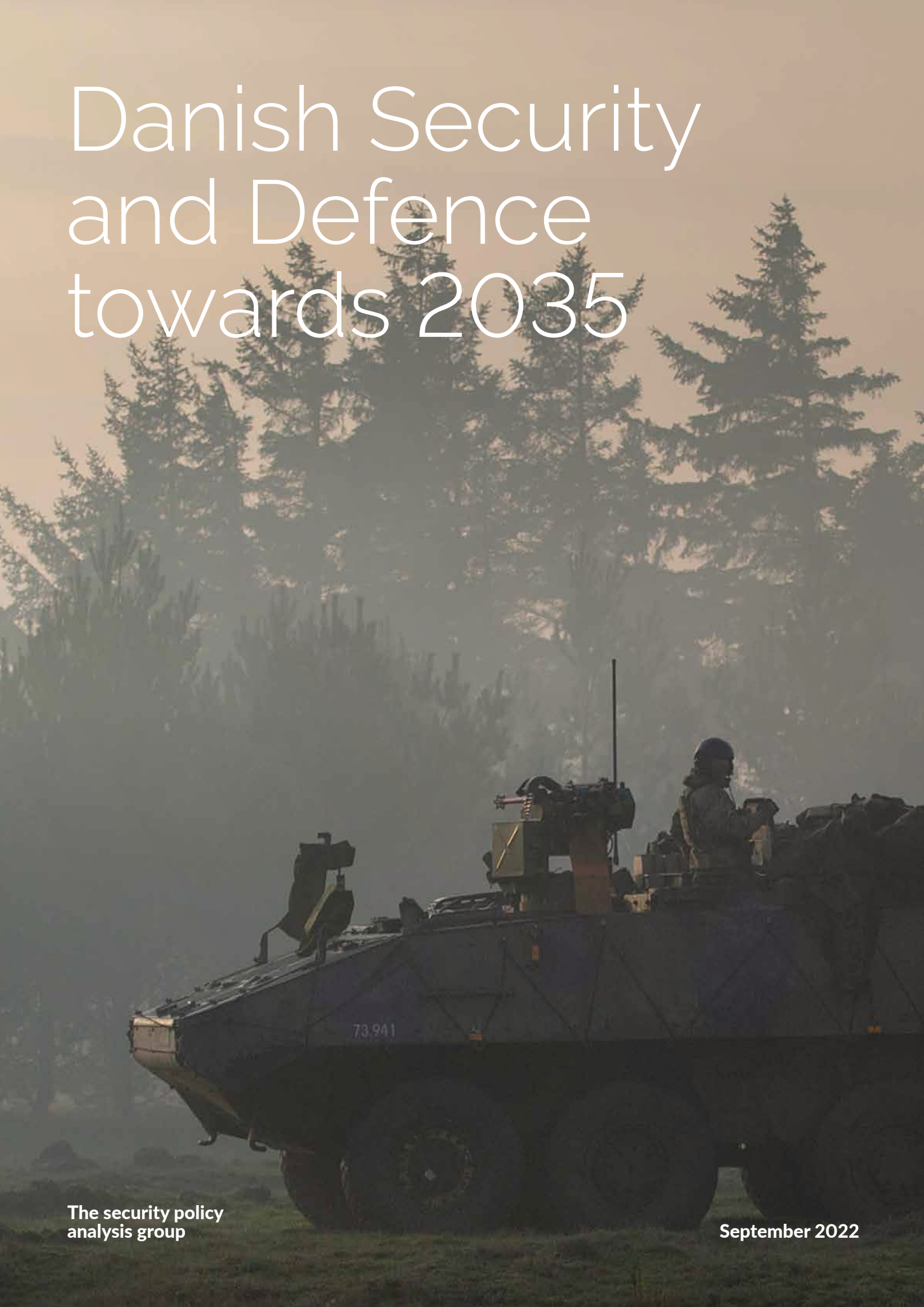
Danish Security and Defence towards 2035



The security policy analysis group

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The security policy analysis group
Asiatisk Plads 2
1448 Copenhagen K

Tel.: +45 33 92 00 00
um@um.dk
www.um.dk

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Summary

An entire generation of Danes grew up without fear of war in Europe and in a world that opened up. They could travel freely around the globe and experience how democracy and human rights progressed. They experienced a historic boom in prosperity in Denmark and the rest of the world. The children and young people of today are faced with a more bleak future.

A new iron curtain is descending over Europe since the brutal Russian attack on Ukraine. This is a landmark event in European security. The Russian willingness to use military force to change the European borders and seek to enforce a European order based on spheres of interest and the right of the strong means that the entire Kingdom of Denmark will face significantly intensified threats in the coming years. The network of arms control agreements and confidence-building mechanisms that created stability and predictability on our continent is lying in ruins.

Not only Europe, but the entire international community, is in disarray. The USA has lost its position as the only superpower, and the balance of power between the great powers is shifting rapidly, not least due to the rise of China. Cooperation is being replaced by sharp competition between the great powers while the UN and other global institutions are weakened. The ever closer integration of the world economy – with complex supply chains across national borders and time zones – has slowed down. Nuclear arsenals are growing and will play a greater role in the global security policy game in the future. We find ourselves on the threshold of a new era in which the rules-based international system based on the unique strength of the United States will be replaced by a new system. At this point, it remains too early to tell how far this development will go towards a more fragmented world order, where power means more than rules and principles. The direction is unfortunately clear, however, and it is certain that the future international system will be very different from what we have known since the end of the Cold War.

The intensified great power competition of the future will take on a different character than was the case during the Cold War. Firstly, the economic integration between China and the West is far deeper than it ever was between the former Eastern Bloc and the West. This means that there will continue to be cooperation in trade, climate and pandemics in parallel to fierce competition for control of transport routes, supply chains and infrastructure and – not least – for the technologies that can fundamentally change the future military battlefield. Secondly, China and the United States are not as globally dominant as were the USSR and USA. The EU, India, Japan and a number of medium-sized powers have considerable economic and military capacity and greater freedom of action than was then the case. This will very likely lead to a more fluid international system with changing patterns of cooperation and more proxy wars between the great powers. A sharp division of the world into democracies and autocratic countries could be an alternative, but is considered less likely.

China's ascendance as an ever stronger and more assertive global power will affect European security. The great geographical distance means that China cannot be expected to become a conventional military threat to Europe before 2035. But because the USA is turning its strategic focus towards

China, Europe will have to provide a much larger part of the NATO deterrence and defence against Russia as well as the efforts against terrorism and irregular migration from the Middle East and Africa. China will also be more prominent in other aspects of the threat landscape. China's rapid development and militarisation of new technologies, and its continued efforts to gain and access to European technology through legal and illegal means, will pressure Europe.

In light of the multiple and significantly intensified threats against Denmark, it is more important than at any other time since the end of the Cold War that we are firmly rooted in NATO and the EU and maintain close ties to strong allies in Europe and North America together with partners in Asia. NATO will remain the foundation for Danish security and the world's strongest military alliance. The intensified Russian threat has strengthened the unity of NATO and triggered a significant strengthening of the collective NATO defence along the eastern flank against Russia. While NATO ensures the military deterrence of Russia, the EU contributes significantly to European and global security in many other ways. With the prompt and harsh sanctions in response to the Ukraine invasion, the EU emerged as a real geopolitical actor. The active involvement of the EU Commission in the European defence dimension is game changer with important ramifications for building an efficient European defence industry.

As a result of the Danish referendum on the lifting of the defence opt-out and the Finnish and Swedish decisions to seek admission to NATO, the Nordic countries will for the first time in history stand together as military allies in NATO and as partners in the EU defence dimension. This opens up entirely new perspectives for Nordic defence cooperation.

The Faroe Islands and Greenland forms part of the Arctic/North Atlantic security policy complex, which has a key role in the mutual nuclear deterrence between the USA and Russia. Greenland lies in the middle of the path of intercontinental missiles between Russia and the USA. As the relations between the two great powers have deteriorated, the relevance of Pituffik (Thule Air Base) has increased. The Faroe Islands and Greenland are important for the strategically important maritime passage in the waters between Greenland, Iceland, the Faroe Islands and Scotland, which Russian submarines and warships must pass to enter the North Atlantic.

The new security policy situation of the Kingdom of Denmark entails a significant increase in the tasks facing the Danish Armed Forces until 2035. It will be necessary to increase the Danish contribution to the ongoing strengthening of the Western deterrence and defence against the increased military threat from Russia and to the relief of the USA in Europe. The main tasks of Danish Defence is expected to be forward defence in the Baltic Sea region, including more forces on short alert, as well as increased surveillance in the Arctic and the North Atlantic. The Armed Forces has to deliver our NATO capability targets. Future NATO targets for Denmark are likely to become even more demanding and to require much higher preparedness levels. Continued support for Ukraine, including training and weapons, can also require more resources.

Climate change and demographics will intensify the threats and challenges emanating from weak and fragile states. Maritime security will also remain a key priority for Denmark. Furthermore, our allies will likely request Danish military contributions to activities in Asia in line with the increased strategic focus there. The Danish defence should therefore retain capacity to send relevant military contributions to distant international operations. Even with the decision to increase defence spending to 2% of GDP, however, there will be less capacity to participate in such operations in the coming years.

The rapid technological development will require a significant technological boost to the Danish Armed Forces if it is to remain a relevant partner for our strongest allies. This increase will also be required to enable the Armed Forces to handle increasing tasks despite limited prospects for expanding the manpower. The new, bleaker threat assessment also requires a strengthening of the broader societal security. The Kingdom of Denmark must be able to deal with a wide range of growing man-made and natural threats, including cyber-attacks, malign foreign interference in political processes or control of critical infrastructure, shortages of critical supplies, pandemics and extreme weather.

Report from the security policy analysis group

An entire generation of Danes grew up without fear of war in Europe and in a world that opened up. They could travel freely around the globe and experience how democracy and human rights progressed. They experienced a historic boom in prosperity in Denmark and the rest of the world. But the children and young people of today are faced with a more bleak future.

A new iron curtain is descending over Europe since the brutal Russian attack on Ukraine. Thousands are dead and injured, hundreds of thousands displaced, and cities and infrastructure have been destroyed. The network of arms control agreements and confidence-building mechanisms that once created stability and predictability on our continent is in ruins.

Not only Europe, but the entire international community, is in disarray. The USA has lost its position as the only superpower, and the balance of power between the great powers is shifting rapidly, not least due to the rise of China. Cooperation is being replaced by sharp competition and a race for new technologies that will have far-reaching consequences for future warfare. The UN and the other global institutions have been weakened. The nuclear arsenals are growing and will play a greater role in the global power game. The ever closer integration of the world economy, with complex supply chains across national borders and time zones, has slowed down. Climate change is creating more violent weather and, together with population growth, is placing already fragile societies under further pressure, which could possibly trigger terrorism and uncontrolled migration. What the new international order will look like is far from certain, but what is certain is that it will be very different from the one we have known since the end of the Cold War.

It is therefore also very difficult to predict the strategic framework for the Danish Armed Forces until 2035, which has been the task of the security policy analysis group. There can be no doubt, however, that the Kingdom of Denmark will face significantly intensified threats in the coming years – above all from Russia – which will require extensive investments in defence and a significant strengthening of our civil society security. With the national compromise on Danish security policy, a broad

majority in the Danish Parliament on 6 March 2022 laid down the general framework for the necessary strengthening of the Armed Forces and safeguarding of Danish security in the decade to come.

Føroya Landsstýri (the Government of the Faroe Islands) and Naalakkersuisut (the Government of Greenland) have participated in the analysis group work. The analysis thus cover all three parts of the Kingdom of Denmark, which for the sake of a more reader-friendly document, are referred to in the text as 'Denmark'. Where the Faroe Islands or Greenland are particularly affected, 'Kingdom of Denmark' is used.

The analysis group has based its work over the past two years on a series of background papers prepared by Danish experts and the analysis group secretariat together with existing analyses from Denmark and abroad. A wide range of Danish and international experts have participated in the discussions, i.a. at a number of conferences and seminars that the group has organised. The special advisory group of experts has made a particularly important and highly valued contribution. The secretariat has visited the EU, NATO, the UN and Denmark's most important security policy partners. The many and very different assessments the group has received are summarised in this report. As such, this report does not represent the analysis or assessments of the governments of Denmark, the Faroe Islands or Greenland.

The report begins in Chapter I with the expectations for the overall development in the international system and then zooms in on the security situation in Europe, the North Atlantic and the Arctic. Chapter II describes the multiple and very diverse threats that Denmark may face from both governmental and non-governmental actors and climate change. Chapter III reviews NATO, the EU and our other most important allies and partners. The consequences of the global and regional development trends towards 2035 for the future tasks of the Armed Forces and the Kingdom of Denmark in general are dealt with in Chapter IV. The group's members, terms of reference and the organisation of the work appear in the Annex, together with the composition of the advisory group of experts.

The geostrategic development towards 2035

01

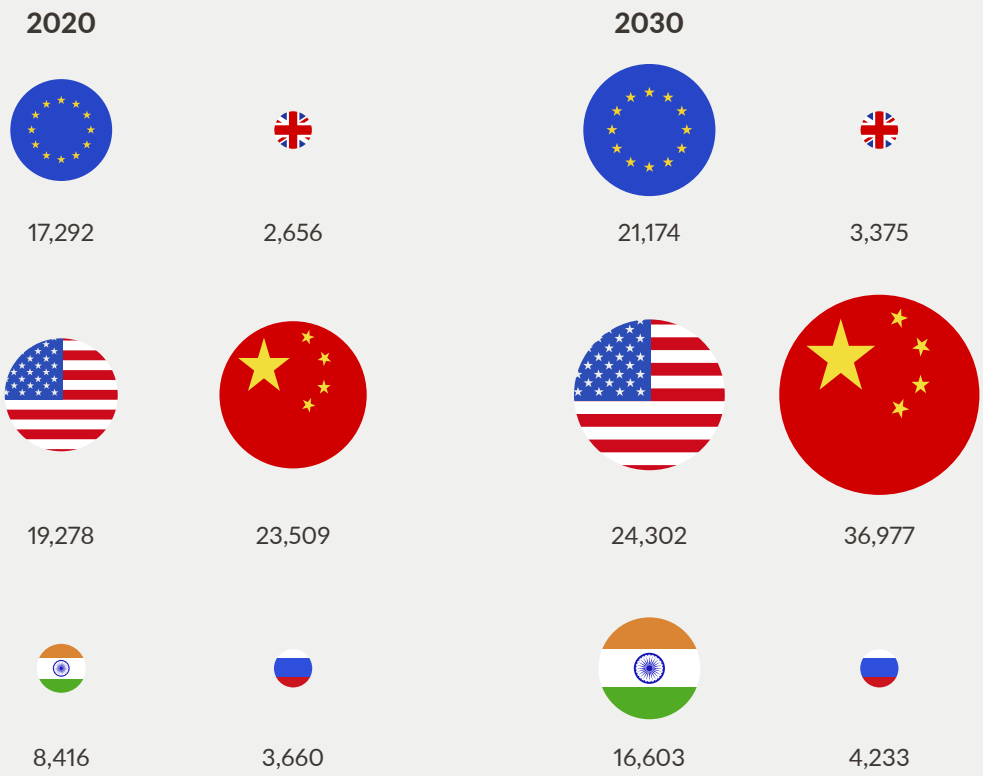
This chapter reviews the expectations for the development of the international system in the years to come, which will be characterised by disintegration, the spreading of power, intensified great power competition and weakened global institutions. The likely development of a Chinese-dominated alternative financial system is described together with various scenarios for either a value-based division of the world into democratic and authoritarian blocs or a more fluid system. The economic and technological dimensions of the great power competition are analysed, after which the perspectives for the European security architecture after the Russian invasion of Ukraine together with the consequences for the Arctic and North Atlantic are described.

1.1 The international system – from a unipolar, liberal world order towards a more fluid order with competing economic systems

The United States has lost its position as the all-dominant superpower due to a spread of economic, technological and military power, which has given (primarily) China and a number of other great powers more influence and room for manoeuvre. Global institutions such as the UN and WTO have weakened, and most of the elements of the complex European and global network of arms control agreements and confidence-building measures no longer function or only do so very weakly. The already shaky rules-based international system received a severe shock when Russia, in violation of the prohibition of the use of force in the UN Charter and its special responsibility to maintain international peace and security as a permanent member of the UN Security Council, attacked a peaceful neighbouring country on 24th of February 2022. The weakening of the rules-based international system is primarily due to the lack of Chinese and Russian respect for the rules of the game, but the USA has also contributed to this with the termination of agreements such as Open Skies[1], the Iran nuclear deal and blocking the WTO dispute settlement system. We are on the threshold of a new era in which the rules-based international system based on the United States as the only remaining post-Cold War superpower will be replaced by a new system. It is still too early to assess how far this development will go in the direction of a more fragmented world order, where power means more than law and principles, but the direction is unfortunately clear.

1 An agreement from 2002 on mutual access to carrying out surveillance flights over the participating countries.

GDP adjusted for purchasing power (mia. USD)



The Indo-Pacific region has replaced the North Atlantic as the global economic centre.[2] The shift in economic and military power from the OECD countries to the emerging economies in Asia must be expected to continue, and the Indo-Pacific region is replacing the North Atlantic as the global economic centre. The OECD expects that economic growth in the large non-Western G20 countries will continue to be higher than in the OECD countries for many years, although the difference in growth rates will narrow considerably over time. Until 2020, China had achieved the highest growth, but in the coming years the growth rates in India and Indonesia are expected to be the highest. In 2030, China and India combined will have almost the same share of global GDP as the EU and USA combined. However, prosperity in India and China will continue to be markedly lower.[3] From 2020 to 2040, the Brazilian and Russian shares of global GDP are expected to decrease, whereas the GDP of Indonesia is expected to increase and overtake Brazil and Russia as early as 2030. Neither Africa nor the Middle East have prospects for gaining a significant share in global growth and prosperity.

The technological balance of power has also shifted. China has built up a large innovative capacity and purposefully tapped knowledge from Western companies and universities using both legal and illegal methods. At the same time, China has developed an unprecedented fusion of its military and civilian high-tech capabilities. Although the West is likely to remain more innovative and technologically stronger overall, we risk losing our accustomed edge in military high-technology. India has developed a strong software industry and has the potential to take an economic and technological leap forward that may eventually rival the rise of China.

2 These expectations and other calculations are based on a background paper, 'Globale økonomiske styrkeforhold frem mod 2035' (Global economic strength towards 2035), prepared by the Ministry of Foreign Affairs Foreign Economic Analysis Unit (cf. Annex 1).

3 Understood here as GDP per capita measured both in market prices and purchasing power parities.

The Ukraine war has accelerated an incipient fragmentation of the global economic system based on Western-dominated institutions, such as the IMF, the World Bank and large private banks. With the sanctions and the EU decision to phase out imports of Russian energy, the economic interaction between the West and Russia will wither in the coming years. A corresponding total decoupling between China and the West would trigger such a dramatic loss of welfare for both parties that, despite the growing political tensions, is unlikely before 2035. However, both parties are in the process of reducing mutual dependence in particularly sensitive areas. China is working purposefully to become less vulnerable to Western sanctions by, among other things, establishing control over strategically important supply chains and building an independent financial system and its own internet. Russia must be expected to become part of this new, Chinese-led system. A number of other countries must also be expected to follow the same path more or less voluntarily. Here, the fact that China is today the single largest trading partner for most of the world's countries and in many countries also a significant investor and lender will play a role. On the Western side, the decoupling agenda is driven by the need for states to secure their freedom of action and protect critical infrastructure and technology. The need for companies to reassess their complex supply chains in light of growing consumer scepticism towards China and the risk of disruptions due to pandemics or sanctions from authoritarian countries is also a driving force behind the decoupling agenda. The competition and balance of power between the classical Western-dominated system and the new Chinese-led system will be decisively affected by how India positions itself in this game. As in the Cold War, India could conceivably seek to present itself as a leader and mouthpiece for the many countries that do not want to choose sides between the two systems. Another important factor will be the extent to which the USA and EU can maintain their position as the setters of global norms and standards for products and technology; a position that China is already actively challenging.

The great power competition will take on a different character towards 2035 than during the Cold War. First, the economic integration between China and the West is far deeper than it ever was between the Eastern Bloc and the West. This means that parallel to the fierce competition for the technologies of the future and control over transport routes, supply chains and infrastructure, there will continue to be a track for cooperation in trade, climate, combating global pandemics and so on.

Denmark has a strong interest in maintaining this cooperative track in light of our open, globalised economy and prioritisation of climate action. Second, China and the United States are not as globally dominant as the USSR and USA were in the 1945–89 period. The EU, India, Japan and a number of other medium-sized powers have considerable economic and military capacity and greater freedom of action than during the Cold War. Turkey, for example, is a member of NATO, but still has room for manoeuvre to go its own way in relation to Russia, as seen with its purchase of Russian weapons and refraining from implementing the sanctions against Russia.

The alternative to a more fluid system could be a fixed value-based division of the world, as proposed by the Biden administration, with the democratic countries united in a global West (North and South America, the European countries, together with Australia, New Zealand, South Korea, Japan and a few others) on the one hand, and authoritarian states such as China, Russia, Iran, North Korea etc. on the other. In this scenario, the values in the form of a special commitment to the liberal-democratic form of government and a rules-based international order with respect for universal human rights become a way to divide the world and simultaneously unite a part of it. In the context of NATO, the values are articulated as a focal point for the cohesion of the alliance, but the organisation does not have the instruments to react when countries drift away from the values, as for example during the military dictatorships in Greece and Turkey. With the Treaty of Lisbon, the EU has obtained such instruments, which have been applied to Poland and Hungary. How effective these instruments are cannot yet be assessed. While the regimes of the authoritarian states have no common ideology, they define themselves in clear opposition to the liberal democracies, both in the form of political discourses about decay in the West, as is the case in Russia, and more fundamentally in the form of measures that limit the rights of civil society. Both China and Russia have learned from the Declaration of Helsinki, which helped to open up communist societies in the final phase of the Cold War, and they are now seeking to counteract the opening that civil liberties provide for a legitimate opposition to challenge the respective regimes.

A value-based division of the world risks standing in the way of handling one of the most important global axes in the long-term great power competition; namely, the relations with the group of countries belonging to the 'non-aligned' grouping during the Cold War. The West needs to cooperate with many of these countries on matters such as replacing Russian energy and on raw materials for the green transition. Global security in the coming years will largely be about the respective attempts made by the Western countries and China–Russia to gain influence and favour in this group of countries. This problem is illustrated by the difference in the reactions to the Russian invasion of Ukraine: Where Western countries have clearly condemned the invasion, the global reaction has been much more varied. It is not only China's role as the largest trading partner and Russia's role as an arms supplier or local security policy actor that has kept many countries from supporting Ukraine as unambiguously as the West; in many of these countries, the West is suspected of double standards, and neither leaders nor populations see any major difference between Russia's actions and US-led interventions in Iraq or the bombing of Serbia and the recognition of Kosovo's independence. In the African countries, Russia and China have gradually gained greater influence, whereas the EU has struggled to convert its large development aid and importance as an export market into political influence. In a broader sense, there is therefore a need for the EU to be put in a position to bring all the external aspects of EU policies into better play in a foreign and security policy strategy. This applies to trade policy, energy policy, environmental and climate policy and industrial policy. The division between community policies and the common foreign and security policy, as well as weaknesses in the decision-making mechanisms, constitute a structural challenge that is not known by other global actors, such as the United States. The TEAM Europe mechanism is a way of creating greater coherence, but the EU still has considerable untapped potential, which Denmark can help realise by working for better joint action.

It is likely that, as during the Cold War, there will be a strategic rationale for a middle group of countries to maintain a non-aligned position to preserve or expand their freedom of action. Here, the value agenda risks creating distance in the very relations that the West has a strategic interest in making closer. This applies to very important Asian countries such as India, Indonesia, Singapore,

Malaysia and Vietnam, as well as most of the Middle East and Africa. The West is weakened in the global struggle for values by the emerging contours of an internal value crisis among the liberal democracies. In both the USA and Europe, populism and polarisation are challenging fundamental democratic institutions and values.

