats, including risks to the economy, heightened political volatility, human displacement, and new venues for geopolitical competition that will play out during the next decade and beyond. Scientists also warn that warming air, land, and sea temperatures create more frequent and variable extreme weather events, including heat waves, droughts, and floods that directly threaten the United States and US interests, although adaptation measures could help manage the impact of these threats. The degradation and depletion of soil, water, and biodiversity resources almost certainly will threaten infrastructure, health, water, food, and security, especially in many developing countries that lack the capacity to adapt quickly to change, and increase the potential for conflict over competition for scarce natural resources.

- 2020 tied for the hottest year on record, following a decade of rising temperatures from 2010 to 2019. Arctic Sea ice minimum coverage reached its second lowest level on record in 2020, highlighting the increasing accessibility of resources and sea lanes in a region where competition is ratcheting up among the United States, China, and Russia.
- In 2020, six Atlantic storms passed a “rapid intensification threshold” because of warming temperatures, representing more damaging storms that offer less time for populations—as well as US military installations on the Gulf Coast—to evacuate or prepare.
- The 2020 storm season hit Central America particularly hard. The region already was suffering from several years of alternating drought and storms, increasing the potential for large-scale migration from the region as pandemic-related restrictions on movement ease.
- Environmental degradation from pollution and poor land management practices will continue to threaten human health and risk social unrest. Air pollution was the fourth leading risk factor for premature death globally in 2019, resulting in approximately 7 million deaths, and has been found to increase the susceptibility to and severity of COVID-19 infections. Despite temporary improvements in air quality globally in 2020 resulting from COVID-19 lockdowns, by September 2020 air pollution had returned to pre-pandemic levels.
- The threat from climate change will intensify because global energy usage and related emissions continue to increase, putting the Paris Agreement goals at risk. Even in the midst of a global pandemic that shuttered countries and significantly reduced travel, global CO2 emissions only decreased by less

than 6-percent in 2020. By December 2020, they had rebounded to previous monthly levels as countries began to reopen, an indication of how strongly emissions are coupled to economic growth.

EMERGING TECHNOLOGY

Following decades of investments and efforts by multiple countries that have increased their technological capability, US leadership in emerging technologies is increasingly challenged, primarily by China. We anticipate that with a more level playing field, new technological developments will increasingly emerge from multiple countries and with less warning.

- New technologies, rapidly diffusing around the world, put increasingly sophisticated capabilities in the hands of small groups and individuals as well as enhancing the capabilities of nation states. **While democratization of technology can be beneficial, it can also be economically, militarily, and socially destabilizing.** For this reason, advances in technologies such as computing, biotechnology, artificial intelligence, and manufacturing warrant extra attention to anticipate the trajectories of emerging technologies and understand their implications for security.

China has a goal of achieving leadership in various emerging technology fields by 2030. China stands out as the primary strategic competitor to the U.S. because it has a well-resourced and comprehensive strategy to acquire and use technology to advance its national goals, including technology transfers and intelligence gathering through a Military-Civil Fusion Policy and a National Intelligence Law requiring all Chinese entities to share technology and information with military, intelligence and security services.

- Beijing is focused on technologies it sees as critical to its military and economic future, including broad enabling technologies such as biotechnology, advanced computing, and artificial intelligence, as well as niche technical needs such as secure communications.

Moscow also views the development of advanced S&T as a national security priority and seeks to preserve its technological sovereignty. Russia is increasingly looking to talent recruitment and international scientific collaborations to advance domestic R&D efforts but resource constraints have forced it to focus indigenous R&D efforts on a few key technologies, such as military applications of AI.

CYBER

Cyber threats from nation states and their surrogates will remain acute. Foreign states use cyber operations to steal information, influence populations, and damage industry, including physical and digital critical infrastructure. Although an increasing number of countries and nonstate actors have these capabilities, we remain most concerned about Russia, China, Iran, and North Korea. Many skilled foreign cybercriminals targeting the United States maintain mutually beneficial relationships with these and other countries that offer them safe haven or benefit from their activity.

States' increasing use of cyber operations as a tool of national power, including increasing use by militaries around the world, raises the prospect of more destructive and disruptive cyber activity. As states attempt more aggressive cyber operations, they are more likely to affect civilian populations and to embolden other states that seek similar outcomes.

Authoritarian and illiberal regimes around the world will increasingly exploit digital tools to surveil their citizens, control free expression, and censor and manipulate information to maintain control over their populations. Such regimes are increasingly conducting cyber intrusions that affect citizens beyond their borders—such as hacking journalists and religious minorities or attacking tools that allow free speech online—as part of their broader efforts to surveil and influence foreign populations.

