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Northern horizon: Strengthening security in the Baltic Sea region

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Northern horizon

STRENGTHENING SECURITY IN THE BALTIC SEA REGION

Izabela Surwillo and Veronika Slakaityte

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LIST OF ABBREVIATIONS

AP	Associated Press
EUR-Lex	European Union Law portal
BALTNET	Baltic Air Surveillance Network
BALTRON	Baltic Naval Squadron
BMS	Battle Management System
BSI	Baltic Security Initiative
DCA	Defence Cooperation Agreement
DDIS	Danish Defence Intelligence Service
EDCA	Enhanced Defence Cooperation Agreement
eFP	Enhanced Forward Presence
EU	European Union
FDF	Finnish Defence Forces
FMV	Swedish Defence Materiel Administration
HNSA	Host Nation Support Agreement
Hybrid CoE	European Centre of Excellence for Countering Hybrid Threats
IAMD	Integrated Air and Missile Defence
IBCS	Integrated Battle Command System
IFV	Infantry Fighting Vehicle
JAOC	Joint Air Operations Centre
JEF	Joint Expeditionary Force
JCIDS	Joint Capabilities Integration and Development System
JSEC	Joint Support and Enabling Command
MLRS	Multiple Launch Rocket Systems
MND N	Multinational Division North
MRSI	Multiple Round Simultaneous Impact
MSB	Swedish Civil Contingencies Agency
NATO	The North Atlantic Treaty Organization
NORDEFCO	Nordic Defence Cooperation
PESCO	Permanent Structured Cooperation
PPBE	Planning, Programming, Budgeting, and Execution
SIPRI	Stockholm International Peace Research Institute
SNMCMG1	Standing NATO Mine Countermeasures Group 1
SNMG1	Standing NATO Maritime Group 1
SPEK	Finnish National Rescue Association
VJTF	Very High Readiness Joint Task Force

ABSTRACT

As a part of a two-volume series, this report provides a strategic assessment of Finland, Sweden, Denmark and Germany in the context of escalating geopolitical threats in the Baltic Sea region. It analyses how each country has recalibrated its defence posture – through adjustments to military spending, modernisation, enhanced civil preparedness, and NATO integration – while leveraging distinct strategic advantages. Finland and Sweden, anchored in their ‘total defence’ traditions, have significantly enhanced military and societal resilience, marking a historic reconfiguration of regional security through NATO accession. Denmark has reinforced its Arctic and Baltic defences, prioritised rapid deployment capabilities and reinforced transatlantic ties. Germany, under its *Zeitenwende* policy, is advancing military modernisation despite persistent resource constraints and bureaucratic inertia. Russia’s full-scale invasion of Ukraine served as a watershed moment prompting all four countries to meet NATO’s 2% GDP defence spending benchmark, underscoring how acute threat perception has driven overdue investment and strategic adaptation. Despite this progress, enduring challenges persist – from readiness gaps and procurement delays to civil defence vulnerabilities. This report examines the recent developments, and challenges and highlights the importance of regional cooperation, NATO interoperability and sustainable defence strategies to ensure long-term stability in the region.

NATO Military unit hierarchy: symbols, functions and strengths

NATO symbol	Military unit	Function	Strength
XXXXXX	Theatre	Theatre command	1,000,000–10,000,000
XXXXX	Army Group	Front command	400,000–1,000,000
XXXX	Theatre Army	Command	100,000–200,000
XXX	Corps	Formation	20,000–60,000
XX	Division	Formation	6,000–25,000
X	Brigade	Formation	3,000–5,000
III	Regiment Group	Unit	1,000–3,000
II	Battalion/Squadron	Unit	300–1,000
I	Company/Battery/Troop	Unit/sub-unit	100–250
...	Platoon	Sub sub-unit	20–50
..	Section/Patrol	Sub sub-unit	12–24
•	Squad	Sub sub-unit	6–12
Ø	Crew	Sub sub-unit	2–4

Source: NATO 2023b, 825–26.

INTRODUCTION

At Davos in 2025, European Commission President Ursula von der Leyen declared: 'Europe has too often outsourced its own security. But those days are gone' (WEF 2025). EU High Representative Kaja Kallas was more direct, warning that 'Russia could test the EU's readiness to defend itself in three to five years' and that 'Russia can, in three months, produce more weapons and ammunition than the entire European Union can in 12 months'. Her message was clear: Europe must be prepared to defend itself – alone, if necessary (Soler 2025b). These statements reflect a growing consensus among European leaders that the security landscape is deteriorating rapidly, requiring sustained investment in defence, faster military readiness, greater resilience and strategic self-sufficiency to meet emerging threats.

Despite the EU defence spending setting new records annually since Russia's full-scale invasion of Ukraine in February 2022, European armed forces and defence industries remain ill-prepared for a potential high-intensity conflict (European Defence Agency 2024). At the outbreak of the conflict, munitions stocks among major European NATO Allies were critically low – barely sufficient for more than three days of wartime use – while much of Europe's military infrastructure, including road, rail and port systems, was unprepared for rapid mobilisation. The conflict caught many Western states off guard, and none of the states analysed in this report – Germany, Denmark, Sweden and Finland – met NATO's 2% of GDP defence spending target prior to 2022 (NATO 2024). In contrast, Russia's defence spending, which stood at 4% of GDP in 2021, is set to rise to 7.2% in 2025, with military expenditure projected to constitute 37% of total government spending—the highest level since the Soviet era (Dyner 2024; Cooper 2025). In September 2024 Russian President Vladimir Putin signed a decree to increase the number of active-duty military personnel by 180,000, bringing the total to 1.5 million by 2026 (AP News

2024), which would make the Russian army the second largest in the world after China (Al Jazeera 2024). Most Russian arms factories have also increased employment and transitioned to 24-hour work operation (Dyner 2024), effectively enabling them to massively outpace their European counterparts in defence production. For instance, Russia's wartime economy now produces about three million artillery shells annually – nearly three times the combined output of the United States and Europe (Lillis et al. 2024).

While Europe races to close its defence gap, NATO cohesion is under renewed strain. The start of President Donald Trump's second term reignited doubts about the credibility of Article 5, as he resumed public criticism of Allies and signalled a conditional US defence commitment (Depetris 2025). In response, Europe – while still committed to the Atlantic Alliance – launched a €800 billion 'Rearm Europe' programme on 4 March 2025, aimed at channelling increased defence spending over the next four years into procurement and industrial capacity (Soler 2025a). Trump's stance has sharpened European awareness of the risks of strategic overdependence on Washington. Europe's dependence on external defence suppliers remains acute: in 2022, the EU Member States sourced 78% of their weapons from abroad, nearly 80% of them from the US (Dmitrieva 2025). The *European Defence Industrial Strategy*, adopted on 5 March 2024, sets procurement targets of at least 50% within Europe by 2030 and 60% by 2035 (Dmitrieva 2025). Nationally, Member States seek to scale up their own deterrence capabilities, defence industries and civil preparedness measures, albeit at an uneven pace and thus with varying results.

This push for strategic autonomy is not occurring in a vacuum. As Europe retools its defence posture, the Baltic Sea region has become as a central theatre of geopolitical competition – where investments in resilience, deterrence and readiness will be most immediately tested. As NATO's centre of gravity shifts northward, the Baltic Sea has emerged not only as a vital corridor for Allied forces but also as a pressure point where Russia actively tests Western deterrence. A flashpoint for both military escalation and hybrid warfare, the region is increasingly exposed to undersea sabotage, cyberattacks, disinformation campaigns, and the testing of critical infrastructure resilience. Despite being heavily engaged in Ukraine, Russia has intensified air and maritime activity across the Baltic airspace and maritime corridors, seeking to stretch NATO's deterrence posture and probe for regional vulnerabilities.

Against this backdrop, this report offers policy-oriented assessment of NATO's evolving presence in the Baltic Sea region. It is the second in a two-volume series.

While the first volume – *North-Eastern Flank: Militarisation of the Baltic Frontier* – examined the frontline states of Poland, Lithuania, Latvia and Estonia, this volume turns to the other four NATO members along the Baltic coastline: Germany, Denmark, Sweden and Finland. The country-case chapters assess each state's defence posture in light of the shifting threat environment, with attention to institutional readiness, procurement priorities, and civil preparedness. Despite their institutional and geographic differences, these countries are becoming central to NATO's regional posture – through reinforcement, industrial capacity, logistics, and political leadership.