Regardless of whether the development will go in the direction of a value-based division of the world or a more fluid international system, it will be even more difficult than today to come together on broad agreements on global challenges. This applies to climate change, where the serious threat to humanity as a whole has thus far promoted global cooperation, which culminated in the conclusion of the Paris Agreement. With the growing tensions between the major powers, there is a risk of this cooperation being replaced by conflict over the distribution of the costs of the necessary CO_2-emissions reductions. Nor is there any prospect that, in the time horizon covered in this report, agreement can be reached on new arms control agreements, including for new weapons systems such as drones and hypersonic missiles. If the old agreements are not replaced with anything, we will likely see an arms race over a relatively broad front.

Great power rivalry will also shape the work of the UN Security Council. While this development is hardly new, the war in Ukraine has contributed to a significant worsening of the climate of cooperation in the Council. It remains too early to assess the full consequences of the Russian invasion for the various agendas in the Council. It seems clear, however, that the Security Council will continue to form a central platform for the important battle for the global narrative, as witnessed by the Russian use of the open UNSC meetings to spread disinformation and propaganda about the war in Ukraine.

With the return of geopolitics and the global struggle for values, it is also becoming more difficult to reach agreement in the Security Council on the handling of crises and conflicts that threaten international peace and security, including the stability of Europe and Denmark's immediate neighbourhood. Thus, by all accounts, it will not be possible to adopt new peace operations in the Council with robust stabilisation mandates in the years leading up to 2035. The extension of existing mandates for both UN-led and delegated peace operations, including the mandates for EU military operations,

is likely to become increasingly difficult, if not impossible. It is, however, still the assessment that the major powers have no interest in completely paralysing the Security Council, and it will therefore probably still be possible to reach more limited agreements in the UNSC on issues such as ensuring humanitarian access, monitoring ceasefires or facilitating peace negotiations.

The pivotal point for global security policy development in the years to come will be the relationship between the United States and China. The declared goal of China is to be able to match the USA as the world's strongest military power in time for the 100th anniversary of the founding of the People's Republic in 2049. President Xi is simultaneously rapidly expanding the Chinese military capacity and initiating a more assertive foreign policy. The USA now views China as its only existential threat and is shifting its strategic focus from Europe to Asia. While the USA has recently strengthened its presence in Europe due to the Ukraine war, the U.S. contribution to conventional defence and deterrence in Europe in the long term must be expected wane significantly.

In other ways as well, China's ascendance as an ever stronger and more assertive global power will negatively affect European security. The vast geographical distance means that China cannot be expected to become a direct conventional military threat to Europe before 2035. But in other aspects of the threat assessment, China will become more important. The rapid Chinese development and militarisation of new technologies, together with its continued efforts to gain control over critical infrastructure and access to European technology by legal and illegal means, will pressure Europe. China's new, long-range weapons systems are also a growing source of concern. Although China still has significantly smaller nuclear arsenals than the United States and Russia, an expansion and modernisation of China's nuclear capabilities is looming, which will eventually be able to reach Europe. The balance between cooperation, competition and systemic challenge in the EU approach to China has changed, with greater emphasis now on competition and addressing the systemic challenge. This development seems to be set to continue; not least reinforced by China's ambiguous actions in relation to Ukraine. The European need to safeguard its own interests in Asia and to show solidarity with the USA and other close partners in the region could further strain the relationship.

1.2 The economy has once again become security policy

Since the earliest state formations, trade, economics and security have all been closely linked, and many wars have been fought control over resources and trade routes. During the Era of globalisation, this connection became less clear; private actors took over much of the influence of the states as world trade and the economies of most countries with centrally planned economies opened up. This trend was further reinforced by the extensive privatisation of critical infrastructure, such as telecommunications, energy, ports, airports and railways in many countries. The largest global companies that made the best use of the new technologies and value chains achieved an economic strength and influence that exceeds that of many states. There was widespread confidence that market forces, with a minimum of regulation, would ensure the delivery of the necessary services to businesses and citizens. At the same time, an unprecedented boom in prosperity was felt around the world as a result of the extensive and sophisticated global division of labour organised in complicated value chains.

However, not all states abandoned geo-economic thinking. Led by China, authoritarian governments have maintained a high degree of state control over their own economies and used the wave of privatisation in other countries to secure control over critical production and infrastructure on a global scale. For example, China now controls the majority of the value chain for the green transition, including the bulk of the production and processing of rare metals and copper, which are necessary for the widespread electrification of economies. China and Russia have both demonstrated a willingness to exploit their control over important resources to enforce political demands.

The increased superpower competition has rendered the security of supply issue acute.

Rare metals

Modern economies depend on a wide range of elements and minerals, some of which are critical from a security of supply perspective. A globalised market has concentrated the production of a number of rare metals in a few countries, primarily outside of Europe and North America, as market economic mechanisms have favoured technically complicated, energy-intensive and environmentally problematic production in low-income countries. The increased superpower competition has rendered the security of supply issue acute. This can be challenged both by a demand that is greater than the supply, but in particular by politically defined uncertainty in supply chains and the risk of states possibly using access to the critical components as a means of political pressure. There has therefore been greatly increased interest in recent years in building the capacity to mine and refine rare earth metals and other critical metals and minerals in Europe and the US.

Rare elements with high technological relevance include a number of metals, semi-metals (e.g., boron, silicon) and non-metals (e.g., graphite). These substances are often erroneously referred to as rare minerals, probably because the rare metals also include a group of 15 metallic elements, which together are called rare earth metals, or rare earths. These metals have almost identical chemical properties and are neither rare earths nor earths, but metals that are relatively widespread in the earth's crust. The critical role of the so-called rare minerals or rare elements is mostly not due to the minerals from which they are extracted being particularly rare, but rather because the market for them is small and specialised, and extraction and refining are often complicated and energy- and labour-intensive. There are therefore few providers, which renders the supply chains uncertain and vulnerable. It is important to distinguish between the different types of rare elements, each of which has unique supply chain vulnerabilities. Virtually all of these elements will be able to be extracted and refined within the EU and associated territories if the will is there.

Not least because of the green transition, demand is rising sharply and supply is not keeping up. By 2040, the world is expected to need four times the amount of critical metals for green energy technology as today. After decades of targeted efforts and the acquisition of mines around the world, China now controls the vast majority of rare mineral production. For example, the Democratic Republic of the Congo is the world's largest producer of cobalt, but 70% of this production takes place in Chinese-owned mines. At the same time, the Ukraine war has demonstrated how NATO countries' contingency stocks of ammunition will not be sufficient for a potential superpower conflict. The U.S. defence is therefore in the process of analysing its production lines and underlying supply chains to clarify production potential and the potential challenges. As with so many other supply chains, ammunition production also depends on critical mineral raw materials, which are primarily supplied by China and secondarily by Russia. A particular challenge is that the semimetal antimony, which is essential for ammunition production, is one of the few that is largely absent in the United States. While the USA itself can produce most rare earth metals but has chosen not to do so for environmental and economic reasons, it has no major deposits of antimony, and the only major producer apart from China and Russia is Tajikistan, which will make it difficult to reorganise supply chains in the near future.

The West has made use of economic sanctions as means for pressuring Iran, Russia and other countries, but very little attention has been paid to how vulnerable we ourselves have become. However, during the COVID-19 pandemic many countries halted vaccine exports and there was an acute shortage of protective equipment. This together with the current problems in the global supply chains with a shortage of semiconductors, triggered a sudden awakening for both states and companies in the Western world. One of the first Biden administration initiatives was to launch a systematic review of vulnerabilities in U.S. supply chains in a wide range of sectors, including semiconductors, batteries, energy and food. Against this background, the administration has presented a comprehensive plan with a large number of initiatives and investments aimed at bolstering supply chain security, including investments of over US$ 50 billion in the development and production of semiconductors.[4] In the EU, too, even the most trade-liberal countries have recognised the need to strengthen the EU's strategic autonomy, which has therefore become a prominent point on the agenda and must be expected to lead to dynamic development in the area in the years to come. In 2021, the Commission carried out a thorough review of the EU's strategic dependence, and the EU has decided to establish joint stockpiles of protective equipment as well as developing the European in-house production of critical products, such as batteries, semiconductors and processors. The common trade policy will be adapted to the new realities and focus on diversifying European imports. To protect critical European infrastructure and technology, the EU has also established an invesment-screening mechanism. In Denmark, investment screening legislation entered into force in July 2021.

Within the framework of the new 'EU-US Trade and Technology Council', the EU and USA have initiated close and promising collaboration to deal with these challenges. Together, the EU and USA will be able to maintain dominant influence on the world economy for many years to come and remain the norm-setter for product standards and other economic rules of the game. Further development of this cooperation will require both parties being able to rise above the traditional competition in these areas and weather the challenges from protectionist forces on both sides of the Atlantic. With the EU–US cooperation at its core, the G7 can play a role in coordinating the overall Western effort to meet the economic and political challenges from China and Russia.

Private companies must also grant greater consideration to the security policy dimension when making decisions, and they must review their supply chains critically with a view to making them less vulnerable. All actors have had to recognise how, after many years of focusing on 'just in time', it will be necessary in the future to focus on 'just in case'. In the long term, this may lead to Western companies repatriating production to the EU and the USA and their immediate neighbourhood – a development that may be reinforced by rising transport costs and labour costs in Asia. However, one might expect some production to remain in Asia, moved to countries with fewer security policy risks ('friendsourcing'), as with Apple's transfer of some of its production from China to India.

4 "The Biden-Harris Plan to Revitalize American Manufacturing and Secure Critical Supply Chains in 2022".

This development will come at a great cost for global economic growth and welfare. In the developed economies, governments will have to make difficult choices in the years to come, with political room for manoeuvre narrowed by increased defence spending, higher inflation and slowing global growth. Where precisely the balance point between security and welfare will lie will depend on the level of tension between the great powers together with the willingness of the populace to suffer economic deprivation for the security of the state. In any case, world trade must be expected to grow less than in recent years.

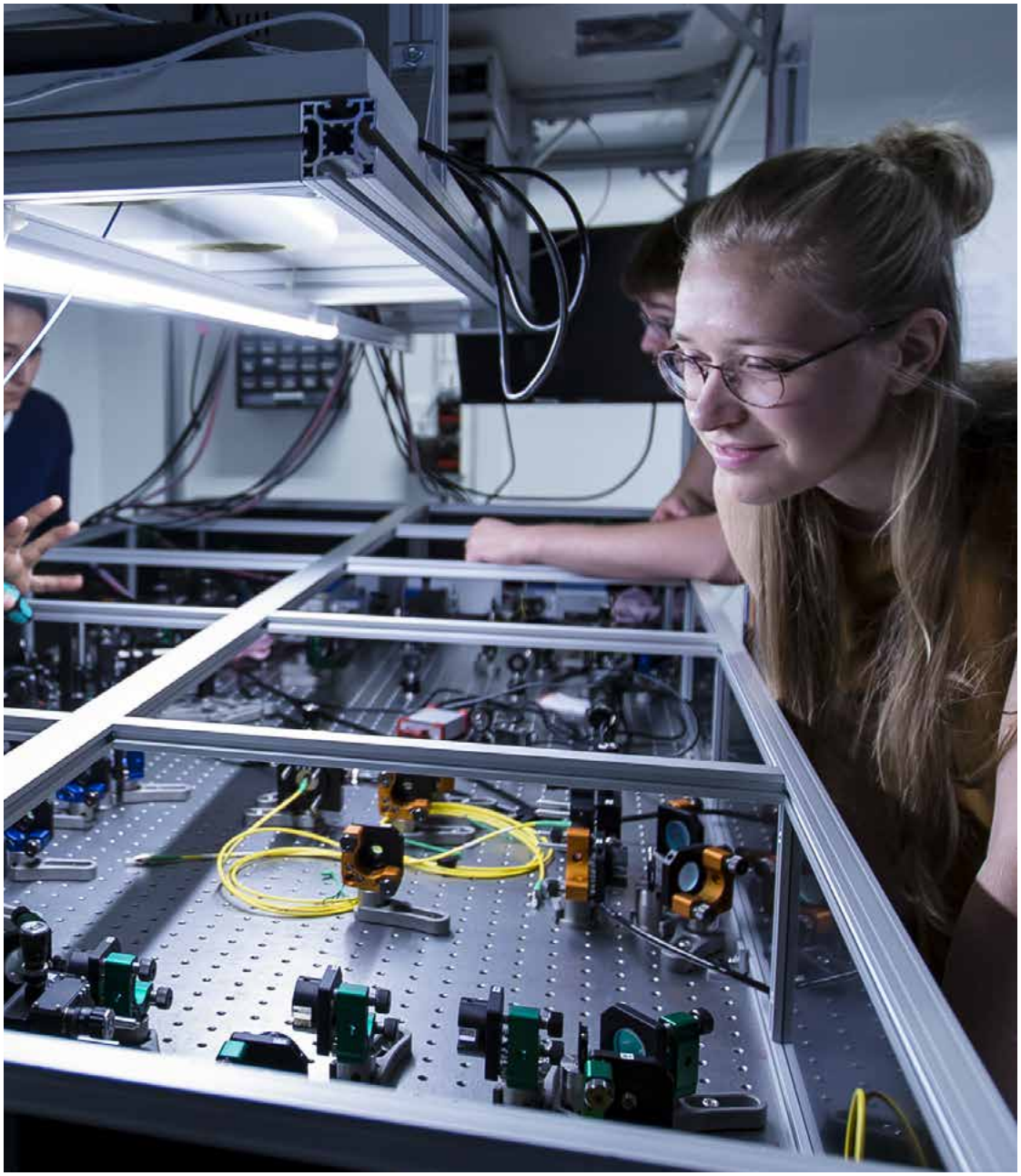
Poor and vulnerable populations will be hit particularly hard by this development. Although development aid has become less important in their economy, the negative impact of the lower global growth will be reinforced by the fact that development aid, in line with trade and investment, must be expected to be used directly as a security policy instrument to a greater degree, while overcoming poverty take a back seat. Previous conditions for development aid aimed at improving conditions for the citizens of the recipient countries, such as respect for human rights, corruption mitigation and so on, is likely to increasingly being overshadowed by demands linked to great power competition.

1.3 Military and civilian competition for technology and innovation

The increased great power competition is particularly manifest as long-term competition for the development of new technologies for both civilian and military purposes. The major players – including the USA, China and the EU – focus especially on the development of so-called disruptive technologies, which have the potential to change the future military battlefield and civilian industries fundamentally. The ability to translate innovation into military means is a key competitive parameter in the great power competition.

Although the disruptive technologies also include biotech, new materials and manufacturing techniques etc., the continued digitisation of modern societies means that IT-related technologies are a hotbed for particularly significant potentials. This applies, among other things, to artificial intelligence, automation (robotics and autonomous weapon systems) and quantum technologies. Together with hypersonic missiles, they will significantly change the battlefield of the future. The disruptive potential of the specific technologies is therefore both about the security policy value that lies in military applications and the more general economic and market gains that lie in civilian applications.

Compared to the Cold War era, the centre of gravity of innovation has shifted from state-organised frameworks to the private sector. Innovation now largely takes place in private companies and is then being converted for military purposes. The major players are therefore focusing on creating a solid basis for innovation via cooperation between government authorities, the world of research and the private sector. Military and civilian competition for technology and innovation are therefore also about the potential for different societal models to stage this type of cooperation. On the one hand, the free-market OECD countries have a significant strength in the form of the world's most innovative private sectors. Moreover, the USA and major European countries have rich traditions for close cooperation with their defence industries, which can be extended to new sectors – although the market economy makes it impossible to dictate such cooperation. On the other hand, authoritarian China's massive, state-owned and party-controlled sector of the economy allows it to orchestrate very close civilian–military cooperation. In the case of China, domestic innovation is supplemented by knowledge obtained from abroad by legal and illegal means, including industrial espionage. The great power competition is therefore expressed to a significant extent in this specific competition for the ability to create innovation in, respectively, authoritarian states and market economies. But it is also a source of internal strategic challenges – between the liberal democracies. Although the European countries and the USA share an increased strategic focus on innovation and disruptive technologies with a particular view to the challenge from China, conflicting industrial policy and strategic interests cannot be avoided.



As can be seen in connection with the EU's opening of the large research funds for projects with both civil and military use ('dual-use') – the establishment of NATO's innovation fund and the DIANA technology accelerator initiative[5] – Western defence industry policy is also changing. The increased prioritisation of innovation and technology development is simultaneously leading to a greater focus on cooperation with the defence industries and the research world, also within the military authorities. The innovation agenda creates new challenges and opportunities for large and small countries alike. For small countries like Denmark, there are both strategic and purely military opportunities and risks associated with the choice of international cooperation partners, both in relation to the EU and the USA, and in relation to military technology dependencies. Great power competition means that the development and acquisition of military equipment by small countries becomes an expression of alliance policy to an even greater extent than previously.

5 Defence Innovation Accelerator for the North Atlantic. This initiative organises a network of test centres and accelerator sites with a view to creating momentum in the development of disruptive technologies.

1.4 Nuclear weapons attain greater importance

The global balance of power consists of economic, political and military factors, including not least nuclear weapons. Global strategic stability is expressed through the distribution of nuclear weapons and their means of delivery, as well as the associated authorities and organisations that handle them. The increasing great power competition implies an increased role for nuclear weapons in global security policy, which is expressed, inter alia, through the great powers' renewal of their nuclear arsenals. The traditional great power status of the USA and Russia in this area is now supplemented by China, which in recent years has significantly expanded its nuclear strike force and its ability to withstand strategic attacks, which has strengthened the mutual deterrence with the USA. Despite this, China does not want to contribute to a new trilateral model of nuclear arms control between the nuclear powers, which has previously been a bilateral affair between Russia and the United States.

The repeated Russian threats to use nuclear weapons, China's extensive nuclear armament and the rest of the global nuclear arsenal clearly demonstrate the greater importance of the nuclear dimension in the future threat assessment. Add to this the increased risk of the further spread of nuclear weapons to new countries. The Russian invasion of Ukraine and failure to comply with the Budapest Memorandum, which provided security assurances to Ukraine in exchange for the country surrendering its extensive nuclear arsenal, as well as the fall of Gaddafi following the abandonment of the Libyan nuclear programme, have sent an unfortunate signal to Iran, North Korea and other countries with nuclear ambitions: You can't rely on international agreements in this area.

This development increases the need for knowledge and skills in relation to nuclear crisis management in NATO and among the decision-makers in the member states. This also applies to Denmark, where it will be important both on military and civilian levels to understand and deal with nuclear

issues and dilemmas – not just in exercises in the Alliance. Among other thing the civilian nuclear preparedness may have to be adapted to the new threat assessment. It is not inconceivable that it may also prove necessary to rethink parts of the Alliance's nuclear policy, profile and burden sharing in a changing security situation.

This new focus on nuclear weapons and possible proposals for the deployment of nuclear-armed, medium-range missiles in Europe will undoubtedly give rise to difficult discussions in the NATO member states, including whether NATO must uphold the commitment to Russia not to station nuclear weapons or nuclear infrastructure among the Alliance members in Eastern Europe. Finland and Sweden are also considering nuclear opt-outs – which Denmark, Norway and Iceland have had for decades – in connection with their ongoing accession to NATO.

The purpose of hybrid threats is to spread instability by, among other things, splitting NATO and the EU, sewing discord in national public opinion, and seeking governing influence in vulnerable countries.

Hybrid threats – security policy and societal security

Russia's use of irregular military forces – the 'little green men' – in connection with the invasion of Crimea in 2014 led NATO to use the concept of 'hybrid threats'. Subsequently, in NATO and the EU, the term has also come to encompass a broader agenda covering very varied, non-military security policy instruments used by opponents against the West. The purpose of these means – which include cyber-attacks, disinformation, manipulation of the democratic debate, influencing electoral actions, genuine sabotage, and economic measures, also in the form of investments and corruption – is to spread instability by, among other things, splitting NATO and the EU, sewing discord in national public opinion, and seeking governing influence in vulnerable countries.

Although parts of the hybrid means can be used militarily in a war situation (typically with irregular special forces), it is mainly used below the threshold of military conflict as in the example of the Russian political conflict with the NATO countries.

Hybrid threats are thus a security policy challenge, which is handled partly by increasing the costs for the attacker by retaliation via financial sanctions, partly by ensuring robustness in the relevant societal functions across government authorities, the private sector and civil society. Robustness has a security policy function and contributes to military deterrence by denying access like a lock on a door.

The tendency of security policy to overshadow the classic preparedness consideration of robustness is spreading across many new policy areas, and can be covered using the concept of societal security. That societal security is a broad matter is seen from the fact that the hybrid threats in a national context are handled by a combination of foreign ministries, defence ministries, intelligence services, emergency and police authorities together with a number of authorities that are not traditional security policy actors. In Denmark, for example, this applies to the Ministry of Business, the Ministry of Finance and the Ministry of Science. The unique political structure of the Kingdom of Denmark constitutes a particular vulnerability that the governments in Denmark, Greenland and the Faroe Islands are aware of. Internationally, NATO (and not least the EU) play a significant role in terms of coordinating concrete efforts and developing a more general framework for handling hybrid threats, just as bilateral cooperation with close allies and neighbouring countries is also essential.

The digitisation of societies also makes them vulnerable to destructive attacks, which in addition to digital effects also result in physical destruction.

Cyber

In line with technological development and increasing digitalisation, cyber-attacks pose an ever greater threat. This particularly applies to cybercrime and cyberespionage, whereas more destructive attacks resulting in physical destruction are still rare. Since it is at the same time largely unclear how basic international rules apply in the context of cyberspace, digital networks constitute a grey zone where the great powers collide.

Quantitatively, cybercrime is the largest cybersecurity challenge and poses a major challenge for both private corporations and public authorities. Although the vast majority of cybercrime is not carried out by state actors, a very large proportion of criminal cyberattacks originate from countries such as Russia, China, Iran and North Korea, which either directly incite attacks on Western countries or simply choose not to prosecute such attacks.

In particular, states use cyberespionage as an acquisition tool that allows intelligence agencies to scrounge up sensitive information from in front of the office computer without the risks associated with analogue acquisition methods. The Chinese intelligence services, for example, have for many years had a special focus on stealing Western trade secrets and patents for the benefit of Chinese industry. Cyber-attacks are also a significant part of the hybrid threats, as for example in the attacks on democratic institutions in the form of disinformation and interference in elections and campaigns. An example of this was the Russian hacker attack on the U.S. Democratic Party in 2016, where the subsequent leak of stolen information was part of a Russian attempt to influence the outcome of the presidential election.

The digitisation of societies also makes them vulnerable to destructive attacks, which in addition to digital effects also result in physical destruction. In this way, cyber-attacks are also an offensive capacity that can be used instead of actual military force. A classic and particularly advanced example is the Stuxnet attack that sabotaged the Iranian nuclear programme by destroying a large number of Iranian uranium enrichment turbines. Russia has also made use of destructive attacks in the war against Ukraine, where a cyber-attack targeting Viasat satellites caused extensive breakdowns in civilian Ukrainian communication systems and led to permanent damage to extensive amounts of communication equipment. Cyber-attacks are also used tactically as a so-called force multiplier that can give military forces an advantage in a combat situation.

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6 According to the report on Russian influence in the 2016 presidential election prepared by former FBI Director Robert Mueller.

1.5 European Security after the Russo–Ukrainian War

The outcome of the Russo–Ukrainian War will have a major impact on the future security of Europe. The extreme scenarios are a complete Russian conquest of Ukraine and replacement of the elected government with a puppet government or a complete Russian defeat, with Russian forces withdrawn completely out of Ukraine, including Crimea. A complete Russian occupation will trigger even greater refugee flows and presumably a protracted guerrilla insurgency, supported by Western countries, with consequent risks of new conflicts. A complete Russian defeat, on the other hand, could trigger a fundamental regime change in Moscow, which might open up for better relations with the West, but would also likely lead to chaotic internal developments with significant risks for Russia's neighbours and the rest of Europe.

The most likely scenario at the time of writing – despite recent Ukrainian military progress – is that the hostilities are halted with a formal ceasefire or that they slowly ebb into a new frozen conflict. In this scenario, there will be a latent risk of a resurgence of hostilities. An amputated Ukraine would struggle to restore a sustainable economy and its physical and human infrastructure. There will be a need for extensive international aid, which will be difficult to finance for Western donors who are already struggling with the consequences of higher energy prices and the lower growth resulting from the war. Much of the aid to Ukraine therefore risks being given at the expense of support for weak and fragile countries in Africa, thereby increasing the security challenges from the latter countries. The Ukrainian military will also require continued Western assistance.

