

A stylized world map is centered in the background, overlaid with concentric green circles and lines, resembling a radar or sonar display. The map is rendered in a light green color against a dark blue background with a grid of small green dots.

ANNUAL THREAT ASSESSMENT

OF THE U.S. INTELLIGENCE COMMUNITY

Office of the Director of National Intelligence

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With Information as of January 2022

ANNUAL THREAT ASSESSMENT OF THE U.S. INTELLIGENCE COMMUNITY

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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 21 January was used in the preparation of this assessment.

CONTENTS

INTRODUCTION	2
FOREWORD	4
CHINA	6
RUSSIA	10
IRAN	14
NORTH KOREA	16
HEALTH SECURITY	18
Infectious Diseases and the Impact of the COVID-19 Pandemic	18
Biological Weapons.....	19
Anomalous Health Incidents.....	20
CLIMATE CHANGE AND ENVIRONMENTAL DEGRADATION	21
ADDITIONAL TRANSNATIONAL ISSUES	22
Preface.....	22
Innovative Use of New Technology	22
Transnational Organized Crime	23
Foreign Illicit Drugs	23
Money Laundering and Financial Crimes.....	24
Cyber Crime.....	24
Migration.....	24
Global Terrorism.....	25
CONFLICTS AND INSTABILITY	28
South Asia	28
Other Regions	29

FOREWORD

In the coming year, the United States and its allies will face an increasingly complex and interconnected global security environment marked by the growing specter of great power competition and conflict, while collective, transnational threats to all nations and actors compete for our attention and finite resources. These challenges will play out amidst the continued global disruption resulting from the COVID-19 pandemic, contention over global efforts to deal with a changing climate, increasingly powerful non-state actors, and rapidly evolving technology, all within the context of an evolving world order where the continued diffusion of power is leading actors to reassess their place and capabilities in an increasingly multipolar world. These challenges will intersect and interact in unpredictable ways, leading to mutually reinforcing effects that could challenge our ability to respond, but also introducing new opportunities to forge collective action with allies and partners against both the renewed threat of nation-state aggression and emerging threats to human security. The 2022 Annual Threat Assessment highlights some of those connections as it provides the Intelligence Community's (IC's) baseline assessments of the most pressing threats to U.S. 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 U.S. adversaries' vulnerabilities. It accounts for functional concerns, such as weapons of mass destruction and cyber, primarily in the sections on threat actors, such as China and Russia.

Competition and potential conflict between nation-states remains a critical national security threat. 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. 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 and potentially threatening its neighbors. Russia is pushing back against Washington where it can—locally and globally—employing techniques up to and including the use of force. In Ukraine, we can see the results of Russia's increased willingness to use military threats and force to impose its will on neighbors. Iran will remain a regional menace with broader malign influence activities, and North Korea will expand its WMD capabilities while being 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 U.S. and allied forces, weakening our conventional deterrence, and worsening the longstanding threat from weapons of mass destruction. As states such as China and Russia increasingly see space as a warfighting domain, multilateral space security discussions have taken on greater importance as a way to reduce the risk of a confrontation that would affect every state's ability to safely operate in space.

The lingering 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. Low-income countries with high debts face particularly challenging recoveries and the potential for cascading crises leading to regional instability, whereas others will turn inward or be distracted by other challenges. The IC continues to investigate the concerning incidences of Anomalous Health Incidents and the danger they pose to U.S. personnel.

Ecological degradation and a changing climate will continue to fuel disease outbreaks, threaten food and water security, and exacerbate political instability and humanitarian crises. Great power competition and disputes between wealthy and low-income nations will threaten progress on the collective action that will be needed to meet global goals for reduction of greenhouse gas emissions.

Other transnational challenges will pose an array of direct and indirect threats to the United States. They will interact in complex and cascading ways with each other and with threats posed by great power competition, increasingly empowered non-state actors, the pandemic, and climate change. Emerging and disruptive technologies, as well as the proliferation and permeation of technology into all aspects of our lives, pose unique challenges. The scourge of transnational organized crime, illicit drugs, violent extremism, and endemic corruption in many countries will continue to take their toll on American lives, prosperity, and safety. Both state and non-state cyber actors threaten our infrastructure and provide avenues for foreign malign influence threats against our democracy. We will see continuing potential for surges in migration from Afghanistan, Latin America, and other poor countries, which are reeling from conflict and the economic fallout of the COVID-19 pandemic. Economic and political conditions in Latin America continue to spark waves of migration that destabilize our Southern neighbors and put pressure on our Southern border. Finally, ISIS, al-Qa'ida, and Iran and its militant allies will take advantage of weak governance to continue to plot terrorist attacks against U.S. persons and interests, including to varying degrees in the United States, and exacerbate instability in regions such as Africa and the Middle East.

Regional instability and conflicts continue to threaten U.S. persons and interests. Some have direct implications for U.S. security. For example, the Taliban takeover of Afghanistan threatens U.S. interests, including the possibility of terrorist safe havens re-emerging and a humanitarian disaster. The continued fighting in Syria has a direct bearing on U.S. forces, whereas tensions between nuclear-armed India and Pakistan remain a global concern. The iterative violence between Israel and Iran, and conflicts in other areas—including Africa, Asia, and the Middle East—have the potential to escalate or spread, fueling humanitarian crises and threatening U.S. persons, as in the case of Al-Shabaab, which is leveraging continued instability in East Africa and the lack of security capacity of regional states to threaten U.S. interests and American lives.

The 2022 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 U.S. 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 impactful near-term risks in the context of the longer-term, overarching threat environment.

CHINA

REGIONAL AND GLOBAL OBJECTIVES AND ACTIVITIES

The Chinese Communist Party (CCP) will continue efforts to achieve President's Xi Jinping's vision of making China the preeminent power in East Asia and a major power on the world stage. The CCP will work to press Taiwan on unification, undercut U.S. influence, drive wedges between Washington and its partners, and foster some norms that favor its authoritarian system. China's leaders probably will, however, seek opportunities to reduce tensions with Washington when it suits their interests. China will maintain its statist economic policies because China's leaders see state direction as necessary to reduce dependence on foreign technologies, enable military modernization, and sustain growth—ensuring CCP rule and the realization of its vision for national rejuvenation.

- Beijing sees increasingly competitive U.S.–China relations as part of an epochal geopolitical shift and views Washington's diplomatic, economic, and military measures against Beijing as part of a broader U.S. effort to prevent China's rise and undermine CCP rule.
- The CCP is increasing its criticism of perceived U.S. failures and hypocrisy, including the U.S. withdrawal from Afghanistan and racial tensions in the United States.
- Beijing is increasingly combining growing military power with its economic, technological, and diplomatic clout to strengthen CCP rule, secure what it views as its sovereign territory and regional preeminence, and pursue global influence.
- However, China faces myriad—and in some cases growing—domestic and international challenges that probably will hinder CCP leaders' ambitions. These include an aging population, high levels of corporate debt, economic inequality, and growing resistance to China's heavy-handed tactics in Taiwan and other countries.