The analysis explores how their distinct historical alignments, strategic cultures, and force structures shape national responses to rising geopolitical pressures – particularly through increased defence spending, military modernisation, and enhanced societal resilience. Germany remains NATO's principal logistical hub despite persistent readiness challenges. Denmark serves as both a maritime actor and regional coordinator. Sweden and Finland, NATO's newest members, are undergoing rapid defence integration, with Finland in particular acting as a frontline stabiliser given its long border with Russia and entrenched national defence model. Together, these countries combine mature and emerging capabilities with a shared urgency to adapt to a changing threat landscape. Their evolving roles – individually and collectively – are key to understanding the transformation of Baltic Sea security.

The report situates these developments in historical context and provides a comparative overview of shifting defence postures, identifying fiscal constraints, capability gaps, and new operational demands. It is written for a broad policy audience and intended as a structured, strategic overview – not a technical military analysis. As the report focuses on Germany, Denmark, Sweden and Finland, it does not explicitly address the Arctic dimension or the roles of other NATO northern flank states such as Norway, Iceland or the United Kingdom. This is a deliberate analytical choice reflecting the report's geographic and strategic emphasis on the Baltic Sea region, where recent security dynamics and regional defence integration efforts warrant focused examination. The report integrates a range of sources, including academic research, policy analysis, government strategy documents, as well as datasets from NATO, national statistics agencies and international organisations. It also draws on media reporting to capture the rapidly evolving nature of the security environment. All financial figures are standardised in euros,¹ and NATO's datasets serve as the baseline for defence spending unless superseded by official national data. The time frame spans from the early 1990s to 18 March 2025.

The report can be read alongside its companion volume for a comprehensive Baltic Sea regional overview, as a standalone assessment, or by focusing on individual case studies.



Finnish conscript gives his solemn military pledge in public in front of his contingent flag in Helsinki, Finland, 2016. Photo: Hannu Mononen / Alamy Stock Photo.

FINLAND

During the Cold War, Finland adopted a policy of neutrality as a pragmatic response to its geopolitical situation, particularly its 1,340 km border with the Soviet Union. Having fought two wars against the USSR during World War II, Finland sought to avoid provoking its powerful neighbour (Gordon Dickinson 2003). The 1948 Finno-Soviet *Treaty of Friendship, Cooperation, and Mutual Assistance* constrained Finland by requiring consultations with Moscow on security matters while preventing alignment with either superpower (Tuominen 2024). This delicate balancing act, often called ‘Finlandisation’, allowed Finland to maintain its sovereignty and develop strong Western economic ties without joining military alliances or provoking Soviet intervention. Instead, Finland adopted a strategy of ‘total defence’, mobilising the entire society to counter the multifaceted Soviet threat (Raitasalo 2023). The military component of this strategy focused on territorial defence, with the Finnish Defence Forces structured to operate independently across the country’s challenging

geography. Finland's strategic location in Fennoscandia, with its dense forests, lakes and rugged terrain, along with extensive land borders, posed formidable challenges to potential aggressors (Visuri 1997). Since 1919 Finland has enforced mandatory conscription for all male citizens (Hadar and Häkkinen 2020), enabling it to sustain a large reserve force throughout the Cold War rather than a substantial active-duty force. By the end of the Cold War, Finland's peacetime defence forces numbered approximately 40,000 personnel. However, in the event of war, a 250,000-strong rapid deployment force could be mobilised within days, while full mobilisation would have brought the total force to 530,000, drawn from a pool of one million trained reservists (Visuri 1990, 94–95).

Following the collapse of the Soviet Union in 1991, Finland began closer cooperation with NATO and the newly independent post-Soviet states. In 1992 Finland initiated defence cooperation with Estonia, viewing it as its southern flank. Between 1996 and 2003 the Finnish Ministry of Foreign Affairs funded the €2.5 million Estonian Project, which trained 1,200 Estonian personnel and provided expertise in operational planning, logistics and equipment procurement (Kaldas 2005, 23–24).

In 1994 Finland joined NATO's Partnership for Peace programme (Puolustusministeriö 2023), which included joint exercises, training, and cooperation with NATO forces. However, full NATO membership remained off the table, backed by strong public opposition – 73% opposed in 1999 (Verkkouutiset 1999). Finland started to participate in international peacekeeping and crisis management missions, including in Kosovo, Afghanistan and Iraq. Meanwhile, it was gradually modernising its military equipment and replacing Soviet-era systems with Western ones.

Finland's total defence mode I

Finnish national defence culture is grounded in its cultural concept of *sisu*, which embodies resilience, perseverance and determination in the face of adversity and is a defining aspect of the nation's identity (Lahti 2019). This steadfastness was famously displayed during the Winter War of 1939–40, when Finland mounted an extraordinary defence against a much larger Soviet force.

In line with this ethos, Finland developed its 'total defence' model, which integrates military, civil, economic and societal preparedness to ensure national resilience. This model still informs the Finnish modern security

strategy. In 2003,² Finland adopted a new comprehensive security strategy, which emphasises collaboration between government, business and civil society to tackle emerging threats including cybersecurity, terrorism, large-scale migration, and military pressures (Valtioneuvosto 2017). The Finnish Security Committee (Turvallisuuskomitea) advises the government on national security preparedness across diverse sectors. Its remit spans military defence, civil preparedness, economic security, cybersecurity and societal resilience, ensuring the stability of critical functions, including leadership, defence capability, internal security and psychological resilience (Turvallisuuskomitea n.d.). Crucially, citizens are active contributors to national security, playing a key role through mandatory conscription, crisis response training and a strong national defence culture.

STRATEGIC SHIFTS

Despite Finland's longstanding approach of military non-alignment, its defence policy began shifting in the early 2000s. The 2004 Finnish Security and Defence Policy Report emphasised international military cooperation, stating that Finland would develop its defence forces' interoperability with NATO standards (Kaldas 2005, 28). Throughout the 2000s, Finland deepened its engagement with NATO through joint exercises, crisis management missions and defence planning coordination.

Finland has also been an active participant in the EU Common Security and Defence Policy, contributing to crisis management operations and military cooperation since joining the EU in 1995. It has also participated in Permanent Structured Cooperation since 2017, contributing to defence projects such as Military Mobility, which improves the movement of troops and equipment across Europe (PESCO n.d.) Additionally, it has taken part in EU battlegroups, which are meant to provide troops and expertise for these rapid reaction forces, as part of its international crisis management activities, but these have not yet been deployed since their establishment in 2006 (Puolustusvoimat n.d.).

EU Article 42.7 vs. NATO Article 5

Article 42.7 of the 2009 EU Lisbon Treaty obliges Member States to provide aid and assistance by all means in their power if another Member State is the victim of armed aggression. However, the form of support – military, economic, political, or humanitarian – is left to national discretion (EUR-Lex n.d.). By contrast, while NATO's Article 5 also allows members to decide how to respond, it carries a stronger expectation of collective military action, underpinned by the alliance's integrated defence structures and its core role as a mutual defence pact.

The 2014 Russian annexation of Crimea and increased military activities in the Arctic and Baltic Sea regions raised significant security concerns in Helsinki. In response, Finland expanded its defence ties with Sweden and other Western partners. Both countries became NATO Enhanced Opportunity Partners in 2014, allowing for greater involvement in NATO exercises, intelligence-sharing, and joint operational planning (Ojanen 2022). Additionally, Finland signed a Host Nation Support Agreement (HNSA) with NATO in 2014, enabling the use of Finnish territory for Alliance military activities. This agreement laid the groundwork for Finland's growing operational integration with NATO, allowing for logistical support, pre-positioning of military assets and joint training exercises. Following the HNSA, Finland expanded its participation in NATO exercises, including *Baltic Operations* and *Arctic Challenge*, and contributed to the NATO Response Force from 2017 onward, signalling deeper integration into Alliance defence structures (Pesu and Iso-Markku 2024).

The ties at regional level with Sweden and Norway were also strengthened through Nordic Defence Cooperation (NORDEFCO) – a framework established in 2009 to strengthen collaboration among Nordic states. The cooperation increasingly focused on joint military exercises, air and maritime patrols, intelligence-sharing and enhanced surveillance (Försvarsdepartementet 2023), particularly around Russian activity in the High North and the Kola Peninsula. As a founding member of the Arctic Council, Finland has played a vital role in regional security and logistics, especially amid Russia's growing isolation and militarisation in recent years. Finland's highly regarded icebreaker fleet keeps its ports accessible year-round.

