



# Metis

## Study

### Islamist terrorism

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**Institute for  
Strategy & Foresight**

# Summary

Islamist terrorism remains a global threat, embodied by groups such as the so-called Islamic State and Al-Qaeda. Currently, the centre of terrorist activity is in Africa, particularly in the Sahel region. New organisational structures, digital recruitment – including young people and

women – and flexible attack tactics characterise contemporary Islamist terrorism. Four scenarios are emerging for the near future: from securing local power to criminal hybrid forms to global attack planning and virtual caliphates.

## Global threat

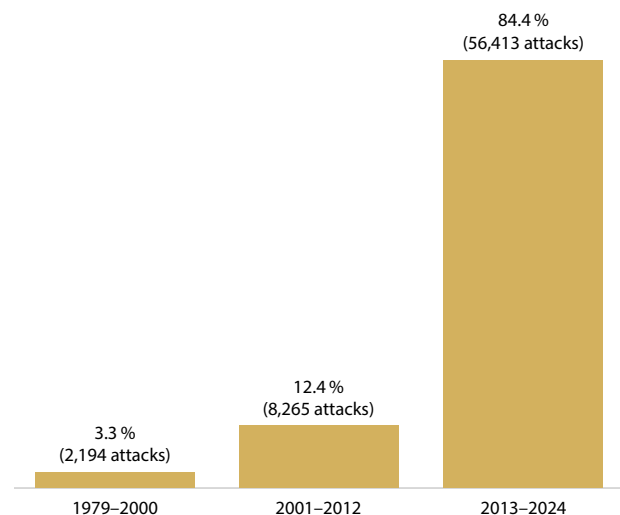
Islamist terrorism is and remains one of the most significant global threats of the 21st century. Typically embodied by organisations such as Al-Qaeda (AQ) and the so-called Islamic State (IS), Islamist terrorism has expanded its destructive potential globally. The number of attacks has been rising steadily for decades.

Despite the current focus of German security and defence policy on national and alliance defence, the fight against Islamist terrorism must not be neglected, as its significance is likely to increase in the coming years. This assessment is based primarily on five factors: 1. regional reorientation; 2. changed organisational structures; 3. recruitment trends; 4. attack tactics and targets; 5. simultaneous competition and limited cooperation between IS and AQ. These factors have been able to exert their influence not least because international efforts to combat terrorism have waned in the face of the return of interstate warfare in Europe.

## Taking stock

In global comparison, Islamist terrorism has been the type of terrorism with the highest death toll since the attacks of 11 September 2001. This is mainly due to conflict zones such as Iraq, Afghanistan and the Sahel region, Syria, Pakistan and Nigeria. Groups such as IS, the Taliban and AQ (or their offshoots) operate in these areas. The four terrorist organisations responsible for the most deaths in 2024 were all

Salafi-jihadist<sup>1</sup> groups: IS, Jamaat Nusrat Al-Islam wal Muslimeen (JNIM), Tehrik-e-Taliban Pakistan (TTP) and al-Shabaab (see Fig. 2). A struggle for geographical spheres of influence can be observed, particularly between IS and the AQ-affiliated organisations JNIM and al-Shabaab.



**Fig. 1** Development of Islamist terrorism worldwide 1979–2024 | Source: <https://www.fondapol.org/>

<sup>1</sup> Jihadism is a violent undercurrent of Sunni Salafism that seeks to create a state governed exclusively by a Salafi interpretation of Islamic law (*sharia*) and in which warfare and violence are sanctioned by religion.



However, even outside the countries and regions mentioned, these groups have a high potential for radicalisation, including in the West (as demonstrated, for example, by the attacks carried out in 2015 by lone perpetrators in the name of IS in New Orleans [14 dead], Munich and Manchester [2 dead each]) and are proving to be extremely resistant to countermeasures by the police, the intelligence services and the military.

The precursors of today's Salafi-jihadist organisations emerged in the late 1970s. AQ dominated in the 1990s and beyond the attack on 11 September 2001, but was replaced by IS as the most significant global terrorist organisation in the middle of the last decade. After proclaiming the caliphate in 2014, IS controlled large parts of Syria and Iraq at its peak. It lost the Iraqi territories at the end of 2017 and the Syrian territories – with the exception of a small border area – in March 2019. Since then, the idea of a territorially constituted Islamic state in the region has been considered a failure. It is therefore hardly surprising that IS and AQ have since (once again) been in fierce competition for geographical spheres of influence, personnel and resources. The focus has shifted

from the Middle East to the African continent, particularly the Sahel region. In terms of numbers (see Fig. 2), IS has consolidated its position as the most dangerous terrorist organisation at present.

