

Statement for the Record

Worldwide Threat Assessment

Armed Services Committee  
United States House of Representatives



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## INTRODUCTION

Chairman Thornberry, Ranking Member Smith, and Members of the Committee, thank you for the invitation to provide the Defense Intelligence Agency's (DIA) assessment of the global security environment and to address the threats facing the nation. A confluence of global political, military, social, and technological developments, which, taken in aggregate, have created security challenges more diverse and complex than those we have experienced in our lifetimes.

Our challenges range from highly capable, near-peer competitors to empowered individuals and the concomitant reduction in our own capacity will make those challenges all the more stressing on our defense and intelligence establishments. This strategic environment will be with us for some time, and the threat's increasing scope, volatility, and complexity will be the "new normal".

The 16,500 men and women of DIA stationed around the globe are confronting this rapidly evolving defense landscape head-on, and leading the Intelligence Community (IC) in providing unique defense intelligence from the strategic to the tactical to deliver a decision advantage to warfighters, defense planners, the defense acquisition community, and policymakers. The men and women – both uniformed and civilian – of your DIA know they have a vital responsibility to the American people and take great pride in their work. I am privileged to serve with them and present their analysis to you. My hope is that this hearing will help the nation – through the important oversight role of Congress – to better

understand the diversity of the global challenges we face and to support this committee in developing possible responses to these threats. Thank you for your confidence and support.

I will begin first with an assessment of Iraq, followed by Afghanistan, where the Department of Defense (DoD), DIA, the IC, and our Coalition partners are on the front lines, actively supporting military operations against threats from the Islamic State of Iraq and the Levant (ISIL), al-Qa'ida, and the Taliban. I will then transition to a selected group of violent extremist organizations and conclude with other regional challenges and global threats.

### **IRAQ AND AFGHANISTAN**

ISIL's resurgence since the withdrawal of U.S. forces from Iraq in 2011 was vividly displayed by the group's rapid advance across much of northern and western Iraq last spring. Since that time, coalition airstrikes have resulted in the removal of a number of ISIL senior leaders and degraded the group's ability to operate openly in Iraq and Syria. We expect ISIL to continue entrenching itself and consolidating gains in Sunni areas of Iraq and Syria while also fighting for territory outside those areas. However, we also expect ISIL to continue limited offensive operations, such as the group's recent operations in Syria and in Anbar province of Iraq. Seizing and holding Shia- and Kurdish-populated areas of Iraq have been, and will continue to be difficult for ISIL in 2015. We expect the group will continue to use traditional terrorist tactics, such as suicide, car bomb, and assassination attacks. Terrorist attacks in Baghdad have been nearly a daily occurrence this past year and the rate is unlikely to significantly change in 2015. ISIL's ability to govern the areas it has captured in Iraq and Syria, and its ability to keep the support – or at least acquiescence – of the Sunni population will be key indicators of the success or failure of the self-declared "Islamic state."

Particularly concerning has been the spread of ISIL beyond Syria and Iraq. With affiliates in Algeria, Egypt, Libya, the group is beginning to assemble a growing international footprint that includes ungoverned and under governed areas. Similarly, the flow of foreign fighters into, and out of, Syria and Iraq – many of whom are aligned with ISIL – is troubling. In 2015, we expect ISIL to continue its outreach to other elements of the global extremist movement, and to continue benefitting from a robust foreign terrorist fighter flow.

Defeats of Iraqi Security Forces (ISF) and the collapse of multiple army divisions highlight large-scale institutional deficiencies within the ISF. Several of the more concerning deficiencies include poor logistics and endemic corruption that has bred ineffective commanders and poor morale. Force generation efforts will be complicated by a lack of experienced and qualified soldiers. Local and tribal pro-government forces suffer from similar supply and manning shortages.

The ISF remains unable to defend against external threats or sustain conventional military operations against internal challenges without foreign assistance. Iraq is diversifying its defense acquisitions through numerous foreign military sales including with Russia and other non-U.S. suppliers to overcome equipment shortfalls and capability gaps, these decisions are reducing ISF interoperability.