In 2017 the Centre of Excellence for Countering Hybrid Threats was established in Helsinki to enhance resilience against such threats. The Centre fosters cooperation between NATO and the EU countries, while also strengthening coordination across public and private sectors, civil and military institutions and academia (Hybrid CoE n.d.). Also in 2017 Finland joined the UK-led Joint Expeditionary Force (JEF), a multinational rapid deployment framework designed to enhance defence cooperation and operational readiness among Northern European partners (Puolustusministeriö n.d.). Trilateral defence cooperation with Sweden and the US expanded from 2018, strengthening joint training, intelligence-sharing and operational coordination.

Following Russia's full-scale invasion of Ukraine in 2022, Finland formally applied for NATO membership and joined the Alliance in 2023, marking a historic break from its longstanding policy of military non-alignment. Though strategic factors mattered, the shift was driven by a sharp turn in public opinion. For decades NATO support lingered at 20–30% despite elite backing. Russia's 2008 invasion of Georgia and the 2014 annexation of Crimea nudged numbers upward but failed to build real momentum. Even in early 2022, only 28% of Finns supported membership. That changed overnight after Russia's full-scale invasion of Ukraine: support soared to 53% within weeks and hit 76% by May, as political parties followed public sentiment (Forsberg 2024).

While the shift in public opinion was a key driver of Finland's NATO membership, recognition that national defence could not provide the strategic deterrence afforded by Alliance-based guarantees also shaped elite strategic calculations. Before 2022 Finland's defence partnerships lacked binding security guarantees. Finnish decision-makers saw NATO's Article 5 as the only credible deterrent, particularly amid Russia's nuclear threats, coercion against non-Allied states, and hybrid warfare. Staying outside a nuclear-armed alliance could limit military assistance from partners in a crisis. Additionally, Sweden's simultaneous NATO bid was seen as a key factor, as Finland sought to ensure regional defence cohesion (Forsberg 2024).

Since joining NATO, Finland has rapidly integrated its defence planning into the Alliance's collective security framework, with a strong emphasis on interoperability. It has hosted and participated in major exercises such as *Air Defender 23* and *Dynamic Front 25*, showcasing air defence and artillery coordination with Allies (Bundeswehr 2023).

In December 2023 Finland signed a Defence Cooperation Agreement (DCA) with the US, enhancing defence and security ties by establishing a framework for the presence of US forces, their dependents and contractors in Finland (Ministry for Foreign Affairs of Finland n.d.). The agreement supplements the NATO Status of Forces Agreement, regulating troop entry, defence materiel storage, and legal jurisdictions while outlining key areas of collaboration and enabling US congressional funding for infrastructure investments in Finland (ibid.).

Finland is also deepening military integration with its Nordic neighbours. Plans are underway to establish closer coordination in air operations – potentially through a future Nordic Joint Air Operations Centre (JAOC) – as well as expanded cooperation on land force interoperability, logistics and regional command structures (Ilmavoimat 2025; Reuters 2024b). In March 2025 Finland signed a bilateral defence cooperation agreement with Denmark focused on enhancing joint maritime coordination in the Baltic Sea, deepening collaboration on F-35 fighter jet operations – including joint training and maintenance – and scaling up exercises under NATO, NORDEFCO and JEF. The agreement also outlines intentions for coordinated defence procurements to improve interoperability (Valtioneuvosto 2025). Finland has also announced plans to host a NATO Land Forces Corps Headquarters by the late 2020s, further embedding itself in the Alliance's command structure (Yle News 2024a). Together, these developments reflect a shift away from purely national defence planning toward multinational, theatre-wide operational structures.

MILITARY SECTOR TRANSFORMATION: MODERNISATION, DEFENCE SPENDING AND PERSONNEL

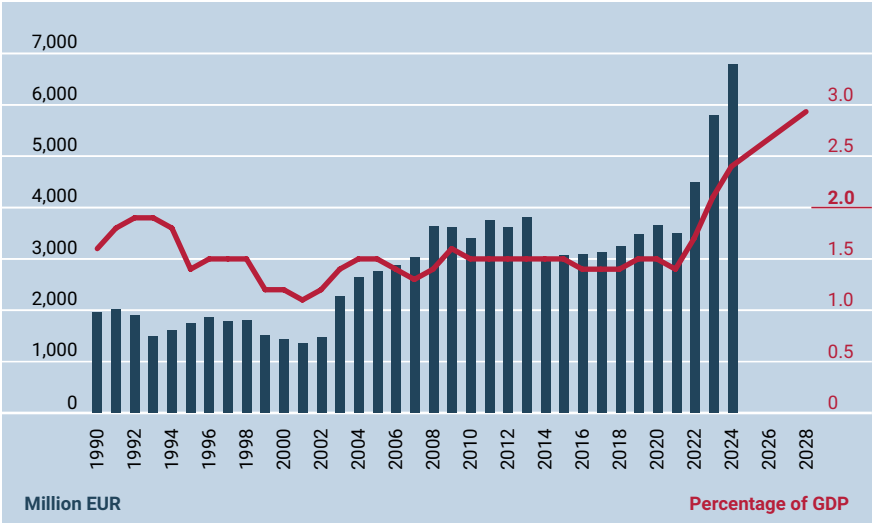
Over the last decade, Finland's military personnel numbers have remained stable at just above 30,000 (NATO 2024). However, despite its modest active military force, Finland has a 900,000-strong reserve in line with its 'total defence' approach, as conscription remains a key element of Finnish defence. As such, the wartime strength of its military forces is 280,000 soldiers, and this can be resupplied by other reservists if needed (Maavoimat n.d.-b). In Finland military training is provided annually for approximately 21,000 conscripts (Maavoimat n.d.-a).

Finland's defence structure is centred on the army and shaped by a doctrine of territorial defence and large-scale mobilisation, with operational emphasis on ground forces, strong artillery, a large reserve, and localised defence units. The

smaller Finnish Navy and Air Forces contribute coastal defence, air surveillance and regional deterrence – particularly in the Baltic Sea. The Navy maintains a coastal defence posture focused on mine warfare and fast-attack vessels, while the Air Force is transitioning to the F-35 to enhance situational awareness and long-range precision. Finland's strengths lie in its readiness, resilience and capacity to rapidly mobilise national defence assets. However, as the country deepens its NATO integration, it is addressing evolving requirements in areas such as expeditionary logistics, joint operational scalability, and integrated intelligence, surveillance and reconnaissance – reflecting a shift from purely national defence toward broader collective security responsibilities (Jonsson 2024).

To strengthen these core capabilities and address operational gaps, Finland has embarked on a broad and purposeful programme of military modernisation. In 2023 Finland spent 2.09% of GDP on defence, coincidentally meeting the NATO 2% target. Finland increased its defence expenditure from 1.5% of GDP in 2014 to 2.4% in 2024, more than doubling its nominal defence budget over the decade (see Figure 1). In December 2024 the Finnish government announced a plan to further increase defence spending from the projected €6.5 billion in 2025 to around €11 billion in 2032 – which, if implemented, would reposition Finland's annual defence spending closer to 3.3% of GDP (O'Dwyer 2024).

Figure 1. Defence spending in million EUR and as a percentage of GDP



Source: Dataset compiled by Slakaityte 2025a.

The budget is primarily allocated to modernising equipment, enhancing cyber capabilities and expanding military infrastructure. A significant focus is on reinforcing Finland's 1,340 km border with Russia, including the construction of 200 km of fencing equipped with advanced surveillance systems, estimated at €380 million (Yle News 2024b). The European Commission is contributing €50 million toward these efforts (European Commission 2024). This funding is designated for enhancing electronic surveillance, telecommunications, mobile detection and drone defence.

Finland's recent procurement wave reflects more than routine updates – it marks a shift in defence posture toward greater agility, readiness and precision, aligned with modern deterrence needs. Recent investments in mobile artillery, armoured vehicles, long-range fires, and advanced air defence platforms signal a move toward layered defence and closer operational alignment with NATO standards (Jonsson 2024).

In 2023, Finland ordered 91 Patria 6x6 armoured personnel carriers, with an option for 70 additional units. In September 2024, it confirmed the purchase of the final 29 vehicles under this option, bringing the total to 161. Deliveries are scheduled to be completed by late 2025 (Puolustusvoimat 2024). In October 2024 the Finnish forces acquired multiple launch rocket systems from Patria Land Oy for €4.7 million, enhancing long-range firepower and mobility (Finnish Government 2024). A major step in modernisation is also the acquisition of 64 F-35A Lightning II fighter jets from the US, with deliveries scheduled between 2026 and 2028 (Ilmavoimat 2024). These advanced jets will replace Finland's aging fleet of F/A-18 Hornets and strengthen the country's air defence capabilities (Ilmavoimat 2021).