### Regional reorientation

Terrorist activities in the 2000s focused on Afghanistan and Iraq and in the 2010s on the Middle East; today, however, the Sahel region (especially Burkina Faso and Mali) and Somalia have become the epicentre of Islamist terrorism. While AQ was already present with its offshoots al-Shabaab and JINM, IS currently appears to be growing fastest in the Sahel region. This is made possible on the one hand by chronic problems in the region (political instability, local grievances, economic suffering, poor governance) and on the other hand by the departure of Western forces, which until recently were still engaged in the region as part of long-standing defence agreements and extensive counter-terrorism measures.

What can be deduced from this and should be kept firmly in mind for the future is the strategy of IS – and also AQ – to target primarily weakly controlled areas.

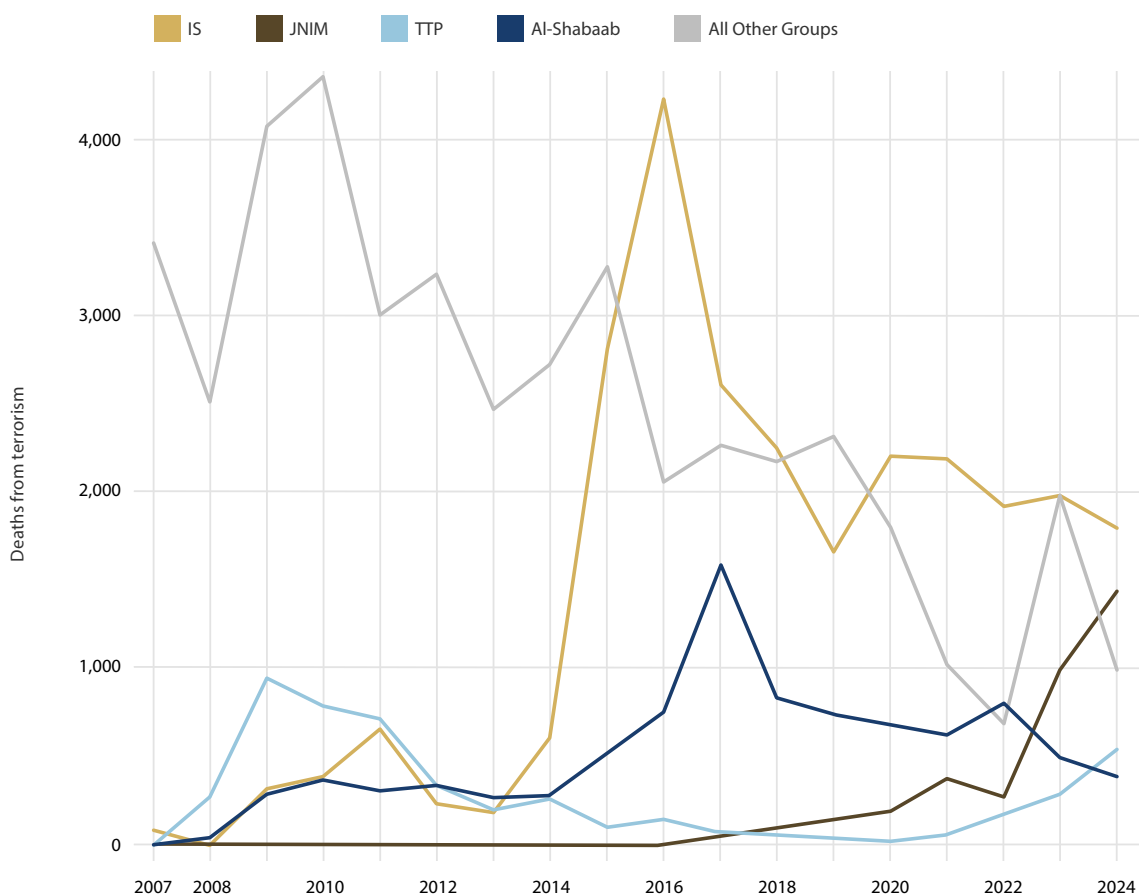


Fig. 2 Number of attacks by the four globally dominant terrorist organisations | Source: <https://www.economicsandpeace.org/>



While IS attempts to establish legitimacy through its own structures and to destroy existing systems of government by force, AQ instead supports local movements through a large network of partner organisations in order to establish its own new structures of government on the ground.