Turning to Afghanistan, the still-developing Afghan National Security Forces (ANSF) remain stalemated with the Taliban-led insurgency. In 2015, we expect the ANSF to maintain

stability and security in Kabul and key urban areas while retaining freedom of movement on major highways. However, the Taliban, al- Qa'ida, and their extremist allies will likely seek to exploit the reduced Coalition presence by pressuring ANSF units in rural areas, conducting high profile attacks in major population centers, and expanding their safe havens.

ANSF will remain reliant on Coalition enablers for air, intelligence, and maintenance support. As NATO and our allies carry out their scheduled drawdown, the ANSF will struggle to effectively replace these lost enablers, deal with interoperability challenges between the army and police, and address persistent maintenance and logistical issues.

The Afghan National Army (ANA) is the most proficient security institution in Afghanistan, and has shown the capacity to plan and conduct multi-Corps operations in high-threat areas. However, the ANA will continue to struggle with permanently denying insurgents freedom of movement in rural areas and will remain constrained by its stretched airlift and logistical capacity. High attrition also continues to plague the force, which has struggled to keep its numbers near full capacity.

The Afghan National Police (ANP) provide sufficient presence and security within urban centers and provincial and district hubs, but remain vulnerable in controlling high-threat, rural areas. ANP challenges include manpower shortages, inadequate training, attrition, logistics shortfalls, and the corrosive influence of corruption. These factors have diminished the effectiveness of the ANP and undermined its popular image.

In 2014, the Afghan Air Force (AAF) improved its support to ground operations, significantly increasing the number of casualty evacuation missions and forward deployments of Mi-17

transport helicopters and Mi-35 gunships into contested areas. Despite these improvements, the AAF is not a reliable source of close air support and still struggles with recruiting qualified pilots and technicians.

The development of ANSF capabilities in 2015 will be critical as the insurgency will again attempt to increase its influence in rural areas, operate in larger formations, and continue to test security forces by temporarily seizing a number of vulnerable rural Afghan checkpoints and district centers. This will include increased high profile attacks, particularly in Kabul, where the Taliban seeks to undermine perceptions of Afghan security. The Taliban will probably sustain the capability to propagate a rural-based insurgency that can project intermittent attacks in urban areas through at least 2018.

## **TERRORISM**

Beyond the immediate threats posed by ISIL, the Afghan insurgency, and homegrown violent extremists aspired to travel overseas, particularly to Syria and Iraq, al-Qa'ida will remain a difficult and critical intelligence challenge in 2015. Al-Qa'ida core is now focused on physical survival following battlefield losses. At the same time, the group is also trying to retain its status as vanguard of the global extremist movement, being eclipsed now by ISIL's rising global prominence and powerful competition for adherents. Despite the fracturing of the global extremist movement, al-Qa'ida core in Pakistan continues to retain the loyalty of its global affiliates in Yemen, Somalia, North Africa, Syria, and South Asia.

Despite ongoing counterterrorism (CT) pressure and competition from ISIL, al-Qa'ida will likely attempt to retain a transnational attack capability, and the group will continue to use

its remaining paramilitary units, trained recruits, and extremist affiliates and allies to target Western interests in South Asia and worldwide. Al-Qa'ida also will likely try to expand its limited presence in eastern Afghanistan as Western CT operations there decline, and in the face of continued CT pressure from Pakistan.

Beyond core al-Qa'ida, I would like to highlight for the committee a handful of other violent extremist groups that are of particular concern to DIA.

**Al-Qa'ida in the Arabian Peninsula (AQAP)** remains committed to attacking the West, probably by targeting commercial aviation with innovative explosives.

**Al-Qa'ida in Lands of the Islamic Maghreb (AQIM)** recently increased efforts to expand its operating areas across North and West Africa by working with, and through, other regional terrorist groups. AQIM almost certainly continues to plan attacks and kidnapping operations against U.S. allies in the region.

As part of the larger al-Qa'ida network, we are concerned about the support **Al-Nusrah Front** provides to transnational terrorist attack plotting against U.S. and Western interests. We expect the group will try to expand its territory in 2015 beyond its Syrian operating areas and enhance its operational capabilities in Lebanon, where it already conducts operations.