Finland also possesses one of the largest artillery arsenals in Western Europe – an enduring pillar of its ground-based defence strategy. As of late 2021, Finnish forces were reported to have around 1,500 artillery guns, 700 cannons, nearly 100 rocket launchers and more than 700 heavy mortars, with only Poland approaching similar capacity in the region (Tanner 2021). This existing strength is being further enhanced through recent procurements, including South Korean K9 Thunder self-propelled howitzers, which bolster Finland's 155mm precision strike capability and mobility in challenging terrain (Maavoimat 2017).

Finland's defence industry

Finland's defence industry, though modest in scale, delivers high-value capabilities to NATO. Patria anchors this effort with systems like armoured modular vehicles and NEMO mortars, and provides lifecycle support to the Finnish Defence Forces (Patria 2025). It also holds a 50% stake in the Nammo Group, a supplier of NATO-standard ammunition (Nammo 2025). In 2023 Patria signed an agreement with Lockheed Martin to produce 400 F-35 forward fuselage assemblies in Finland, strengthening the country's role in the global F-35 supply chain (Patria 2023). Meanwhile, DA-Group strengthens Finland's defence technology with expertise in radar systems, underwater surveillance and electronic warfare (DA-Group 2025). ICEYE supports situational awareness through SAR satellite technology and Bittium ensures secure, interoperable communications (ICEYE 2025; Bittium 2025).

SOCIETAL RESILIENCE

Developments in the military sector aside, societal resilience and continuity management are central to the Finnish security strategy, with citizens recognised as active security contributors (Hyvönen and Juntunen 2020). In line with Finland's 'total defence' concept, residents are encouraged to actively participate in community preparedness initiatives, emphasising personal responsibility and reflecting a deep Finnish tradition of volunteerism. Local Defence Units composed of reservists and volunteers play a critical role in defending infrastructure, supporting civil authorities and responding to regional emergencies. Organisations such as the volunteer fire brigades and the Finnish National Rescue Association that is coordinating civil preparedness efforts, actively foster community-level engagement. Finland also conducts large-scale civil defence and readiness drills, involving local authorities and businesses in crisis response planning (Puolustusvoimat 2022). National programmes like the '72 hours concept' also instruct citizens to maintain emergency supplies and prepare to sustain themselves for three days without state assistance in the event of disruptions or emergencies. The dedicated website invites citizens to put both their skills and their supplies through a series of tests in preparation (72 tuntia 2025).

In November 2024 Finland updated its comprehensive online civil preparedness guide, covering responses to crises such as war, pandemics, terrorism and natural disasters. It also offers practical advice for managing infrastructure disruptions – including blackouts, water outages, communication failures and payment disruptions – and addresses modern threats like cyber risks and disinformation, with measures to recognise false narratives and practise digital safety (Suomi n.d.).

As of 2022 the country had 50,500 civil defence shelters with capacity for 4.8 million people – nearly 90% of its population (Sisäministeriö n.d.). The majority are privately owned, reinforced concrete shelters located in individual buildings, while larger properties have joint bunkers. In normal conditions many shelters serve as sports halls, metro stations, parking areas or storage spaces but must be cleared and made operational within 72 hours in case of an emergency. This extensive infrastructure places Finland among the best-prepared nations in the world for civil emergencies, second only to Switzerland in terms of per capita shelter coverage and operational readiness.

It is worth noting that the vast majority of Finns (84%) perceived Russia as a threat to their country in spring 2022, and this opinion still prevailed as of autumn 2024 (86%) (Eurobarometer 2024). Finns are currently also the strongest supporters of increased cooperation in defence matters at the EU level (90%) in the Baltic Sea region (Eurobarometer 2024). At the same time, the Finnish context is noteworthy for its strong public trust in the state defence capacities. In a December 2024 survey, 86% of respondents expressed trust in the Defence Forces' capability to defend Finland against various military threats (Valtioneuvosto 2024).



Sweden flag on soldier's arm (collage), 2018.
Photo: Bumble Dee / Alamy Stock Photo.

SWEDEN

Sweden's security approach has long been rooted in the 'total defence' model – an integrated system combining military, civil, economic and psychological preparedness (Larsson 2020). Developed during World War II it emphasised the interdependence of all sectors in safeguarding national security. During the Cold War Sweden maintained neutrality and self-reliance, refraining from military alliances. Focusing on external threats, the country maintained a large and well-equipped army with compulsory military service for all men. Swedish armed forces during their peak in the 1960s could mobilise around 850,000 men and women (Lallerstedt 2021). Sweden's domestic arms industry ensured self-reliance and a steady defence supply, maintaining deterrence despite its Cold War neutrality. Sweden also developed coastal fortifications, a strong air force with dispersed bases, and an extensive civil defence infrastructure, including bomb shelters and underground command centres. Strategic locations such as the Stockholm

archipelago, the Öresund Strait or the island of Gotland were prioritised for defensive operations to prevent territorial encroachment (Beredskapsmuseet 2022). Gotland, in particular, was a key strategic asset in the Baltic Sea, heavily militarised, and played a crucial role in securing Swedish airspace and maritime routes.

Post-Cold War, while staying outside military alliances, Sweden joined NATO's Partnership for Peace agreement in 1994 to facilitate cooperation. Since the 1990s the Swedish Armed Forces have participated in NATO-led operations in Bosnia and Herzegovina, Kosovo, Afghanistan, Libya and Iraq (Regeringskansliet 2023b). Since the late 1990s Sweden has also actively participated in the EU's Common Security and Defence Policy, contributing to crisis management operations, peacekeeping missions and military cooperation.

Unlike neighbouring Finland, Sweden dismantled much of its total defence model, reducing military readiness and reorienting civil capacity toward peacetime crisis management. Sweden emphasised diplomacy, international law and confidence-building measures, while deepening security ties with the EU and engaging in Nordic–Baltic cooperation. Following the 2004 Defence Bill, defending Sweden against armed attack was no longer the primary focus of the Swedish Armed Forces and was largely removed as a planning priority. The 2009 Defence Bill deemed an armed attack against Sweden unlikely for the foreseeable future. Consequently, the Swedish Armed Forces shifted focus to international crisis management, counterterrorism and peacekeeping missions, leading to a significant reduction in war units, regiments and flotillas. Munitions were largely scrapped, regional operational management dismantled, and logistics centralised for peacetime efficiency (Secretariat of the Swedish Defence Commission 2024). Conscription was suspended in 2010 (Lallerstedt 2021) and the system transitioned to a volunteer-only military force, and military personnel numbers dropped to around 15,000 by the mid-2000s (NATO 2024).

STRATEGIC SHIFTS

Swedish security policies shifted again in the 2010s, particularly after Russia's 2014 annexation of Crimea. The 2015 Defence Bill marked a fundamental shift in defence posture in Sweden, re-establishing military presence on Gotland, reinstating conscription and reorienting defence planning toward territorial defence and armed conflict (Secretariat of the Swedish Defence Commission 2024). The island of

Gotland, demilitarised in 2005 (Brooks 2022), has been steadily reinforced, from a small military presence to a permanent base in 2016. In 2018 Sweden further strengthened its posture on Gotland by forming a new regiment with approximately 400 permanent troops, a mechanised battalion equipped with CV90 infantry fighting vehicles and Leopard 2 tanks, alongside a home guard amphibious battalion designed for coastal defence (Adamson and Wieslander 2023). By 2021 air defence systems were reactivated, reinforcing the island's capabilities.

The annexation of Crimea in 2014 prompted Sweden to become an Enhanced Opportunities Partner with NATO, strengthening cooperation through political dialogue, joint training, and information sharing. In 2016 Sweden also signed HNSA with NATO, allowing its forces to operate on Swedish territory during exercises or crises. The agreement enhanced Sweden's military readiness by facilitating logistical support, troop hosting and pre-positioning of military assets (Regeringskansliet 2023b). Meanwhile, Sweden regularly participated in NATO-led and NATO-partnered military exercises to enhance interoperability. These included *BALTOPS*, a naval exercise in the Baltic Sea since the 1990s (Försvarsmakten n.d.); *Arctic Challenge*, a Nordic air defence drill launched in 2013 (ac.nato.int n.d.); and *Aurora 17*, Sweden's largest military exercise in decades, involving NATO partners (The Economist 2017). At the regional level, Sweden also strengthened its cooperation with Norway and Finland through the Nordic Defence Cooperation (NORDEFCO) framework.