### Changed organisational structures

Experts are debating whether IS has now developed into a decentralised network of associated offshoots or whether it has transformed into a more globally unified organisation. This debate is similar to the one that took place after 11 September 2001 regarding the changed organisational structure of AQ: the transformation from a centralised, hierarchical organisation to a loose, decentralised network.

In the case of IS, it seems plausible to assume a hybrid model in which regional autonomy is dynamically balanced with central control. On the one hand, the fact that IS relies primarily on a fluid network of regional offshoots that operate with greater autonomy than ever before speaks in favour of autonomy. The most prominent of these is IS-Khorasan, based in Afghanistan, not least because it is considered to be responsible for numerous attacks in Afghanistan, Iran and Russia, among other places. Furthermore, little is known about the current fifth caliph of IS other than his name, Abu Hafs al-Hashimi al-Qurashi: for the operability and effectiveness of a network, the individual person is less important than ideological continuity. On the other hand, the fact that central control is maintained by IS's so-called *General Directorate of Provinces* argues against autonomy:

little is known about this body, except that it appears to function as a higher-level supervisory body responsible for ideological cohesion, operational support and financing opportunities for the offshoots.

From an ideological perspective, IS, like AQ, also draws on the belief – politicized by AQ in the 1990s – that there is a global Muslim community (*umma*). According to this interpretation, every Muslim is obliged to help their fellow believers in times of need – even through combat. Combined with group-specific enemy stereotypes, this idea has developed enormous appeal even beyond the respective areas of operation. This is particularly evident in the virtual space.

### Recruitment trends

Currently, the recruitment strategies of Islamist terrorism in the West are primarily aimed at young people. The digital activities of both IS and AQ are central to this: the organisations use social media, apps and encrypted messaging tools to spread their propaganda, radicalise and recruit.<sup>2</sup> Younger population groups are particularly at risk, as they are particularly active online and, due to their age, particularly receptive to the recruitment activities of IS and AQ. In 2024, around one in five terror suspects in numerous

<sup>2</sup> See „The Delegitimation of the IS Narrative: What Are Our Partners' Strategies?“, Metis Study No. 04 (May 2018).