China uses coordinated, whole-of-government tools to demonstrate strength and compel neighbors to acquiesce to Beijing's preferences, including its territorial and maritime claims and assertions of sovereignty over Taiwan.

- Beijing will press Taiwan to move toward unification and will react to what it views as increased U.S.–Taiwan engagement. We expect that friction will grow as China continues to increase military activity around the island, and Taiwan's leaders resist Beijing's pressure for progress toward unification. China's control over Taiwan probably would disrupt global supply chains for semiconductor chips because Taiwan dominates production.
- In the South China Sea, Beijing will continue to use growing numbers of air, naval, and maritime law enforcement platforms to intimidate rival claimants and signal that China has effective control over contested areas. China is similarly pressuring Japan over contested areas in the East China Sea.

Beijing will continue to promote the Belt and Road Initiative (BRI) to expand China's economic, political, and military presence abroad. Beijing will adjust its approach to BRI in response to publicity and sustainability challenges, and diversify project selection in an attempt to improve the initiative's brand and minimize international criticism. China also will promote new international norms for technology and human rights,

emphasizing state sovereignty and political stability over individual rights. It will continue to erode the vestiges of freedom in Hong Kong.

China will remain the top threat to U.S. technological competitiveness as Beijing targets key sectors and proprietary commercial and military technology from U.S. and allied companies and institutions. Beijing uses a variety of tools, from public investment to espionage to advance its technological capabilities. Beijing's willingness to use espionage, subsidies, and trade policy to give its firms a competitive advantage represents not just an ongoing challenge for the U.S. economy and its workers, but also advances Beijing's ability to assume leadership of the world's technological advancement and standards.

China will continue deepening diplomatic, defense, and technology cooperation with Russia to challenge the United States.

MILITARY CAPABILITIES

China will continue pursuing its goal of building a world-class military that will enable it to secure what it views as its sovereign territory, establish its preeminence in regional affairs, and project power globally while offsetting perceived U.S. military superiority.

- Beijing is accelerating the development of key capabilities it believes the People's Liberation Army's (PLA) needs to confront the United States in a large-scale, sustained conflict.

The PLA Navy and Air Force are the largest in the region and continue to field advanced platforms that improve China's ability to establish air superiority and project power. The PLA Rocket Force's (PLARF) short-, medium-, and intermediate-range conventional systems can hold U.S. forces and bases in the region at risk. In 2020, the PLARF fielded its first operational hypersonic weapons system, the DF-17 hypersonic glide vehicle-capable medium-range ballistic missile (MRBM), which could challenge U.S. missile defense systems.

We expect the PLA to continue to pursue the establishment of overseas military installations and access agreements to enhance its ability to project power and protect China's interests abroad.

WMD

Beijing will continue the largest ever nuclear force expansion and arsenal diversification in its history. Beijing is not interested in agreements that restrict its plans and will not agree to negotiations that lock in U.S. or Russian advantages. China is building a larger and increasingly capable nuclear missile and bomber 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 strike capability in any scenario.

- China is building hundreds of new intercontinental ballistic missile (ICBM) silos.
- As of 2020, the People's Liberation Army Air Force (PLAAF) had operationally fielded the nuclear-capable H-6N bomber, providing a platform for the air component of the PRC's nascent nuclear triad.
- China conducted a hypersonic glide vehicle (HGV) flight test that flew completely around the world and impacted inside China.

SPACE

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

- China's space station began assembly and crewed missions in 2021, with full operational capability expected between 2022 and 2024. China also 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—and satellite communications into its weapons and command-and-control systems to erode the U.S. 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 U.S. and allied satellites. The PLA is fielding new destructive and nondestructive ground- and space-based antisatellite (ASAT) weapons.

CYBER

We assess that China presents the broadest, most active, and persistent cyber espionage threat to U.S. Government and private sector networks. China's cyber pursuits and export of related technologies increase the threats of attacks against the U.S. homeland, suppression of U.S. web content that Beijing views as threatening to its control, and the expansion of technology-driven authoritarianism globally.

- China almost certainly is capable of launching cyber attacks that would disrupt critical infrastructure services within the United States, including against oil and gas pipelines and rail systems.

China leads the world in applying surveillance and censorship to monitor its population and repress dissent, particularly among minorities. Beijing conducts cyber intrusions that affect U.S. and non-U.S. citizens beyond its borders—such as hacking journalists—to counter perceived threats to the CCP and tailor influence efforts.

- 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.

MALIGN INFLUENCE

China will continue expanding its global intelligence and covert influence posture to better support the CCP's political, economic, and security goals, increasingly challenging U.S. influence. China is attempting to exploit doubts about U.S. leadership, undermine democracy, and extend Beijing's influence, especially in East Asia and the western Pacific, which Beijing views as its traditional sphere of influence.

- China will continue spreading COVID-19 misinformation and downplaying its early failures while casting blame on the West. Its misinformation includes claims that the United States created COVID-19.

- Beijing probably is reviewing publicly disclosed Russian influence operations and gaining experience from operations that use social media and other technologies against societies in Asia and elsewhere.
- Beijing is intensifying efforts to mold U.S. public discourse, pressure perceived political opponents, and muffle criticism on such issues as religious freedom, suppression of democracy in Hong Kong, and oppression of the Uyghurs as well as other minorities.

RUSSIA

REGIONAL AND GLOBAL OBJECTIVES AND ACTIVITIES

We expect that Moscow will remain an influential power and a formidable challenge to the United States amidst the changing geopolitical landscape during the next decade. It will continue to pursue its interests in competitive and sometimes confrontational and provocative ways, including pressing to dominate Ukraine and other countries in its “near-abroad,” while exploring possibilities to achieve a more stable relationship with Washington.

- We assess that Russia does not want a direct conflict with U.S. forces. Russia seeks an accommodation with the United States on mutual noninterference in both countries’ domestic affairs and U.S. recognition of Russia’s claimed sphere of influence over much of the former Soviet Union.
- Russia’s officials have long believed that the United States is trying to undermine Russia, weaken President Vladimir Putin, and install Western-friendly regimes in the former Soviet states and elsewhere, which they conclude gives Russia leeway to retaliate.

Russia continues to prepare for a military attack against Ukraine, with well over 100,000 troops massed near the Ukraine border, including Russian military forces in Belarus, occupied-Crimea, and the separatist forces in Eastern Ukraine. Moscow is sending more forces. In mid-December 2021, Russia issued a statement demanding that NATO provide formal security guarantees, including putting an end to the possibility that Ukraine might join the Alliance.

We assess that Moscow will continue to employ an array of tools to advance its own interests or undermine the interests of the United States and its allies. These will be primarily military, security, and intelligence tools, with economic cooperation playing a smaller role. We expect Moscow to insert itself into crises when Russia’s interests are at stake, the anticipated costs of action are low, or it sees an opportunity to capitalize on a power vacuum.

Russia probably will continue to expand its global military, intelligence, security, commercial, and energy footprint and build partnerships aimed at undermining U.S. influence and boosting its own.