In 2017 Sweden reinstated selective conscription to boost military readiness, applying to both men and women aged 16–70 (Krisinformation 2024). In the new system the government can assign conscripts to military, civilian or general compulsory service based on national needs, with those selected for military service undergoing basic training before receiving specific roles.

In December 2023 Sweden signed a Defence Cooperation Agreement (DCA) with the United States, granting US forces access to Swedish military bases for joint training, pre-positioning of equipment, and improved interoperability (Regeringskansliet 2023a).

The shift away from neutrality, increased militarisation, reinstated conscription and enhanced civil preparedness marked Sweden's revival of its total defence model.

Swedish 'total defence' model revisited

The Swedish Civil Contingencies Agency (MSB) established in 2009 with its 'all-hazards' approach embodies the spirit of 'total defence' by emphasising societal security and international cooperation (Larsson 2020, 47–61). The agency has focused on areas such as emergency services, accident prevention, crisis preparedness, civil defence, cybersecurity and secure communication. MSB also provides training sessions on crisis communication to enhance preparedness within organisations and improve coordination among various actors during emergencies (MSB 2025b).

In the mid-2010s Sweden's total defence model was revived to once again focus on integrating the military and civilian sectors in preparation for potential crises or war. As such it encompasses both military defence, ensuring territorial integrity and operational readiness, and civil defence, which mobilises public and private sectors to maintain essential services (Regeringskansliet 2024c). Additionally, total defence duty requires all citizens aged 16–70 to contribute to national defence, albeit that can vary and include military service, civilian service in essential sectors like healthcare and rescue services, or a general national service obligation to maintain critical functions during crises (Krisinformation 2024).

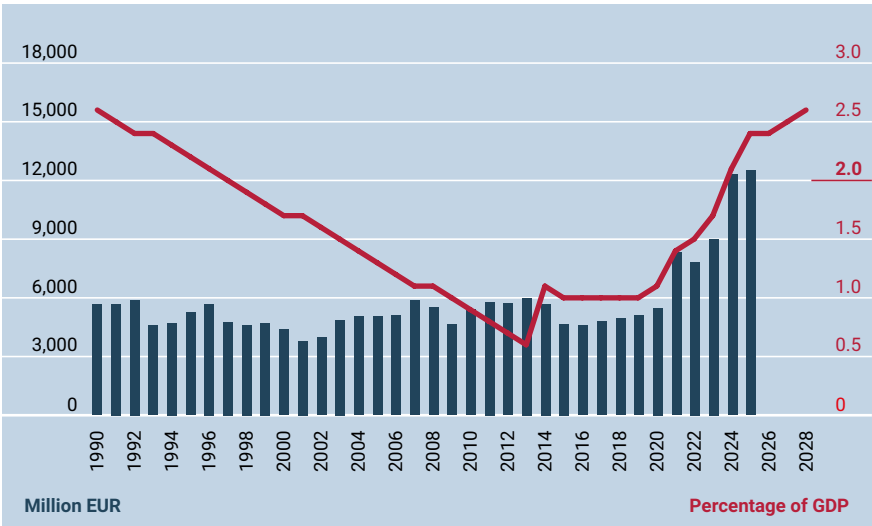
MILITARY SECTOR TRANSFORMATION: MODERNISATION, DEFENCE SPENDING AND PERSONNEL

Nearly two years after Russia's full-scale invasion of Ukraine, Sweden's Civil Defence Minister Carl-Oskar Bohlin warned attendees at a security and defence conference in January 2024 that 'there could be war in Sweden' (Kirby 2024). The statement resonated strongly in a country that has not been involved in a war since 1808, only breaking from its policy of peacetime non-alignment and wartime neutrality in March 2024 by joining the NATO Alliance. Notably, Swedish public opinion mirrored this institutional alignment. Support for NATO membership held steady at around 20% from 1995 to 2012. It began to increase after 2013, fluctuating between 27% and 38% until Russia's invasion of Ukraine in 2022, when it surged to 64% (Persson and Widmalm 2024).

Following its NATO accession Sweden has expanded joint planning and interoperability efforts with Finland and Norway, particularly in air and land domains. Current initiatives include discussions on establishing a Nordic Joint Air Operations Centre (JAOC), enhancing shared use of airspace and bases, and developing common logistics and command structures. These efforts reflect Sweden’s transition from nationally-focused defence planning toward a multinational, theatre-wide operational approach aligned with NATO’s northern posture (Försvarsmakten 2025).

Between 2014 and 2020, Sweden’s defence spending was among the lowest in the Baltic Sea region, fluctuating around 1% of GDP (see Figure 2). Amidst the worsening geopolitical situation, Sweden adopted the 2020 Defence Bill aimed to restore Swedish military capabilities and increase defence spending by 40% by 2025 (Swedish Ministry of Defence n.d.). The Russian invasion of Ukraine in 2022 accelerated this process.

Figure 2. Defence spending in million EUR and as a percentage of GDP



Source: Dataset compiled by Slakaityte 2025b.

In 2024 Sweden met NATO’s defence spending benchmark, allocating 2.1% of its GDP. In real terms, Sweden’s defence spending exceeded €12 billion in 2024 – more than doubling since 2014 – making it the third-largest defence spender in the Baltic Sea region after Germany and Poland (Slakaityte 2025b). In the next five years

(2025–30) Stockholm will allocate an additional SEK 170 billion (approximately €14.87 billion) to military defence, with the Swedish defence expenditure expected to rise to 2.6% of GDP by 2028 (Regeringskansliet 2024a).

Increased military budget translates into growing numbers of military personnel. By 2030 Sweden plans to expand its armed forces by approximately 27,000, increasing the total force to around 115,000, which will include both professional soldiers, conscripts and reservists. The number of Swedish military conscripts has doubled from 4,000 in 2017 to 8,000 in 2024 (Secretariat of the Swedish Defence Commission 2024). The Swedish Defence Commission's final report from April 2024, 'Strengthened Defence Capability – Sweden as an Ally', outlines a plan to increase the number of conscripts to 10,000 by 2030 and 12,000 by 2032, with consideration for further increases to 14,000 by 2035 (Regeringskansliet 2024b).

Sweden's growing financial commitment also reflects a deliberate effort to rebuild its defence capacity after years of underinvestment and force reductions. While Sweden maintains technologically advanced platforms, its overall military capacity remains limited in scale and readiness. In 2023 the Swedish Navy operated a small but high-tech fleet – Visby-class corvettes and Gotland-class submarines – designed for coastal defence but constrained in range and numbers. The Air Force maintained around 100 JAS 39 Gripen fighters, optimised for dispersal and agility, but lacking strategic airlift capability and long-range strike (Häggbloom 2024). As of 2024 the Swedish Army maintained two operational mechanised brigades, with plans to expand to three mechanised brigades and one infantry brigade by 2030 (Secretariat of the Swedish Defence Commission 2024). Specialised units for mountain, motorised and amphibious operations are being developed alongside the restoration of cross-cutting support functions such as logistics, air defence and command systems (Häggbloom 2024). Procurement, in this context, serves as the linchpin of Sweden's rearmament – guided by the dual imperative of addressing these capability gaps and ensuring full interoperability with NATO Allies. This includes significant modernisation across land, naval, and air domains.

In June 2022 a contract was signed with BAE Systems Bofors for the procurement of 24 Archer truck-mounted howitzer systems (Mackenzie 2022), which will equip an additional artillery battalion. In September 2023 the Swedish government awarded BAE Systems a \$500 million (approximately €462 million) contract for 48 more Archer systems, with deliveries starting in 2025 (BAE Systems 2023b). Additionally, in 2024, Sweden and Denmark jointly signed a \$2.5 billion (approximately €2.3 billion) contract with BAE Systems to procure around 115 CV90 combat vehicles for

Denmark and 50 for Sweden. The agreement also includes provisions to support Ukraine, such as enabling future transfers of vehicles (Reuters 2024a). Sweden is also investing in Leopard 2A8 main battle tanks, announcing in January 2025 a \$1.97 billion (approximately €1.90 billion) procurement for 44 new tanks and upgrades to 66 existing tanks, with deliveries expected in 2028–31 (Reuters 2025b). Additionally, Sweden is upgrading combat vehicles and tanks for better mobility and firepower as well as investing in missile systems, battlefield surveillance and long-range rocket artillery for precision strikes (Regeringskansliet 2024a).