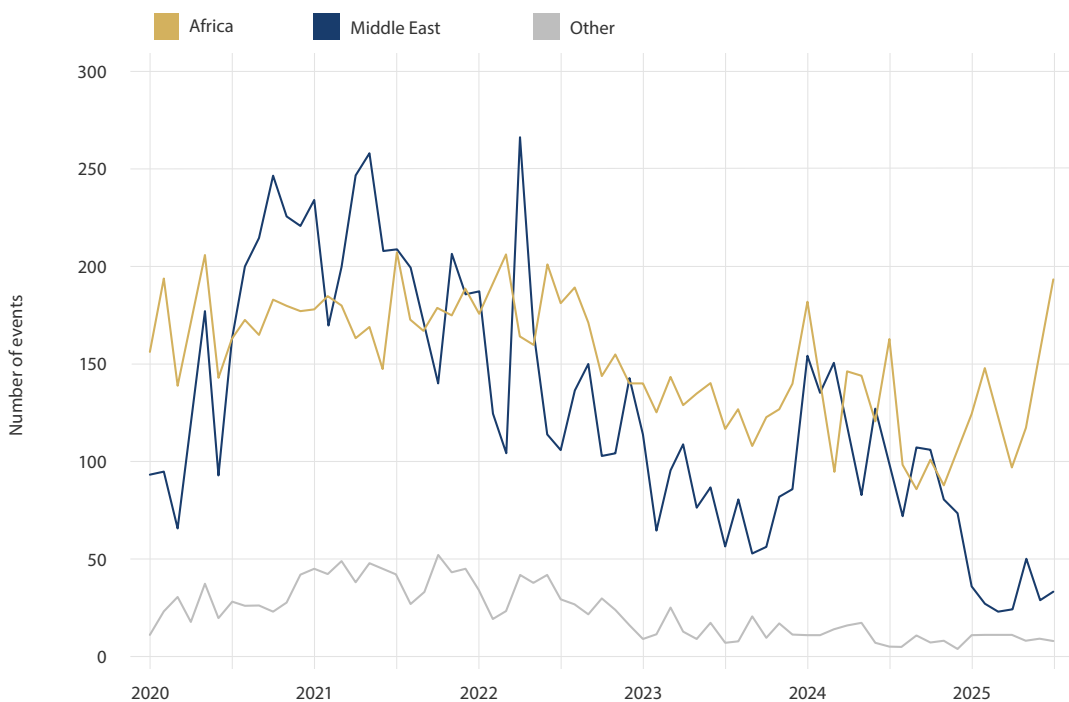


Fig. 3 Africa as a key target for IS attacks | Source: <https://acleddata.com/>



Western countries was under the age of 18. One example: in April 2024, a group consisting of two 15-year-olds (male and female) and two 16-year-olds (male and female) planned a foiled terrorist attack on Christian and Jewish institutions in North Rhine-Westphalia, Western Germany, in the name of IS. They met and arranged the attack online.

Women play an important role in this context. Jihadist groups have long recognised the strategic value of mobilising women, whether to gain tactical advantages or to increase the number of female followers. IS in particular has been able to recruit women as propagandists, recruiters and perpetrators. Between 2013 and 2018, hundreds of women from all over the world travelled to what were then IS territories and performed domestic or logistical support functions there. Women were also involved in enforcing IS norms (e.g. in the all-female Al-Khansaa Brigade) and occasionally in combat operations. Boko Haram and IS in West Africa use women as suicide bombers.

Children who were systematically indoctrinated under IS rule represent a special case. Boys were trained as fighters and suicide bombers, and children were used in brutal propaganda videos. Today, tens of thousands of women and children who formerly belonged to IS live in refugee camps such as al-Hol in Syria. These camps function as potential “jihad academies” where the ideology of IS lives on. How these women and children are dealt with (either through deradicalisation or neglect) will greatly influence the recruitment opportunities for Islamist terrorism in the coming years. Shifting recruitment to the next generation is a long-term investment in the survival of the jihadist movement worldwide.

### Attack tactics and targets

In addition to bombings and armed attacks as tactics of choice, one of the key tactical changes in Islamist terrorism is the use of lone perpetrators and/or small cells to carry out attacks. In Western countries in particular, lone perpetrators – often radicalised online – pose the greatest threat: 93% of terrorist attacks in the West in the last five years were carried out by lone perpetrators. These attacks often take the form of knife attacks, shootings or vehicles driven into crowds of people. They require minimal preparation.

The use of drones (armed disposable effectors, reconnaissance and surveillance drones) has been part of the attack tactics of Islamist terrorism for some time. IS is considered a pioneer in this field, as revealed by video footage and documents found on drone workshops in Iraq and Syria. This know-how has spread: in 2024, for example, a group allied with IS flew an explosive-laden drone into a military camp in Congo. It is to be expected that drones will continue to be used for reconnaissance and attack purposes, and that their use will increase.

The threat of deploying chemical or biological substances should also not be overlooked, as IS has experimented with simple chemical warfare agents in bombs in Syria and Iraq.

So far, the offensive cyber capabilities of AQ and IS have been limited. However, there is a possibility that in the future, technically savvy individuals radicalised online will be recruited to carry out effective cyber operations. The widespread availability of large language models has also lowered the threshold for carrying out such actions.

In recent years, attacks in the West have been characterised by individual acts that resulted in fewer fatalities. In addition, the organisations continue to attempt to attack “soft” but symbolic targets (such as the Taylor Swift concert in Vienna or the Olympic Games in France, both in 2024). Even though neither IS nor AQ currently have a base close to Europe (which IS had at the time of the Paris attacks in 2015, among other things) and strict security measures make it difficult to carry out large-scale attacks, the residual risk of more complex, coordinated attacks in the West cannot be ignored.

The vast majority of victims of terrorism (98%) today come from conflict zones where jihadist groups operate. Although security forces and the military are the main targets of attacks, civilians in countries such as Mali, Somalia, Iraq, Nigeria and Afghanistan are the most affected.

The camps and prisons in north-eastern Syria, where approximately 8,500 fighters suspected of having links to IS are being held, are a particular target for IS. Their release is of great interest to IS due to their combat experience. IS has therefore carried out various attacks on these facilities (e.g. on al-Sina’a prison in the Syrian city of al-Hasakah in January 2022).