The **Khorasan Group** is a cadre of experienced al-Qa'ida operatives that works closely with and relies upon al-Nusrah Front to provide personnel and space for training facilities in northwestern Syria. The group is primarily focused on transnational terrorist attack plotting. Coalition airstrikes in Syria probably killed a number of senior al-Nusrah Front and Khorasan



Group operatives, but the group almost certainly has maintained some capability to continue plotting against Western interests.

**Islamic Revolutionary Guard Corps–Qods Force (IRGC-QF) and Lebanese Hizballah** are instruments of Iran’s foreign policy and its ability to project power in Iraq, Syria, and beyond. Hizballah continues to support the regime of Syrian President Asad, pro-regime militants and Iraqi Shia militants in Syria. Hizballah has sent trainers and advisors to Iraq to assist Iranian and Iraqi Shia militias fighting Sunni extremists there. Select Iraqi Shia militant groups also warned of their willingness to fight U.S. forces returning to Iraq.

**Boko Haram (BH)** is engaged in a brutal, multi-front offensive in northeastern Nigeria largely against the Nigerian government and continues to carry out near daily attacks. The Nigerian government has failed to improve its force-centric efforts against BH, let alone implement a whole-of-government counterinsurgency approach. If continued along the same trajectory, BH’s successes could grow in into a significant regional crisis with implications outside of northwest Africa.

## **REGIONAL THREATS**

### **RUSSIA**

Moscow has made significant progress in modernizing its nuclear and conventional forces, improving its training and joint operational proficiency, modernizing its military doctrine to integrate new methods of warfare and developing long range precision strike capabilities.

Despite its economic difficulties, Moscow is fully committed to modernizing both nuclear and conventional forces and we anticipate continued high levels of Russian military activity in 2015.

In 2014, Moscow moved to shape events in Ukraine, employing its improved military capabilities to occupy and attempt to annex Ukrainian territory and to create a long-term conflict in Ukraine's Donbas and Luhansk regions. All indications are that Moscow will continue to employ a mix of military and nonmilitary pressure against Kyiv this year, to include the use of propaganda and information operations, cyberspace operations, covert agents, regular military personnel operating as "volunteers," mercenaries, para-institutional organizations, and the threat of military intervention. These actions are consistent with Russia's new military doctrine and strategy, which will continue to raise anxieties with states along Russia's periphery.

Russia's future force will be smaller and more agile, capable of handling a range of contingencies. During the next year, we expect continued efforts to improve joint operations capabilities and rearmament because of the high priority that Russian leadership places on these portfolios.

At the same time, Russian forces have conducted exercises and a record numbers of out-of-area air and naval operations. We expect this to continue this year to include greater activity in the Caribbean and Mediterranean Seas.

Moscow affirmed its intent to improve the military's capability to control the Russian Arctic region, stressing that area's current and future strategic and economic importance.

Recently, Moscow has increased its exercise activities and established new airbases in its Arctic region. Russia also plans to establish additional air defense, coastal missile defense, and ground forces there. Highlighting the importance of the Arctic to Russian leaders, Moscow announced the 1 December activation of a Joint Service Command (OSK) North.

Russia will continue to place the highest priority on the maintenance of a robust and capable arsenal of strategic nuclear weapons. Priorities for the strategic nuclear forces include the modernization of its road-mobile intercontinental ballistic missiles (ICBMs) and upgrades to strategic forces' command and control facilities. In the next year, Russia will field more road-mobile SS-27 Mod-2 ICBMs with multiple independently targetable reentry vehicles. It also will continue development of the RS-26 ballistic missile, the Dolgorukiy ballistic missile submarine and its SS-N-32 Bulava submarine-launched ballistic missile, and next-generation air- and ground-launched cruise missiles.

## **EAST ASIA**

**China's** People's Liberation Army (PLA) is building a modern military capable of defending China's "core interests" of preserving its political system, protecting territorial integrity and sovereignty (China views these to include Taiwan and other contested claims to land and water), and ensuring sustainable economic and social development.

The PLA remains focused on transforming the Army to a fully mechanized force. The PLA is converting divisions to brigades to increase lethality and improve combat capabilities.

China's national-level training focus has been on brigade-level exercises that stress unit

combat mission capabilities under realistic conditions, long distance mobility, and command and control. We expect these trends to continue.