- In the Middle East and North Africa, Moscow is using its involvement in Syria, Libya, and Sudan to increase its clout, undercut U.S. 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 republics, Moscow is well positioned to increase its role in the Caucasus and, if it deems necessary, intervene in Belarus and Central Asia to halt instability after widespread anti-government protests, as it did in Belarus after the fraudulent 2020 election and early this year in Kazakhstan.
- We expect Russia to continue to use energy as a foreign policy tool to coerce cooperation and force states to the negotiating table, as it recently did in 2021, when Russia stopped coal and electricity

exports to Ukraine. Russia also uses its capabilities in COVID-19 vaccine development and civilian nuclear reactor construction as a soft-power tool in its foreign policy.

Russia uses corruption as an effective foreign policy tool to further its geopolitical goals and buy influence in other countries; however, it also serves as a long-term domestic vulnerability as well as a drag on Russia's economic performance and ability to attract investment.

- Russia has used corruption to help develop networks of patronage in countries, including Hungary, Bulgaria, Slovakia, and Ukraine, to influence decisionmaking, and help carry out Russia's foreign policy objectives.
- Russians regularly identify corruption as one of the country's biggest problems, which has been a recurrent cause of public protests and a key theme of imprisoned Russian opposition figure Aleksey Navalnyy's campaign against the Kremlin.
- We assess that Russia would need to reduce corruption and state control of the economy, and improve the rule of law in Russia to attract investment and expand growth beyond 1-3 percent per year.

MILITARY CAPABILITIES

We expect Moscow to sustain military modernization and enhance its armed forces, enabling it to defend Russia's national security while projecting influence globally and challenging the interests of the United States and its allies.

Despite slow growth in defense spending, Russia will emphasize the development and acquisition of 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 conflicts 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.
- Vagner group and other private security companies managed by Russian oligarchs close to the Kremlin extend Moscow's military reach at low cost in areas ranging from Syria to the Central African Republic and Mali, allowing Russia to disavow its involvement and distance itself from battlefield casualties.

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 material protection, control, and accounting at Russia's nuclear sites since the 1990s.

- Moscow views its nuclear capabilities as necessary for maintaining deterrence and achieving 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.
- Moscow continues to develop long-range nuclear-capable missile and underwater delivery systems meant to penetrate or bypass U.S. missile defenses.

- Russia is expanding and modernizing its 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 U.S. 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. We assess that Russia views cyber disruptions as a foreign policy lever to shape other countries' decisions, as well as a deterrence and military tool.

- Russia is particularly focused on improving its ability to target critical infrastructure, including underwater cables and industrial control systems, in the United States as well as in allied and partner countries, because compromising such infrastructure improves and demonstrates its ability to damage infrastructure during a crisis.
- Russia is also using cyber operations to attack entities it sees as working to undermine its interests or threaten the stability of the Russian Government. Russia attempts to hack journalists and organizations worldwide that investigate Russian Government activity and in several instances, has leaked their information.

MALIGN INFLUENCE

Russia presents one of the most serious foreign influence threats to the United States, using its intelligence services, proxies, and wide-ranging influence tools to try to divide Western alliances, and increase its sway around the world, while attempting to undermine U.S. global standing, amplify discord inside the United States, and influence U.S. voters and decisionmaking. We assess that Moscow probably will build on these approaches to try to undermine the United States as opportunities arise—Russia and its influence actors are adept at capitalizing on current events in the United States to push Moscow-friendly positions to Western audiences.

- Moscow almost certainly views U.S. elections as opportunities for malign influence as part of its larger foreign policy strategy. Moscow has conducted influence operations against U.S. elections for decades, including as recently as the 2020 presidential election. We assess that it probably will try to strengthen ties to U.S. persons in the media and politics in hopes of developing vectors for future influence operations. Moscow almost certainly will continue these online influence operations in the United States and in countries such as Belarus, Ukraine, and other countries of key Russian interest. Moscow will also continue and seek out new methods of circumventing technology companies' anti-disinformation activities to further expand its narratives globally.

SPACE

Russia will remain a key space competitor, maintaining a large network of reconnaissance, communications, and navigation satellites. Moscow will focus on integrating space services—such as communications; positioning, navigation, and timing; geolocation; and intelligence, surveillance, and reconnaissance—into its weapons and command-and-control systems, allowing Moscow to more quickly identify, track, and target U.S. satellites during a conflict.

In recent years, Russia has focused its efforts on developing its civil and commercial space capabilities. Moscow is capable of employing its civil and commercial remote sensing satellites to supplement military-dedicated capabilities that reduce U.S. ability to perform sensitive military activities undetected. In addition to improving its launch capability, it is working to support human spaceflight for future deep space missions.

Russia continues to train its military space elements and field new antisatellite weapons to disrupt and degrade U.S. 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 U.S. and allied satellites.

- Russia is investing in electronic warfare and directed energy weapons to counter western on-orbit assets. These systems work by disrupting or disabling adversary C4ISR capabilities and by disrupting GPS, tactical and satellite communications, and radars.
- Russia continues to develop ground-based direct ascent ASAT weapons capable of destroying space targets in low Earth orbit.

IRAN

REGIONAL AND GLOBAL OBJECTIVES AND ACTIVITIES

Iran will continue to threaten U.S. interests as it tries to erode U.S. influence in the Middle East, entrench its influence and project power in neighboring states, and minimize threats to regime stability. Tehran will try to leverage its expanding nuclear program, proxy and partner forces, diplomacy, and military sales and acquisitions to advance its goals. The Iranian regime sees itself as locked in an existential struggle with the United States and its regional allies, while it pursues its longstanding ambitions for regional leadership.

The election of President Ebrahim Raisi in 2021 has invigorated Supreme Leader Ali Khamenei to try to make progress toward his long-term vision of molding Iran into a pan-Islamic power capable of defending global Muslim causes while tightening its theocratic rule at home.

- The regime is reluctant to directly engage diplomatically with the United States on a renewal of the Joint Comprehensive Plan of Action (JCPOA), even though it still aspires to secure sanctions relief. Iran's hardline officials deeply distrust Washington and do not believe the United States can deliver or sustain any benefits a renewed JCPOA might offer.

We assess that Iran will threaten U.S. persons directly and via proxy attacks, particularly in the Middle East. Iran also remains committed to developing networks inside the United States—an objective it has pursued for more than a decade. Iranian-supported proxies will launch attacks against U.S. forces and persons in Iraq and Syria, and perhaps on other countries and regions. Iran has threatened to retaliate against former and current U.S. officials for the killing of Islamic Revolutionary Guard Corps-Qods Force (IRGC-QF) Commander Qasem Soleimani in January 2020, and has previously attempted to conduct lethal operations in the United States.