The Russo–Ukrainian war must be expected to lead to a new iron curtain descending between Russia, Belarus and any Russian-occupied areas in Ukraine, Georgia and Moldova, on the one hand, and free Europe on the other. As the EU replaces its remaining energy imports from Russia with other suppliers and European firms wind down their investments, the economic, political, diplomatic, cultural and human contacts between Russia and the West will wither away. Some countries have also suspended their direct military channels of communication, while others, including the USA and Norway, are trying to keep those channels open to reduce the risk of accidental confrontation. The Russian authorities are closing the last cracks for Western media and news. Stereotypes and visions of enemies will therefore blossom on both sides of the Iron Curtain, and mutual distrust could reach Cold War levels. Just like during the most tense phases of the Cold War, direct diplomatic dialogue and communication as well as discussions with Russia in multilateral organisations is likely to become severely limited, while signalling through military actions such as exercises and the deployment of units and weapon systems will assume greater importance. The interruption of channels of dialogue and confidence-building mechanisms increases the risk of tensions, accidents or misunderstandings possibly triggering a new Russian military use of force that could spiral out of control.

With its invasion of Ukraine, Russia has buried the last vestiges of the cooperative pan-European security structure in its hitherto known form. Organisations such as the OSCE and the Council of Europe will find it very difficult to have any real significance for relations between Russia and the rest of Europe. Russia has already been excluded from the Council of Europe, and the country is systematically and grossly violating its OSCE obligations. However, this does not mean that the two organisations have lost their right to exist. The OSCE may have a role to play in monitoring a cease-fire line in Ukraine or as the last European forum for West–Russia dialogue if the parties should at some point become interested in discussing a stabilisation of the security situation in Europe. It is also significant that in the OSCE, as in the UN, Russia can be held to account for the abuses against its neighbours and its own population. Finally, it is important to remember that Russia is not the only source of tension in Europe. Not least the large ethnic, linguistic and cultural minorities and groups of displaced persons that resulted from the drawing of borders after World War II and the dissolution of the Soviet Union and Yugoslavia will continue to be a source of domestic and foreign political unrest and conflict for many European states. The local dynamics of the latent ethnically and historically determined conflicts may be amplified and more difficult to handle in a situation of fierce confrontation between Russia and the West. These conflicts thus risk developing into new proxy wars with the additional danger that NATO countries may be involved. The potential for conflict in the Western Balkans and in the Caucasus was most recently illustrated by the war between Armenia and Azerbaijan.

Before the war, Russia presented a proposal for a new European security structure that would have entailed a return to a Europe divided into spheres of influence dominated by the great powers and a farewell to the existing principles. While the EU and NATO countries rejected the proposal, they declared themselves ready to discuss Russia's legitimate security needs and tighter arms control together with new confidence-building mechanisms. Since the invasion, however, there are no longer any prospects of the current Russian leadership being prepared to return to the respect for the basic obligations and principles of the UN Charter, the OSCE Charter, the Paris Document, etc., which will be the prerequisite for meaningful discussions of a new trust-based European security architecture.

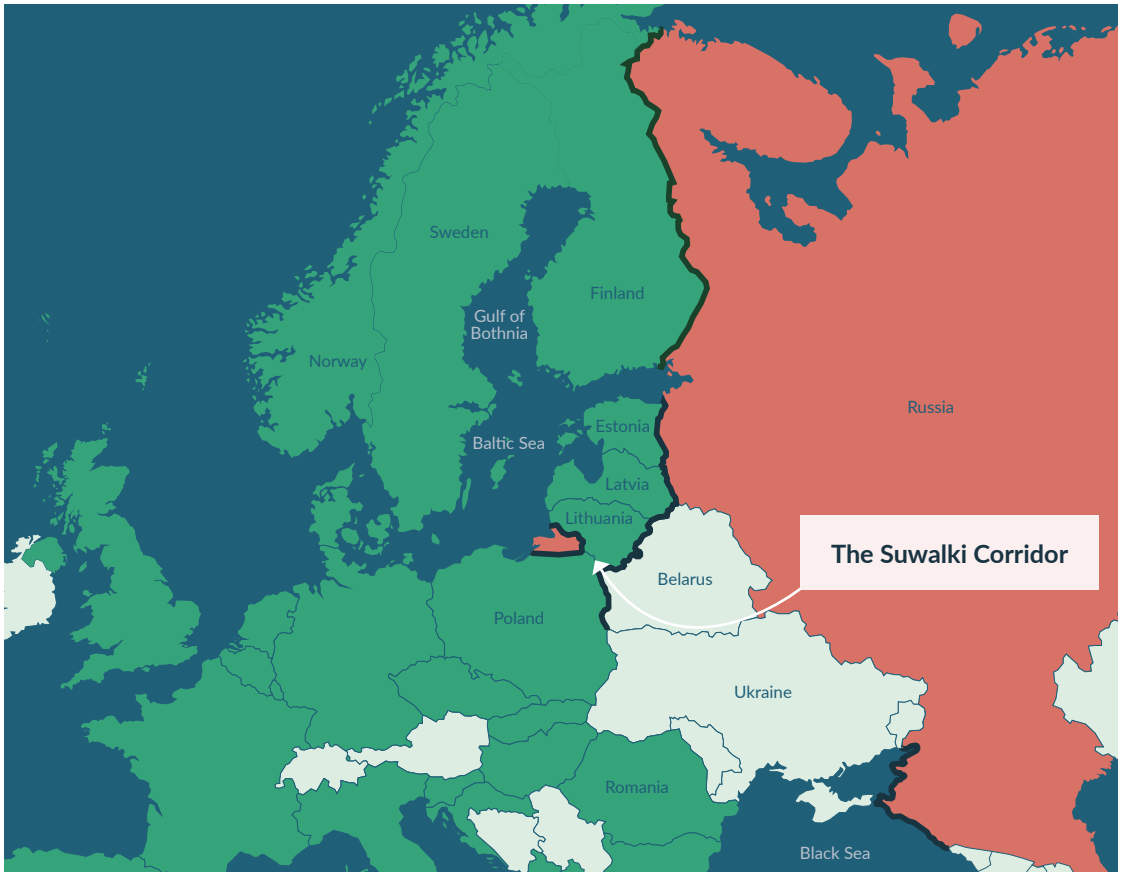
A ceasefire or peace agreement between Russia and Ukraine is unlikely to change this picture. Trust can probably only be re-established by a fundamental regime change in Russia that could enable charting a radically different course for the country. However, the landscape could also change if, due to the threat from China, a U.S. president were to decide to close the European flank by concluding an agreement on a new security arrangement in Europe that accepts the Russian demands for control over a sphere of influence and limitations on NATO's deployment of forces on the territory of the Eastern Allies; however, both parts are assessed as unlikely in a 2035 perspective.

That it is possible even for warring parties to enter into agreements is illustrated by the UN-facilitated agreement on the resumption of Ukrainian grain exports. It is possible that there could be a mutual interest in cooperation on other specific issues across the trust gap between Russia and the West.

The European security geography has already been significantly changed by the war. The ability of Russia to dominate the Black Sea will be strengthened if it maintains full or partial control over the Ukrainian coast. The direct 'front line' between NATO and Russia has grown much longer. First, the Russian attack into Ukraine from Belarus has demonstrated that Belarus' territory is effectively under Russian control, meaning that its long border with Latvia, Lithuania and Poland has also become part of the 'front line'. Secondly, the accession of Finland and Sweden to NATO will further extend the NATO–Russia border by more than 1,300 km.

The inclusion of the two countries also entails a fundamental shift in the balance of power in the Baltic Sea region. Although Sweden and Finland are already NATO's closest partners and also EU members, Finnish and Swedish membership will strengthen the Alliance's defence and deterrence profile in the region. Both countries have strong military forces. Finland's large army and air force, which will soon feature 64 F-35 fighter jets will, from a Russian perspective, create uncertainty about the supply route

up to Murmansk and the defence of St. Petersburg. It is less than 150 km from the Finnish border to St. Petersburg, and less than 150 km from there to the Estonian border. Aside from the bits of Russian coast off St. Petersburg and Kaliningrad, the entire coast of the Baltic Sea will become NATO territory, and the Baltic Sea will practically be reduced to a NATO sea, where the Russian navy will find it very difficult to operate and bring reinforcements to Kaliningrad. This will increase the strategic importance of the so-called Suwalki Gap, where NATO can cut off overland supplies to Kaliningrad, and Russia can conversely cut off the overland NATO supply route to the Baltic countries.



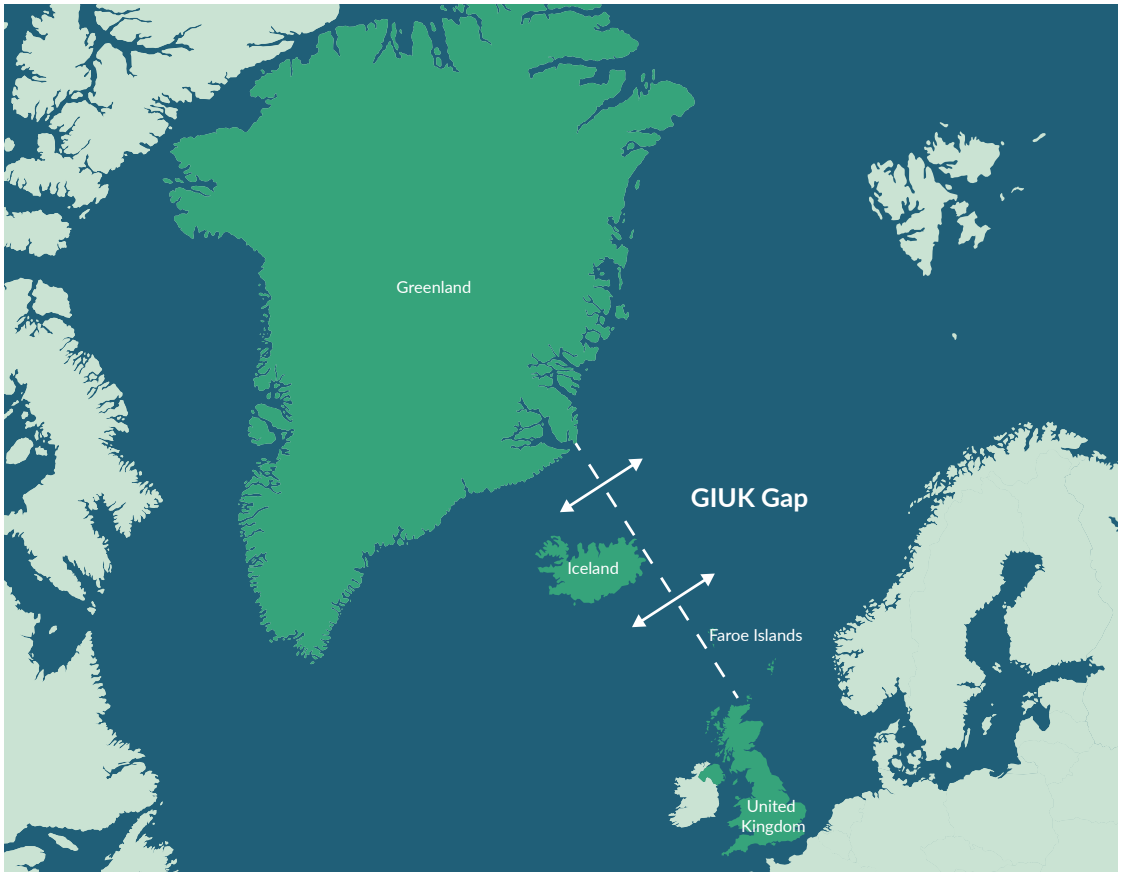
It is of crucial importance to Russia that a possible armed conflict will not be fought on Russian territory. It is therefore also to be expected that the Baltic Sea region will remain a central focal point for the Russian armed forces until 2035. In recent years, Russia has purposefully built up its forces in order to ensure that the Russian military would be able to establish regional superiority in the Baltic Sea region. In the early, decisive phases of a conflict with NATO, part of the Russian land forces in the region have been deployed in Ukraine in 2022. As long as the war with Ukraine continues, Russia does not have the resources to marshal a response to NATO's improved military-strategic position in the region. When the war is over or has been reduce din intensity, a Russian reaction to NATO's inclusion of Finland and Sweden can be expected, which could further exacerbate the tensions in the region. In a 2035 perspective it can thus be expected that Russia will challenge NATO's increased freedom of movement in the Baltic Sea, including through the continued expansion of Russian missile systems. Similarly, Russia can be expected to rebuild its military position and increase its ability to rapidly mobilise large numbers of land-forces on the border with the Baltic countries. Here, Russia could exploit the increased military access to Belarusian territory by placing more Russian armed forces in Belarus, which will pose a threat to the south-eastern flank of the Baltic countries. Regardless of the temporary Russian weakening in the Baltic Sea region, it will therefore be an important task for NATO towards 2035 to strengthen its deterrence and defence profile in line with the decisions taken at the NATO summit in Madrid in 2022 in order to ensure the necessary strategic balance.

1.6 Security in the Arctic and North Atlantic: Intensified great power competition

The growing global great power competition is also increasingly being felt in the Arctic and North Atlantic. The region is subject to new security policy dynamics and an increased military presence, especially from Russia. The Arctic and North Atlantic have thus far been characterised by a conflict–cooperation paradox, where cooperation between Arctic states has existed in parallel with an increasing potential for conflict. With the Russian invasion of Ukraine on 24 February 2022, the balance between the two dimensions has shifted. A united West has frozen cooperation with Russia – also in the Arctic.

The Danish Defence Intelligence Service has assessed the Russian military expansion in the Arctic to be defensively motivated, but that it increasingly contains elements that can be used in offensive operations, and thus poses a threat to Western interests. This has induced to the USA and the other Arctic coastal states to increase their military presence in the region, partly to assert sovereignty and to carry out monitoring tasks. This also applies to the DKK 1.5 billion Danish capacity package from 2023. However, there is a risk of a security dilemma in the Arctic, where the defensively motivated build-up of capacities carried out by one party is seen by another as a threat because it holds offensive possibilities. This could lead to an arms race, even if nobody wants one.

NATO has increased its attention to the Arctic in light of security policy developments. This was expressed, among other things, in connection with the NATO summit in June 2021 in Brussels, where 'The High North' was mentioned for the first time in a summit declaration. In addition, over a number of years NATO has increased its focus on security challenges in the North Atlantic and the strategically important maritime passage in the sea between Greenland, Iceland, the Faroe Islands and the UK ('the GIUK gap'), through which Russian submarines and warships must pass in order to gain access to the North Atlantic.



This makes it necessary for NATO to strengthen its knowledge of the Arctic and the North Atlantic, including specifically knowledge of the Faroe Islands and Greenland, just as the governments in Greenland and the Faroe Islands require more knowledge about NATO. The increased security policy interest from NATO as well as from larger allied European states also introduces a new dynamic to the regional relations. Consequently, as something new, the Kingdom of Denmark must also deal with increased military interests, presence and activity from a number of European NATO allies close to or within the territory of the Kingdom of Denmark. Additionally, the development of actual NATO positions and policies for significant parts of Faroe Islands and Greenland territories can be expected. It is not inconceivable that Denmark may be assigned specific North Atlantic and Arctic obligations by the Alliance, which will be demanding to fulfil, not least because of the harsh climate and vast distances in the region.

China has referred to itself as a 'Near-Arctic state' and displays an increasing long-term and strategic interest in the Arctic in the framework of its global ambitions/Belt and Road Initiative. This interest primarily includes access to Arctic resources and sea routes as well as increased influence on Arctic affairs through, among other things, research. At the same time, the previous Russian reticence towards Chinese presence in the Arctic could potentially diminish if the Russo–Chinese relationship develops in a direction where Russia increasingly becomes more dependent on China.

It is in the Arctic that the alliance relationship between the Kingdom of Denmark and the United States is most visible and is anchored in a comprehensive, bilateral defence agreement. Here, the defence of U.S. territory is also at stake, and the dependence is therefore mutual. The core U.S. interests in the Arctic make handling the alliance relationship and alliance obligations (formal and informal alike) of the Kingdom of Denmark to the USA even more delicate. The United States thus largely sets the strategic direction in the Arctic and defines the challenges of the security policy agenda – and how the Kingdom of Denmark can contribute to handling them.

There are strong traditions and incentives for cooperation between Western countries and Russia in the Arctic. The cooperation between Arctic states and peoples is particularly manifest in the Arctic Council, which is the primary forum for regional cooperation. In light of the Russian invasion of Ukraine, however, the Arctic states, with the exception of Russia, have decided to put cooperation in the Arctic Council on hold for, without prospects for any resumption in the foreseeable future. Another example is the (thus far) continued cooperation between the Arctic coastal states on border demarcation in the Arctic Ocean under the auspices of the UN Commission on the Limits of the Continental Shelf (CLCS). However, there is a risk of the constructive rule-based cooperation being replaced here by a more confrontational Russian approach, depending on the outcome of the CLCS work and the further developments in the relations between the West and Russia.

Although the deteriorating relationship between the West and Russia is likely to continue and possibly intensify further in the coming years, it can be expected that at some point before 2035 the great power competition in the Arctic will find a more or less stable equilibrium. Both parties have an interest in this due to scarce resources (both human and financial), which for both the USA and Russia must be prioritised in relation to, for example, the Chinese challenge and dynamics in other regions, including Eastern Europe and the Pacific region. A more stable geopolitical situation at a 'higher' level of tension still means extensive military focus on the region and serious consequences if the relationship wobbles, for example due to misunderstandings. At the same time, however, the risk of misunderstandings also wanes as the relationship finds an equilibrium with dynamics and reaction patterns that are to some extent predictable for both parties.

The Arctic will likely be one of the first areas where the West could resume cooperation with Russia when the time is right. The Arctic states continue to hold strong common interests in a number of areas, and the primary forum for cooperation, the Arctic Council, does not include security issues. However, Russia's new role as the only non-NATO state in the Arctic (after Finland and Sweden join NATO) can be expected to complicate future regional cooperation, as Russia will feel isolated and suspect the other Council members of reaching agreements in advance.

Security policy threats and challenges

02

Whereas the first chapter analyses overall trends in the global geostrategic landscape towards 2035, the focus in this chapter shifts to the security policy threats and challenges that this landscape contains. The analysis deals with threats and challenges from governmental and non-governmental actors alike, as well as non-actor-driven threats and challenges.

The Russian invasion of Ukraine constitutes a landmark in European security. The demonstration of the Russian willingness to use military force combined with Russia's clearly stated intention to radically change the European security order constitutes a significant threat to that very order and therefore also to Denmark. At this stage there is not an existential security threat to Denmark; that is, concrete military threats to the security, sovereignty and the territorial integrity of the Kingdom. However, because the security of Denmark as a small state is closely linked to the European security order, not least as a result of NATO's Article 5, the situation is so serious that it requires a thorough reassessment of Danish defence and security policy. The threat from Russia will therefore in many ways shape Danish defence and security policy, even though China will play an increasingly important role in the long term.

In contrast to the clear shift in focus from territorial defence to international operations, which was heralded by the so-called Bruun Report from 2003,[7] the challenges and threats from the global south (international terrorism, geopolitical and societal instability, irregular migration, etc.) has not diminished since the Russian invasion of Ukraine. On the contrary, they must be expected to aggravate up to 2035, driven also by negative effects from great power competition, demographic developments, climate change and, especially for the European neighbourhood, USA balancing away from the Middle East and Africa. For Denmark, the period up to 2035 will therefore be characterised by a dual agenda, with threats and challenges from both east and south, with very different types of problem complexes, approaches, and configurations of cooperation partners, including NATO and the transatlantic community, the EU and the European countries, as well as the UN and the global community.

In the following sections and in Chapter III, key figures for the respective parties' military forces are included, based on IISS – The Military Balance 2022, to illustrate the overall strength ratio. However, the figures must be taken with considerable caution due to the very substantial differences in the training of personnel and the quality of their weapon systems. For example, a modern frigate with the most advanced weapon systems has a far greater combat power than an old Cold War frigate.

2.1 Russia

Regardless of how the Russo–Ukrainian war ends, it will leave behind a weakened Russia, regardless of any possible territorial gains. The possible strengthening of the country's geostrategic position on the south-western flank through the annexation or control over significant parts of Ukrainian territory will not compensate for the significant weakening on the north-western flank resulting from Finland and Sweden joining NATO. Replacing the massive losses of materiel and personnel incurred by the Russian military as well replenishing ammunition stores will take time and be expensive. Politically, Russia has become the most isolated great power on the global stage. Economically, the loss of Russia's largest export market, the EU, will limit growth and welfare for many years, during which time the country will try to redirect its exports, especially to Asia, and dependence on China will increase significantly. Even before the war, Russia's economic prospects were bleak as a result of negative demographic developments, lack of digitisation, market distortions in the state controlled economy and widespread corruption. The Russian share of the world economy is expected to fall from 3.6% in 2020 to 2.6% in 2040. However, the wealth of Russian natural resources and its industrial base, together with continued global dependence on fossil fuels, will stave off economic collapse. Moreover, China will probably have both the will and the ability to prevent such a collapse. The Russian economy is thus expected to continue to be able to support a rebuilding of the Russian military and a reduced but tolerable standard of living for the population in a 2035 perspective. In contrast to the final phase of the Cold War, there are no immediate signs that economic conditions in the time perspective of the report will lead to fundamental reforms or systemic political change. However, history has demonstrated in the past that domestic political changes in Russia can be difficult to predict – and that they can evolve quickly.

The war in Ukraine has revealed that conventional Russian forces are generally less effective than expected in modern warfare against a capable adversary. Widespread expectations of a quick

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7 The Security Policy Basis for Danish Defence, August 2003 (The Bruun report).

8 The figures for Russia are early 2022; that is, before the invasion of Ukraine and thus also before the decree regarding the expansion of the army.

9 From the SIPRI Yearbook 2022.

Ukrainian defeat proved wrong. The apparently inadequate training of Russian soldiers together with the lack of logistical, tactical and planning capabilities of the Russian armed forces, combined with a grossly inadequate ability to gather and process intelligence, have been surprising. At the same time, the Russian air force has been unable to establish air supremacy against an apparently inferior Ukrainian opponent, while the Russian tanks have proven vulnerable to, among other things, Western-produced anti-tank missiles. The poor military performance is partly due to the flawed strategic decisions made by Russia's top political and military leadership early in the invasion, including the decision to invade from multiple different fronts, which spread Russian forces thin. The preliminary results of Russia's warfare in Ukraine calls for a reassessment of Russia's current conventional military strength and a sharpened focus on its future development.

Threats are assessed on the basis of both capabilities and intentions. The war in Ukraine has shown that Russia's intentions are brutal and ruthless, which means that even a weakened Russia cannot be seen as a less dangerous Russia – on the contrary. Russia also still possesses the world's largest nuclear strike force, large land forces and a large arsenal of various missile systems. Moreover, the extensive Western arms donations to Ukraine has given the Russian armed forces ample opportunity to study and gain experience in countering modern Western equipment together with experience in modern warfare in general. In the Baltics in particular, the short distances and increased Russian military access to Belarusian territory mean that the Russian ability to quickly occupy parts of or even all of three Baltic countries in order to test NATO solidarity and willingness to wage large-scale war will still constitute the most significant threat to the Alliance until 2035.

Russia's nuclear strike force is raising increasing concerns. In recent years, Russia has substantially sharpened its nuclear rhetoric towards NATO, several NATO member states and most recently Sweden and Finland. Back in 2015, Denmark was also the subject of unveiled threats[10] regarding the possible use of Russian nuclear weapons against Danish naval vessels in connection with considerations made to acquire missile defence radars (BMD capability) for these ships. Putin's public statements early in the Ukraine war had clear undertones of nuclear threats to any countries supporting Ukraine militarily. And in recent years, Russia has incorporated nuclear elements into several of its major military exercises. Coupled with the Russian deployment of nuclear-capable Iskander missiles in Kaliningrad, recent flights in the Baltic Sea region by Russian strategic bombers, and Russian violations of the INF treaty on land-based intermediate-range missiles, a picture emerges of a Russia that has purposefully raised the level of risk for the possible use of nuclear weapons. In addition, it is broadly assumed in the West that there is a particular risk that Russia, should it come to an armed conflict, could seek to dominate the conflict by deploying nuclear weapons early. Finally, the weakening of Russia's conventional capabilities due to losses and attrition in Ukraine may reduce the Russian threshold for the use of nuclear weapons.