The PLA Navy continues to expand its operational and deployment areas. China's first aircraft carrier, commissioned in late 2012, will not reach its full potential until it acquires a fully operational fixed-wing air regiment, but we expect the Navy will make progress toward this goal this year.

The South China Sea (SCS) remains a potential flashpoint. Overlapping claims among China, Vietnam, the Philippines, Malaysia, Taiwan and Brunei, exacerbated by large-scale construction or major steps to militarize or expand law enforcement has increased tensions among SCS claimants, and has prompted an increase in defense acquisition to include submarine capabilities in some of these countries.

In 2014, China twice deployed submarines to the Indian Ocean. The submarines probably conducted area familiarization to form a baseline for increasing China's power projection. China continues production of JIN-class nuclear-powered ballistic missile submarines and submarine-launched ballistic missiles. We expect China to conduct its first nuclear deterrence patrols this year.

The PLA Air Force is approaching modernization on a scale unprecedented in its history. China now has two stealth fighter programs. The third and fourth J-20 stealth fighter prototypes conducted their first flights in March and July 2014 and further development is anticipated.

China's nuclear arsenal currently consists of 50-60 ICBMs. China is adding more survivable road-mobile systems, enhancing its silo-based systems, and developing a sea-based nuclear deterrent. They are also augmenting the more than 1,200 conventional short-range ballistic missiles deployed opposite Taiwan with a limited but growing number of conventionally armed, medium-range ballistic missiles, including the DF-16, which will improve China's ability to strike regional targets. China continues to deploy growing numbers of the DF-21D antiship ballistic missile and is developing a tiered ballistic missile defense system, having successfully tested the upper-tier capability on two occasions.

**The Democratic People's Republic of Korea's (DPRK)** primary goals are preserving the control of the Kim family regime, improving its poor economy, and deterring attack by improving its strategic and conventional military capabilities. Pyongyang maintains that nuclear and ballistic missile capabilities are essential to ensure its sovereignty.

The DPRK continues to place a priority on readiness in its large, forward-deployed forces, and is stressing increased realism in military training, but exercises still appear to do little more than maintain basic competencies. Because of its conventional military deficiencies, the DPRK also has concentrated on improving its deterrence capabilities, especially its nuclear technology and ballistic missile forces.

We believe the DPRK continues to develop its nuclear weapons and missile programs which pose a serious threat to the U.S. and regional allies. We remain concerned that the DPRK will conduct a nuclear test in the future. Following United Nations condemnation of its human rights record in November 2014, North Korea indicated it would "not refrain any further

from conducting a nuclear test.” This followed a statement in March 2014 wherein North Korea’s Foreign Ministry warned it “would not rule out a new form of nuclear test”.

Pyongyang also is making efforts to expand and modernize its deployed missile forces consisting of close-, short-, medium-, and intermediate-range systems. It seeks to develop longer-range ballistic missiles capable of delivering nuclear weapons to the United States, and continues efforts to bring its KN08 road-mobile ICBM to operational capacity. In 2015, North Korea will continue its efforts to improve the combat proficiency of its deployed ballistic missile force and will work to improve missile designs to boost their overall capability. The North likely will launch additional ballistic missiles as part of its training and research and development process. We remain concerned by North Korea’s illicit proliferation activities and attempts to evade UN sanctions.

### **MIDDLE EAST AND NORTH AFRICA**

**The Islamic Republic of Iran** continues to threaten U.S. strategic interests in the Middle East. Iran’s actions and policies are designed to further its goal of becoming the dominant regional power, as well as to enhance its strategic depth. Tehran views the United States as its most capable adversary and has fashioned its military strategy and doctrine accordingly. Iran’s military posture is primarily defensive. This strategy is designed to deter an attack, survive an initial attack and retaliate against the aggressor to force a diplomatic resolution. Numerous underground facilities reduce the vulnerability of critical elements of Iran’s military. We do not anticipate any changes to this posture in 2015.

We continue to assess that Iran's goal is to develop capabilities that would allow it build missile-deliverable nuclear weapons, should a decision be made to do so. The regime faces no insurmountable technical barriers to producing a nuclear weapon, making Iran's political will the central issue.