- *Iran remains a threat to Israel, both directly through its missile forces and indirectly through its support of Lebanese Hezbollah and other terrorist groups.*
- *Iran will remain a problematic actor across the region with its backing of Iraqi Shia militias, which is the primary threat to U.S. personnel in Iraq. Iran's economically and militarily propping up of a rogue Syrian regime, and spreading instability across Yemen through its support to the Huthis—including a range of advanced military systems—also pose a threat to U.S. partners and interests, including Saudi Arabia.*

MILITARY CAPABILITIES

Iran's hybrid approach to warfare—using both conventional and unconventional capabilities—will pose a threat to U.S. interests in the region for the foreseeable future. The IRGC-QF and its proxies will remain central to Iran's military power.

- 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 and maintain strategic depth.

Iran's ballistic missile programs, which include the largest inventory of ballistic missiles in the region, continue to pose a threat to countries across the Middle East. Iran's work on a space launch vehicle (SLV)—including its Simorgh—shortens the timeline to an ICBM because SLVs and ICBMs use similar technologies, if it decided to develop one.

NUCLEAR ISSUES

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. In July 2019, following the U.S. withdrawal from the JCPOA in May 2018, Iran began resuming some activities that exceed JCPOA limits. If Tehran does not receive sanctions relief, Iranian officials probably will consider further enriching uranium up to 90 percent.

- Iran has consistently cast its resumption of nuclear activities as a reversible response to the U.S. withdrawal from the JCPOA and messaged that it would return to full compliance if the United States lifted sanctions and also fulfilled its JCPOA commitments.
- Iran continues to increase the size and enrichment level of its uranium stockpile beyond JCPOA limits. Iran continues to ignore restrictions on advanced centrifuge research and development and continues uranium enrichment operations at the deeply buried Fordow facility. Iran has been enriching uranium hexafluoride (UF₆) up to 60 percent U-235 since April 2021, and continues to accumulate UF₆ enriched up to 20 percent. The IAEA has verified that Iran is conducting uranium metal research and development, including producing laboratory-scale quantities of uranium metal enriched up to 20 percent U-235.

CYBER AND MALIGN INFLUENCE

Iran's growing expertise and willingness to conduct aggressive cyber operations make it a major threat to the security of U.S. and allied networks and data. Iran's opportunistic approach to cyber attacks makes critical infrastructure owners in the United States susceptible to being targeted by Tehran, especially when Tehran believes it must demonstrate that it can push back against the United States in other domains. Recent attacks on Israeli and U.S. targets show that Iran is more willing than before to target countries with stronger capabilities.

- Iran was responsible for multiple cyber attacks between April and July 2020 against Israeli water facilities. Iran's successful disruption of critical infrastructure in Israel—also a superior cyber power compared with Iran—reflects its growing willingness to take risks when it believes retaliation is justified.

NORTH KOREA

REGIONAL AND GLOBAL OBJECTIVES AND ACTIVITIES

North Korean leader Kim Jong Un will continue efforts to steadily expand and enhance Pyongyang's nuclear and conventional capabilities targeting the United States and its allies, periodically using aggressive and potentially destabilizing actions to reshape the regional security environment in his favor. These actions will include developing and demonstrating capabilities up to and possibly including the resumption of nuclear weapons and ICBM testing.

- We assess that Kim views nuclear weapons and ICBMs as the ultimate guarantor of his totalitarian and autocratic rule of North Korea and believes that over time he will gain international acceptance as a nuclear power. He probably does not view the current level of pressure on his regime, the economic hardships resulting from sanctions and his domestic COVID-19 countermeasures as enough to require a fundamental change in approach.
- Kim also aims to achieve prestige as a nuclear power as well as strategic dominance over South Korea. Kim probably will continue to try to undermine the U.S.–South Korea alliance by vacillating between periods of escalatory behavior and symbolic gestures toward the South to exploit differences between Washington's and Seoul's approach to solving the Korea problem.
- We assess that North Korea continues to engage in illicit activities, including cyber theft and the export of UN-proscribed commodities to fund regime priorities, including Kim's WMD program.

MILITARY CAPABILITIES

North Korea will pose a serious threat to the United States and its allies by continuing to invest in niche capabilities that will provide Kim with a range of options to deter outside intervention, offset enduring deficiencies in the country's conventional forces, and coercively advance his political objectives.

- In early 2021, in a public report to the Eighth Party Congress, Kim identified priorities for developing new weapon systems, such as a nuclear-powered submarine, hypersonic glide vehicles, long-range solid-propellant missiles, and multiple independently targetable reentry vehicles (MIRV). Although some of these capabilities are longer-term projects, we assess that they represent Kim's commitment to expanding and diversifying his arsenal over time.

Kim is continuing to prioritize efforts to build an increasingly capable missile force designed to evade U.S. and regional missile defenses. Kim probably will continue to order missile tests—including of short-range ballistic missiles (SRBMs), cruise missiles, submarine-launched ballistic missiles (SLBMs), and HGVs—to validate technical objectives, reinforce deterrence, and normalize Pyongyang's missile testing.

- In September 2021, North Korea claimed for the first time to have tested an HGV that probably would be capable of reaching regional targets. North Korea followed with two more claimed hypersonic missile flight tests in January 2022, demonstrating its commitment to continued development of hypersonic weapons.

WMD

Kim remains strongly committed to expanding the country's nuclear weapons arsenal and continuing ballistic missile research and development. North Korea's continued development of ICBMs, IRBMs, and SLBMs demonstrates its intention to bolster its nuclear delivery capability.

- Fissile material production continues in North Korea, which maintains its plutonium program and probably is expanding its uranium enrichment program.

In January, North Korea began laying the groundwork for an increase in tensions that could include ICBM or possibly a nuclear test this year—actions that Pyongyang has not taken since 2017. Flight tests are part of North Korea's effort to expand the number and type of missile systems capable of delivering nuclear warheads to the entire United States.

- North Korea continues to seek a sea-based nuclear-strike capability. In October 2021, North Korea flight tested a new SLBM.

North Korea's chemical and biological weapons (CBW) capabilities remain a threat, and the IC is concerned that Pyongyang may use such weapons during a conflict or in an unconventional or clandestine attack.

CYBER

North Korea's cyber program poses a sophisticated and agile espionage, cybercrime, and attack threat. Pyongyang is well positioned to conduct surprise cyber attacks given its stealth and history of bold action.

- Pyongyang probably possesses the expertise to cause temporary, limited disruptions of some critical infrastructure networks and disrupt business networks in the United States.

Cyber actors linked to North Korea have conducted espionage efforts against a range of organizations, including media, academia, defense companies, and governments, in multiple countries.

HEALTH SECURITY

INFECTIOUS DISEASES AND THE IMPACT OF THE COVID-19 PANDEMIC

The COVID-19 pandemic has killed millions of people and disrupted life worldwide, with far-reaching effects extending well beyond global health to the economic, political, and societal spheres. Although the most severe health impacts of COVID-19 are lessening as global vaccination coverage increases and natural immunity builds, countries worldwide will continue to grapple with COVID-19 during the next year. The socioeconomic and political implications of the pandemic will ripple through the world for years.