Democracies will continue to debate how to protect privacy and civil liberties as they confront domestic security threats and contend with the perception that free speech may be constrained by major technology companies. Authoritarian and illiberal regimes, meanwhile, probably will point to democracies' embrace of these tools to justify their own repressive programs at home and malign influence abroad.

During the last decade, state sponsored hackers have compromised software and IT service supply chains, helping them conduct operations—espionage, sabotage, and potentially prepositioning for warfighting.

- A Russian software supply chain operation against a US-based IT firm exposed approximately 18,000 customers worldwide, including enterprise networks across US Federal, state, and local governments; critical infrastructure entities; and other private sector organizations. The actors proceeded with follow-on activities to compromise the systems of some customers, including some US Government agencies.

FOREIGN ILLICIT DRUGS AND ORGANIZED CRIME

We expect the threat from transnational organized crime networks supplying potent illicit drugs, which annually kill tens of thousands of Americans, to remain at a critical level. The pandemic has created some challenges for traffickers, mainly due to restrictions on movement, but they have proven highly adaptable, and lethal overdoses have increased.

- Mexican traffickers dominate the smuggling of cocaine, fentanyl, heroin, marijuana, and methamphetamine into the United States. They produce heroin, marijuana, and methamphetamine in Mexico, and they obtain cocaine from South American suppliers. They almost certainly will make progress producing high-quality fentanyl through this year, using chemical precursors from Asia.
- The total number of overdose deaths increased from 2018 to 2019, and opioids—particularly fentanyl—are involved in more than half those deaths, according to the Centers for Disease Control. As of July 2020, provisional data suggests that the total number of overdose deaths have continued to rise.
- Traffickers temporarily slowed drug smuggling because of stricter controls along the US southwest border associated with the pandemic but have since resumed operations.

Transnational criminal organizations will continue to employ cyber tools to steal from US and foreign businesses and use complex financial schemes to launder illicit proceeds, undermining confidence in financial institutions.

MIGRATION

The forces driving global migration and displacement—including economic disparities and the effects of extreme weather and conflict—almost certainly will encourage migration and refugee flows, but pandemic restrictions will remain a check on cross-border movements. Migration and displacement will heighten humanitarian needs, increase the risk of political upheaval, exacerbate other health crisis risks, and aid recruitment and radicalization by militant groups—particularly as COVID-19 strains global humanitarian response mechanisms and funding.

Many refugees and internally displaced persons are unlikely to return to their homes.

The number of people being displaced within their own national borders continues to increase, further straining governments' abilities to care for their domestic populations and mitigate public discontent.

Transnational organized criminal groups exploit migrants through extortion, kidnapping, and forced labor, and facilitate migration to divert attention from their other illicit activities.

In the Western Hemisphere, the combined effects of the pandemic and hurricanes, as well as perceived changes in US immigration policy and seasonal employment opportunities in the United States, are creating the economic and physical conditions for a resurgence in US-bound migration—especially if COVID-19 infection rates in the United States decline.

Last year, mobility restrictions tied to COVID-19 initially suppressed migration from Central America to the US southwest border, but the number of migrants started to rise again in mid-2020.

High crime rates and weak job markets remain primary push factors for US-bound migration from Central America because origin countries lack the capacity to address these challenges.

Migration from the Middle East and North Africa to Europe has continued to decline since its peak in 2015, and COVID-19 travel restrictions are likely to further suppress migrant flows this year, but renewed conflicts in the Middle East could trigger more migration, and previous waves fanned nationalist sentiments in many European countries. Countries are witnessing the rise of populist politicians and parties campaigning on loss of sovereignty and identity. Some European countries are trying to balance migration and COVID-19 concerns with the need for workers to supplement their aging workforces.

GLOBAL TERRORISM

We assess that ISIS and al-Qa'ida remain the greatest Sunni terrorist threats to US interests overseas; they also seek to conduct attacks inside the United States, although sustained US and allied CT pressure has broadly degraded their capability to do so. US-based lone actors and small cells with a broad range of ideological motivations pose a greater immediate domestic threat. We see this lone-actor threat manifested both within homegrown violent extremists (HVEs), who are inspired by al-Qa'ida and ISIS, and within domestic violent extremists (DVEs), who commit terrorist acts for ideological goals stemming from domestic influences, such as racial bias and antigovernment sentiment. DVEs also are inspired by like-minded individuals and groups abroad. Lebanese Hezbollah might conduct attacks against US and allied interests in response to rising tensions in the Middle East and as part of its effort to push the United States out of the region. The diffusion of the terrorist threat globally, competing priorities for many countries, and in some cases decreased Western CT assistance probably will expand opportunities for terrorists and provide them space to recover from recent setbacks.