Iran's overall defense strategy relies on a substantial inventory of theater ballistic missiles capable of reaching as far as southeastern Europe. Iran continues to develop more sophisticated missiles and to improve the range and accuracy of current missile systems. Iran has publicly stated it intends to launch a space-launch vehicle as early as this year that could be capable of intercontinental ballistic missile ranges, if configured as such.

Iran also is steadily improving its military capabilities. The navy is developing faster, more lethal surface vessels, growing its submarine force, expanding its cruise missile defense capabilities, and increasing its presence in international waters. The navy aspires to travel as far as the Atlantic Ocean.

Iran is laboring to modernize its air and air defense forces under the weight of international sanctions. Each year, Iran unveils what it claims are state-of-the-art, Iranian-made systems, including SAMs, radars, and unmanned aerial vehicles. It continues to seek an advanced long-range surface-to-air missile system.

In **Syria**, we assess the conflict is trending in the Asad regime's favor. The regime holds the military advantage in Aleppo, Syria's largest city, and we anticipate that in 2015 the regime's strategy will be to encircle Aleppo, cut opposition supply lines, and besiege the opposition. Damascus' key allies in its fight against the opposition – Hizballah and Iran – continue to

provide training, advice, and extensive logistic support to the Syrian government and its supporters. Despite the Syrian regime's military advantage – particularly in firepower and air superiority – it will continue to struggle and be unable to decisively defeat the opposition in 2015.

In **Libya**, political instability and ongoing militia violence have worsened over the year, exacerbating conditions that have already made Libya an attractive terrorist safe haven. ISIL has increased its presence and influence in Libya, particularly in Darnah, where it has begun establishing Islamic institutions. Without a unified government and capable military, there is limited possibility of stability in the near-term.

In **Yemen**, instability has increased since the Huthis, a northern Zaydi Shia group with Iranian ties, captured the Presidential Palace in mid-January and attained senior positions in nearly all key Yemeni government and security institutions. Current conditions in the country provide AQAP operational space, with Yemen's neighbors increasingly concerned about instability spilling over the borders bringing the potential of another humanitarian crisis in the region.

As **Egypt** prepares for parliamentary elections starting in March, its leaders are facing numerous security concerns driven by regional unrest and several major terrorist attacks in 2014. Egyptian security forces face frequent attacks in Sinai and the Nile Valley despite suppressing most political unrest in the last year. Egypt has responded to these attacks by increasing its counterterrorism campaign in Sinai and tightening security on the Gaza and Libya borders to reduce militant and arms flow into Egypt. The upcoming year will likely see



Egyptian security forces stressed by internal terrorist activities and efforts to manage instability in Libya.

## **SOUTH ASIA**

**Pakistan's** Army and paramilitary forces remain deployed in the Federally Administered Tribal Areas (FATA) and Khyber Pakhtunkhwa Province. Army ground operations in North Waziristan Agency (NWA) have cleared antistate militants from most population centers, and we expect the military will continue targeting remaining militant strongholds in 2015. The December 2014 Tehrik-e Taliban Pakistan (TTP) attack against the Army-run school in Peshawar that killed more than 140 people, mostly children, has emboldened military efforts against antistate militants, including intensified airstrikes against TTP leadership and fighters. The government and military are also working together to implement a national action plan against terrorism, which includes the establishment of military courts.

Despite ongoing military operations, Pakistan will continue to face internal security threats from militant, sectarian, and separatist groups. Additionally, Pakistan remains concerned about ISIL outreach and propaganda in South Asia.

Pakistan continues to take steps to improve security of its nuclear arsenal. We anticipate that Pakistan will continue development of new delivery systems, including cruise missiles and close-range "battlefield" nuclear weapons to augment its existing ballistic missiles.

**India** is in the midst of a major military modernization effort – undertaken by all three military services – to address problems with its aging equipment and to better posture itself

to defend against both Pakistan and China. New Delhi is working to address impediments to modernization, such as its cumbersome procurement process, budget constraints, and a domestic defense industry that has struggled to provide military equipment that meets service requirements.

Relations with Pakistan remain strained. Both sides engaged in periodic skirmishes on or near the Line of Control that separates Indian and Pakistani Kashmir, resulting in the highest number of civilian casualties since 2003. Occasional unofficial Track-II dialogue continued throughout the year, but resulted in little progress in resolving bilateral disputes.