Although President Putin plays a dominant role in Russian politics, the intensified confrontation with the West in recent years is not the work of a single man – it has broad support. This popular support is fed by anti-Western propaganda in Russian media and educational institutions, and there is reason to fear that it will intensify in the future, especially if Russia must admit at some point that it cannot achieve its military goals in Ukraine. Support from NATO-countries to Ukraine in the form of weapons and training will be presented as the cause of Russian military failure. There is also a deep distrust of NATO in the more well-informed Russian political elite. Here, it is felt that NATO's eastern expansion, and especially the membership commitment to Georgia and Ukraine, has broken promises made to Russia in the context of peaceful German reunification. The prevailing view is also that the Russian security ambitions in its so-called "near abroad" do not differ from those of the USA in its neighbourhood, just as Russian use of military power is equated with that of the USA and NATO in the Balkans, Iraq, Libya and so on.

10 The current Russian ambassador in an article in the Danish daily newspaper Jyllandsposten in 2015.

2.2 China

In 2035, China is expected to be the world's largest economy and to be on par with Europe and the USA in most technological areas. China will thus have achieved full internal freedom of action and the ability to resist economic and political pressure from the West, because, together with Russia and its other close partners, it will be able to decouple itself economically from the West in a tough confrontation scenario. However, China will have a strong interest in avoiding such a decoupling and in maintaining large-scale trade activity and mutual investment with the West.

The relationship between the Communist Party and Chinese society is evolving rapidly, and greater demands and expectations have been developing domestically in China in terms of what the party must deliver. Since the start of the Chinese economic reform process in the late 1970s, the ideological basis of Party legitimacy has more or less eroded and been replaced by a form of output or performance legitimacy. The Party's deliverables are continued domestic political stability, economic growth and prosperity for the entire population. China's role as a great power in the international system is deemed necessary to defend the Chinese development model, and with it the Party's legitimacy. Demographics and accumulated imbalances in the heavily state-regulated economy will

11 Based on IISS – The Military Balance 2022.

probably moderate the high growth rates towards 2035; if not dealt with, this may challenge the Party's legitimacy. There is therefore a less likely scenario where the Chinese economy enters a deep crisis towards 2035 and that this triggers domestic political and social unrest.

China's great power ambitions are thus closely linked to the Communist Party's need to legitimise its continued monopoly on power, but they are made difficult by the country's geostrategic conditions. Throughout China's ancient history, Chinese leaders have often struggled to secure the lengthy borders and to manage relations with the 14 neighbouring states with which China shares its approximately 22,800 km land border (in addition to which is roughly 18,000 km of coastline). Chinese foreign and security policy has consistently focused on ensuring China a strong role in a stable neighbourhood, and many diplomatic, economic and military resources are continuously invested towards this end. The design of the Chinese military with the traditional prioritisation of a large army reflects this focus. This has changed, however, as China has resolved or settled most of its border disputes, and the focus has increasingly shifted towards China's maritime borders and on bolstering China's ability to project military power outside of China's immediate neighbourhood as well.

In a 2035 perspective, the USA will remain the stronger global military power, but China will be well on its way to catching up and will at least be on par in the Indo-Pacific region. China has already amassed a large, modern fleet, while the USA, Japan and especially Taiwan have older equipment that they cannot manage to modernise within the period under consideration. China possesses more than 1,000 short- and medium-range ballistic missiles and cruise missiles, some of which can also be used against naval targets. These missiles can reach U.S. bases in Japan, South Korea and Guam, and they pose a serious threat to aircraft carriers. This makes it risky for the USA to operate close to the so-called first island chain in the East China Sea and in the northern part of the South China Sea, which limits the American ability to hit targets in China early in a conflict. China is also expanding its nuclear arsenal and is expected to have over 1,000 warheads by 2030. China is exploiting the significant shift in the regional balance of power to push the USA out of its maritime neighbourhood.

While China will not pose a military threat to Europe or North America in a 2035 perspective, it is already using its political, military and economic clout to defend its so-called 'core interests'. This development will continue in line with China's targeted efforts to gain global control over critical production and infrastructure.

2.3 Global hotspots

The world is full of tension and unresolved conflicts. The intensification of great power competition is making it more difficult to use the UN to reduce conflict levels and to set the framework for resolution processes. On the contrary, the risk of such conflicts being 'instrumentalised' by the great powers and developing into proxy wars increases. This applies not least in areas where Russia or China have special interests and influence.

Ukraine and numerous other examples demonstrate Russia's ability to negatively influence its immediate neighbourhood. The entire post-Soviet space[12] must therefore be considered a 'hot spot', where new and old conflicts can flare up again. Among these are worth mentioning the dispute between Armenia and Azerbaijan over Nagorno-Karabakh, which as recently as 2020 triggered fierce fighting. Another protracted conflict is the Russian de facto occupation of the two regions of Abkhazia and South Ossetia in Georgia, where, for example, a referendum on incorporation into Russia could lead to military clashes. Since the Russian invasion of Ukraine, Moldova has expressed concerns about whether the country was going to be 'next' after Ukraine. Even if this is not the case, there is a latent risk of unrest in the breakaway republic of Transnistria, which borders Ukraine and

where Russia has had 1,500 soldiers stationed in a so-called peacekeeping mission for more than 30 years. In several of the regions in Russia's federal North Caucasus district, including Dagestan, Ingushetia and Chechnya, militant Islamists can trigger unrest and the use of force. Although Russian influence has weakened in the Western Balkans, where the EU has far greater influence and is much more attractive, here too Russia will be able to fish in troubled waters and, with all its hybrid means, provoke smouldering unrest to flare up.

In China's immediate vicinity, Taiwan is the greatest risk of a military confrontation. Both the American and Chinese signalling has intensified, most recently in connection with the visit of Speaker of the U.S. House of Representatives Nancy Pelosi. It may become a complicating factor that the U.S. willingness to defend Taiwan's autonomous status is deliberately not clearly defined, in contrast to, for example, the alliance with Japan. In addition, the domestic political developments in Taiwan, which neither the USA nor China control, could trigger a conflict, even if neither party wants it. A military confrontation between China and the United States could also be triggered by a clash in the East or South China Sea in connection with a U.S. naval operation aimed at ensuring free navigation in areas that China considers Chinese. After the failed attempts by former U.S. President Trump and former South Korean President Moon to engage North Korea in a dialogue and stabilisation process, more direct responses to continued North Korean provocations and their development of nuclear weapons must be expected. Although China also has great difficulty in influencing North Korea, Chinese interests are so strong that it is difficult to imagine that it can avoid becoming involved in a possible military conflict on the Korean peninsula.

Iran pursues its own agendas, but the common dislike of the West provides a certain commonality of interests with China and Russia. In the years to come, the country's great destabilising potential in the Middle East can be expected to affect European security negatively and demand attention while also creating a need to extend support to close EU and NATO partners in the region. The development of the Iranian missile programme in combination with the collapse of the JCPoA nuclear agreement[13] means that in the years leading up to 2035, Iran will be able to become a direct threat to Europe, including nuclear weapons. The revival of the agreement would reduce the nuclear dimension of the threat to Europe. The power play between Iran, Turkey and Saudi Arabia will continue to shape the conflict landscape in the Middle East, where proxy wars involving various major powers must be expected to play out in several places.

2.4 Threats from terrorism and transnational crime, challenges from irregular migration

For many years, the fight against terror and the other challenges from the South were very high on the international, Western and Danish security agendas. But political attention to the need to prevent and manage violent conflicts, cross-border instability and humanitarian crises in and around fragile states has waned as global power shifts, technological developments and climate change have created new threats and security risks. This trend also reflects increasingly widespread frustrations with the inability of the West to translate its military superiority into political results in the weak and fragile states.

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12 A term for the cluster of states that remained after the collapse of the Soviet Union: Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Ukraine and Uzbekistan, as well as Estonia, Latvia and Lithuania, which today are EU member states and therefore not mentioned here.

13 Joint Comprehensive Plan of Action. The agreement aimed to limit Iranian capacity to produce and store enriched uranium, and it was reached between Iran, France, China, Russia, Britain, Germany and the United States.

The global shifts in power can turn weak and fragile states into an arena for the dark sides of great power competition. As the United States increasingly turns its focus to China and the EU struggles to translate its economic weight into political influence, both Russia and China are increasing their economic, technological, political and military involvement in these countries. Although Africa is neither geographically close nor a core interest for either Russia or China, both countries are using the full range of hybrid instruments and purposefully strengthening their influence on the continent. China especially uses its economic and political clout, whereas Russia also uses the Wagner Group, arms deliveries, military training and the like in countries such as Libya, Mali and Central Africa. The populations of the world's poorest countries risk becoming the big losers upon becoming pawns in the power struggles between the great powers, even though in some cases the leaders of the countries in question might manage to exploit the situation to obtain advantageous agreements with great powers that lead to real economic and technological development. Population growth, together with the derived consequences of climate change and the socio-economic consequences of COVID-19 and potential future epidemics, will act as threat and conflict multipliers, both within and between fragile states. The food and energy insecurity caused by the Russian invasion of Ukraine will be a further destabilising factor in the fragile states. There is therefore no indication that, looking towards 2035, there will be less instability and conflict in the fragile states in the European area. On the contrary, the manifold and complex problems linked to fragility will increasingly affect the security situation in the area. It is very likely that both more and more difficult-to-manage conflict scenarios will arise in and around fragile states.

A large number of the fragile states (e.g., Mali, Libya, Syria, Iraq and Lebanon) are close to Europe, and uncertainty and instability in these areas pose direct and indirect threats to European interests and security. Such instability can lead to radicalisation, irregular migration, violent extremism and terror, as well as piracy, the proliferation of weapons of mass destruction, organised crime, drug production and arms trafficking. Although Afghanistan is further away, the negative consequences of the Taliban takeover and the chaotic withdrawal may also reach Europe.

Despite many years of attempts to use Western engagement and influence to create stability in the areas – based on the understanding that security and development are inextricably linked and with a focus on building effective and legitimate state institutions – the terrorist threat from militant Islamism must be expected to remain serious. Islamic State and al-Qaida have every intention of continuing their attacks on the West, and the organisations inspire individuals, including Western foreign fighters, to carry out attacks both inside and outside Europe. The Taliban takeover in Afghanistan will create greater room for manoeuvre for terrorist groups. Likewise, militant extremists are likely to be able to consolidate in Africa in the years to come, including in the Sahel, where al-Qaida is strong and Islamic State is expanding.

The need to strengthen the NATO military deterrence against Russia, the trauma of Afghanistan, and the clear American intent to reprioritise its efforts away from military engagement in Africa and the Middle East will lead to a considerable reduction of NATO efforts against terrorism, irregular migration, and piracy in the future compared to the past 20 years. At the same time, we can expect more, but different forms of stabilisation operations in Africa, carried out either by regional organisations with a mandate from the UN Security Council, including the African Union, or through more ad hoc arrangements like the G5 Sahel. Europe's own efforts against terror, irregular migration, and piracy must therefore be expected to be organized by the EU or ad hoc coalitions under European leadership – often in cooperation with African-led operations. Although there is therefore little reason to expect massive new military operations on the scale of the US-led operations in Afghanistan and Iraq, it will be a major and resource-demanding challenge for the EU and European countries, and there will be a need to develop new and more effective combinations of civilian and military instruments, including capacity building. This may not least become relevant if one of the key countries in North Africa is threatened by collapse or an Islamist takeover. After lifting the defence opt-out, Denmark can contribute to the full spectrum of EU efforts in this area. The increased EU focus on a combination of peacemaking/peacekeeping, development and humanitarian aid has thus far yielded some good results but is still characterised by coordination problems, silo thinking, budget limitations and a lack of cross-cutting cooperation between the member states. Denmark is a significant player in the field of humanitarian and development policy and, with the lifting of the defence opt-out, will have better opportunity to contribute actively to remedying these problems.

2.5 Climate as a global battleground

According to the UN climate panel, at the current global emissions levels, the average level of global warming could already reach 1.5 degrees within 10 years, and the world is currently heading towards a 3° C increase by the end of this century. The CO_2 concentration in the atmosphere is the highest it has been in two million years, the temperature on the Earth's surface has not been higher for at least 2,000 years, and sea levels are rising at a faster rate than they have in 3,000 years.

The consequence of the increased rate of climate change is much more extreme weather in the form of heat waves with extreme temperatures, violent and frequent downpours, droughts and cyclones together with less Arctic sea ice, snow cover, and permafrost. On the other side of 2 degrees of global warming, the extreme temperatures will likely be dangerous for both human health and a threat to agriculture and food security, and they will affect the water supply for billions of people.

Heavy downpours will also follow different patterns than today, including the monsoon rains in tropical and subtropical regions. Coasts and coastal areas will be affected by rising seas, floods and erosion. Storm surges that have historically occurred once every century will occur on an annual basis in some parts of the world by the end of the 21st century.

The UN Climate Convention from 1992 and the annual negotiations on its implementation are based on a world order in which the OECD countries were the economic and technological leaders. At that time, the OECD accounted for 60% of the global economy, roughly 50% of global emissions of greenhouse gases (GHGs), and OECD countries emitted five times the amount of GHGs as China. Today, they have reduced emissions significantly, while China and the rest of the world have greatly increased them. Chinese emissions have come to exceed those of all the OECD countries combined, and Russia produces approximately 5% of global emissions, making it the fifth largest emitter after China, USA, EU and India. With the shift in the share of global emissions, the West has become less able to reduce climate change and the speed with which it is occurring through its own actions and limitations on emissions.

Emissions from energy production for electricity, industry, and transport make up over 70% of global emissions. The decoupling of fossil energy supplies from Russia to Europe could potentially lead to increased CO_2 emissions, because gas must be replaced by coal in a transition period. As Europe is phasing out its dependence on fossil energy, this in itself can lead to the nearby states whose main source of revenue is the sale of oil and gas collapsing and becoming failed states with internal conflict. Developing the European in-house production of critical products and infrastructure together with global initiatives to break the Chinese near-monopoly on the production of infrastructure for the utilisation of solar energy and of natural resources for other green technologies may also produce tensions in third countries.

With the intensified great-power competition and as climate change becomes more apparent and the socio-economic costs of the reduction measures increase, there is a growing risk of global co-operation being replaced by disputes over the right to emit CO_2. In order to counter the consequences of global warming, proposals are now being made for targeted man-made changes in the earth's natural systems by changing the basic parameters that regulate the climate ('geo-engineering'). Within a short period, some states or non-state operators could to be tempted to use geo-engineering to improve their own situation, even if such interventions will have significant negative consequences for others. A lack of commitment to international coordination and willingness to follow rule-based solutions in this area could create major conflicts. This may be an argument for a national or EU-based preparedness that monitors closely the development of these technologies and the political readiness to use them, together with an effort to strengthen international regulations.

Since climate changes will primarily affect the poor, exposed, and more vulnerable regions of the globe, this is where their security policy consequences will first appear. In the short term, they will affect conflict and migration patterns caused by, for example, drought, food disasters and famine. Military operations in these areas will furthermore have to be adapted to the worsening climate conditions, including the extreme temperatures and risk of more frequent and heavier downpours.

Climate change and its consequences will also become increasingly important in the North Atlantic and our immediate neighbourhood. Rising sea levels, melting Arctic ice, and the thawing permafrost (together with the resulting methane emissions) can all affect the assertion of sovereignty for Denmark and NATO, partly because the physical framework conditions for defence efforts and operations change. For example, physical infrastructure built on permafrost in the Arctic will require extensive maintenance and capital investment if and when the permafrost thaws, and coastal erosion may increase due to more powerful waves resulting from reduced sea ice cover. This can affect the options for military deterrence for both NATO and Russia.

The pandemic became part of a changing global geopolitical landscape, where conventional and unconventional security risks are connected in new ways.

The pandemic in a security policy perspective

According to the WHO, the COVID-19 pandemic had resulted in over 6 million deaths and 529 million cases of illness by June 2022. In addition to the impact on health, the pandemic has also had economic and societal consequences for countries and societies around the world, with many affected by, and still experiencing, the consequences of extensive health and supply crises. The pandemic thus highlighted an increasingly close relationship between supply, trade, energy and security policy, but also a number of vulnerabilities associated with them. Many were indirectly, if not directly, related to security.

During the pandemic, critical infrastructure and security of supply became key concepts in relation to the capacity of the healthcare system as well as technological capacity and global supply chains. Disrupted supply chains led to food shortages and aggravated poverty on a global scale. In addition to the humanitarian consequences, this also became a source of instability and increased the risk of radicalisation in weak and fragile states. The pandemic also put digital security on the agenda as a result of the necessity of teleworking, partly due to the challenges related to establishing secure digital information spaces and increasing IT security in general, but not least also by increasing vulnerabilities to misinformation and disinformation.

The COVID-19 pandemic exposed existing cooperation and coordination difficulties both internationally and nationally, and it demonstrated the need to strengthen strategic autonomy and resilience in the face of complex threats. In Denmark, this led to the establishment of a new critical supply agency for, while a number of important initiatives in the area have been launched at the EU level, including the establishment of common stocks of protective equipment.

The COVID-19 pandemic revealed more clearly than ever before how the security dimension has continuously expanded in the 21st century, and how it is getting intertwined with new spheres that have not previously been considered relevant in a security context. In that sense, the pandemic also became part of a changing global geopolitical landscape, where conventional and unconventional security risks are connected in new ways.

Allies and partners

03

In light of the multiple and significantly intensified threats against Denmark, it is more important than at any other time since the end of the Cold War that we are firmly rooted in NATO and the EU and cooperate closely with strong allies in Europe and North America while also maintaining close partnerships in the Indo-Pacific. While the Russian attack on Ukraine has weakened the pan-European organisations, the EU and NATO have instead become significantly stronger, and their mutual co-operation has deepened. This chapter reviews the prospects f the two organisations looking ahead to 2035, together with the expectations concerning our most important allies and partners, including India, Japan and other Asian partners. There is a particular focus on the new opportunities in the Nordic security policy cooperation resulting from Finnish and Swedish NATO membership and the lifting of the Danish defence opt-out in the EU.

3.1 NATO: A strengthened alliance in a more complex security landscape

NATO will remain the foundation for Danish security and the world's strongest military alliance throughout the period covered by this analysis. After some turbulent years under the Trump administration, the Ukraine war has created unprecedented unity in NATO. In a crisis rife with risk that has developed surprisingly and quickly, the alliance members have quickly managed to make the necessary far-reaching decisions jointly and at the national level. Not least Poland has shown initiative and a remarkable willingness to bear costs. Denmark and other allies quickly sent reinforcements to NATO's standing forces and the most vulnerable countries close to Russia and Ukraine. NATO has also decided to supplement the Enhanced Forward Presence in the three Baltic countries and Poland with corresponding NATO battle groups in Bulgaria, Romania, Slovakia and Hungary, as well as to strengthen air patrolling over the Baltic countries and the presence of the standing naval forces.

NATO has also strengthened the Alliance's focus on a large number of other security challenges in recent years, including in new domains beyond the traditional three (land, water and air). These include hybrid threats on which the Alliance has intensified its focus since 2014, especially including cyber threats. Cyber was declared an operational domain in 2016, and the heads of state and government adopted a new cyber defence policy at the 2021 summit. In 2019, NATO also declared space an operational domain, and the Alliance adopted a new space policy. At the Brussels Summit in 2021, the heads of state and government declared that an attack in, from, or into space could trigger Article 5 of the Washington Treaty. Going forward, there will be a need for a stronger focus on NATO as a nuclear alliance.

Within the framework of NATO2030, NATO has intensified its work on adaptation to future challenges with a focus on strengthening the Alliance militarily as well as politically. Over a number of years, NATO has expanded its approach to security, including a focus on protecting the rules-based international order and strengthening cooperation with partner countries and organisations to deal with common security challenges. With the adoption of a new strategic concept, the Madrid Summit in June 2022 has set the overall direction for NATO development towards 2035. The strategic concept will first and foremost become the basis for NATO's adaptation to a markedly intensified threat from Russia and to a new burden-sharing between the USA and Europe.

Russia, which in the previous strategic concept was considered a cooperation partner, has been clearly articulated as a threat. Against this background, NATO's main future task will be to further strengthen the NATO defence and deterrence profile with the development of more comprehensive and in-depth defence plans and the deployment of additional NATO forces in Eastern and Central Europe. Expanding the Alliance with Finland and Sweden will require the preparation of new defence plans for the Baltic Sea region and adapting the command structure to the new geographical reality.

Against the backdrop of the gloomy security environment, the heads of state and government at the Madrid Summit decided on a fundamental change in the approach to collective defence. This will not mean returning to the massive presence of Allied forces on the borders as we knew it during the Cold War, but instead an architecture containing the necessary skeleton to defend the most vulnerable Allies. The tripwire logic is being replaced by combat-ready forces on the eastern flank that can be scaled up from the existing battlegroups to brigade-size where and when needed. To begin with, only elements of the brigades will be deployed to the exposed countries, including the Baltics, but with dedicated forces for rapid reinforcement, prepositioned equipment, and strengthened and more coherent command and control structures. NATO has also decided on a new force structure model aimed at significantly increasing force readiness, which will improve the ability of the Alliance to react at very short notice. The NATO response forces will thus be increased from 40,000 to 300,000 L. The new force structure (New Force Model) is divided into three readiness levels. The Allies are expected to register over 100,000 personnel at a level of up to 10 days readiness and a further 200,000 personnel at 10–30 days readiness. In addition, a further 500,000 personnel are expected to be registered for 30–180 days of readiness. These forces will be assigned specific defence plans, increasing the credibility of the Alliance's collective defence capability.

The strategic concept also focuses on resilience, including protection of critical infrastructure and supply chains following-up to the NATO summit in June 2021, where the resilience commitment of the member states was strengthened. The Allies have thus committed themselves to preparing and complying with overall objectives for each of NATO's seven guidelines for civil preparedness.

Where China was not mentioned at all in the previous strategic concept, it is now described as a systemic challenge for NATO. However, an operational role in Asia for NATO is not likely in a 2035 perspective. NATO is more likely to deepen its cooperation with the Pacific partners (Japan, South Korea, Australia, and New Zealand) and offer to develop partnerships with other relevant actors in Asia (e.g., India, Indonesia, Singapore, the Philippines and Vietnam). An interesting question will be the extent to which NATO can and will develop substantial dialogue with China.

At the Madrid Summit, the heads of state and government could rejoice over how almost all of the member states have either reached the 2% target or presented credible plans to reach it in the near future. As 2035 approaches, it will become clear that 2% is not a ceiling, and increasing pressure for a higher target figure can be expected. Within the time horizon of this report, a credible defence of Europe will remain dependent on extensive military assistance from the United States, but the significantly increased European defence budgets provide a solid basis for the new burden-sharing, where the European allies can begin to assume a significantly larger share of the responsibility for conventional defence and deterrence in Europe. The European allies overall are in the process of establishing credible, complete brigade/division level manoeuvre units with higher readiness and making the necessary massive investments to begin to replace American strategic capabilities, such as aerial refuelling, heavy air transport, satellite surveillance, and other advanced information acquisition. Moving towards 2035, the changed burden-sharing will reduce the need for conventional American reinforcements in crisis and war, and thus also the military importance of the maritime connection lines across the Atlantic. The USA's pre-deployment of materiel in European countries will further contribute to this.

The more equal burden-sharing between the USA and Europe may in the long term impact the political dynamics in the Alliance, which is currently depending on and is directed by American leadership. A stronger European military capacity and a strengthening of the EU as a geopolitical actor could, together with the U.S. pivot to Asia, transform NATO into a more equally balanced political structure based on two pillars - a North Atlantic pillar defined by the USA and a European pillar defined by key EU member states.