Stockholm is making significant reinforcements to its naval forces, focusing on surface and submarine warfare, as well as ice-breakers. In December 2023 the Swedish Defence Materiel Administration signed a contract with Saab to conduct concept development studies for advanced submarine technologies (Gosselin-Malo 2023). This initiative is part of a broader effort to enhance Sweden's underwater warfare capabilities, building on its fleet of Gotland-class submarines, which have undergone mid-life upgrades to extend their operational lifespan and incorporate advanced technologies. Sweden is developing two new Blekinge-class (A26) submarines, with deliveries expected in 2027 and 2028 (Saab 2021). Sweden is also upgrading its surface fleet as part of the 2025–30 Total Defence Bill, focusing on modernising Visby-class corvettes with enhanced stealth and anti-aircraft missile systems. To strengthen Baltic Sea defences, Sweden is expanding its coastal missile capability, equipping two units with anti-ship missiles. Beyond this, Sweden will procure Luleå-class surface combat vessels over the next five years, increasing naval capacity and air defence. The Swedish government's defence resolution outlines plans for further acquisitions of surface combat vessels, for integrating advanced radar and stealth technology, and for enhanced anti-aircraft and anti-submarine warfare systems to improve maritime deterrence (Regeringskansliet 2024a). Additionally, the Swedish government purchased the icebreaker Polar Circle in 2024 to strengthen capacity for year-round navigation, and plans to acquire two new icebreakers by 2027/2028 (Håkansson 2025; Haun 2024).

Sweden's air defence capabilities are also undergoing significant development. In 2024 Saab and FMV reached an agreement for the delivery of a third GlobalEye airborne early warning and control aircraft, valued at SEK 2.6 billion (approximately €227 million), with delivery scheduled from 2024 to 2029 (Saab 2024). Additionally, the Swedish Air Force continues to prioritise upgrades to its fleet of JAS 39 Gripen fighter aircraft, focusing on the latest Gripen E variant, which features enhanced radar, advanced avionics, extended range, and upgraded weapon systems (Saab n.d.). The introduction of these Gripen E fighter aircraft begins in late 2024 and will

continue through 2030. In November 2024 Sweden selected the Embraer C-390 Millennium as its new military transport aircraft, replacing its aging Lockheed Martin C-130 fleet (Araujo and Ahlander 2024). To strengthen operational capabilities, Sweden will also procure additional Black Hawk HK16 helicopters and SK 50 basic trainer aircraft. Sweden is accelerating its air and missile defence modernisation to strengthen NATO interoperability, deploying new radars and command systems for improved early warning and coordination. Its integration into NATO's Integrated Air and Missile Defence (IAMD) is also being expedited, enhancing sensor networks, command structures and joint threat response capabilities (Regeringskansliet 2024a).

While Sweden's ongoing modernisation of the defence sector contributes to NATO's increased military capabilities, its recent accession also strengthens the Alliance by boosting NATO's defence industry and innovation, as well as security of the northern flank. In the High North Sweden's membership completes Nordic defence integration, enabling joint Arctic coordination with Norway, Denmark, Iceland and Finland, strengthening deterrence against Russia and supporting coordinated air patrols over Arctic airspace. In the Baltic region, Sweden's central position improves regional coordination between Allies, and its Gotland Island provides early warning and control over Baltic Sea routes – constraining the operational freedom of Russia's Baltic Fleet in Kaliningrad. Following the war in Ukraine the Swedish government announced a significant investment of SEK 1.6 billion (approximately €150 million) to further enhance Gotland's military infrastructure (Adamson and Wieslander 2023).

Sweden's defence industry

Sweden's defence industry is central to national security and a potentially key NATO asset, enhancing the Alliance's technological edge, supply chains and interoperability. Without large, state-owned firms, Sweden has developed a competitive ecosystem across air, land, sea and cyber domains. Saab AB leads with exports like the JAS 39 Gripen fighter jets, guided missiles, and ground combat weapons such as NLAW, AT4 and Carl-Gustaf M4, along with submarines, Visby-class corvettes, and CB90 combat boats. BAE Systems Hägglunds produces CV90 infantry fighting vehicles, while Bofors manufactures the Archer self-propelled artillery system, all widely used by NATO partners. Sweden's defence sector is also highly research-intensive, specialising in IT systems, intelligent ammunition, cryptography and

advanced sensors (ESD 2023). Swedish firms and institutions also lead in emerging defence technologies, including 5G/6G communications (Ericsson, n.d.), AI for autonomous operations (Saab 2025), cybersecurity (Försvarsmakten 2021), early-stage research into hypersonic propulsion (FOI 2023), directed energy weapons (FOI 2025), quantum encryption, and graphene-based stealth materials (RISE, n.d.-a; n.d.-b).

SOCIETAL RESILIENCE

As of autumn 2024, 88% of Swedes considered Russia's invasion of Ukraine to be a threat to Swedish national security. Moreover, 85% of Swedes declared a need for an increased cooperation in defence matters at the EU level as well as increased spending on defence in the EU (71%) (Eurobarometer 2024). These are remarkably high numbers for a country with a long history of neutrality.

Reflecting the need to enhance civil preparedness amidst the escalating geopolitical tensions, the Swedish government plans to allocate an additional SEK 37.5 billion (approximately €3.3 billion) in the next five years (2025–30) to all sectors involved in civil preparedness, with priority given to sectors such as electronic communications and postal services, food supply and drinking water, health, medical care and welfare, transport, energy supply and civil protection (Regeringskansliet 2024a). Digitalisation, innovation and research to enhance defence capabilities and self-reliance are also prioritised. Key measures include increasing funding for technological development and defence research by over 50% by 2027 to SEK 1.6 billion (€140 million), strengthening interoperability with NATO through expanded command and logistics structures, and advancing Sweden's role in space initiatives such as reconnaissance and satellite communications (Regeringskansliet 2024a).

Sweden already has over 65,000 shelters and hiding places for seven million people, which constitutes about 85% of its population (MSB 2024). However, many of them were constructed during the mid-20th century, with no significant new construction since 2002, and require maintenance and modernisation to ensure they meet current safety standards and are fully operational in the event of a crisis (Wallin 2023). The Swedish government has proposed to spend additional SEK 100 million (approximately €8.7 million) per year for the improvement and modernisation of civil defence shelters starting in 2024 (Regeringskansliet 2023c).

In 2022 Sweden established the Psychological Defence Agency, tasked with countering foreign influence operations and disinformation campaigns. The agency identifies, analyses and counters foreign malign influence and disinformation targeting Sweden and its interests. It works to combat efforts that weaken national resilience, undermine public confidence and manipulate perceptions, behaviours and decision-making processes (Psychological Defence Agency 2024).

In November 2024 an updated version of Sweden's civil preparedness leaflet 'If Crisis or War Comes' was published. This is the fifth version of the brochure distributed to the Swedish public, following previous releases in 1943, 1952, 1961 and 2018. The new publication emphasises collective responsibility for resilience and addresses threats such as armed conflict, cyberattacks, terrorism, extreme weather and disinformation. The leaflet introduces significant updates to the 2018 edition and includes new topics such as nuclear weapon defence, managing pathogens, psychological resilience, and guidance on talking to children about crises. Enhanced sections on digital security and disinformation highlight the growing importance of countering cyberthreats. Practical advice on home preparedness, evacuation and shelters has been also significantly broadened, particularly for scenarios involving nuclear or biological threats (MSB 2025a).



Denmark military uniform. Danish troops, 2019.
Photo: Bumble Dee / Alamy Stock Photo.

DENMARK

Although a founding member of NATO, Denmark historically maintained modest defence expenditures and selectively aligned with key Alliance priorities, often appending national reservations to collective decisions. Throughout the Cold War successive Danish governments treated defence spending as less a response to Soviet threat than an entry fee for US protection – raising budgets only under direct pressure from Washington (Ringsmose 2009). Danish Cold War strategy combined formal NATO alignment with tactical opt-outs – most notably on nuclear policy – and official disclaimers appended to key Alliance communiqués. These measures aimed to manage domestic opposition and maintain political consensus (Olesen 2006). Post-Cold War, Denmark – like many neighbouring countries – downsized its military further while gradually shedding its ‘free-rider’ image through active participation in NATO missions abroad (Lucas et al. 2023; Ringsmose and Rynning 2008, 55).