New Delhi and Beijing maintain limited military-to-military engagement and continue to discuss their longstanding border dispute, despite occasional altercations between troops patrolling the border. India is concerned over Chinese logistical improvements along the border and is raising additional ground forces, improving logistical capacity, and is basing advanced fighter aircraft opposite the China border. India also is concerned over China's increased activity in South Asia and the Indian Ocean.

India continues to conduct periodic tests of its nuclear-capable missiles to enhance and verify missile reliability and capabilities. In early December 2014, India successfully tested the Agni-IV intermediate-range ballistic missile, which New Delhi claims has a range of 4,000 kilometers. India will continue developing an ICBM, the Agni-VI, which will reportedly carry multiple warheads, and is working on the development of several variants of a submarine-launched ballistic missile.

## **AFRICA**

Security conditions in **Somalia** improved in 2014 as progress was made against al-Shabaab. The African Union Mission in Somalia (AMISOM) and the Somali National Army (SNA) conducted two rounds of offensive operations liberating several al-Shabaab-held towns in south-central Somalia, including the lucrative port city of Baraawe. Somali militia participated in these operations, but they remain unable to maintain control of cleared areas primarily due to endemic corruption and underlying clan dynamics. Mogadishu's focus on governance and force integration efforts should help decrease prospects for instability as regional administrations evolve during the next year.

**Nigeria's** military forces have been challenged by mass desertions and often retreat on first contact with BH. The military leadership – often focused on advancing private gain over strategic imperatives – has failed to properly resource and train troops. Nigeria recently acquired new weapons systems, but troops lack the training and motivation to effectively employ them. The presidential election this month probably will be the most close and contentious since civilian rule was restored in 1999. Violence throughout the election – and probably thereafter – will stretch security and military forces thin. These problems are likely to lead to massive population displacements, more civilian deaths and kidnappings, growing extremist safe havens and refugee spillover into neighboring countries.

## **LATIN AMERICA**

In Latin America, transnational threats such as drug- and arms- trafficking and special interest alien transit, coupled with porous borders, have increased insecurity and challenged

stability and prosperity. Moreover, outside actors are increasingly seeking to challenge the U.S. as the defense partner of choice in the region.

**Mexico** remains the principal transit country for U.S.-bound cocaine, and the primary foreign supplier of methamphetamine, heroin, and marijuana to the United States. Civilian and military security force pressure on all major drug trafficking groups has likely contributed to the recent decline in drug-related homicides.

The **Colombian** government has made significant progress to reduce cocaine production. Colombia is no longer the top cocaine producer globally, but remains the principal supplier of cocaine and a supplier of heroin to the United States. Drug profits fund insurgent and illegal armed groups, including the Revolutionary Armed Forces of Colombia (FARC), the National Liberation Army (ELN), and criminal gangs (BACRIM). These groups increasingly work directly with Mexican drug cartels and their networks also move money, weapons, and people. During 2015, Bogota will be focused on reducing urban violence and maintaining a state presence in rural zones.

**Venezuelan** President Nicolás Maduro has not resolved the factors that contributed to nationwide antigovernment protests in 2014, including a poor economy, shortages of basic goods, unchecked violent crime, and the government's authoritarian tactics against the political opposition. In 2015, we anticipate student organizations and the political opposition will stage protests in the months leading up to legislative elections. Military leaders have remained loyal and will continue to quell antigovernment protests. We anticipate security forces occasionally will use heavy-handed tactics to restore order.

In **Honduras, El Salvador, and Guatemala**, violence tied to gang, drug, and criminal activity remains amongst the highest levels in the world. Crime levels are forcing these nations to continue to rely on their militaries to provide security while concurrently addressing long-term police, judicial, and prison reform.

### **GLOBAL THREATS**

The threat to **U.S. space systems and services** will increase as potential adversaries pursue disruptive and destructive counterspace capabilities. Rapidly evolving commercial space technology will support the global pursuit of enhanced space and counterspace capabilities that may narrow the technological gap with the United States.

Chinese and Russia military leaders understand the unique information advantages afforded by space systems and are developing capabilities to deny U.S. use of space in the event of a conflict. Chinese military writings specifically highlight the need to interfere with, damage, and destroy reconnaissance, navigation, and communication satellites. China has satellite jamming capabilities and is pursuing other antisatellite systems. In July 2014, China conducted a non-destructive antisatellite missile test. A previous destructive test with this same system in 2007 created long-lived space debris.