The economic fallout from the pandemic is likely to continue to challenge governments and hold back human development and wellbeing, particularly in low-income countries. Societal discontent resulting from these conditions could worsen instability in some countries and fuel surges in international migration, as people grow more desperate in the face of interlocking pressures that include sustained economic downturns.

- The COVID-19 pandemic will continue to increase debt burdens, constrain government spending by poor countries, and cause persistent job insecurity, in turn undermining economic and political stability, particularly in low-income countries. 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.
- The economic fallout from COVID-19, combined with conflict and weather extremes, has driven hunger worldwide to its highest point in more than a decade, which increases the risk of instability. The number of people facing acute food insecurity doubled from 135 million in 2019 to more than 270 million in 2020, and is projected to continue rising.

COVID-19 is likely to continue to strain health systems and create conditions that could facilitate the spread of other infectious diseases globally, including to the U.S. homeland.

- The pandemic has significantly disrupted essential health services—for example, causing healthcare worker shortages, delays in non-emergency procedures, or avoidance of healthcare facilities because of fears of becoming infected with COVID-19—which are likely to worsen health outcomes and continue to hamper countries' abilities to control disease, particularly low and middle-income countries.
- Influenza and other seasonal respiratory diseases could surge to abnormally high levels in 2022 with the reduction of COVID-19 mitigation measures, which have dampened circulation of these diseases since early 2020, and in turn reduced the level of population immunity to these infections.

Countries globally remain vulnerable to the emergence of a novel pathogen that could cause a devastating new pandemic. Drivers for disease emergence persist and are on the rise, including deforestation and other human encroachment into unsettled land, wildlife harvesting and trade, livestock production, and climate change. These drivers are compounded by factors that facilitate global spread, such as international travel and trade, inadequate global disease surveillance and control, distrust of public health authorities, health disinformation, and health system strain brought on by the COVID-19 pandemic. Emerging agricultural

diseases—even those that do not harm humans directly—threaten to cause immense economic damage and disruption to food supplies if they spread globally or into new regions.

COVID-19 Origins Assessment

The IC continues to investigate how SARS-CoV-2, the virus that causes COVID-19, first infected humans. The IC assesses that the virus probably emerged and infected humans through an initial small-scale exposure that occurred no later than November 2019. All agencies assess that two hypotheses are plausible explanations for the origin of COVID-19: natural exposure to an infected animal and a laboratory-associated incident.

- Four IC elements and the National Intelligence Council assess with low confidence that the initial SARS-CoV-2 infection was most likely caused by natural exposure to an animal infected with it or a close progenitor virus—a virus that probably would be more than 99 percent similar to SARS-CoV-2. One IC element assesses with moderate confidence that the first human infection with SARS-CoV-2 most likely was the result of a laboratory-associated incident, probably involving experimentation, animal handling, or sampling by the Wuhan Institute of Virology. Analysts at three IC elements remain unable to coalesce around either explanation without additional information.
- Beijing continues to hinder the global investigation, resist sharing information, and blame other countries, including the United States.

BIOLOGICAL WEAPONS

Global shortcomings in preparedness for the pandemic and questions surrounding the origins of the COVID-19 virus and biosecurity may inspire some adversaries to consider options related to biological weapons developments.

- As China, Iran, and Russia continue to publicly tout individual or collaborative efforts to improve biosecurity, they have pushed narratives that further drive threat perceptions, including linking U.S. laboratories abroad to COVID-19 origins, breaches in biosafety, untrustworthy vaccines, and biological weapons. This messaging probably will be amplified in the lead up to the once-every-five-years Review Conference of the Biological and Toxin Weapons Convention, tentatively slated to convene in mid-2022.
- Rapid advances in dual-use technology, including bioinformatics, synthetic biology, and genomic editing, could enable development of novel biological weapons that complicate detection, attribution, and treatment.

ANOMALOUS HEALTH INCIDENTS

We continue to closely examine Anomalous Health Incidents (AHIs) and ensure appropriate care for those affected. IC agencies assess with varying levels of confidence that most reported health incidents can be explained by medical conditions, or environmental or technical factors and that it is unlikely that a foreign actor—including Russia—is conducting a sustained, worldwide campaign involving hundreds of incidents without detection. This finding does not change the fact that U.S. personnel are reporting real experiences, nor does it explain every report. The IC continues to actively investigate the AHI issue, focusing particularly on a subset of priority cases for which it has not ruled out any cause, including the possibility that one or more foreign actors were involved.

CLIMATE CHANGE AND ENVIRONMENTAL DEGRADATION

We assess that climate change will increasingly exacerbate risks to U.S. national security interests as the physical impacts increase and geopolitical tensions mount about how to respond to the challenge. Meanwhile, environmental degradation will increasingly intersect with and worsen climate change effects in many countries, particularly low-income countries.

- Geopolitical tensions are likely to grow as countries increasingly argue about how to accelerate the reductions in net greenhouse gas emissions necessary to meet the Paris Agreement goal of limiting global temperature rise to 1.5°C since pre-industrial times. The current trajectory of growing global greenhouse emissions, based on governments' current policies and pledges, would cause the global temperature rise to reach 1.5°C around 2030, and surpass 2°C by mid-century.
- Countries will debate who bears more responsibility to reduce emissions and who should pay—and countries will compete to control resources and dominate new technologies needed for the clean energy transition. Most countries will face difficult economic choices and probably will count on technological breakthroughs to rapidly reduce their net emissions later. China and India will play critical roles in determining the trajectory of temperature rise.
- The increasing physical effects of climate change are likely to exacerbate domestic and cross-border geopolitical flashpoints producing additional instability. The reduction in sea ice already is amplifying strategic competition in the Arctic over access to its natural resources and shipping routes. Elsewhere, as temperatures rise and more extreme effects manifest, there is a growing risk of conflict over water and migration, particularly after 2030, and an increasing chance that countries will unilaterally test and deploy large-scale solar geoengineering—creating a new area of disputes.
- Scientific forecasts indicate that intensifying physical effects of climate change out to 2040 and beyond will be most acutely felt in low-income countries, which we assess are also the least able to adapt to such changes. These physical effects will increase the potential for instability and possibly internal conflict in some countries, in some cases creating additional demands on U.S. diplomatic, economic, humanitarian, and military resources. Despite geographic and financial resource advantages, the United States and its partners face costly challenges that will become more difficult to manage without concerted effort to reduce emissions and cap warming.

Unsustainable land use, poor water governance, and pollution will intersect with and worsen the effects of climate change, primarily but not exclusively in low-income countries in the near term. The combination of environmental degradation, rising temperatures, changing precipitation patterns, and other climate effects is likely to lead to an array of human challenges such as food and water insecurity and threats to human health.

ADDITIONAL TRANSNATIONAL ISSUES

PREFACE

The pandemic and climate change highlight the challenges that a wide range of transnational issues pose to U.S. national security; we will now address several more priority issues. Some have a direct and immediate impact on U.S. interests, such as narcotics trafficking and terrorism. Others seem to be building for the future, or pose chronic, indirect challenges, such as corruption. These issues also vary in the scope of the threats they pose, having broad, global impact or causing local, even individual harm.