From the 1990s Denmark's defence spending declined – stabilising at 1.3% of GDP from 2005 to 2012 before dropping again until 2017. Denmark pursued a 'super Atlanticist' strategy, anchoring its security in even deeper bilateral ties with the US as the cornerstone of its national security strategy (Nyemann and Staun 2016). Concurrently, it advanced European integration and addressed crises in Eastern and Southeastern Europe (Nordenman 2019). Denmark's exclusion from the EU defence and security policy following its opt-out from the Maastricht Treaty in 1992 significantly shaped its security policy, positioning NATO and US partnerships at the centre of Denmark's defence strategy (Andersen 2018). Denmark's close alignment with US-led operations enhanced its influence within NATO, as evidenced by high-profile appointments: Prime Minister Anders Fogh Rasmussen served as NATO Secretary General (2009–14), and Chief of Defence Knud Bartels chaired NATO's Military Committee (2012–15), with their tenures overlapping for 33 months. These appointments underscored Denmark's elevated status and deep commitment to the Alliance (Schaub and Jakobsson 2018).

Until recently Denmark's national security posture was shaped predominantly by non-conventional threats: terrorism, cyberattacks, migration challenges (heightened since 2015), the erosion of the international order, and EU cohesion. Over the years, more than 100 Danes joined or aligned themselves with jihadist groups – either by travelling abroad or through domestic radicalisation – resulting in attacks like the 2015 Copenhagen shootings, the 2016 Kundby bomb plot, and arrests in 2020 and 2023 (Dennison, Franke and Zerka 2018, 18; CTA 2024). While the threat perceptions of Russia were primarily influenced by its role in Arctic militarisation and cyberthreats (Dennison, Franke and Zerka 2018, 18), a direct Russian attack on NATO was previously deemed unlikely. However, the Danish Defence Intelligence Service (DDIS) has consistently flagged escalating regional threats since 2014 (Szymański 2018). Its February 2025 assessment identified Russia as a credible and growing threat, indicating a shift toward a more aggressive and risk-tolerant posture – including the possibility of military actions beyond hybrid warfare (Forsvarsministeriet 2025a; Jochecová 2025).

Reflecting this renewed threat environment, Denmark – once viewed primarily as a barrier state controlling Baltic access during the Cold War (Larsen 2022) – now plays an important role in NATO's northern posture, particularly in the maritime domain. It controls access to the Baltic Sea through the Danish Straits – Øresund, Storebælt and Lillebælt – vital for Alliance force mobility and regional deterrence. Denmark also safeguards Greenland and the Faroe Islands, reinforcing its critical role in the security architecture of the Arctic and North Atlantic (Lucas et al. 2023).

FORCE STRUCTURE, CAPABILITIES AND MISSIONS

The Danish armed forces comprise the army, navy, air force, and home guard, with 16,000 active-duty personnel, 13,400 home guard volunteers, and 30,000 reservists (Danish Defence 2024; Hjemmeværnet 2025). The Defence Command oversees operations, including two mechanised army brigades for rapid response and NATO interoperability, a navy focused on maritime and Arctic defence, and an air force (Forsvaret 2025; Danish Airforce 2025; Forsvaret 2024). The home guard plays a critical role in national readiness and Alliance support, contributing to territorial defence, civil contingency operations, and host nation support for NATO deployments (Hjemmeværnet 2025).

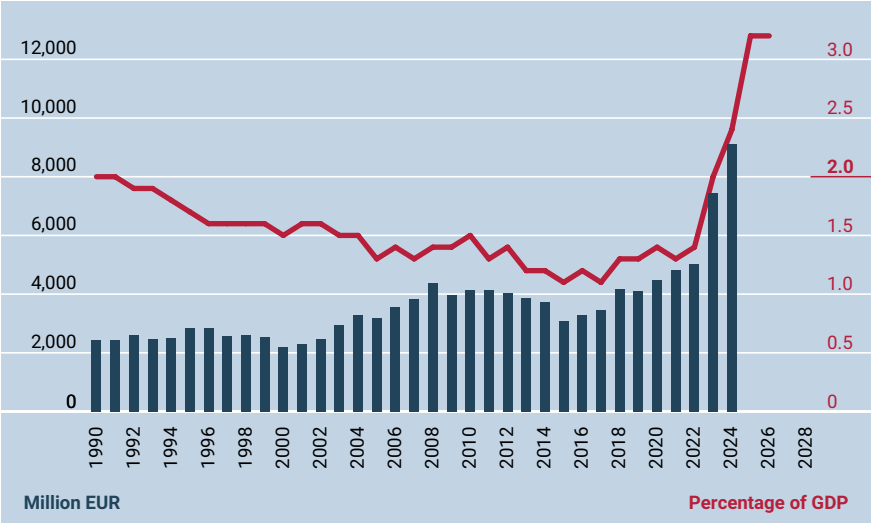
Conscription remains integral to Denmark's force structure. Reinstated after World War II, military conscription requires men to register at 18 (Teasdale 2009). Originally nine to twelve months, service was reduced to four months under the 2005–9 Defence Agreement (Simon 2008). Despite its limited scope, 98% of conscripts serve voluntarily. To address naval shortages and enhance mobilisation, conscription expanded between 2018 and 2023 (Szymański 2018). By 2026, it will include women and extend to 11 months, reflecting post-Ukraine war priorities and evolving security needs (Olsen 2024).

Operationally, Denmark has been a reliable contributor to NATO-led missions. In the 1990s, it shifted to an expeditionary forces model, focusing on peacekeeping and high-intensity operations in Iraq and Afghanistan (Lundquist 2020). Military personnel decreased from 31,000 in 1990 (World Bank 2020) to 17,700 by 2009, with a 13% vacancy rate, strained resources and depleting ammunition stocks (Danish Ministry of Defence 2008, 27–29). Combat in Afghanistan caused significant equipment losses, while streamlining under the 2005–9 Defence Agreement added additional pressure (Danish Ministry of Defence 2008, 22). Aging F-16 aircraft, reduced from 77 to 48, prompted discussions on the acquisition of F-35s to sustain combat capabilities (Danish Ministry of Defence 2008, 27–29). Despite challenges, Denmark ranked second in precision-guided munitions in Libya's 2011 Operation Odyssey Dawn, deployed seven F-16s against ISIS (2014–2015), and upgraded its navy with modular frigates for anti-piracy and US task force missions (Schaub and Jakobsson 2018). In 2019–20 Denmark contributed to MINUSMA in Mali with a C-130J and 65 personnel, and to Operation Barkhane with two helicopters and 70 personnel (Szuba and Kelly 2019). In November 2020 Denmark assumed command of NATO Mission Iraq, deploying 200 personnel (NATO 2020; AFP 2019).

**DEFENCE TRANSFORMATION: MODERNISATION, CHALLENGES
AND STRATEGIC SHIFTS**

The 2014 annexation of Crimea refocused NATO on deterring aggression in the Baltic Sea, though Denmark initially maintained its security strategy and spending (see Figure 3). Key NATO initiatives included the NATO Readiness Initiative and the Very High Readiness Joint Task Force (VJTF), a 5,000-strong rotational force with pre-positioned equipment in Eastern Europe (Larsen 2022, 388). Strategically, Denmark's location makes it a critical rear area for NATO, hosting bases for air operations, ports for troop reinforcements, and securing infrastructure for frontline deployment (Larsen 2022, 389–90).

Figure 3. Defence spending in million EUR and as a percentage of GDP



Source: Dataset compiled by Slakaityte 2025c.

The lessons from the 2014 conflict in Ukraine prompted the adoption of ‘shoot-and-scoot’, enhancing mobility and survivability. To counter modern battlefield threats, the Danish army began upgrading its artillery in 2015 with the Cardom 10 mortar system, mounted on Piranha 5 armoured personnel carriers. The system offers a 10 km range, autonomous mortar-laying, multiple rounds simultaneous impact capabilities, and advanced fire control systems (Johnsson 2019).

Despite a strong public preference for welfare over defence – reflected in 2018 polling where only 4% prioritised defence spending (Schaub and Jakobsson 2018) – Denmark adopted a significantly more ambitious security posture. The 2018–23 Defence Agreement prioritised deterrence and collective defence, outlining NATO commitments: Baltic Air Policing (four F-16s and 60 personnel), NATO's eFP in Estonia (200 personnel), naval support to SNMG1 and SNMCMG1, and a frigate accompanying a US Navy carrier group (Szuba and Kelly 2019). These initiatives were underpinned by a 20% increase in the 2018–23 defence budget, enabling investment in a deployable brigade, light infantry battalion, enhanced special operations, cyberdefence, and a new cyberwarfare unit (Mehta 2019; Army Recognition 2018). However, balancing these Alliance contributions with global expeditionary tasks exposed persistent shortfalls in personnel, equipment and spending (Szymański 2018).