The Russian attack on Ukraine has brought the allies much closer together in assessing the threat from Russia and the necessary NATO measures to counter it. Nuances remain, however, as illustrated by the uncompromising policy of some eastern NATO countries towards Russia, such as the Lithuanian handling of Russian transit to Kaliningrad, compared to, for example, the softer Turkish line towards Russia, with no Ukraine sanctions and acquisition of a Russian air defence system. Disrespect for democracy, equality and the rule of law in countries such as Hungary and Turkey may also weaken NATO unity and question shared values. More serious internal tensions could be triggered if Trump or another Republican with similar policies wins the next U.S. presidential election. Upcoming elections in European countries could also lead to governments, which may of trigger cracks in the unity.

3.2 The EU: An increasingly important contribution to European and global security

While NATO is the military guarantor of European security, the EU contributes significantly to European and global security in many dimensions. The EU has brought hereditary enemies together in a unique community. The attractiveness of the Union and the enlargement process itself are the prerequisites for the settlement of many disputes and for the continued dissemination of democracy and the rule of law in Europe. The EU has begun to adapt to the fact that the age of globalisation is being replaced by a world characterised by fierce competition between great powers and weakened global institutions, which demands stronger strategic autonomy. That the EU must necessarily strengthen its own autonomy was already highlighted when the strategic agenda 2019–2024 was adopted, and when the current Commission was sworn in half a year later, Commission President Ursula von der Leyen unequivocally defined her Commission as geopolitical. The Global Gateway initiative is one of many examples of the EU increasingly beginning to act as a genuinely geopolitical actor.

The Russo–Ukrainian war has demonstrated the importance of the EU's common foreign and security policy. The EU reacted quickly and decisively, not least by imposing comprehensive economic sanctions on Russia. As the EU is Russia's most important export market, the EU sanctions have hit Russia far harder than the corresponding sanctions from the USA and other countries. The decision to phase out imports of Russian gas places Russia under further massive pressure. The EU's economic integration and financing of trans-European energy and transport networks have been decisive in ensuring especially the resilience of the Eastern European member states to the Russian use of energy as a weapon against individual countries and the EU as a whole. Conversely, the price for EU citizens and businesses has also been higher – and will rise sharply if Russia shuts off the gas supply entirely before the EU and the individual member states are able to secure the necessary alternative supplies.

The EU plays a key role in defending against hybrid warfare, and it has stepped up the use of its 'cyber diplomatic toolbox' as a result of several large-scale and global cyber-attacks in 2021. The upcoming NIS2 Directive is expected to improve the common European cyber security levels considerably, addressing the root of the comprehensive and cross-border nature of the cyber threat. Far more

sectors must now actively attend to cyber security, and EU member states must share information and notify each other of cyber-attacks to a far greater extent. In addition, Denmark is working together with other countries to expand the options for countermeasures over a wider spectrum, especially in areas where hostile external interference and manipulation threaten EU values, democracy, and prosperity. Finally, the upcoming Critical Equipment Resilience Directive (CER Directive) is expected to strengthen the protection and resilience of European critical infrastructure.

The use of migration as a means of pressure against the EU has resulted in an increasing focus on migration as a security threat to the EU and its borders. Handling this challenge draws on a wide range of the EU's unique tools: from joint border control to diplomatic dialogue via the EU delegations with the third countries from where they came. At the same time, there is still agreement that the handling of migration is primarily about the long haul, where the classic foreign affairs and development instruments are with renewed levels of ambition. In 2021, the EU rolled out its new development instrument, 10% of which is dedicated to addressing irregular migration and forced displacement, while at the same time working on eight provisionally tailored migration partnerships with third countries. In addition, there is an increasing focus on giving the EU's stabilisation efforts a mandate to handle migration challenges and cooperation with Frontex.

In addition to the important contributions to European security within traditional economic and political cooperation, the EU defence dimension has developed significantly in recent years. In March 2022, the European Council, with the adoption of the EU's Strategic Compass, set the direction for the common security and defence policy for the years to come. The Compass focuses on four specific areas that will contribute to increasing the ability and willingness of the EU to act in light of the security policy challenges: Crisis management, resilience, capabilities, and partnerships. Divided into these areas, the compass contains a number of proposals, some of the most prominent of which are:

- Establishment of an EU reaction capacity of up to 5,000 soldiers, which compared to NATO's future response force of 300,000 soldiers indicates its very different objective. The reaction capacity is expected to build on the existing battle group concept and will exclusively be for use in crisis management outside EU territory. The reaction capacity will be based on voluntary contributions from EU member states.

- A hybrid toolbox that will enable coordinated counter-responses should the EU or its member states be exposed to hybrid attacks across all domains. Countermeasures can assume the form of diplomatic reactions such as joint declarations or sanctions, but the plan also includes hybrid threats being handled in both the EU's civilian and military crisis management missions and operations.

- More flexible decision-making procedures that will make it easier to establish coalitions of the willing within an EU framework. This could involve increased use of the possibilities provided by the EU Treaty for those member states that wish to proceed with military crisis management operations and missions in smaller groups.

- New opportunities for cooperation between the EU's own military crisis management operations and missions and European-led ad hoc coalitions outside of the EU framework.

Like NATO, the EU must henceforth be expected to place stronger emphasis on efforts in Europe itself. However, the continued instability and fragility in large parts of the Middle East and Africa – with direct consequences for European security – will probably require that the EU strengthens its broad-spectrum engagement in these regions, not least as U.S. and NATO military engagement are reduced. This aligns with the widespread desire among member states to demonstrate European willingness to take responsibility in relation to maintaining peace and stability in the immediate area. At the same time, the ever-increasing importance of the Asian and Pacific region politically, economically and in relation to security will lead to increased pressure on and desire from the European side to focus more on this more distant part of the world.

Overall, the EU member states are expected to become significantly more willing to invest in and prioritise security and defence. Particularly noteworthy is the German announcement of a new €100 billion national defence fund, which is particularly for the development and acquisition of material in the European context. In continuation of this, as well as on the basis of the Versailles Summit in March 2022 and the European Commission's two announcements in the field of defence from February and May 2022, respectively, cooperation on innovation and development in the defence industry area must be expected to be strengthened within the framework of PESCO, the European Defence Agency (EDA) and the European Defence Fund. The active involvement of the EU Commission in European defence is an important breakthrough, which gives new weight and momentum to the cooperation. It will be of great importance for building an efficient defence industry with the capacity to compete with China, Russia and the USA on the global market. The large joint projects are also the prerequisite for Europe to relieve the USA by providing strategic capabilities itself, such as space defence, satellite-based intelligence, sea-based ballistic missile defence and strike capability, aerial refuelling, and strategic air transport. In the long term, the cooperation also has the potential to make the national EU militaries reduce the massive waste resulting from the use of an excessively large number of different versions of the same weapon system, such as tanks, in contrast to the USA, Russia and China. Third countries (e.g., Norway, Ukraine) participate in parts of this cooperation, and the UK is also expected to engage at some point towards 2035 in order to exploit the great defence industrial and military potential in European defence cooperation .

The strengthened unity in the EU and the dynamic development of the EU's strategic autonomy and role as a security policy actor are threatened by populist forces that are challenging fundamental EU principles regarding the rule of law and democracy and which want to roll back the EU. As long as they only have power in countries like Hungary, the problem is manageable; but should they win

power in one of the major countries, there is a serious risk of the cohesion and dynamism of the Union being undermined. An impending energy crisis and economic recession also has the potential to challenge the bolstered EU unity.

3.3 New division of labour between NATO and the EU

The handling of the Ukraine crisis and the adoption of the EU's Strategic Compass and NATO's Strategic Concept have helped to clarify the division of labour between the EU and NATO. For any foreseeable future the idea of the EU as a possible alternative to NATO when it comes to the military defence of Europe and deterrence of Russia is off the table. As NATO's concentrates on military defence and deterrence against Russia, the EU and Europe must expect to have to assume the main responsibility for combatting terrorism, irregular migration and piracy, as. This also applies in relation to peace and stabilisation work carried out by other regional organisations and actors with whom the EU and NATO can establish and strengthen various forms of partnerships, including capacity-building projects.

The future division of labour between the EU and NATO is less clear when it comes to other security issues, which may give rise to competition and/or duplication if the trend towards strengthened cooperation between the two organisations is not maintained.

This applies, among other things, to the effort to maintain Western technological superiority and the ability to develop future advanced weapon systems in all domains. Here, America's dynamic tech sector plays a key role together with the advanced American military. Other countries or international organisations will have very little influence on U.S. efforts in this area. Among the EU countries, it is becoming increasingly clear – even for the major countries – that a united European effort is required to be able to secure Europe a role in the global technology race and development of future advanced weapons systems. The EU has established the institutional framework for joint European efforts to develop technologies with military potential and advanced weapons systems with the opening of the European research funds for projects with military applications, the EU Commission's two defence communications and the establishment of the European Defence Agency, the Defence Fund, and the permanently structured cooperation (PESCO). There is, however, no guaranty that this will lead to the desired results. Internally, national business interests can slow the momentum, and external actors can have an interest in derailing the project. The EU is also behind from the start due to a lack of depth in the European advanced technology sector and a fragmented European defence industry. The other NATO countries, led by the USA, will be interested in gaining access for their companies to participate in the EU-funded programmes and development projects, but will probably be less inclined to give EU companies corresponding access to their own programmes and projects. This could give rise to difficult discussions.

NATO's special transformation command, ACT, plays an important role as a focal point for the sharing of defence technology between the allies. ACT needs to become faster at adapting NATO's force goals and certification process to the changed burden-sharing and to the requirements for the continuous technological updating of the Allies' forces. This update will pose a major challenge for the European allies, not least for many of the newer member states in the east. NATO, on the other hand, has so far not been the major framework for the development of new technologies and materiel or for joint procurement. Recently, however, NATO has established a so-called 'defence innovation accelerator' (DIANA) together with an innovation fund. There is reason to expect that there will be very different views concerning the extent to which NATO has or should have an effective capacity to develop new technologies and weapon systems, also in view of the risk of duplication of ongoing efforts in the EU.

There is also no clear division of labour when it comes to the need to ensure the civil preparedness and resilience of Western societies against hybrid attacks and in war. The main responsibility naturally lies with the national authorities, but the threat assessment requires a higher degree of common standards and mutual support. Here, the EU is quite far ahead and has a strong comparative advantage with its ability to legislate. Even though NATO has set up seven so-called baselines for the Allies' resilience, the Alliance efforts in this area by no means has the same depth and effect as the efforts in the EU.

The worsening threat assessment and the outstanding questions about the division of labour between the EU and NATO emphasise the need to maintain and develop the close and constructive cooperation between the EU and NATO, which fortunately today is at a historically ambitious level. Concrete, day-to-day working relationships have been established between the two organisations to address European security challenges across a wide range of areas. A further intensification of EU–NATO cooperation is expected to be launched by a new EU–NATO declaration in the time to come. In the longer term, when the acute handling of the Ukraine crisis will no longer function as an almost overriding, unifying factor for the West, the development towards a more military EU and a more political NATO could challenge the relatively settled division of labour. Non-NATO members of the EU and non-EU members of NATO could also have reservations regarding certain aspects of the division of The Cyprus conflict has negatively affected EU–NATO cooperation for many years and can be expected to continue to do so.

Another important issue that can create discord in both the EU and NATO is the admission of new members. While the accession of Finland and Sweden to NATO is expected to proceed quickly, the question of accession to the EU and NATO of the candidate countries in the Balkans, and not least of Ukraine and Georgia, give rise to difficult discussions; Many Eastern European countries are pushing for rapid admission, which would require the abandoning of the previous admission requirements, while most Western European countries, insist on maintaining the criteria. For Georgia and Ukraine, the Russian occupation of significant parts of their territory will pose a particular problem in relation to both EU and NATO membership. Deeply rooted tensions between the countries of south-eastern Europe could also continue to lead to blockages in the admission processes of various candidate countries.

3.4 USA – Still the most powerful military force in the world

The USA will continue to be Denmark's most important security ally towards 2035. Although China will overtake the USA economically, the USA will remain the world's strongest military and political force in the time perspective of this report. Regardless of the pivot of its main strategic focus from Europe to Asia, the USA will continue to have a decisive interest and role in European security. The USA will remain closely linked with Europe in strong mutual economic dependence as well as by strong human, cultural, and value links. A credible deterrence of Russia for the foreseeable future will not only require maintaining the U.S. nuclear guarantee, but also some U.S. military presence in Europe and unequivocal support for the security guarantee to the European allies in NATO's Article 5.

As the experiences with the Trump and Biden administrations have demonstrated, depending on the domestic political development in the USA, there can be very different scenarios in terms of how the USA looks after its interests and role in European security in the future. With an administration like the current one, the community of values is stronger and broader and includes the climate, human rights, etc. Political energy and willingness to compromise will be invested in creating a common line together with the EU vis-à-vis China. The economic competition with the EU will be handled with respect for the existing rules of the game with the aim to find balanced solutions. Support for NATO will be strong and unequivocal. The line towards Russia will be sharp, but the USA will ensure that the conflict does not spiral out of control. Even under the current administration, however, the positive role of the United States in the world and the transatlantic relationship may be challenged by the highly polarised internal political climate and the need to invest resources in dealing with a number of major domestic societal problems.

A new administration led by a re-elected Trump or a president with a similar political programme would challenge the transatlantic relationship. In a Trump II administration, transatlantic-minded Republicans and officials would be expected to have a less stabilising influence than under Trump I. This would increase the risk of abrupt shifts in U.S. foreign and security policy and violent verbal outbursts against friends and foes. There will be transatlantic disagreement on important issues, such as climate, equality, and minority rights. NATO and other international organisations will be de-prioritised by the USA, and the main emphasis in international relations shift to bilateral relationships with the great powers. Former president Trump has expressed understanding of the Russian invasion of Ukraine, and some Europeans are therefore concerned that a Trump II administration might be willing to enter into an agreement with Russia on a new security arrangement in Europe over the heads of the European allies. There is also widespread concern in Europe that such an administration will seek to push the EU into a hard-line confrontation with China, that trade conflicts with the EU will escalate, and that the USA will support populist forces that undermine the rule of law and democracy in European countries.

Any future U.S. administrations in a 2035 time perspective is expected to respect in principle the NATO obligations, including Article 5 and not least the nuclear guarantee. There is cross party consensus on the demand for Europe to make a far greater contribution to deterrence and defence in order to free up resources that the USA can invest in deterring China, as well as on the expectation of European support for the U.S. line towards China. Finally, there is a broad political agreement in the USA not to engage American forces on land in the fight against terrorism, etc. in Africa or the Middle East.

3.5 France: The EU security policy beacon

While the French economy will continue to struggle with a substantial backlog of reforms for years to come, France stands better equipped than many other countries to face the new world order due to its traditional focus on high technology and strategic autonomy together with a strong defence industry. With its status as a nuclear power, a strong military, and its overseas territories in the Pacific, the Indian Ocean and elsewhere, France will find it natural to play an active role in foreign policy and militarily, both in Europe and globally in the years to come.

NATO will remain the cornerstone of European and French security. The Russian invasion of Ukraine has made Paris even more aware of the need for a strong, well-functioning transatlantic alliance and the French also attach great importance to close bilateral coordination with Washington. France has traditionally tried to maintain a dialogue with Russia, but after the invasion of Ukraine the French president and administration have sharpened their tone and unequivocally joined the NATO track, even though a stable relationship with Russia after the Russo-Ukrainian war is still seen as an essential part of the European security landscape. The French thus see a distinction between defending Ukrainian territorial integrity and creating a stable relationship with Russia in the future. From a French perspective, it is possible to pursue both goals.

In light of the increasing American focus on Asia and its withdrawal from Afghanistan, France sees an even stronger need for Europe to develop that ability to act independently in the field of security and defence policy, which has for so long been a French priority. As the French see it, it is in the American interest that Europe can stand more on its own two feet and assume the responsibility for ensuring stability in its own immediate area. For France, strong European security and defence policy cooperation is a necessary supplement to the cooperation in NATO. For the same reason, the French would like to see closer security policy cooperation with the UK. Europe is thus seen as being larger than the EU in French security policy perspective. In military operations, for the foreseeable future, a distinction will continue to be drawn between coalitions of willing European countries for the more dangerous and risky military operations and the EU management of less dangerous operations. This can change if EU decision-making processes and procedures are adapted to be able to act quickly and efficiently.

The French nuclear capacity and membership of the UN Security Council mean that France believes it has the natural prerequisites to drive European ambitions forward. On the EU side, development of the defence capabilities of European countries, strengthening of the European defence industry, and better coordination across national borders will remain key priorities towards 2035.

France sees China as a partner, but increasingly also as a competitor and rival. French foreign policy strategy towards China is closely related to the French commitment to the Indo-Pacific region. Towards 2035, France will develop closer relations, including through security partnerships and closer economic ties as part of its strategy towards the Indo-Pacific region. Here, France will seek to contain Chinese dominance without necessarily following a confrontational American policy on China.

Most recently, in the presidential and parliamentary elections in 2022, France has experienced a tendency towards stronger political polarisation. If the extreme right or left wing were to win the presidential election in 2027, a significant shift in French security policy towards a stronger degree of bilateralisation, including in relations with Russia, the USA and other major global players, must be anticipated, while engagement in the EU and NATO would be weakened.

3.6 Germany – Soon the world's third-largest defence budget

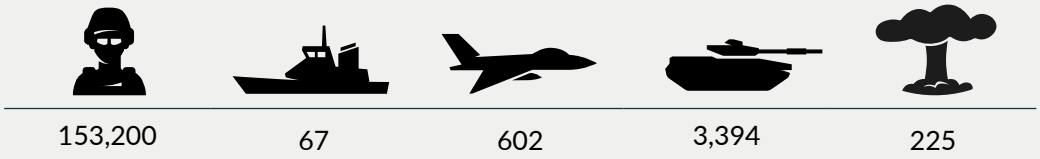
Germany is in the process of security policy transformation, the latest decisive steps being triggered by the Russian invasion of Ukraine. A new political consensus has emerged and is expected to continue, also with a possible future CDU/CSU-led government. The German side is now willing to invest in a substantial modernisation and rearmament of the German military. The details of the rearmament and the precise use of the funds are pending, and the German defence, like other countries, will find it difficult to quickly get defence material delivered for the many additional funds; nevertheless, in the longer term, Germany can become Europe's strongest conventional military power after Russia. The government has clearly indicated that procurement and materiel development will be concentrated on pan-European projects, thereby also benefitting the German defence industry.

Whether this will mean that Germany assumes a more assertive and independent security policy role remains an open question. With his Zeitenwende speech on 27 February 2022, Chancellor Scholz sent an important signal of political will to increasingly supplement Germany's economic leadership position with a stronger security policy role. At the same time, it is clear that in large parts of German society and business, an embedded reticence remains against a too strong and active German security policy. This could stand in the way of a stronger profile. However, the crisis between the West and Russia resulting from the Russo–Ukrainian war and the increased concern for their own security, which it has also brought about in the German population, may help speed up the security policy transformation.

As seen from the current government programme and elsewhere, Germany will continue to regard NATO and the USA as the ultimate guarantor of European security. However, Germany wants to strengthen the ability of Europe to take care of its own security, partly within the EU framework, partly among the European NATO members. For Germany, the strengthening of the European defence capability is seen as a supplement – not an alternative – to NATO. At the same time, it is seen as a way of maintaining American engagement in Europe. For the same reason, Germany emphasises that European strategic autonomy must not weaken the transatlantic ties.

China is expected to become even more significant to German foreign policy in the next 10–15 years. Germany supports the EU approach to China as a partner, competitor and systemic rival. At the same time, the German approach is characterised by China's status as a crucial trade partner. As long as China does not behave in ways reminiscent of Russia's violent actions in its immediate neighbourhood, Germany can be expected to go to great lengths to maintain its economic relations with China. There is, however, increasing attention to the need for the diversification of German trade policy relations precisely to avoid over-dependence on the Chinese market. In 2021, Germany began the practical implementation of its Indo-Pacific policy and is expected to strengthen its engagement in the region in the coming decade, including regular naval visits.

3.7 Great Britain – Between global ambitions and European necessity



The UK will continue to have a decisive interest and active role in European security for the next 10–15 years and NATO and transatlantic cooperation will remain the most important foundation for British security policy.

At the same time, the UK continues to hold global ambitions, and the Global Britain concept entails, among other things, an intensified and broad-spectrum effort in the Indo-Pacific. China is seen as a strategic competitor and as the biggest systemic threat to British economic security, but the approach balances the need to cooperate with China on, for example, the climate challenge, the economy and pandemics. This approach is to be closely coordinated with Washington, which ensures the UK a seat at the table. In the global perspective, the UK also prioritises the AUKUS[14] cooperation, which will primarily deal with the cooperation with Australia and the USA on new nuclear-powered submarines, but which may also include more politically focused areas in the years to come. Furthermore, British security policy will in the future apply broader sense threat assessment than traditional military challenges. This includes hybrid threats and cyber, climate change, pandemics and economic crises. Learning from the experiences of recent years, British society as a whole must be made more resilient. This is partly to be achieved by increasing the integration across the central administration, the armed forces and civil society.

Even before the Ukraine invasion, Russia was regarded as the most acute threat to the UK, and the war has demonstrated the British will and ability to continue to take responsibility for European security. Despite global ambitions and the broader concept of security, British national interests will thus in practice be marked by a focus on European security within the NATO framework towards 2035. As part of its hard Brexit model, Britain chose to reduce security policy cooperation with the EU to the absolute minimum on an ad hoc basis. An increased British emphasis on closer bilateral security cooperation with the individual EU countries is to be expected instead. A political generational change in London will be required to open up a less strained relationship with the EU and thereby make it possible to develop the close and structured military and security policy cooperation that will be in the interest of both parties.

The Russo–Ukrainian war has further galvanised support in both parliament and government for increased defence spending. After the budget increases of recent years, the British already score high, with an annual budget of approximately 2.3% of GDP, which is planned to be increased to 2.5%. However, the large national debt and gloomy prospects for the British economy after the pandemic and Brexit, which have recently been greatly aggravated by high energy prices and rising inflation, make it difficult to see how additional funds will be available for British defence in the short and medium term. The UK will continue to argue for increased defence spending and at minimum that all NATO countries live up to the 2% target.

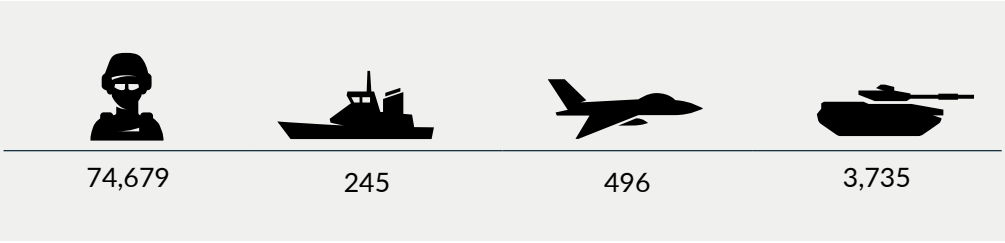
After the leadership transition in the Labour Party in 2020, there has been broad agreement between the government and opposition regarding the broad lines of the security policy. This applies to NATO, nuclear, nuclear weapons, transatlantic cooperation and the size of the defence budget. The war in Ukraine has only strengthened the broad security policy consensus, which is not expected to be challenged in the next decade.

In a 2035 perspective Scotland and/or Northern Ireland may leave the United Kingdom, which could affect the role of the country in European security. In such a scenario the country could lose 10–15% of its population and be expected to focus on the new internal system for a longer period.

14 Australia, the UK and the USA.

3.8 The Nordics: United as military allies for the first time in history

With the Danish referendum on lifting the defence opt-out and the Finnish and Swedish decisions to seek admission to NATO, the Nordic countries will for the first time in history stand together as military allies in NATO and as partners in the EU's defence dimension.[15] From the North Pole to St. Petersburg, the Nordics constitutes the NATO front line against Russia, which makes for a decisive role in the Alliance.



Collectively, the Nordic countries have strong military forces on land, at sea and in the air. Both the EU and NATO will expect that the Nordic countries, in addition to defending their own territory, including the High North, will also contribute to the defence of Europe by sending forces to weaker NATO countries and to stabilisation operations in the European neighbourhood.