ISIS

ISIS remains capable of waging a prolonged insurgency in Iraq and Syria and leading its global organization, despite compounding senior leadership losses. Although we have seen a decline in the number of ISIS-inspired attacks in the West since they peaked in 2017, such attacks remain a high priority for the group. ISIS-inspired attacks very likely will remain the primary ISIS threat to the US homeland this year, rather than plots operationally supported or directed by ISIS, given the logistical and security challenges the group would need to overcome to deploy and support attackers in the United States.

- ISIS will attempt to expand its insurgency in Iraq and Syria, where it has been attacking prominent local leaders, security elements, infrastructure, and reconstruction efforts.
- The appeal of ISIS's ideology almost certainly will endure, even if it appeals to a narrower audience. The group will continue to use its media to encourage global supporters to conduct attacks without direction from ISIS leadership, but ISIS's degraded media capabilities probably will hamper its ability to inspire its previous high pace of attacks and attract recruits and new supporters.

Al-Qa'ida

Al-Qa'ida's senior leadership cadre has suffered severe losses in the past few years, but remaining leaders will encourage cooperation among regional elements, continue calls for attacks against the United States and other international targets, and seek to advance plotting around the world. Al Qa'ida's regional affiliates will exploit local conflicts and ungoverned spaces to threaten US and Western interests, as well as local governments and populations abroad.

- Al-Qa'ida's affiliates in the Sahel and Somalia have made gains during the past two years, but the group experienced setbacks elsewhere, including losing key leaders or managing only limited operations in North Africa, South Asia, Syria, and Yemen.

Hizballah

We expect Hizballah, in coordination with Iran and other Iran-aligned Shia militants, to continue developing terrorist capabilities as a deterrent, as retaliatory options, and as instruments of coercion against its adversaries.

Hizballah's focus on reducing US influence in Lebanon and the Middle East has intensified following the killing of IRGC-QF Commander Qasem Soleimani. Hizballah maintains the capability to target, both directly and indirectly, US interests inside Lebanon, in the region, overseas, and—to a lesser extent—in the United States.

Racially or Ethnically Motivated Violent Extremists

DVEs motivated by a range of ideologies that are not connected to or inspired by jihadi terrorist organizations like al-Qa'ida and ISIS pose an elevated threat to the United States. This diverse set of extremists reflects an increasingly complex threat landscape, including racially or ethnically motivated threats and antigovernment or antiauthority threats.

Of these, violent extremists who espouse an often overlapping mix of white supremacist, neo-Nazi, and exclusionary cultural-nationalist beliefs have the most persistent transnational connections via often loose online communities to like-minded individuals and groups in the West. The threat from this diffuse movement has ebbed and flowed for decades but has increased since 2015.

- Violent extremists who promote the superiority of the white race have been responsible for at least 26 lethal attacks that killed more than 141 people and for dozens of disrupted plots in the West since 2015. While these extremists often see themselves as part of a broader global movement, most attacks have been carried out by individuals or small, independent cells.
- Australia, Germany, Norway, and the United Kingdom consider white racially or ethnically motivated violent extremists, including Neo-Nazi groups, to be the fastest growing terrorist threat they face.
- Both these and other DVEs, such as antigovernment or antiauthority extremists, are motivated and inspired by a mix of ideological, sociopolitical, and personal grievances against their targets, which have increasingly included large public gatherings, houses of worship, law enforcement and government facilities, and retail locations. Lone actors, who by definition are not likely to conspire with others regarding their plans, are increasingly choosing soft, familiar targets for their attacks, limiting law enforcement opportunities for detection and disruption.

CBRN

Terrorists remain interested in using chemical and biological agents in attacks against US interests and possibly the US homeland.

CONFLICTS AND INSTABILITY

Internal and interstate conflict and instability will continue to pose direct and indirect threats to US persons and interests during the next year. Competition for power and resources, ethnic strife, and ideology will drive insurgency and civil war in many countries. Interstate conflicts will also flare, ranging from border sparring, such as that between China and India, to potentially more sustained violent confrontations.

AFGHANISTAN

We assess that prospects for a peace deal will remain low during the next year. The Taliban is likely to make gains on the battlefield, and the Afghan Government will struggle to hold the Taliban at bay if the coalition withdraws support.

- Kabul continues to face setbacks on the battlefield, and the Taliban is confident it can achieve military victory.
- Afghan forces continue to secure major cities and other government strongholds, but they remain tied down in defensive missions and have struggled to hold recaptured territory or reestablish a presence in areas abandoned in 2020.