Transnational threats interact in a complex system along with more traditional threats such as great power competition, often reinforcing each other and creating compounding and cascading risks to U.S. national security. Underpinning many of the threats are weak or poor governance and geopolitical competition. During the past decade, an erosion of democracy around the world, strains in U.S. alliances, and challenges to accepted, international norms have made it more difficult to tackle transnational challenges such as climate change and the pandemic while creating greater opportunities for rogue governments and groups to operate with impunity. Increasing interconnections among countries—ranging from supply chains to social media—have also created new opportunities for transnational interference and conflict.

Corruption illustrates the complexity of the transnational issues, the relationships among them, and the range of their implications for U.S. interests. Corruption is a chronic challenge but thrives particularly in poorly governed countries. It can undermine weak governments and economies, contributing to political instability, organized crime, and disputes over migration—all of which in turn can fuel greater corruption. Corruption in international transactions can directly cost U.S. exporters billions of dollars in sales, give U.S. adversaries geopolitical openings, and prop up regimes that abuse human rights. However, corruption also can be a positive—undermining the capacity and credibility of authoritarian regimes.

Several transnational challenges stand out for the clear and direct threats they will pose to U.S. interests during the coming years. Among these are the rapid development of destabilizing technologies, including some that are transforming the battlefield, the threats posed by transnational organized crime and terrorism, and the challenge of international migration.

INNOVATIVE USE OF NEW TECHNOLOGY

Multiple trends are shaping the technology landscape of the next decades. The increasing convergence of seemingly unrelated fields and the rise of global competition to generate and lock in advantage are leading to a global diffusion of emerging technologies, shrinking timelines for development and maturation of technologies, and increasingly blurred lines between commercial and military endeavors, particularly in fields with broad impact across societies and economies, such as artificial intelligence (AI), biotechnologies, robotics and automation, and smart materials and manufacturing.

- Emerging technologies are rapidly improving a broad range of human experiences and capabilities, but at least in the short term, these same technologies are disrupting longstanding systems and societal dynamics, forcing individuals, communities, and governments to adjust and find new ways of living, working, and managing. As with any disruption, some will thrive whereas others will struggle, potentially facing increasing inequalities and imbalances.

Novel uses of both mature and new technologies are proliferating among a growing number of state and non-state actors, posing direct and growing threats to traditional pillars of U.S. military power, such as secure rear-area lines of communication and mobilization, air and space dominance, and power projection. The threats posed by new technologies will ultimately hinge on how they are operationalized by individual actors, each driven by unique goals, perceptions, strengths, and vulnerabilities.

- One of the most significant, ongoing trends in new military technology and weaponry is the growing combination of high speed, long range, greater maneuverability, and pinpoint accuracy. These advances are improving actors' ability to strike across continents as well as regionally or locally with UAVs, guided rockets, artillery shells, and mortars. Long-range precision strike inventories are likely to include increasing numbers of hypersonic and highly maneuverable systems that present a daunting challenge to those trying to develop countermeasures to detect, track, and intercept such fast-moving and maneuverable weapons. Many technologies previously available only to the advanced, industrial nations are trickling down to smaller and less expensive systems thereby becoming more available worldwide, as seen in recent battlefield use of UAVs by Azerbaijan and Ethiopia.
- Some technologies—such as hypersonic systems and nascent efforts to operationalize military AI—probably will remain within the purview of great powers and wealthier states, but relatively low cost and more widely available systems ranging from cyber tools to unmanned aerial and naval vehicles could be exploited by lesser powers and non-state actors to achieve high impact and even strategic-level effects.
- We are in the midst of a rapid expansion of state and non-state use of unmanned vehicles in both the air and sea domains, which could disrupt the status quo in part because air and naval defense often hinge on the assumption that the primary threat stems from a relatively small number of crewed platforms or ground-based missiles.

TRANSNATIONAL ORGANIZED CRIME

Global transnational criminal organizations (TCOs) pose a direct threat to the United States through human trafficking, the production and trafficking of lethal illicit drugs, cyber crime, and financial crimes and money laundering schemes eroding the integrity of the international financial system. Cyber criminals, in addition to phishing and other online fraud schemes, are also increasing their ransomware attacks. TCO activities also indirectly threaten U.S. national security by compounding and aggravating corruption, violence, and challenges to governance that undermine the rule of law in partner nations, spurring violence, driving atrocities, and contributing to migration.

- Human trafficking, including sex trafficking and forced labor, is not only a violation of human rights and freedoms but a threat to U.S. national security and economic development and is enabled by corrupt actors and networks that fuel the growth of transnational organized crime.

Foreign Illicit Drugs

Illicit drug trafficking by TCOs, particularly synthetic drugs, endangers the health and safety of millions of U.S. citizens and imposes as much as one trillion dollars in direct and indirect economic losses. The threat from illicit drugs is at historic levels, with more than 100,000 American drug-overdose deaths for the first time annually, driven mainly by a robust supply of synthetic opioids from Mexican TCOs.

- Mexican TCOs are the dominant producers and suppliers of illicit drugs for the U.S. market. They produce fentanyl, heroin, methamphetamine, and marijuana in Mexico, and obtain cocaine from South America to smuggle into the United States. Mexican TCOs probably will seek to continue expanding their capacity to produce finished fentanyl.
- Since 2019, Mexican TCOs have shifted from importing finished fentanyl from China to synthesizing fentanyl from precursor chemicals, primarily also from China, partly because of China's fentanyl class controls. Mexican TCOs are able to circumvent international controls on precursor chemicals by changing analogues and methodologies for synthesizing and producing synthetics.
- Turf battles among Mexican TCOs vying for drug routes and territory have resulted in steady, high homicide rates since 2018 that are four times the rate of homicides in the United States. In parts of Mexico, TCOs use billions of dollars of drug proceeds to intimidate politicians and influence elections, as well as recruit and arm fighters capable of directly confronting government security forces.

Money Laundering and Financial Crimes

TCOs exploit the U.S. financial, services, and manufacturing sectors by conducting complex money laundering and fraud schemes.

- TCOs generate hundreds of billions of dollars of revenue by trafficking illicit drugs and other goods and people; conducting extortion and racketeering that targets U.S. persons; producing and selling counterfeit and stolen goods in U.S. markets; and running financial fraud schemes.

Cyber Crime

Transnational cyber criminals are increasing the number, scale, and sophistication of ransomware attacks, fueling a virtual ecosystem that threatens to cause greater disruptions of critical services worldwide. These criminals are driven by the promise of large profits, reliable safe havens from which to operate, and a decreasing technical barrier to entry for new actors.

- Many major transnational cybercrime groups have diversified business models that engage in direct wire-transfer fraud from victims, or use other forms of extortion alongside or in place of ransomware. In 2020, business-e-mail compromise, identity theft, spoofing, and other extortion schemes ranked among the top five most costly cybercriminal schemes.