The geographical proximity, cultural similarity and the large overlap of political-military goals means that there is a great potential for strengthened cooperation among the Nordics when of Finland and Sweden become members of NATO. This applies to operational matters, exercises, information sharing and building a common situational picture, materiel development and cooperation, host nation support and possibly even joint defence plans. The new situation also creates potential for the Nordic countries' respective defence industries; not least as participants in the dynamic development of defence industry cooperation in the EU.

Different historic experiences and security policy traditions mean that it will take time and require considerable political energy to develop these promising and important potentials. As the only Nordic country that was a member of both the EU and NATO until 2022, Denmark could have a special obligation and interest in making an active effort in this regard. Here, however, it might be a barrier that the other Nordic countries have until recently seen Denmark as less engaged in the Nordic military and security policy cooperation. There is thus today a remarkably close and substantial cooperation between the Finnish, Norwegian and Swedish militaries; which it will require time and effort for the Danish Armed Forces to catch up to.

The Nordic region also has great potential in the broader security policy spectrum. The 'Nordic brand' remains strong on the global stage and in the UN, and it could offer a platform for increased efforts for conflict resolution and stabilisation. The Nordic region also has opportunities to achieve an environmentally, socially and economically sound supply of critical raw materials to Europe[16]. The Nordics (incl. Greenland) have known resources of a large number of critical elements and minerals, and the access to energy is good. The level of expertise in mining, refining/metallurgy, environmental protection and renewable energy is high, as is the research capacity to develop sustainable solutions in the processing from geology to finished raw materials and components. Production costs in the Nordic region will be higher as a result of environmental standards and wage levels, but raw materials make up an increasingly small share of the price in the vast majority of high-tech products. With

15 While Norway is not a member of the EU, it actively participates in parts of the EU defence cooperation.

the right EU-level framework conditions, Nordic mining and raw material processing could make a valuable contribution to the European strategic autonomy.

NORDEFCO is an important focal point for Nordic military and security policy cooperation, based in particular on the close Swedish–Finnish and Swedish–Norwegian bilateral defence cooperation. With the joint integration of the Nordics into the EU and NATO, it will be natural to turn the role of NORDEFCO away from operational and joint projects towards a forum for Nordic coordination and policy development within the EU and NATO.

3.9 Bilateral defence cooperation and ad hoc coalitions

As a supplement to cooperation in NATO and the EU, Denmark and several of our close European allies are increasingly entering into bilateral defence cooperation agreements and various forms of ad hoc cooperation.

In recent years, several NATO countries in Europe have thus entered into bilateral defence cooperation agreements with the United States. These are mostly agreements that regulate and form the framework for American military presence or concrete defence activities in addition to the joint NATO SOFA (NATO Status of Forces Agreement). Denmark has also started discussions with the USA about such an agreement.

In addition to the bilateral defence cooperation agreements, there is a growing tendency for several of our allies and partners to enter into various ad hoc collaborations on the implementation of international military operations. This is also the case for Denmark, which has participated in, among other things, the European Monitoring Mission in the Strait of Hormuz (EMASoH), the French-led Operation Barkhane and Task Force Takuba in West Africa, as well as the US-led coalition against ISIL.

3.10 Partners in the Indo-Pacific

As political and military power shifts to Asia, Europe and Denmark must develop the security dimension of their partnerships with a wide range of countries in the region. Although the United States remains the most important security policy partner in the overall Indo-Pacific region, several of the countries are expected to be interested in such cooperation with Europe in order to gain the greatest possible freedom of action within the Sino–American power struggle.

The Indo-Pacific as a whole is characterised by the absence of collective security policy systems in favour of a network of bilateral relations. Until the late 1970s, the region was among the most conflict-ridden in the world, but has since enjoyed a certain stability. This has made rapid economic development possible, making the area the world's primary engine of growth. Most countries adopt an approach based on relatively cautious diplomacy and non-interference in internal affairs to maintain regional stability. This approach is enshrined in the Bali Treaty of Amity and Cooperation in Southeast Asia from 1976. A number of third countries have acceded to this, most recently the Netherlands, Denmark and Greece in 2022.

16 Raw materials are described as critical if they form the basis for important societal functions and at the same time are provided through uncertain supply chains.

With the intermingling of security policy, economics and innovation, the Indo-Pacific will likely become the scene of increased geopolitical disputes and great power competition towards 2035. Southeast Asia is expected to play a growing role in the diversification of supply chains, including access to raw materials such as natural gas, green fuels and raw materials for the technology sector. The massive Chinese investments in infrastructure in the region must be seen in a geopolitical light. China is the largest trading partner for many of the countries in the region and is very actively investing in ports and other infrastructure in the region. This massive Chinese investments in infrastructure must be seen in a geopolitical light. There is also a significant Chinese diplomatic offensive among the countries in the Pacific, most recently illustrated by a security agreement with the Solomon Islands, which had recognised Taiwan's independence until 2020.

The U.S. approach to the region includes five partners with alliance treaties in the form of Australia, Japan, South Korea, Thailand and the Philippines. However, the relationship with the latter two in particular is complicated by the domestic political development in the countries, just as there is also ongoing debate in South Korea and Japan about the American bases. South Korean security policy is predominantly characterised by the threat from North Korea, as well as the historically complicated relations with Japan and China. Conversely, cooperation with Australia in particular is growing stronger in light of the increasingly assertive Chinese behaviour.

The USA is increasingly betting on more informal collaborations with other countries, where the so-called Quad collaboration with Japan, India and Australia is particularly important, which is primarily due to the participation of India. With the addition of the Indo-Pacific Economic Framework (IPEF) at the Tokyo summit, India has accepted in principle a structure rooted in a Western framework and values. Although the cooperation is not officially directed against any country, the Quad cooperation must be seen as a counterweight to China.

In the spring of 2022, Secretary of State Antony Blinken focused on 'alignment'[17] with partners in the region as the most important political move to counter the rise of China. Singapore acts as a kind of internal catalyst in the region and is the only country in Southeast Asia to have introduced sanctions against Russia due to the Russo–Ukrainian war. However, Singapore cannot pull other countries along on its own and, like other countries, is deeply dependent economically on China. Among the medium-sized countries in the region, the USA is betting particularly on Vietnam and Indonesia. Vietnam traditionally has a very tense relationship with China (the most recent war in the region was China's failed invasion of Vietnam in 1979), although it also has a communist, single-party government with close ties to the Communist Party of China.

From the European perspective, the ambitions for partnerships with the region and especially ASEAN are being stepped up considerably. In the short term, however, they are hampered by disagreements about sustainability, especially including palm oil, but also regarding democracy, since only two of the 10 member states can be considered democratic. This also challenges the internal cohesion of ASEAN, as illustrated by the military coup in Myanmar. At the same time, the ASEAN cooperation can in the long term develop the potential to act as a platform to resolve disagreements between the smaller countries in the region, thereby contributing to reducing the level of conflict. Brexit and the launch of the AUKUS partnership have triggered increasing competition among the European allies, most clearly between the UK and France. Both are very actively seeking a share in the rapidly increasing defence purchases from the region. Denmark is also attracting increasing interest in military cooperation and equipment from several countries, especially in the maritime area.

The EU will be an important platform for developing economic partnerships in the Indo-Pacific. It currently has free trade agreements with Japan, Korea, Singapore and Vietnam, and is negotiating with Indonesia.

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17 'Alignment' can be defined as a loose strategic coordination or consensus, but is by the nature of the concept relatively non-binding.

India

India commands special attention in the region due to its size and rapidly growing economic, political, climatic, technological and military importance. In 2025-26, the Indian population will reach 1.5 billion, 1 billion of whom will be under 35 with an average age of 29. The Indian economy is expected to match the EU in 2040. India will increasingly appear as an independent player geopolitically and economically, with a focus on its own defined interests. In terms of foreign and security policy, India will maintain its own approach (i.e., strategic independence) and will not join treaty-based partnerships. This approach has been expressed, among other things, in the Indian reaction to the Russo–Ukrainian war, where it aims to remain neutral.

India's overriding security policy focus is China, with whom it shares an almost 3,400 km long land border. The demarcation remains disputed, resulting in ongoing conflicts, which is expected to continue. There has been a significant military build-up on both sides, and further confrontations on the border must be considered possible. The outline of ever closer cooperation between China and Russia, raises concerns in New Delhi, in particular in view of the increasing Chinese dominance in the aftermath of the Russo-Ukrainian war. China's rise and expectedly more assertive line will strengthen

the orientation towards ever closer and more binding cooperation with the USA and Europe. Regardless of the fact that it is crucial for India to maintain non-alignment, India has thus moved significantly towards the United States and most recently Europe. People look to the USA for both economic and military reasons, while Europe is seen more as a strategic partner in the economic field. India has also reached out to smaller European countries, including not least Denmark with a focus on green transition.

India's broader security policy focus is on the Indo-Pacific, where it wants to minimise Chinese influence and presence. Consequently, India has initiated cooperation in this regard with key players such as the USA, EU and UK. The collaboration also focuses on supply lines and chains, which are critical to India's continued economic development.

On the technological front, including in digitalisation, India will aim to present itself as a serious challenger to China. India's current rapid economic and technological development will drive the development of new strategic and innovative technologies, and it will thus become a decisive piece in the puzzle of global cooperation in the future between democracies and market economies.

Along with its economic and technological growth, India will also develop its military capabilities. India has an immediate military challenge due to its long-standing dependence on Russian technology and equipment, which in all three branches of the military is quite significant. This means that India's deterrent capability, including in the nuclear field, will be under severe pressure if Russia cannot or will not continue to supply spare parts. Despite significant investments and in-house production of nuclear submarines, India remains very far from being able to manufacture the necessary weapons systems itself. In the coming years, Indian arms purchases must increasingly be expected to be made in the USA and France.

Approaching 2035, India will become one the world's most influential countries, driven partly by its size and technological development power, partly by its own global ambitions. It will greatly impact the new world order how India will balance its need to orientate itself towards the West in order to meet the challenge from China against its desire for strategic independence and a role as a mouthpiece for the many countries that do not want to choose sides between China and the USA.

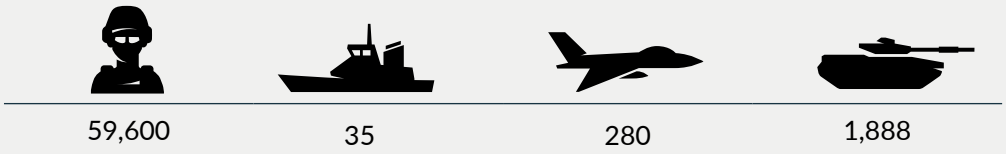
Japan

Over the past 20 years, Japan has moved further away from its post-World War II pacifist heritage and towards becoming a more active foreign and security policy actor in the Indo-Pacific region. This is primarily prompted by the more assertive China. Since the Russian invasion of Ukraine, Japan has made its position clear and abandoned decades of attempts at reconciliation with Russia. At the same time, relations with the EU and NATO have been further strengthened, and Japan has assumed a unique and greater role as a gateway and partner for the West in the Indo-Pacific. This applies not only to the USA, but also to the EU. Likewise, there is a strengthened Japanese focus on building new military relations and international cooperation – this happens both within the Quad cooperation and bilaterally with, among others, Australia, the UK, Indonesia and the Philippines. With the current stable

domestic political situation, the necessary majority in the Japanese parliament is ready to change the pacifist constitution and strengthen Japan's military capabilities. This opens the way for a more active Japan in security policy on the international stage, for example in the form of participation in international operations. There are even thoughts of contributing to a possible defence of Taiwan.

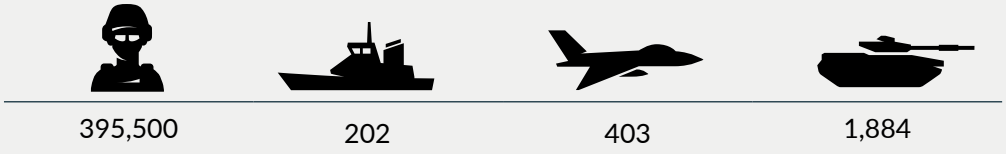
In 2021, Japan had the seventh largest defence budget in the world. At the end of 2022, the government will present an updated national security strategy, which is expected to contain recommendations to increase defence spending from the current approximately 1% of GDP to 2% over a 5-year period, which was what Prime Minister Kishida ran for election on in autumn 2021. If this materialises, Japan will have one of the world's largest defence budgets. It is also expected that the updated national security strategy will contain recommendations on the acquisition of offensive capabilities that can target military objectives in China and North Korea.

Australia



Australia traditionally has very strong bonds with the USA and UK and has contributed significantly to the military effort in Iraq and Afghanistan. After the election in the spring of 2022, one of the major flanks in relation to climate policy was closed, and broader cooperation opened up not only with Europe but also with the countries in the region. At the same time, in recent years Australia has established a clearer foreign policy identity, as exemplified in the AUKUS partnership with the USA and UK, which also aimed to keep the USA in the region. In parallel, Australia has entered into bilateral defence cooperation with Japan, which is another expression of a trend towards a greater need to form alliances. Australia is also aligning itself with (and vice versa) the NATO-AP4 cooperation (Australia, Japan, New Zealand and South Korea).

Indonesia



Indonesia also has a firm non-aligned approach and a reluctance to allow itself to be instrumentalised by the West. It sees itself as a future superpower and is expected to become one of the world's 10 largest economies by 2035, with a geography and population the size of the United States. In terms of defence, broad cooperation is sought, but with a clear preponderance of Western partners, especially the USA and Australia.

Consequences for Denmark and the Danish Armed Forces until 2035

04

This chapter assesses the consequences that the expected development in the world around us towards 2035 will have for the security of the Kingdom of Denmark, for the tasks of the Danish Armed Forces and for the wider societal security in Denmark, the Faroe Islands and Greenland

The significantly intensified threat from Russia, together with the turning of the military strategic focus of the USA towards Asia, means that the Danish Armed Forces must make a significantly greater contribution to NATO's defence and deterrence in the immediate neighbourhood of the Kingdom of Denmark. This must be expected to become the main task for the Danish Armed Forces in the years to come. However, climate change and demographics will also intensify the threats to Europe from terrorism, illegal migration and piracy, which the Armed Forces will need to help to deal with. The rapid technological development will demand a significant technological boost of our Armed Forces, if they are to remain a relevant partner for our strongest allies. This boost will also be the prerequisite for the Armed Forces, with limited prospects to be able to expand manpower, to be able to carry out increased tasks. The new threat assessment, with a greater risk of hybrid attacks, pandemics and natural disasters, will also place greater demands on wider societal security.

4.1 Security policy consequences

The clear threat Russia poses to the European security order will constitute the defining parameter for Danish security for a foreseeable future. Building up NATO's deterrence and territorial defence capabilities to match the increased threat will require significant financial costs and strategic attention.

At the same time, the complex of threats and challenges from weak and fragile states, which the Armed Forces have focused on for the past 20 years, has not gotten smaller; on the contrary, it is likely that climate change, demographics and the lack of growth in Africa and the Middle East will further intensify these issues in the years to come.

Add to this the challenge from a significantly stronger and more assertive China, which is not expected to become a direct military threat to Europe until 2035, but which challenges our security on many other levels and forces the USA to turn its strategic and military focus from Europe to Asia.

The Kingdom of Denmark must deal with all of these increased threats and risks in a new, fragmented world order, where intensified great power competition with technology as the decisive parameter is on its way to replacing the rules-based international order supported by strong international institutions.

A lone bright spot in the dark prospects of the future is the strengthening of the EU and NATO, which the Russian attack on Ukraine has triggered, including the applications made by Finland and Sweden to NATO and Denmark lifting the EU defence opt-out.

The foreign and security policy situation facing the Kingdom of Denmark can generally be divided into five security domains with different actors, dynamics, logics, etc.: the Nordics, the Baltic Sea, wider Europe, the Arctic/North Atlantic and the global arena. The security policy threats and challenges play out differently in and across each of these geographically defined domains. Therefore, there are also different conditions for the provision of security within the Kingdom of Denmark. The political-strategic conditions for the security of Denmark, the Faroe Islands and Greenland, respectively, thus vary due to their different geographical locations.

As the bottleneck in the Baltic Sea, Denmark is linked to the Nordic region and the Baltic Sea, where Russia is the overriding security policy challenge. At the same time, as part of the European continent and member of the EU, Denmark is exposed to threats such as terror and challenges from uncontrolled migration from the Middle East and Africa or the consequences of war and instability in the Balkans and the Caucasus.

The geographical location of the Faroe Islands and Greenland leave them less exposed to these threats from the south. They are part of the Arctic/North Atlantic security policy complex and have great importance for the mutual nuclear deterrence between the United States and Russia. Greenland lies in the middle of the projected path of intercontinental missiles flying between Russia and the United States, which, in line with the worsening of relations between the two great powers, has given Pituffik (aka. Thule Air Base) renewed relevance. At the same time, the Faroe Islands and Greenland are central nodes in the so-called GIUK gap (see Chapter 2).

The security of the entire Kingdom is also affected by global developments and events far away. This primarily applies to the power games between the USA and China, which are also played out in Nuuk, Tórshavn and Copenhagen. The decline of the rules-based world order leaves smaller countries extra exposed and dependent on alliances with strong allies. In a more brutal world with fierce superpower competition, potential independence processes for the Faroe Islands and Greenland run the risk of being complicated by foreign interference.

The gloomy development in security policy presents Denmark with a dilemma in the distribution of the limited security policy resources. It is necessary to increase the Danish contribution to the ongoing strengthening of the defence of the West against the increased military threat from Russia and to contribute to the relief of the USA in Europe. As a result, the Danish Armed Forces will focus on collective and forward defence, including in the Baltics, with a view to contributing to the strengthening of the NATO deterrence and defence profile. At the same time, the Armed Forces can expect political demands to continue to contribute to countering the continuing serious threats and challenges that arise from weak and fragile states in the areas immediately surrounding Europe. Finally, dealing with the growing challenge from China is likely to draw increasingly on security policy resources.

The favourable security policy conditions in the 1990s and 2000s enabled severe cuts to be made to the capacity of the Armed Forces for territorial defence. Even within a reduced budget, the Armed Forces could therefore deploy significant forces for stabilisation operations far from Danish borders. The threat assessment for the years to come does not indicate that the resources for the necessary strengthening of the contribution made by the Danish Armed Forces to NATO's advanced collective defence can be provided by abandoning the ability to contribute to stabilisation efforts. Even with the decision to increase defence spending to 2% of GDP, the Danish military will, however, in the coming years have less capacity to participate in international operations outside Europe, and priorities will have to be set even sharper than before, when deciding on the issue of Danish military contributions. This applies regardless of whether it is a contribution to operations outside Europe or within Europe and regardless of the framework for the deployment.

The overall threat landscape has changed significantly in recent years, and it can be expected to be increasingly characterised by complexity and unpredictability towards 2035. Denmark can be hit by very different man-made and natural crises with major societal consequences. It is therefore essential

that the national crisis management system be prepared for major crises in the future, including new threats within a wider spectrum of society, in which the crisis management system traditionally has less or no experience, such as security of supply and financial issues. Major crises are characterised by a high degree of uncertainty, unpredictability, insufficient information, high complexity and instability, which are experienced by decision makers together with considerable pressure regarding time and expectations. The experiences from, among other things, the handling of COVID-19 (including the recommendations in the Grønnegård report) and the Afghanistan evacuation have revealed that the national crisis management system is not sufficiently agile and effective in all respects when a major crisis strikes. In addition, previous experiences point to an increased need for central coordination with a cross-cutting aim, increased robustness in relation to handling different kinds of major crises, where society's overall needs are supported at the same time. It is important that crisis management structures are well established before the crisis occurs to ensure cross-cutting coordination at all levels – political/strategic, operational and tactical – so the crisis can be managed by known and tested structures.

Against this background, the government has decided to examine possible weaknesses in the national crisis management system and how it can be strengthened with a view to making Denmark stronger in terms of being able to handle a wide spectrum of possible major crises in the future. The work will of course also have to incorporate experiences from the handling of the Ukraine crisis and the like.

4.2 Increased security policy importance of the Danish Armed Forces

The significant change in the security policy situation caused by the Russian invasion of Ukraine represents the provisional culmination of the long-term development trend, of which the Russian invasion and annexation of Crimea in 2014 was also a symptom. The world around Denmark has become more dangerous, and the importance of the Armed Forces for security policy has increased. The de-escalation that followed the end of the Cold War led to a 'peace dividend' on Western defence budgets. In the context of NATO, the 2014 Russian invasion of Ukraine signalled the beginning of the reversal of that process – most clearly expressed with the Wales summit decision in 2014 to aim toward increasing defence spending to 2% of GDP in 2024, and to use 20% of defence budgets for investments in new materiel and technology. Military defence will always play a decisive role in security policy, but the new situation underlines and emphasises the relative importance of military instruments in security policy.

Security policy is also about things other than defence policy; arms control and other diplomatic measures to deal with international security problems are an example. But the arms control regimes are currently in ruins. The Vienna document, which established important confidence-building mechanisms in the OSCE, and other elements may one day be the subject of a renewed diplomatic conversation with a future Russia about the European security architecture. But until then – and even then – the military instruments will play a renewed concrete role as signallers of strength and intentions through the military deterrence profile. For political leaders who are responsible for security policy, this means that they must even better know and understand the logic and routines of the military machine. And for military leaders with strategic responsibility, this means that they must even better understand the political-strategic effects of military practice.

The defence and security dimension will also play a greater role in civil society, where the requirements for the general robustness of society increase. This primarily applies to the need to protect society from increased threats from cyber-attacks, espionage, technology theft, etc., where in particular destructive cyber-attacks against critical IT infrastructure can potentially have devastating consequences due to the extensive digitisation of Danish society. Sectors which until now in

Denmark have been regarded as purely civilian may also play a new role in the overall Danish contribution to protecting the EU and NATO. This may give rise to considering new forms of collaboration between the Armed Forces and Danish research institutions, as well as uncovering barriers to this. The Niels Bohr Institute's collaboration with NATO offers an example of a civilian research institution that has gained security policy relevance due to its research in quantum technology, which is expected to lead to landmark innovations in technology of military interest such as encryption, sensors and computing power.

4.3 The tasks and needs of the Danish Armed Forces towards 2035

The changed security policy situation of the Kingdom of Denmark described in the introductory chapters, entails a significant increase in the tasks of the Armed Forces towards 2035. The intensified threat from Russia requires a stronger Danish contribution to NATO's deterrence and defence with a focus on the Baltic Sea, the Arctic and the North Atlantic, including more forces on short alert. Together with the other European allies, the Danish Armed Forces must also prepare to take over tasks related to the defence of Europe from the United States, which is turning its military-strategic focus towards Asia. China's rise and more assertive foreign policy may also produce new tasks in Asia for the Danish Armed Forces. At the same time, the threats from terrorism, radicalisation and illegal migration, which the Armed Forces have focused on over the past 20 years, must be expected to grow. There is also an increasing need for investment as a result of rapid technological development, just as the Armed Forces' need to support civil authorities may increase as a result of climate change and wilder weather – not least in Greenland.

Against this background, there is a need for a massive increase in the resources of the Armed Forces, as decided in the national compromise, which was concluded on 6 March 2022 by a number of the Danish political parties behind the defence agreement.

The Danish Defence has to deliver its capability targets in NATO. Already delivering the existing capability targets will be very expensive and time consuming and the future NATO targets for Denmark must be expected to increase and to require a significantly increased preparedness levels as a result of the decisions at the Madrid Summit regarding strengthened defence and deterrence as well as the need to relieve the USA. Secondly, the Armed Forces should prioritise continuous technological updating, including digitisation, with a view to integrated network connections enabling Danish forces tooperate effectively together with the most advanced forces of our major allies, and thus offer significant added value. Since the NATO capability targets cannot be expected to become sufficiently precise and sophisticated to define this qualitative goal in the foreseeable future, the Danish Armed Forces themselves should develop their ability to follow the rapid military technological development in close cooperation with other allies as well as Danish research institutions and companies. An inspiration could be other well-developed Nordic defence research institutions, such as the Swedish Defence Research Agency (Totalförsvarets forskningsinstitut) or the Norwegian Defence Research Establishment (Forsvarets forskningsinstitutt), which are not only valuable for their national armed forces but also their respective defence industries. That the rapid pace of military technological development renders it impossible to foresee all the necessary technology investments in the future defence settlement, should be taken into account in the next multiannual defence spending plan.