INDIA-PAKISTAN

Although a general war between India and Pakistan is unlikely, crises between the two are likely to become more intense, risking an escalatory cycle. Under the leadership of Prime Minister Narendra Modi, India is more likely than in the past to respond with military force to perceived or real Pakistani provocations, and heightened tensions raise the risk of conflict between the two nuclear-armed neighbors, with violent unrest in Kashmir or a militant attack in India being potential flashpoints.

MIDDLE EAST

The Middle East will remain a region characterized by pervasive conflicts, with active insurgencies in several countries, sparring between Iran and other countries, and persistent terrorism and protest movements sparking occasional violence. Domestic volatility will persist as popular discontent and socioeconomic grievances continue to rise, particularly as the region contends with the economic fallout from the COVID-19 pandemic and its leaders struggle to meet public expectations for political and economic reform. As a result, some states are likely to experience destabilizing conditions that may push them close to collapse. Conflicts that have simmered may flare, particularly if Russia, Turkey, and other countries intervene, increasing the risk of escalations and miscalculations.

Iraq

The Iraqi Government almost certainly will continue to struggle to fight ISIS and control Iranian-backed Shia militias. Baghdad relies on US and other external support to target ISIS leaders and cells; the group nonetheless has shown resilience as an insurgency. Iranian-backed Shia militias are likely to continue attacks against US targets, such as the February rocket attack on Irbil International Airport, to press US forces to leave if the Iraqi Government does not reach an agreement with Washington on a timetable for

withdrawal. US personnel would also face danger if popular protests against government corruption and a declining economy took a more violent turn or if Baghdad became embroiled in a broader regional conflict.

Libya

The interim Government of National Unity will face enduring political, economic, and security challenges that have prevented previous governments from advancing reconciliation. Instability and the risk of renewed fighting in Libya's civil war will persist this year—despite limited political, economic, and security progress—and might spill over into broader conflict, as Libyan rivals struggle to resolve their differences and foreign actors exert influence. Egypt, Russia, the UAE, and Turkey are likely to continue financial and military support to their respective proxies. A potential flashpoint will be whether Russia and Turkey abide by the cease-fire, brokered by the UN in October 2020, which calls for the departure of foreign forces.

Syria

Conflict, economic decline, and humanitarian crises will plague Syria during the next few years, and threats to US forces will increase. President Bashar al-Asad is firmly in control of the core of Syria, but he will struggle to reestablish control over the entire country against residual insurgency, including reinforced Turkish forces, Islamic extremists, and opposition in Idlib Province. Asad will stall meaningful negotiations and rely on the support of Russia and Iran. The Kurds will face increasing Syrian regime, Russian, and Turkish pressure, especially as Kurdish economic and humanitarian conditions decline and if the United States withdraws forces. US forces in eastern Syria will face threats from Iranian and Syrian-regime-aligned groups, mostly through deniable attacks. Terrorists will try to launch attacks on the West from their safe havens in the country, and increased fighting or an economic collapse might spur another wave of migration.

ASIA

The Burmese military's February seizure of power, detention of State Counselor Aung San Suu Kyi, and declaration of a one-year state of emergency marked a break in that country's democratic transition and ushered in new societal instability and widespread popular protests amidst COVID-19-related economic strains.

LATIN AMERICA

The Western Hemisphere almost certainly will see hotspots of volatility in the coming year, to include contested elections and violent popular protests. Latin America will hold several presidential and legislative elections this year, some of which—such as Honduras and Nicaragua—are occurring amidst heavily polarized environments in which allegations of fraud probably will arise.

- Public frustration is mounting over deep economic recessions following the COVID-19 pandemic, which is also compounding public concerns about crime and widespread official corruption. Colombia, Guatemala, and Peru have witnessed protests during the pandemic.
- Already-high rates of crime and narcotics trafficking probably will increase as poverty worsens and resources for police and judiciaries shrink, potentially fueling migration attempts to the United States.

- The political and economic crisis in Venezuela will continue, sustaining the outflow of Venezuelans into the rest of the region and adding strain to governments contending with some of the highest COVID-19 infection and death rates in the world.

AFRICA

East Africa will struggle with ethnic conflict in Ethiopia, power struggles within the transitional government in Sudan, and continued instability in Somalia, while a volatile mixture of intercommunal violence and terrorism will threaten West Africa's stability. Conflicts, undergoverned spaces, the marginalization of some communities, and persistent communications connectivity are likely to fuel terrorism during the next year, particularly in the Sahel and parts of eastern and southern Africa. Throughout Sub-Saharan Africa, a string of contentious elections will elevate the risk of political instability and violence.