U.S. Government entities, businesses, and other organizations face a diverse range of ransomware threats. Attackers are innovating their targeting strategies to focus on victims whose business operations lack resilience or whose consumer base cannot sustain service disruptions, driving ransomware payouts up.

MIGRATION

In the Western Hemisphere, factors such as longstanding poor socioeconomic conditions, perceived changes in U.S. immigration policy, and employment opportunities in the United States will continue to drive migration to the Mexico-U.S. border; a growing number of people from around the world see transiting Mexico as a way to reach the United States. High crime rates, violence, corruption, weak job markets, and poor living conditions remain

primary push factors for U.S.-bound migration from Central America and Haiti because origin countries lack the capacity to address these challenges.

- Eased COVID-19-related travel restrictions and perceptions of greater job opportunities in a recovering U.S. economy are contributing to a rise in migration. These dynamics, along with perceptions of U.S. immigration policies, will determine the flow of migrants this year.

Economic disparities and the effects of conflict and extreme weather will encourage internal and international migration and refugee flows. Migration and displacement will heighten humanitarian needs, increase the risk of political upheaval, exacerbate the risk of other health crises, and aid recruitment and radicalization by militant groups—particularly as COVID-19 strains global humanitarian response mechanisms.

- The number of people displaced within their own national borders continues to increase, straining governments' abilities to care for their domestic populations and mitigate public discontent. Afghanistan is likely to be a growing source of global migration in 2022, as a result of reduced international support, deteriorating economic conditions, and repressive Taliban regime governance.

Transnational organized criminal groups exploit migrants through extortion, kidnapping, human trafficking, and forced labor.

Conflicts in the Middle East, Africa, and Europe, aggressive Russian actions on the periphery of Europe, a possible renewal of Belarusian efforts to fuel the migrant crisis along its border with Poland and Lithuania, and the Taliban takeover of Afghanistan could trigger more migration to Europe this year and a nationalist backlash. Countries are witnessing the rise of populist politicians and parties campaigning on loss of sovereignty and identity.

- The UNHCR estimated that 500,000 Afghan refugees could attempt to cross into surrounding countries if the situation in Afghanistan did not stabilize and is working with surrounding countries to prepare for Afghan refugee arrivals.
- Conflict in Ethiopia's Tigray region since November 2020 has worsened humanitarian conditions and resulted in at least 2.1 million internally displaced persons. The ongoing conflict has also led to refugees fleeing to neighboring countries, which could destabilize the region resulting in additional migrants seeking to travel to Europe.

GLOBAL TERRORISM

Terrorism remains a persistent threat to U.S. persons and interests at home and abroad. Individuals and small cells inspired by a variety of ideologies and personal motivations—including Sunni violent extremism, racially or ethnically motivated violent extremism, and militia violent extremism—probably present the greatest terrorist threat to the United States. ISIS, al-Qa'ida, and terrorists aligned with Iran such as Lebanese Hizballah, probably pose the greatest threat to U.S. persons and interests abroad. Consistent U.S. and allied counterterrorism pressure has degraded the external attack capabilities of ISIS and al-Qa'ida, but they still aspire to conduct attacks in the United States. Communal conflict, insurgency, and instability almost certainly will provide terrorist groups continued opportunities to recruit members, acquire funds, and establish or expand safe havens from which to plot attacks—including reviving safe havens in Afghanistan. Local insurgencies have at times bolstered their Sunni jihadist credentials to fully assimilate into ISIS and al-Qa'ida, allowing them to strengthen and resulting in increased attacks, lethality, and territorial influence and

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

ISIS

ISIS leaders remain committed to their vision of building a self-styled global caliphate headquartered in Iraq and Syria and are working to rebuild capabilities and wear down opponents until conditions are ripe for seizing and holding territory. The threat from ISIS against U.S. persons and interests probably will remain greatest in regions where the group has an operational presence; ISIS's ideology and propaganda, however, almost certainly will continue to inspire attacks in the West, including in the United States.

- In Iraq and Syria, ISIS probably will prioritize attacks on local military and civilian targets to erode its opponents' will to fight, maintain relevance among members and supporters, and stoke religious and ethnosectarian tension. ISIS has slowed its operational tempo in Iraq and Syria, probably because of logistical, financial, personnel, and leadership shortfalls. The group remains intent on freeing some of the 10,000 ISIS fighters who remain in detention in northeast Syria.
- In Afghanistan, ISIS-Khorasan is attempting to exploit an influx of funds and personnel from prison breaks to undermine the Taliban and build an external attack capability if it can withstand Taliban pressure.

Al-Qa'ida

Al-Qa'ida has increasingly devolved operational responsibility to regional affiliates as it has shifted away from centrally directed plotting. Because of leadership and battlefield setbacks, al-Qa'ida is constrained in its efforts to lead a unified global movement, but it will try to maintain its presence in Afghanistan and capitalize on permissive operating environments.

Al-Qa'ida remains intent on striking U.S. interests; it is more capable of striking U.S. interests in the regions where its affiliates operate rather than in the Homeland. The primary threat to the United States abroad from al-Qa'ida emanates from the countries where its strongest affiliates currently operate—Yemen, Somalia, and West Africa—and will vary based on local circumstances, including affiliate leadership priorities and battlefield conditions.

Al-Qa'ida senior leaders lack an operational presence in Afghanistan, and the group's affiliate, al-Qa'ida in the Indian Subcontinent (AQIS) is weak. Al-Qa'ida and AQIS praised the Taliban's return to power and are likely to maintain their ties to the Taliban regime.

- Al-Qa'ida probably will gauge its ability to operate in Afghanistan under Taliban restrictions and will focus on maintaining its safe haven before seeking to conduct or support external operations from Afghanistan.

Hizballah

Lebanese Hizballah will continue to work with Iran to develop terrorist capabilities as a complement to the group's growing conventional military capabilities.

- Hizballah seeks to reduce U.S. influence in Lebanon and the broader Middle East, and maintains the capability to target U.S. persons and interests in the region, worldwide, and—to a lesser extent—in the United States.

Foreign Racially or Ethnically Motivated Violent Extremists

Foreign Racially or Ethnically Motivated Violent Extremists (REMVE) very likely will continue to pose a threat to the United States and its allies. These actors continue to rely on transnational ties and adapt violent extremist narratives around current events, including the U.S. and coalition departure from Afghanistan last August.

Foreign REMVEs draw on a diverse range of ideologies, including white supremacy, neo-Nazism, exclusionary cultural-nationalist beliefs, and racial conspiracy theories. Foreign REMVEs organize primarily on a number of online platforms, especially podcasts, applications, and encrypted social media platforms.

- In mid-2021, foreign REMVEs in Europe sought to exploit popular fears of a potential Afghan refugee crisis similar to the influx of refugees from Syria in 2015 and 2016. Xenophobic sentiments have prompted an increasing number of individuals to engage with foreign REMVE groups in Europe.