Large investments in advanced weapons systems can also contribute to enabling the Armed Forces to handle far greater tasks with very limited prospects for expanding the Armed Forces personnel substantially because of declining youth cohorts, a high employment rate and difficulties in retention. Instead, the striking power and productivity of the individual soldier must be increased significantly. This will require a thorough technological skills upgrade for much of the personnel, which can be implemented working together with relevant Danish educational institutions (e.g., IT University and DTU). There will be tough competition from the rest of the public sector and from private companies for the new skills that the Armed Forces will demand. This could provide occasion to consider whether the Armed Forces recruitment model and terms of employment, including conscription, are up-to-date. Calling up more conscripts for a longer period of time may to some extent remedy the recruitment problems and provide the Armed Forces better opportunity to support civil authorities in crisis situations. Here, it is worth considering whether gender-specific conscription will continue to be appropriate. Prior to a decision on extended conscription, the consequences for the Armed Forces and society as a whole should be analysed.

Not only t NATO capability targets will require a higher readiness of Danish forces; so will the need for the Armed Forces to be able to deliver relevant options and the ability to respond quickly to the political level in a more dynamic and unpredictable security policy environment towards 2035.

NATO's Article 3 makes clear that all allies have a national obligation to be prepared to 'resist an armed attack' individually and in cooperation with other allies. This applies not least in the initial phase of a potential crisis, where it cannot be taken for granted that there will be complete clarity as to whether this is a situation where Article 5 can be activated.

This national ability for territorial defence will be particularly important in the coming years, when increased military aactivity is to be expected in the immediate neighbourhood of the Kingdom of Denmark. This particularly applies to increased activity by the Russian navy and air force, which increasingly display a provocative character or, intentionally or not, violate Denmark's territorial waters and Danish airspace. An increased level of tension and an increased military presence in the Kingdom'ss immediate territory will also increase the risk of misunderstandings, unintended incidents and escalation. This could provide occasion to consider a direct military line of communication between the Danish Defence Command and the Russian Western and Northern Command in order to counter the increased risk of accidental escalation.

The Baltic Sea

Denmark has a central strategic position in the Baltic Sea region, as the maritime access to the Baltic Sea passes through the Danish straits. Strengthening the NATO deterrence against Russia in the area will therefore also entail more tasks for Danish Defence. Historically speaking, Denmark has a rich tradition of contributing to security in the Baltic Sea region, and there is reason to expect that Denmark will be asked to contribute more with military units from the Navy, Air Force and the Army in the area, especially in the three Baltic countries. It is therefore to be expected that Denmark will have to be present in one or more of the three Baltic countries on a permanent or semi-permanent basis with a significantly higher force contribution than has been the case since the establishment of NATO's Forward Presence in 2016. These units would then be locked into a stationary role and thus not be available for unexpected tasks, which will reduce the flexibility of Danish Defence compared to the current situation. Permanent deployment of Danish forces in the Baltics must therefore be balanced with regard to being able to react to the unexpected, as well as the fact that towards 2035, NATO will be demanding even more capabilities that can be kept on a very 'short-alert basis' with a view to rapid deployment in the case of Russian aggressions. In order to preserve as much military freedom to manoeuvre as possible, it will be natural to explore the opportunities to share the permanent tasks in the Baltics with other allies, including especially Sweden and Finland, once they have joined NATO. Concentrating the Danish contributions in one of the Baltic countries would

provide the most efficient use of resources and the best training opportunities. With the accession of Finland and Sweden to NATO, there will also be a need for a new NATO command structure in the region, which will be a good opportunity to consider whether the existing multinational command and force structure is up to date.

An armed conflict breaking out in the Baltic Sea region would have major consequences for both the Armed Forces and Danish society as a whole. In such a situation, maintaining the Allies' access to the Baltic Sea via Danish waters would be an important priority that would entail extensive and resource-intensive tasks for the Armed Forces. Denmark will also have to use considerable resources to act as a base and staging area for NATO forces (Host Nation Support), which will place great demands on the Danish Armed Forces and civil authorities. In such a situation, it will be the responsibility of the Armed Forces and a number of other authorities to provide accommodations, logistical support, health preparedness, security tasks and catering. A further investment in the ability of Denmark to receive and host large forces and heavy equipment will be a valuable addition to the Alliance's ability to reinforce the eastern Allies in the event of a crisis in the Baltic Sea region. As a NATO member, Sweden, with its geographical location and well-developed infrastructure, will open new avenues for moving NATO forces to the Baltic Sea, just as Norway can also be expected to receive more tasks as a host for the Allies' armed forces. There is therefore potential for increased Scandinavian cooperation in this area.

With the significant German rearmament in the near future, Germany will come to play a significantly increased role in NATO defence and deterrence in the region, which will make it relevant for the Armed Forces to cooperate much closer with the German military. Danish–German cooperation was very close during the Cold War, but receded into the background in favour of close cooperation with the British Armed Forces in connection with the major overseas stabilisation operations.

The Arctic and the North Atlantic

As an Arctic state, the Kingdom of Denmark has a shared responsibility for the regional order in the Arctic while at the same time attending to its own interests. The tense situation between the West and Russia versus the strong incentives for regional cooperation inevitably places the Kingdom in a difficult balancing act. This requires a well-coordinated and multi-pronged approach in the field of foreign, security and defence policy. Military tasks and broader security policy and diplomatic efforts are interconnected. This applies particularly in relation to the three great powers (USA, Russia and China), the Arctic allied coastal states and leading non-Arctic allied states. Many central interests must be managed, a challenge that is multiplied by the complex relationship between the parties constituting the Kingdom of Denmark regarding foreign and security policy.

It is to be expected that, towards 2035, Danish Defence must increase its investments in the Arctic. Especially with a view to the better monitoring of the massive Greenlandic sea space and land territory and a more systematic assertion of sovereignty in the air as well as on and under the sea. East Greenland in particular will require resources and the creative use of new technologies, such as autonomous systems.

NATO's increased attention to the region will bring with it expectations that the Arctic allies strengthen their efforts in the region to the benefit of the Alliance. This can be expected to include the development of actual NATO positions, policies and possible force targets regarding Greenland and the Faroe Islands. However, it is considered less likely that NATO will have an actual operational role in Greenland or the Faroe Islands with a permanent presence of forces or headquarters.

Conversely, it is likely that more allied military forces will be present in the Arctic and the North Atlantic in the future – often close to or actually within the Kingdom territory. Hosting such forces will entails new tasks.

While NATO's growing interest in the North Atlantic and Arctic region gives the Kingdom opportunity to articulate its Arctic interests to important European and transatlantic allies, the increased security policy interest from NATO and larger allied European states also brings new dynamism to regional relations, which risks further straining relations with Russia. This underscores the need for a tailored and calibrated approach to avoid unintended escalation.

In addition to the development of security policy, there are also other – primarily economic and climatic – factors that will necessitate that the region continues to be prioritised in terms of defence policy by the Kingdom in the years leading up to 2035. The area that the Armed Forces have to monitor in the Arctic will grow as the sea ice melts and possibly also as a result of the decision made by the UN Continental Shelf Commission on the Danish claim to the continental shelf in the Arctic.

Full Faroese or Greenlandic independence would change the status of the Kingdom as an Arctic and North Atlantic state and could have major consequences for the tasks of the Armed Forces.

The Faroe Islands

For the past hundred years, the question of full independence has divided the Faroese, and at the turn of the millennium, the establishment of the Faroe Islands as an independent state was quite prominent on the political agenda. While this no longer has the same political priority, there is broad political and popular support for continued development of Faroese self-government and for the Faroe Islands to be able to represent themselves internationally to a greater extent and to obtain membership in their own name in relevant international organisations, such as WTO and the Nordic Council of Ministers.

In the view of the Danish government, however, several of these wishes cannot be accommodated within the Danish Constitution. Within a foreseeable number of years, this could conceivably result in a Faroese demand or request to find a new framework for cooperation outside the constitution. In a possible new framework for the cooperation between the Faroe Islands and Denmark, with the countries being formally equal in some kind of union, it is considered not unlikely that the Faroese side would have a desire for an arrangement implying that the Danish Armed Forces would continue to undertake sovereignty enforcement and territorial defence in cooperation with the Faroese authorities.

Greenland

The right to Greenlandic independence is described in Chapter 8 of the Greenland Self-Government Act. A majority of parties in Inatsisartut (the parliament of Greenland) support the work towards Greenland's independence. A minority of parties want to maintain the current construction. There is work ongoing across the parties to build a self-sustaining Greenlandic economy, and Greenland wants and is working to take on more responsibility. This also applies to areas that cannot be taken over within the framework of the Self-Government Act, not least defence, foreign and security policy.

International Operations

Climate change, demographic development and growing global inequalities will intensify the threats to Europe from terrorism, illegal migration and piracy originating in Africa and the Middle East towards 2035. At the same time, it is likely that the USA and major European allies will demand Danish military contributions to activities in the Indo-Pacific in line with the increased strategic focus on the region and the power struggle with China. The Danish Armed Forces should therefore have the capacity to send relevant military contributions to international operations outside Denmark and the immediate area. In recent decades, Danish Defence has invested in equipment and training with a view to being able to participate in international operations, particularly in the Middle East and Africa. Considerable knowledge and specialised skills have thus been developed, meaning that the Danish Armed Forces is a valued partner for our allies. It will be important to be able to retain and maintain these skills and adapt them to the ongoing development in the nature of international operations. On the basis of the expected tasks, which are described in more detail in the following sections, the Armed Forces could i.a. focus on the further development of the existing long-range maritime capacities as well as on the types of less manpower-intensive but very flexible capacities that, according to experience, are in the greatest demand, such as helicopters, transport aircraft, special forces and trainers.

Anti-terror and stabilisation efforts

As the United States shifts its strategic focus towards Asia and given the new division of labour between NATO and the EU, Denmark and the rest of Europe will have to assume a greater role and take more responsibility for European security, including in the fight against extremism in the Sahel, North Africa and Iraq. The experiences from international stabilisation efforts emphasise the need for solid local anchoring and ownership, realistic goals for democracy and human rights, and for the military to be combined with a long-term civilian effort. The EU has all the necessary tools for such wide-ranging efforts, but the political decision-making structure entails a risk of setting unrealistic goals for the time horizon in which progress towards good governance, equality and other rights can be expected.

In the coming years, it must be expected that Denmark will be met by a very wide range of requests for Danish military contributions to efforts in and around fragile states. However, these efforts will have a more focused and capacity-building nature than the previous long-term and extensive engagements in Afghanistan and Iraq. The demand will come both from the UN and – with the abolition of the defence opt-out – the EU as well as from ad hoc coalitions. In the latter, France in particular can be expected to request Danish contributions to continued joint efforts in the Sahel and potentially more broadly in the region. Demand from the USA is more difficult to predict. All indications are that the United States will continue to reduce its presence in weak and fragile states. At the same time, the USA will appreciate and expect Europe to make a larger contribution to stabilisation efforts. However, it cannot be ruled out that towards 2035, prompted by a 9/11-like event, the USA will again find itself forced to intervene.

Maritime security (outside Danish territory)

As the world's sixth largest maritime nation, maritime security will continue to be a central Danish priority.

Maritime security outside Danish waters includes a range of threats, the most prominent of which is currently the threat from piracy. Despite extensive efforts to combat maritime crime, the threat of piracy still exists. Denmark may have a national interest in continuing to invest resources in protecting trade routes and ensuring free navigation. This applies not least to the Gulf of Guinea and the Horn of Africa, but towards 2035 of course also other regions, including the Indo-Pacific.

Maritime security also includes freedom of navigation, including the right to free navigation, and Denmark has prioritised this through, among other things, an extensive contribution to and management of the monitoring mission in the Strait of Hormuz (EMASoH), which aims to ensure free navigation, contribute to de-escalation in the region as well as collect information about navigation in the strait. The Danish Armed Forces solving similar tasks in the future will naturally limit the opportunities to get involved elsewhere. Conversely, a downgrading of efforts for freedom of navigation could potentially have consequences for Danish shipping and trade.

With the abolition of the defence opt-out, Denmark is able to participate in the EU's two maritime military operations: EUNAVFOR ATALANTA and EUNAVFOR IRINI.

Towards 2035, there may very well be demand and an expectation from the USA or major European allies for Danish participation in freedom of navigation operations in the Indo-Pacific, including in the South China Sea, where US–China tensions are expected to increase. It will not be cost-free for the Danish Armed Forces to send frigate contributions – neither to the South China Sea nor to the Indo-Pacific as a whole – and with a relatively modest fleet of five frigates, such a deployment have a major impact on what Denmark can otherwise engage in.

Capacity building, training, arms assistance and other support

Experiences from in the major military operations in Iraq and Afghanistan are reflected a deeper development in the Western approach to handling stabilisation efforts. Since around 2010, the West has largely focused on preventive efforts, including training and other capacity building within the security sector. This shift implies a logic that local actors – who are sufficiently efficient and legitimate – are a prerequisite for sustainable handling of a conflict situation. Danish soldiers, commanders and officers as well as civilian employees have amassed specialised skills for this type of training and consultancy, which will undoubtedly be in high demand in the future. In Den are typically organised through the Peace and Stabilisation Fund, which is partially financed through the defence budget.

Since the Russian invasion of Ukraine, there has been a definite paradigm shift in the Western willingness to provide arms donations for a country at war. Denmark issending arms to Ukraine on an unprecedented scale. It is in Denmark's security policy interest to help Ukraine, and there will obviously continue to be a need for, among other things, arms donations and training of Ukrainian soldiers for the in the near future. It complicates the building up of the Armed Forces and the fulfilment of the NATO capability targets that materiel prices rise because of capacity problems in defence industries and that Danish military stocks are emptied and in order to donate arms and other equipment to the Ukrainian freedom struggle.

It is clearly not possible to return to the political line from before the Russo–Ukrainian War, where the delivery of heavy deadly weapons to belligerent countries outside NATO constituted a red line for Denmark and many other allies. Towards 2035, it may also prove necessary to provide similar support to countries such as Georgia or Moldova should Russia choose to attack them. It is therefore worth considering the further development and anchoring of the skills and the learning about training and weapons assistance that the Armed Forces have accumulated in a specific organisational framework such as, for example, a special international support command, possibly in cooperation with related countries.

4.4 Adaptation of Societal Security to a heightened threat landscape

Open, wealthy and thoroughly digitised societies such as Denmark, the Faroe Islands and Greenland must not only protect themselves against military attacks and terror but also against a wide range of man-made and natural threats, such as cyber-attacks, governmental influence on political processes, insufficient control over critical infrastructure, shortages of critical supplies, pandemics and extreme weather. Societal security, broadly defined, is a core task for the modern state, where many different authorities have tasks relating to societal security and organisation and responsibility, and where cooperation across these authorities plays an important role in effectively countering the threats.

In a new security policy reality, the framework conditions for how a robust and secure society is maintained and developed are changing. Societal security is partly about preparedness policy and the overall ability of society to handle non-actor-driven threats. But societal security is also about the national, domestic security policy challenges resulting from changed international conditions. The increased great power competition and the changing threat landscape described in this report challenge the domestic security of the Kingdom of Denmark. The high number of cyber-attacks underlines the importance of the hybrid threats, and there is a greater risk of a shortage of supplies critical to society due to, for example, natural disasters, pandemics or sanctions from countries such as Russia. This emphasises the vulnerability of society and can lead to a greater need for coordination and management across authorities and sectors, especially when threats spread to new professional areas, such as the increased risk of espionage and technology theft in the Danish higher education sector.

During the pandemic, municipalities, regions, civil society and private companies all stepped in to solve the challenges in society together. Nationwide organisations such as the Red Cross participated in crisis management under the leadership of the authorities and working together closely. Societal security in the future can advantageously involve increased cooperation between many types of actors. But with more actors comes more management issues and challenges about how new areas of operations can be flexibly integrated into existing organisations. Another challenge is that a number of relevant authorities have not previously had contact with security policy in their everyday operations. Societal security can largely depend on, among other things, the resources lying in civil society being considered more systematically before, during and after crisis events, as doing so can strengthen societal resilience locally and nationally.

In view of the more dangerous and complex threat landscape, proposals have been made for a thorough review of the civil society and supply security throughout the Danish Realm, including to ensure that all Danish authorities and suppliers of critical infrastructure have up-to-date, robust and thoroughly rehearsed contingency plans that can ensure the functioning of society in the entire spectrum of threats from those created by nature, such as pandemics and natural disasters, over hybrid attacks to the nuclear dimension.

The division of labour between Danish, Faroese and Greenlandic authorities in the area of societal security can pose a separate challenge if issues with security policy aspects arise in areas taken over by Greenland and the Faroe Islands. This has been illustrated in recent years by the security policy aspects of supplier selection in the critical telecommunications infrastructure. We can therefore look at finding ways to handle such cases, and the recently established Foreign, Security and Defence Policy Contact Committee can be the first step to achieving a better common understanding in the area. It will not benefit the security of the Kingdom if dealing with the increasingly frequent occurrence of new threats outside the conventional security policy space regularly leads to friction in the internal relations of the Kingdom.

There are major differences between the conditions for wider societal security and the official organisation in Denmark, the Faroe Islands and Greenland, which are therefore described separately.

Denmark

The crisis management and handling of societal security by the government and authorities is organised differently in Denmark than in most other European countries. For example, Denmark has no 'national security council' with key ministers and top officials, including the chief of defence, the chief of national police and the chief of civil emergency as permanent members, supported by a solid secretariat to organise the daily work and oversee coordination in a crisis situation. Instead, in Denmark there is a crisis management organisation led at the political level by the Government's Security Committee (Regeringens Sikkerhedsudvalg), which includes the Prime Minister (chairman), the Minister of Foreign Affairs, the Minister of Justice, the Minister of Finance and the Minister of Defence as permanent members, and where the heads of the Danish Security and Intelligence Service and the Danish Defence Intelligence Serviceand the Chief of Defence participate when necessary. The committee is supplemented by the Civil Service Committee for security issues (Embedsmandsudvalget for Sikkerhedsspørgsmål), where the permanent secretaries of the same group of ministries together with the heads of the Domestic Intelligence Service and the International Intelligence Service are permanent members. In addition to the permanent members, the Prime Minister's Office (PMO) can call ad hoc representatives from other authorities to the Security Committee and the Civil Service Committee. A limited secretariat service for the committees is provided by the PMO and the participating ministries. At a strategic operational level, coordination in times of crisis is handled by the National Operational Staff (Den Nationale Operative stab), including the Central Operational Communications Preparedness (Det Centrale Operative Kommunikationsberedskab) and the International Operational Staff (Den Internationale Operative Stab).

While the principle of sectoral responsibility, where the responsibility for the maintenance, safety and continuation of a sector's societal functions is basically decentralised to each individual authority, is used in all of the Nordic countries, it has particular weight in Denmark. Thus Denmark does not have large, well-staffed directorates for societal security with broad powers as do Norway and Sweden.

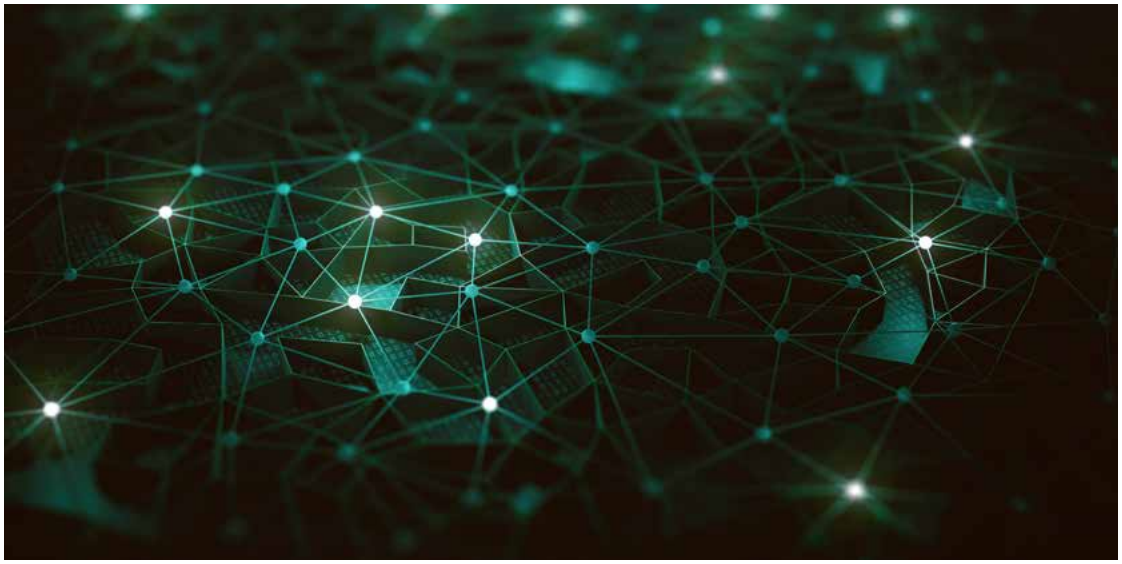
The Norwegian Directorate for Civil Protection (Direktorat for Samfunssikkerhet og Beredskap – DSB) is under the Ministry of Justice and Emergency Preparedness and has around 700 employees. It functions as a sort of umbrella that both monitors risks and threats and cuts across all sectors and ministries in society, assuming a coordinating role on behalf of the Ministry. In addition, the National Security Authority (NSM) carries out cross-sector monitoring of both the military and civilian areas in the country. The Norwegian societal security directive aims to strengthen the ability of society to prevent crises and to deal with serious incidents through holistic and coordinated work with societal security.

The Swedish Civil Contingencies Agency (Myndigheten för samhällsskydd och beredskap – MSB) aims to make society safer and performs the coordinating role across all actors before, during and after major incidents. The authority has roughly 1,000 employees and is subordinate to the Ministry of Justice, which in Sweden is responsible for a wide range of crisis management tasks. In particular, the Agency works with emergency services, accident prevention work, crisis preparedness, civil defence, cyber security and secure communication. Already in 2006, Sweden introduced a security strategy with a focus on societal security (samhällets säggett), which focuses on the continued functionality of society, the life and health of the population and the protection of fundamental values.

The Danish Emergency Management Agency (Beredskabsstyrelsen) belongs to the Ministry of Defence and has, among other things, been tasked with coordinating emergency planning and advising the authorities on such matters. To support emergency planning, the Emergency Management Agency prepares, among other things, the 'National Risk Picture', but it does not have the same opportunity as its sister organisations in Sweden and Norway to monitor the authorities' emergency planning. For example, the Emergency Management Agency does not supervise other state authorities in the field of emergency preparedness. Approximately 10 of the National Emergency Management Agency's 500 employees work with emergency planning, but the National Emergency Management Agency only plays a coordinating role across sectors to a limited extent and cannot sanction authorities. The Danish Emergency Management Agency is also responsible for a number of other

areas of operations, including fire prevention, and also provides the state rescue response with personnel to assist the municipal rescue services and other authorities with operational emergency response tasks, including chemical and nuclear specialist response. This set of operational tasks also distinguishes the Danish Emergency Management Agency from the Nordic sister organisations.

Denmark is one of the most digitised countries in the world, which has brought great benefits to Danish society and made everyday life easier for the individual Dane. But this has also left Denmark particularly vulnerable to cyber-attacks that can damage critical government and private IT systems. In recent years, the threat from cyber-attacks against Denmark has been classified as very high by the Centre for Cyber Security. There is reason to expect the digitisation of Denmark to continue in the coming years, where 5G-based technologies will also provide both new opportunities and vulnerabilities. Denmark has invested heavily in cyber security in the past several years, however, and compared to many other European countries it is highly advantageous that there is a relatively simple organisational anchoring of the effort. Denmark thus has a good starting point for further strengthening cyber security as the threat landscape develops.