### Simultaneous competition and limited cooperation between IS and AQ

Since IS split from AQ in 2014, the two organisations have been vying for leadership in the global jihad. The rivalry stems from strategic and ideological differences: while AQ has long focused on attacks against the “distant enemy” (the West) and entered into pragmatic alliances with local Islamist groups, IS immediately established a caliphate and cracked down with great brutality on all dissenters (including Sunni Muslims).

Today, there is local cooperation between IS and AQ depending on the situation, but in all likelihood, both will remain separate entities. It is conceivable that both groups will grow simultaneously if global conditions favour jihadism. The interaction between IS and AQ will have a decisive impact on the nature of the threat: whether counter-terrorism forces will face a divided, weakened enemy or a resurgent and united movement.



## Outlook

How will Islamist terrorism, specifically IS, AQ and their offshoots, develop over the next five years in view of the five influencing factors mentioned above? Four scenarios for the period up to 2030 are plausible.

### 1. Formation of local emirates

In this scenario, IS and AQ offshoots focus on establishing permanent local and regional government structures in weak states and areas. In the Sahel, the Horn of Africa and parts of Afghanistan, the groups establish semi-permanent “emirates” that offer justice, social services and economic opportunities, exploiting extreme weather events, resource conflicts and the weakness of state structures. Women and children are recruited for support and logistical tasks, while boys are actively trained for combat. Tactics consist primarily of attacks on local security forces, sabotage of infrastructure, and selective terror against rival factions or communities deemed hostile. The death toll remains high in the areas where emirates are being formed, while the number of international attacks is declining. Despite competition, IS and AQ offshoots sometimes negotiate non-aggression pacts or limited cooperation. International responses increasingly consist of remote support, sanctions and humanitarian interventions rather than direct (military) operations.

### 2. “Organised criminal Islamist terrorism”

In this scenario, the distinction between Islamist terrorism and transnationally organised crime becomes even more blurred than before, as both IS and AQ offshoots continue to split into small cells and criminal networks under pressure from targeted efforts to combat their financing and leadership. Offshoots in Africa, South Asia and the Levant are shifting their focus from large-scale operations to financing through illegal trade (people, wildlife, gold, drugs), cybercrime and kidnappings. Women and children are being strategically used as (money) couriers and for propaganda purposes. Attack tactics are less aimed at spreading fear and terror and more often linked to criminal, profit-oriented activities. Despite the decline in ideologically motivated attacks with many victims and a general decline in the number of fatalities, particularly in Africa, South Asia and the Levant, the regions remain unstable. The competition between IS and AQ is localised and transactional. Alliances are formed and dissolved depending on local interests.

### 3. International spread

Spectacular attacks with many victims in large urban centres by Islamist terrorist groups, especially offshoots such as IS-Khorasan, form the core of the third scenario. The groups use their significant advances in drone technology, encrypted communications and the proliferation of commercial dual-use technologies to carry out spectacular attacks on sporting events, concerts and transport hubs in Europe, Russia and Southeast Asia. Recruitment takes place primarily online, where tailored propaganda (local, inspired by pop culture, with gender-specific messages) specifically targets disaffected youth, women and children. Women are increasingly acting as operational supporters and assassins, exploiting security gaps that exist due to gender stereotypes. The death toll rises sharply, leading to global counter-terrorism measures. Regional offshoots of AQ attempt to exploit this backlash by presenting themselves as a “moderate”, less violent alternative in regional contexts (offline and online). Competition between IS and AQ intensifies sharply, with both groups vying to take responsibility for high-impact operations.

### 4. Renaissance in the virtual caliphate

Increased use of encrypted, decentralised social media and virtual asset technologies enables IS and AQ to create online “safe havens” in this scenario. These digital spaces become central locations for recruitment, ideological training, operational planning and fundraising. AI-assisted propaganda radicalises a new generation of global followers, including many minors, some of whom (after complete online radicalisation) carry out attacks as lone actors. Overall, attacks in the real world are less frequent, but they are supported and carried out by scattered lone actors and micro-cells that use cryptocurrencies and online marketplaces to procure weapons and materials. The number of fatalities varies, with a few cyber or hybrid attacks causing significant international unrest. IS and AQ compete for digital supremacy, with IS-Khorasan and selected AQ offshoots developing into influential virtual “brands”.

One thing unites the scenarios outlined above: Islamist terrorism is characterised above all by persistence. This is evident in the shift to the next generation of jihadist followers and the increasing recruitment of female followers. AQ and IS are playing the long game.

## IMPRINT

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