CONFLICTS AND INSTABILITY

SOUTH ASIA

Afghanistan

The Taliban takeover is rolling back social changes of the past two decades and deepening Afghanistan's humanitarian crisis, heightening prospects for increased migration and displacement.

- The Taliban has been organizing its new regime with a bias for longtime stakeholders. Many of the people named to senior positions served in the Taliban's last government and are under international sanction. Few ethnic minorities and no women have been selected, and the Taliban is likely to keep resisting international pressure to govern more inclusively.
- Across the country, most girls' schools are closed, and all but a few women have been told to stay home from work. In some areas, public punishments have returned, along with restrictions on beard length and media controls. However, near-term prospects for regime-threatening resistance are low because large swathes of the Afghan public are weary of war and fearful of Taliban reprisals, and armed remnants lack strong leadership and external support.
- Taliban leaders lack the resource base and technical capacity to prevent a major economic contraction. They probably will rely on humanitarian aid to sustain some basic services and would rather preside over a more rudimentary economic system and tax the drug trade than accept international conditions for additional assistance.
- A majority of Afghans are suffering food insecurity because of the effects of conflict, drought, and COVID-19 disruptions, and further deterioration almost certainly will increase internal displacement, which could lead to international migration. Refugee flows could spike if the Taliban attempted to relieve pressure by allowing larger populations to leave Afghanistan or conditions sharply deteriorated.
- Regional powers will continue to narrow their interests and seek to develop transactional arrangements with the Taliban while proceeding cautiously with formal recognition. They would have preferred a more inclusive government, but they are prioritizing stability and are unlikely to intervene in ways that would significantly change Taliban behavior.

India-Pakistan

Crises between India and Pakistan are of particular concern because of the risk—however low—of an escalatory cycle between two nuclear-armed states. Pakistan has a long history of supporting anti-India militant groups; 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 each side's perception of heightened tensions raises the risk of conflict, with violent unrest in Kashmir or a militant attack in India being potential flashpoints.

India-China

Relations between New Delhi and Beijing will remain strained in the wake of the lethal clash in 2020, the most serious in decades. We assess that the expanded military postures by both India and China along the disputed border elevates the risk of armed confrontation between two nuclear powers that might involve direct threats to U.S. persons and interests and calls for U.S. intervention. Previous standoffs have demonstrated that persistent low-level friction on the Line of Actual Control (LAC) has the potential to escalate swiftly.

OTHER REGIONS

Internal and interstate conflict and instability will continue to pose direct and indirect threats to U.S. persons and interests during the next year. Several threats, which we assess to be particularly important, are discussed below.

Near East

The Middle East will remain a region characterized by persistent conflict, with active insurgencies in several countries, sparring between Iran and other countries, and 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, increasing the risk of internal or international conflict that would threaten U.S. persons and national security interests.

- Iran-backed Shia militias are likely to continue attacks against U.S. targets in Iraq, and ISIS remains a persistent threat. U.S. personnel would also face danger if popular protests against government corruption, continued dysfunction in the wake of the elections in October 2021, and poor economic conditions took a more violent turn, or if Baghdad became embroiled in a broader regional conflict.
- Conflict, economic hardship, and humanitarian crises will plague Syria during the next few years, and threats to U.S. forces will increase. President Bashar al-Asad will rely on the support of Russia and Iran and the nascent progress he has made reintegrating Syria into the region to stall meaningful peace negotiations. U.S. forces in eastern Syria will face continued threats from Iran, Iran-backed militias, and Syrian regime-aligned groups. ISIS and Hurras al-Din probably will plan and could attempt to launch attacks on the West from their safe havens in the country and increased fighting or further economic decline could spur another wave of migration.

There is some prospect to reduce conflicts that threaten U.S. persons and interests in the Middle East. Countervailing factors—heightened fear of Iran, doubts about U.S. reliability, and economic imperatives—are encouraging efforts to deescalate conflicts. Relations between Israel and select Arab states continue to warm, Qatar's isolation from its neighbors is waning, some Arab states are working to normalize relations with Damascus and encourage its return to the Arab league, and key Gulf states are talking with Iran, including its key rival, Saudi Arabia.

East Asia

In addition to Beijing's provocative behavior in numerous parts of Asia, domestic developments in some East Asian countries risk exacerbating underlying tensions with the potential to produce unrest and violence.

- Burma's security and economic conditions probably will continue to deteriorate because both the regime and the opposition are relying on the use of force in an attempt to break the ongoing political stalemate and advance their respective positions. Both sides remain entrenched in their positions and neither are able to decisively prevail. Economic deterioration and ongoing violence in addition to the ongoing COVID-19-pandemic will amplify the country's deteriorating humanitarian conditions, such as population displacement, food insecurity, and a poorly functioning health care system.

Western Hemisphere

Latin America and the Caribbean almost certainly will see hotspots of volatility in the coming year, undermining or distracting reliable U.S. partners from improving living conditions, tackling illicit flows, addressing climate change, and warding off foreign influence. In many cases, the COVID-19 pandemic has intensified high levels of public discontent with worsening longstanding poor socioeconomic conditions and public services that manifested in large anti-government protests. Elevated levels of U.S.-bound migration from Latin America and the Caribbean region will persist into at least mid-2022 because the underlying economic and insecurity drivers will remain unchanged, and migrants view the U.S. labor market and immigration policies and enforcement as favorable.

Africa

Sub-Saharan African governments will exhibit clear agency in their foreign affairs as the international community recognizes the importance of the region to its economic and security interests. Large numbers of U.S. citizens will be at risk from conflict in several countries. As the region seeks to reinvigorate its upward trajectory following the social and economic effects of the COVID-19 pandemic, it will continue to face unstable commodities prices, poor service delivery and endemic corruption, stresses of extreme weather events, and insecurity because of terrorism, insurgency, sectarian violence, and political instability.

- East Africa probably will see new bouts of conflict in the coming year as the region becomes increasingly strained by the civil war in Ethiopia, power struggles within the transitional government in Sudan, continued instability in Somalia, and a potentially contentious election in Kenya. In Ethiopia, the prospects for a long-term ceasefire remain slim because the belligerents probably do not believe the other side will negotiate in good faith or have a right to be at the table, increasing the prospects for continued conflict, atrocities, and food insecurity. Sudan is almost certainly starting on a protracted and fragile path towards civilian governance that will depend on reconciliation between three opposing elements: the guarded security leadership, the fragmented political coalition, and the mercurial street. In Somalia, leaders' myopic focus on politicking has led to government paralysis, widening the opening for al-Shabaab and raising the risk of recurring outbreaks of violence in Mogadishu.
- In West Africa, a volatile mixture of democratic backsliding, intercommunal violence, and terrorism will threaten the region's stability. Recent undemocratic transfers of power in Burkina Faso, Chad, Guinea and Mali highlight the region's fragility and in some cases the belief among publics that their government are not able to effectively deliver services or managing expanding insecurity. Some of the leaders who remain in power are turning to autocratic, state-centric, and religious governance practices, with some prioritizing security in key urban centers while ceding rural territory to jihadists.