The Armed Forces have a long tradition of supporting civil society, helping to carry out tasks for authorities and assuming responsibility as an important part of the overall preparedness, including specialised contributions in the event of a major terrorist attack on Danish soil in support of tactical unites (Aktionsstyrken) under the Police Intelligence Service. Those needs will continue to exist and even be intensified by climate change and the intensified hybrid threats. More frequent cases of extreme weather, such as droughts, large wildfires and floods, can increase the demand on the Armed Forces' resources and competences in crisis management. In addition, there is a possible need for additional contributions from the Armed Forces to deal with new migration crises, including, for example, dispatching personnel and materiel to Frontex. It is also entirely possible that in the period up to 2035 the Armed Forces will again be involved in the handling of a highly virulent disease.

Finally, the more prominent role that nuclear weapons will play in the future with respect to Russia deterrence preparedness entails an increased risk of nuclear incidents that will require the involvement of the Armed Forces. For example, an accident on a nuclear-powered vessel in Danish waters could, in addition to a number of security policy risks resulting from a tense situation in the Baltic Sea, also lead to extensive radioactive contamination of Danish land, buildings and infrastructure. In the event of such an incident, military contributions will be able to interact with the civil emergency efforts from the police and the Emergency Management Agency, which underlines the need for the coordination of sector efforts.

The Faroe Islands

Since 1948, the fire and ambulance service have been separate Faroese matters, while the police service in the Faroe Islands is a joint matter and continues to be organised as a Danish police district. The Faroe Islands Police, just like in Denmark, is the coordinating authority for major accidents on land, in fjords and on lakes, while the responsibility for the overall crisis management from a societal security perspective since the adoption of the Faroese Emergency Act in 2012 takes place in coordination between the respective sectors of society. These are each responsible for contingency planning, risk management and building crisis management capacity within their own sector. However, the sector-responsibility principle has not yet been fully implemented in the Faroe Islands in practice, and the coordinating crisis management is challenged by small organisations with a limited number of employees with the right skillsets. The fact that there are no fewer than 29 Faroese municipalities also means that the local rescue services are very small in many places, which can pose challenges in relation to risk-based dimensioning, preparation of emergency plans and the like.

In 2017, an actual Faroese crisis management organisation was drawn up, which was approved politically in June 2019. The strategic level of the organisation consists of the Strategic Crisis Staff for the Faroe Islands (Kreppuraðið), which refers to the political level of the national government, while at the operational level coordination is carried out between authorities in the Faroe Islands Emergency Staff (Áttaksráðin). For incidents at sea, the actual operational coordination takes place at MRCC Tórshavn, while for incidents on land, as mentioned, the police are in charge. There is also a Faroese Emergency Management Council, which provides advice to the minister responsible for emergency management (fisheries) and in relation to other national government areas with emergency management responsibility, such as the telecommunications sector.

Greenland

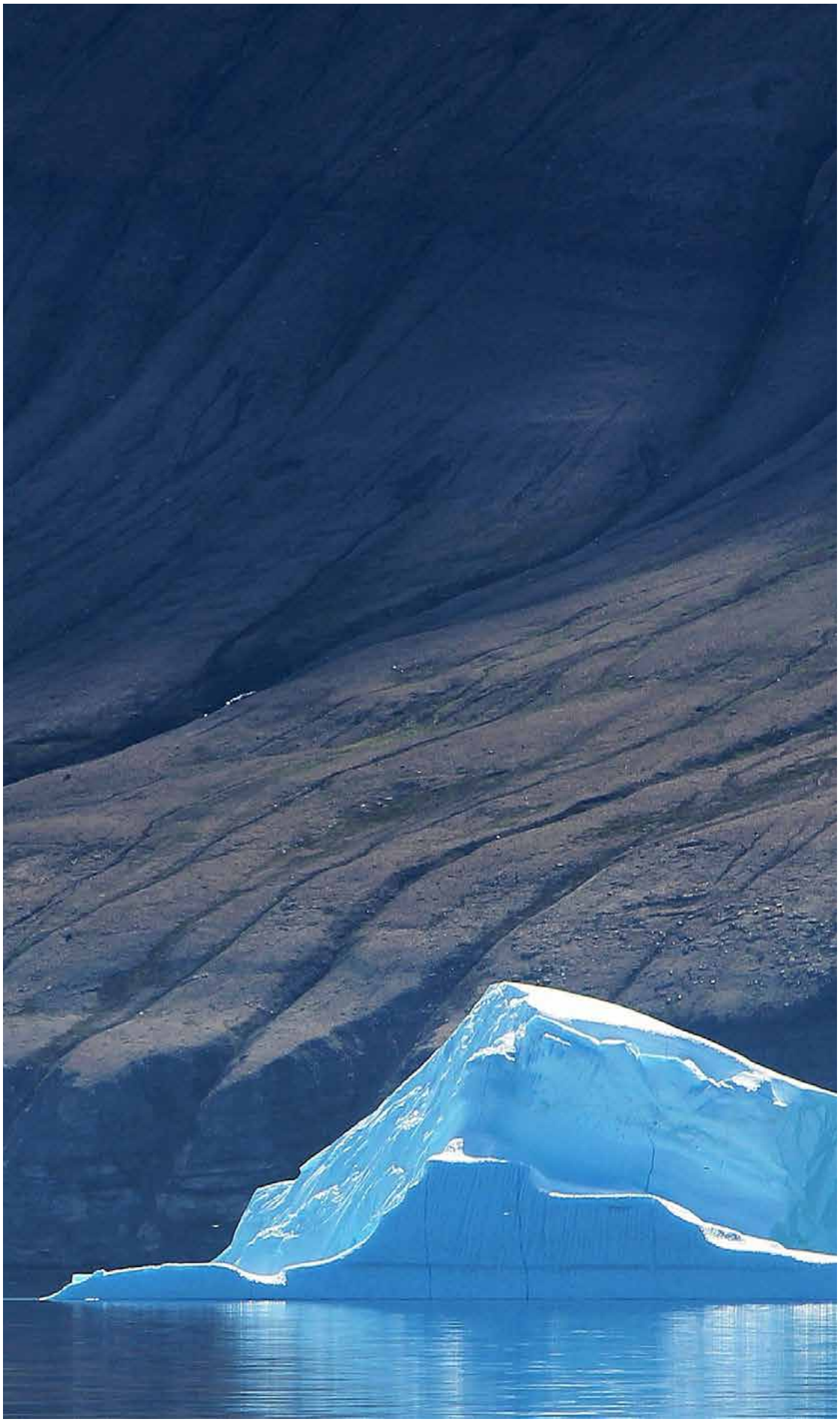
Shortly after the introduction of Home Rule, local fire services in Greenland were taken over and managed by the Greenlandic municipal authorities. Greenland got its first real emergency response law in 2010, whereby the municipal fire services became rescue services with a larger area of responsibility, including disaster preparedness. The crisis management organisation in Greenland is divided into levels and, as in Denmark, is based on the underlying principle of coordination following from sectoral responsibility. At the operational level there is the Greenland emergency response team, which in Danish terminology corresponds to a local emergency response team. Here, the police are responsible for coordination, while the other sectors are represented at a similar level, such as the municipal emergency manager. Greenland's Contingency Commission (Grønlands Beredskabskommission) constitutes the strategic crisis management level in Greenland. The Greenland Emergency Management Commission advises Naalakkersuisut in the event of major incidents and disasters. In addition to being responsible for preparing and updating a contingency plan for Greenland, the Emergency Commission aims to ensure coordinated efforts and the use of Greenlandic and Danish resources in the event of major accidents and disasters, including crisis and war situations.[18] The Emergency Commission consists of department heads from a number of Departments in Greenland's Self-Government, the Office of the National Medical Examiner, the Chief of Police in Greenland, the National Ombudsman in Greenland, the Arctic Command and a representative of Greenlandic municipalities. The National Ombudsman in Greenland is also a permanent member of the Emergency Response Commission and acts as a link between authorities in Greenland and the Danish system during crises.

During major crises such as the extensive power failure in Nuuk in late 2021 and COVID-19, there is close cooperation between the Greenland Police, Arctic Command and Naalakkersuisut.

The Ministry of Defence contributes to the national security of society with the Arctic Emergency Response Force, which ensures the possibility of rapid deployment of capacities from the Danish Defence and the National Emergency Management Agency in both Greenland and the Faroe Islands in the event of crises and disasters. The police in both Greenland and the Faroe Islands Police can similarly draw on assistance from the Danish National Police and the other Danish police districts, and cooperation agreements between the Emergency Management Agency and Greenlandic and Faroese emergency authorities support the resilience of society in areas requiring specialisation and special equipment. The growth in North Atlantic and Arctic cruise ship tourism, increased risk of avalanches, landslides around inhabited areas as a result of climate change and interruptions of community-critical supplies may create a need for more cooperation between Naalakkersuisut and the Armed Forces.

Neither Greenland nor the Faroe Islands have their own national risk assessments to use as the basis for emergency planning, or dedicated Computer Emergency Response Teams (CERT); that is, 24-hour government monitoring centres staffed with IT security experts who can quickly intervene if, for example, critical infrastructure or authorities are exposed to cyber-attacks. The respective telecommunications authorities have, within their area of responsibility, operation centres that monitor operations and cooperate closely on all incidents. The Centre for Cyber Security advises both public and private actors both in the Faroe Islands and in Greenland in the area of security. Significant additional activity in the area of telecommunications security is to be expected in the years to come, which may create a need to further develop the models for cooperation between Faroese, Greenlandic and Danish authorities with a view to maintaining the security of the critical telecommunications infrastructure in the Faroe Islands and Greenland.

18 The agreement on the assumption of responsibility for the planning for war, crisis and the threat of war has not been signed.



The Chairman's postscript

This report paints a rather gloomy picture of the future. Much can develop differently than we predict, but there cannot be any doubt that Denmark will face far more serious threats moving towards 2035 than at any other time since the Cold War. A much stronger, more flexible and action-ready defence is therefore needed. Our well-trained officer corps and personnel, with their valuable experience from international operations, provide a solid foundation. They deserve to be equipped with the world's best equipment. With limited opportunities to increase manpower, the Armed Forces can only handle the increasing tasks by using new, advanced technology to increase the combat power and effectiveness of the individual soldier and weapon platform.

The necessary restructuring and upgrading of the Armed Forces will take time. And it will be expensive. I hope that this report will be the starting point for a long-term and visionary defence agreement that gives Danish Defence the necessary resources and sufficient freedom to continuously adapt to new opportunities and new challenges along the way. The NATO capability and the Danish contribution to strengthened defence and deterrence along NATO's eastern flank must be the main priority. But the defence of the future should be designed so that it can also safeguard the interests in the North Atlantic and provide contributions to the protection of European borders to the south as well as other international operations. Even with significantly increased Armed Forces budgets, however, an even sharper prioritisation will be needed in the future before Danish forces can be deployed outside the Kingdom of Denmark.

Not only our military defence must be strengthened. With the intensified threats against Denmark within the entire spectrum of hybrid attacks, there is a need for a systematic review of the overall security of our civil society. Across all public and private sectors, we must ensure that robust and well-rehearsed contingency plans enable the maintenance of vital societal functions during crises, natural disasters and hybrid attacks. With the growing importance of nuclear weapons, there is also reason to consider whether we must once again prepare for the worst.

In the course of our discussions, we have uncovered a promising potential in new forms of cooperation between the Armed Forces, private companies and universities. This potential should be further explored. The same applies to the opportunities that are opening up after the lifting of the defence opt-out to involve Danish companies, research institutions and the Danish Armed Forces in the dynamic development of the EU defence industry.

I am grateful up for the active and persistent commitment of the members of the analysis group and the advisory group of experts throughout a lengthy process, where conditions have changed dramatically along the way with the war in Ukraine, the pandemic and the withdrawal from Afghanistan and Mali. The background papers provided by the Centre for Military Studies, DIIS, DMI, the Defence College and the Foreign Economic Analysis Unit guided the two groups' discussions of the many different themes we have had on the agenda. Many colleagues in the Ministry of Defence, the Danish Defence Intelligence Service and the Ministry of Foreign Affairs have helped with valuable input and sparring along the way.

I owe a very special thanks to the secretariat: Anders Trelborg, Anna Haugsted Dehn, Johanne Kloster Kirk, Karoline Fristed Binger and Sami Carøe Moussa. On top of their heavy daily work dealing with current crises, they have cheerful and full of energy spent countless hours, late evenings and long weekends organising the work and writing this report. Last but not least, Henrik Ø. Breitenbauch's huge effort must be emphasised. Without his professional insight, astute intellect and sharp pen, we would never have reached our goal.

Michael Zilmer-Johns

Annex

Annex

1. Terms of reference for the security policy analysis group

The rapid development of foreign and security policy, including the increased pressure on the rules-based international order and the increasing great power competition, will in the coming years set the framework for Danish security and defence policy. The scope and complexity of the international threat landscape will likely increase in line with the global shifts in power and the rapid technological development.

The current defence settlement 2018–2023 (incl. additional agreement) provides new resources to the Danish Armed Forces by the end of the settlement period that strengthen the Danish contribution to the NATO deterrence and collective defence and provide increased capacity for participation in international operations and stabilisation efforts within the framework of NATO, the UN and/or international coalitions. The national cyber-defence and the ability of the Danish Armed Forces to assist in national security tasks are also being strengthened.

The unpredictability of the world surrounding Denmark dictates that a thorough analysis of the foreign and security policy situation is carried out prior to the conclusion of a new defence settlement.

The government has appointed Ambassador Michael Zilmer-Johns from the Ministry of Foreign Affairs to lead the analysis group.

Mission
As part of the preparation of the next defence settlement, the analysis group must prepare a professional analysis of the foreign and security policy situation and identify the challenges and consequences that it may entail for Denmark and the Danish Armed Forces. The next multiannual defence agreement (cf. the supplementary agreement of January 2019) will be based on the Wales Summit Declaration.

To the greatest extent possible, the analysis group must build on existing analyses and reports, just as current foreign analyses will possibly be included.

The analysis group will also have to contribute to raising public awareness of the foreign and security policy situation.

The analysis will not have to come up with specific recommendations regarding the defence budget, the organisation of the Armed Forces or the acquisition of capacities.

Practical details
The head of the analysis group is placed in the Ministry of Foreign Affairs. The other analysis group members are security policy directors from the Ministry of Foreign Affairs, the Ministry of Defence, the Ministry of Finance, the Ministry of Justice and representative of the Danish Armed Forces. Greenland and the Faroe Islands participate on an equal footing with the other members in the work

regarding the Arctic and the North Atlantic, and they observe the rest of the group's work. The Prime Minister's Office participates as an observer in the group.

The Ministry of Foreign Affairs and the Ministry of Defence provide secretarial assistance dedicated to the purpose. In addition, the analysis group can draw on relevant ministries, which provide material relevant for the work.

The start of the analysis group's work has been postponed until mid-2020 due to the COVID-19 crisis.

The analysis work will be continuously discussed in a follow-up group with experts with insight into the area from, among other things, relevant interest organisations and the research environment, just as the analysis group will be able to meet with the established foreign policy forums, including NATO and the EU, as well as the political parties in the Danish Parliament. The analysis group will also be able to hold talks with representatives from other countries and foreign institutions.

Thematic conferences/seminars will also be held, including external participation from both domestic and foreign experts. The events will target the public and/or political parties in the Danish Parliament.

The government will be able to discuss the status of the analysis group's work on an ongoing basis.

Reporting
The analysis group reports to the government.

The analysis must be completed in early 2022 with a view to being able to be included in the preparation of the next defence settlement. In connection with the reporting, the analysis will be made publicly available.

2. Members of the analysis group

- Ambassador Michael Zilmer-Johns, Chairman
- Chief of Defence Staff, Lieutenant General Kenneth Pedersen
- Director in the Ministry of Defence, Pelle Holager/Peter Emil Engedal
- Director in Ministry of Foreign Affairs, Christian Grønbech-Jensen/Søren Jensen
- Deputy Director in the Ministry of Finance, Gustav Nedergaard/Chief Consultant Kristine Buus Nielsen
- Director in the Ministry of Justice, Louise Mariegaard
- Director in the Prime Minister's Office, Jakob Henningsen/Lene Mandel Vensild
- Chief Consultant in the Greenlandic Department of Foreign Affairs and Energy, Hans Peder Kirkegaard
- Adviser in the Faroe Islands Department of Foreign Affairs, Svein Magnason

3. The work of analysis group

The analysis was carried out under the leadership of Ambassador Michael Zilmer-Johns. Henrik Breitenbauch, Dean of the Royal Defence College, provided advice and sparring.

The analysis group secretariat consisted of Special Consultant in the Ministry of Foreign Affairs Anders Trelborg; Head of section in the Ministry of Foreign Affairs, Johanne Kloster Kirk; Head of section in the Ministry of Foreign Affairs, Anna Haugsted Dehn; Special Consultant in the Ministry of Defence, Karoline Fristed Binger; Head of section in the Ministry of Defence, Sami Carøe Moussa; Head of section in the Ministry of Defence, Frederik Søholm Jørgensen.

The framework for the analysis group's work is described in the terms of reference. The purpose of the analysis group was to carry out an analysis of the foreign and security policy situation for Denmark. There were 10 overall analysis tracks:

- The international community
- Global climate change
- Technological developments
- The anatomy of conflicts now and in the future
- The resilience of society
- European and transatlantic security
- The Baltic Sea
- The North Atlantic and the Arctic
- Weak and fragile states
- Asia and the Indo-Pacific

The task of the analysis group has been to carry out an analysis extending to 2035. Such a long-term analysis is naturally fraught with great uncertainty. It must necessarily focus on the overarching factors while acknowledging the role that chance plays in human history. The analysis group has sought to deal with this uncertainty in a number of ways.

Firstly, the work process has built on discussions based on background papers prepared for the analysis group. These discussions, and not least the discussions in the associated follow-up group of experts, have gone far to ensuring the quality of the analysis along the way. Secondly, the analysis group has focused on recognised projections of, for example, economic, demographic and climate conditions. In the period leading up to 2035, many such factual conditions will be either given or at least very likely to occur within known boundaries. Third, the analysis itself distinguishes between threats, challenges and risks. Here, threats must be understood as military threats, while challenges such as irregular migration can have a non-military security policy significance. In the long-term perspective, risks can be identified that can turn into threats and challenges. The 'art' of defence and security policy is thus partly to identify the threats and challenges of the present and the near future, as well as the slightly more distant, long-term future risks – and to try to hold these against each other in a balance that leads to defence and security policy priorities. Finally, the analysis uses graded assessments of probability, ranging from unlikely, to less likely, to possible, likely and very likely.

Along the way, the analysis group secretariat has gathered knowledge on a number of trips. These trips have gone to:

Washington, New York, Brussels, Paris, London, Berlin, Warsaw, Oslo, Stockholm, Helsinki, Nuuk and Tórshavn.

4. Members of the advisory group of experts

- Anders Ladekarl
- Anders Wivel
- Anja Bechmann
- Anja Dalgaard-Nielsen
- Anne H. Steffensen
- Astrid Kjeldgaard-Pedersen
- Bertel Heurlin
- Birgitte Qvist-Sørensen
- Camilla Tenna Nørup Sørensen
- Carsten Schürmann
- Catharina Sørensen
- Cecilia Bonefeld-Dahl
- Cecilie Felicia Stokholm Banke
- Charlotte Flindt Pedersen
- Charlotte Slente
- Christoffer Green
- Claus Haugaard Sørensen
- Claus Mathiesen
- Flemming Splidsboel Hansen
- Frank Bill
- Frederik Bergenfelt Friis
- Hans Andrias Sølvará
- Henriette Søltoft
- Helle Malmvig
- Jan Westenkær Thomsen
- Jarl Krausing
- Jens Christian Svabo Justinussen
- Jens Lundgren
- Jens Ringsmose
- Jeppe Teglskov Jacobsen
- Joachim Finkielman
- Jon Rahbek-Clemmensen
- Jørgen Delman
- Katrine Krogh Andersen
- Kjeld Erik Brødsgaard
- Kjell Engelbrekt
- Kristian Fischer
- Kristian Søby Kristensen
- Lars Bangert Struwe
- Lars Erslev Andersen
- Lone Malmborg
- Luke Anthony Patey
- Lykke Friis
- Malthe Mulvad
- Marlene Wind
- Martin Marcussen
- Michael Linden-Vørnle
- Michael Svarer
- Mikkel Runge Olesen
- Mikkel Vedby Rasmussen
- Minik Thorleif Rosing
- Morten Glamsø
- Morten Valbjørn
- Nils Wang
- Niels Westergård-Nielsen
- Nina Græger
- Øistein Knudsen
- Ole Ravn
- Ole Wæver
- Peter Viggo Jakobsen
- Poul Engberg-Pedersen
- Rasmus Dahlberg
- Rasmus Mølgaard Mariager
- Ravinder Kaur
- Rasmus Sinding Søndergaard
- Rebecca Adler-Nissen
- Steen Rasmussen
- Sten Rynning
- Tobias Liebetrau
- Tonny Brems Knudsen
- Torben M. Andersen
- Torben Möger Pedersen
- Rasmus Anker Pedersen
- Rasmus Gjedssø Bertelsen
- Rasmus Leander Nielsen

Conferences and seminars

Seminar on weak and fragile states, 15 June 2021 in collaboration with the Danish Institute for International Studies

Conference on the Baltic Sea region, 23 November 2021

Seminar on the resilience of society, 11 February 2022Conference in Nuuk, 'Security in the Arctic now and in the future', 16 March 2022, in collaboration with Ilisimatusarfik/University of Greenland and the Royal Defence College Conference in Tórshavn, 'Security and geopolitics in the North Atlantic', 7 April 2022, in collaboration with the University of the Faroe Islands and the Royal Defence College

Conference on Asia and the Indo-Pacific, 11 May 2022

A broad, international conference on European and transatlantic security is planned for October 2022, and a conference on technological development and the future battlefield is planned for November 2022.

6. Background documents

- Foreign Economic Analysis Unit, Ministry of Foreign Affairs. Background Paper on Global Power Relations: Foreign Economic Perspective Analysis. Global economic strength ratios towards 2035
- DMI. Note on climate change: Global and regional consequences of climate change in Denmark and the Arctic
- DIIS POLICY BRIEF (Jessica Larsen & Jakob Dreyer). Danmark kan få klimasikkerhed på den internationale dagsorden [Denmark can get climate security on the international agenda]
- DIIS POLICY BRIEF (Jakob Dreyer & Jessica Larsen). New partnerships can strengthen climate action in the Middle East and North Africa
- DIIS POLICY BRIEF (Trine Villumsen Berling, Peer Schouten & Izabela Surwillo). Renewable energy will lead to major shifts in geopolitical power
- Centre for Military Studies (Henrik Breitenbauch & Tobias Liebetrau). Teknologikonkurrencen og dens implikationer for Danmark [The technology competition and its implications for Denmark]
- Centre for Military Studies (Henrik Breitenbauch & Lise Wiederholt Christensen). Fremtidens konflikter og krige i et strategisk perspektiv [Future conflicts and wars in a strategic perspective]
- Royal Defence College (Rasmus Dahlberg). Robusthed i rigsfællesskabet [Robustness in the Danish Realm]
- The Secretariat for the Government's Security Policy Analysis Group. Background paper on the Baltic Sea
- Centre for Military Studies (Kristian Søby Kristensen & Lin Alexandra Mortensgaard). Rigsfællesskabets arktiske militærstrategiske problemkompleks [The Arctic military-strategic problem complex of the Danish Realm]
- DIIS WORKING PAPER (Louise Riis Andersen). Dansk forsvars engagement i skrøbelige stater frem mod 2035 [Danish defence engagement in fragile states towards 2035]
- Jesper Segelcke Thomsen & Camilla T. N. Sørensen. Indo-Pacific: Betydningen for Europa, Danmark og Dansk Forsvar [The Indo-Pacific: Significance for Europe, Denmark and Danish Defence]
- Center for Militære Studier (Henrik Breitenbauch og Alexander Høgsberg Tetzlaff) - Samfundssikkerhed i Danmark. Det robuste og sikre samfund i en ny sikkerhedspolitiske virkelighed. [Societal security in Denmark. The robust and secure society in a new security policy reality]

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The security policy analysis group
Asiatisk Plads 2
1448 Copenhagen K

Tel.: +45 33 92 00 00
um@um.dk
www.um.dk