Russia's Military Doctrine emphasizes space defense as a vital component of its national defense. Russian leaders openly assert that the Russian armed forces have antisatellite weapons and conduct antisatellite research.

The global **cyber threat** environment presents numerous persistent challenges to the security and integrity of DoD networks and information. Threat actors now demonstrate an increased ability and willingness to conduct aggressive cyberspace operations—including both service disruptions and espionage—against U.S. and allied defense information networks. Similarly, we note with increasing concern recent destructive cyber actions against U.S. private-sector networks demonstrating capabilities that could hold U.S. government and defense networks at risk. For 2015, we expect espionage against U.S. government defense and defense contractor networks to continue largely unabated, while destructive network attack capabilities continue to develop and proliferate worldwide. We are also concerned about the threat to the integrity of U.S. defense procurement networks posed by supply chain vulnerabilities from counterfeit and sub-quality components.

Threat actors increasingly are willing to incorporate cyber options into regional and global power projection capabilities. The absence of universally accepted and enforceable norms of behavior in cyberspace contributes to this situation. In response, states worldwide are forming “cyber command” organizations and developing national capabilities. Similarly, cyberspace operations are playing increasingly important roles in regional conflicts—for example, in eastern Ukraine—where online network disruptions, espionage, disinformation and propaganda activities are now integral to the conflict.

Iran and North Korea now consider disruptive and destructive cyberspace operations a valid instrument of statecraft, including during what the U.S. considers peacetime. These states likely view cyberspace operations as an effective means of imposing costs on their adversaries while limiting the likelihood of damaging reprisals.

Non-state actors often express the desire to conduct malicious cyber attacks, but likely lack the capability to conduct high-level cyber operations. However, non-state actors, such as Hizballah, AQAP, and ISIL will continue during the next year to effectively use the Internet for communication, propaganda, fundraising and recruitment.

**The proliferation and potential use of weapons of mass destruction (WMD) and ballistic missiles** is a grave and enduring threat. Securing nuclear weapons, materials, and the scientific capabilities to develop chemical and biological weapons is a worldwide imperative. The time when only a few states had access to the most dangerous technologies is past, and the use of chemicals in Syria further demonstrates the threat of WMD is real.

China will continue to be a source of dual-use WMD-applicable goods, equipment, and materials to countries of concern, like Iran, North Korea, and Syria. North Korea is among the world's leading suppliers of ballistic missiles and related technologies and, despite the adoption of United Nations Security Council Resolutions, the DPRK continues proliferating weapons-related materiel. Russia, China, Iran, and North Korea engage in national-level military denial and deception programs that include the use of underground facilities to conceal and protect WMDs, and command, control and other strategic assets and functions.

**The proliferation of advanced conventional weapons**, especially air defense systems and antiship cruise missiles, is a military issue of growing concern. Russian exports of these arms, including the SA-17, SA-22, SA-20 surface-to-air missile (SAM) systems and the SS-N-26 Yakhont supersonic antiship cruise missile is particular troubling. Russia has exported

several of these systems to countries of concern, including the SA-17 to Venezuela, and the SA-17, SA-22 and Yakhont to Syria. The 300-kilometer-range Yakhont poses a major threat to U.S. naval operations particularly in the eastern Mediterranean. There are no signs these sales will abate in 2015. If Russia was to sell the SA-20 to Iran, it would significantly increase Iranian military capabilities.

**Infectious diseases** are emerging as a global health concern. The Ebola epidemic in West Africa is the most visible reminder that health issues can suddenly materialize from anywhere and threaten American lives and interests. Our ability to mitigate and control health threats before they impact the United States relies on early warning, despite the absence of precise indicators of when and where new diseases will emerge. Pandemic warning likely will become more challenging and complex in 2015.

Finally, **Foreign intelligence threats** from Russian, Chinese, and Cuban intelligence services continue to be a challenge. Trusted insiders who disclose sensitive U.S. information for nefarious purposes will also remain a significant threat in 2015. The technical sophistication of this insider threat exacerbates the challenge.