The Arctic posture

In 2019 Denmark prioritised Greenland in its national security strategy amid growing US, Russian and Chinese Arctic interest. The US Cold War-era Thule Air Base (now known as Pituffik Space Base) remains vital for missile warning and Arctic surveillance (Peter 2019), with proposals for expanded dual-use infrastructure to counter Chinese influence (Rahbek-Clemmensen 2019). Economic competition has intensified, notably with China's rare earth projects like the Kvanefjeld mine. In 2019 Denmark deployed its largest naval support ship *Absalon* to patrol Greenlandic waters, signalling a shift in defence posture (Peter 2019). In May 2019 Defence Minister Claus Hjort Frederiksen proposed stationing four F-35s to counter potential Russian threats from Nagurskoye Airbase, 1,000 km from Greenland (Second Line of Defence 2019). The retreat of the ice sheet has made Greenland's resources more accessible, further amplifying its strategic and economic importance (Peter 2019). President Trump's 2019 and 2025 bids to purchase Greenland have underscored its value, pushing Denmark to address sovereignty concerns and balance US military interests with Greenlandic autonomy through more transparent and inclusive decision-making.

Following the war in Ukraine, the DDIS assessed Russia's Arctic military expansion as primarily defensive but increasingly incorporating offensive capabilities that threaten Western interests. In response, Arctic coastal

states, including Denmark, bolstered their military presence. In January 2025 Denmark's Ministry of Defence announced plans to re-evaluate the need for icebreakers in Arctic defence, following Prime Minister Mette Frederiksen's emphasis on evolving Arctic security during a Finland summit. Denmark retired its last icebreakers in 2010 due to budget cuts (Asmussen 2025). This renewed focus on Arctic capabilities further underscores Denmark's broader militarisation efforts. However, these defensive measures risk escalating tensions, potentially triggering a security dilemma and an unintended arms race (Zilmer-Johns et al. 2022).

In early 2025 Denmark launched a landmark Arctic and North Atlantic defence initiative, committing approximately €1.96 billion to strengthen sovereignty, surveillance, and situational awareness in cooperation with Greenland and the Faroe Islands. The agreement includes the procurement of three new Arctic naval vessels, two long-range surveillance drones, expanded satellite and sensor-based intelligence, and upgrades to the Joint Arctic Command in Nuuk. These assets will enhance Denmark's operational flexibility and responsiveness across the region. The deal also increases access to Arctic military training for Greenlandic youth, strengthens civil preparedness, and supports local economic development – signalling a shift toward whole-of-society resilience in Arctic defence. A second, more comprehensive agreement – focused explicitly on deterrence – is expected by mid-2025. This renewed emphasis on Arctic capability reflects Denmark's recognition of the Arctic's strategic volatility and its intent to anchor NATO's northern presence with credible, forward-deployed assets (Forsvarsministeriet 2025c).

In 2019 Denmark formed the XIII Light Infantry Battalion to meet NATO's rapid deployment needs. Fully operational by 2023, this 500-strong unit specialises in agile operations, complementing the mechanised 1st Brigade and enhancing rapid response capabilities (Johnsson 2020). Denmark also modernised 44 Leopard 2A5 tanks to the advanced Leopard 2A7 standard, completing upgrades by September 2023 (Albert L. 2020; Defence Industry Europe 2023). In 2020 the army acquired 56 Eagle V vehicles for multi-role operations, enhancing mobility and protection against mines, improvised explosive devices, and ballistic threats (Heiming 2020). The same year, Denmark began trials of the Nammo M72 MK2 lightweight antitank weapon, designed to bolster infantry capabilities with reduced backblast and improved

portability (Leigh L. 2020). The 2021 *National Defence Industrial Strategy* prioritised innovation, international partnerships, and secure supply chains, overseeing key acquisitions like Leopard 2A7 tanks, ocean patrol vessels and the F-35 fighters (Forsvaret 2022b). Also in 2021, Denmark's Ministry of Defence launched a tender for advanced surveillance drones worth €174.2 million, but procurement was delayed by three rounds of bidding, a calculation error and legal disputes. These issues have postponed the delivery of JUMP-20 drones until at least 2026, leaving the army reliant on outdated Puma drones. Resolving this bottleneck is critical for modernisation of Denmark's 1st Brigade (Lomholt 2025). In January 2022 Denmark reinforced NATO's Baltic presence by deploying the frigate *Peter Willemoes* to SNMG1, four F-16 jets for Baltic Air Policing, and 160 soldiers – including 14 Leopard 2A7 tanks and support units – to NATO's eFP in Estonia, responding to escalating Russian threats near Ukraine (Forsvaret 2022c).

The outbreak of Russian war in Ukraine in February 2022 prompted a significant shift in Danish security policy. Denmark allocated €940 million for defence over 2022–23 to address regional threats (Ritzau 2022c). It launched its largest deployment in 23 years, sending 750 soldiers, hundreds of vehicles, and equipment to Latvia under NATO command, operational by May. The deployment included a surveillance aircraft, a frigate and mobile air defence radar systems (Ritzau 2022b). Denmark also sent 14 upgraded Leopard 2A7 tanks to Estonia, marking its first tank deployment abroad since 2003 (Ritzau 2022a). In April Denmark strengthened NATO logistics by hosting the *ARC Endurance* at Esbjerg, facilitating the transport of US armoured vehicles to Poland with Danish security and logistics support (Forsvaret 2022f). In May, the frigate *Niels Juel* completed Denmark's first SM-2 missile test, enhancing Iver Huitfeldt-class frigates' long-range air and missile defence capabilities (Forsvaret 2022e).

In June 2022 a Russian warship violated Danish waters during the Folkemødet democracy festival on Bornholm, highlighting rising Baltic tensions and Denmark's assertive security posture (Reuters 2022). Later that month a referendum saw 66.9% vote to abolish Denmark's EU defence opt-out, reflecting a shift toward EU security integration. Pre-referendum surveys showed 55% support, indicating growing public concern (Schaart 2022). In September the Nord Stream pipeline explosions near Bornholm brought the war closer to Denmark. In response, Danish Defence deployed an F-16 interceptor unit, the frigate *Absalon*, the pollution control vessel *Gunnar Thorson*, a patrol ship and helicopter support to secure exclusion zones and ensure safety (Forsvaret 2022d).

In April 2023 Denmark approved a €4.7 billion defence plan for 2024–28, aiming to meet NATO's 2% GDP target by 2030. The plan includes investments in short-range air defence systems, Arctic and North Atlantic drones, close air defence missiles, torpedoes for navy frigates and Sea Hawk helicopters, and enhanced logistics. However, already by late 2023, Prime Minister Mette Frederiksen acknowledged that escalating security threats necessitated revising the plan (The Watch 2024; Hall 2024). In December 2023 Denmark and the US finalised a Defence Cooperation Agreement granting US forces access to air bases at Karup, Skrydstrup and Aalborg, strengthening NATO's European defence posture and bilateral security ties (Forsvaret 2023). Headquarters Multinational Division North (MND N), based in Denmark and Latvia, achieved NATO certification in 2023, enhancing scalable crisis response and full-scale defence capabilities in the Baltic region (Forsvaret 2022a).

The neglected territorial defence approach prompted Denmark to re-evaluate threat perceptions, focusing on Russia's hybrid tactics (Lucas et al. 2023). By 2023 Denmark had 15,500 active soldiers, 44,200 reservists, 44 main battle tanks, 44 infantry fighting vehicles, 50 artillery units, 50 fighter jets and 17 helicopters, 5 major ships and 12 other surface vehicles (Polyakova et al. 2023). Nevertheless, General Henrik Lyhne reported severe military understaffing, with the 1st Brigade 1,000 soldiers short of its 4,000 target. NATO identified a 'critical deficit of combat capability', with Denmark meeting only 3 of 17 strength targets, and demanding urgent investment (Haw 2023). To address this, Denmark plans to expand conscription to increase numbers, to extend service duration, and to include women and citizens of Greenland and the Faroe Islands (Ritzau 2023). Defence Minister Troels Lund Poulsen proposed revisiting the €20.1 billion 2024–33 military budget to counter potential NATO threats (Ritzau 2024). In January 2024 a partial Defence Agreement allocated €2.15 billion for equipment, recruitment and retention, adding €655 million to the budget through 2029. By April a second agreement had raised the framework to €25.5 billion, fast-tracking investments in the 1st Brigade, air defence and naval capabilities. It also introduced 11-month conscription with gender parity, targeting 5,000 conscripts annually (Forsvarsministeriet 2024). In 2024 Denmark, as chair of the Nordic Defence Cooperation, signed the Nordic Defence Concept and Vision 2030 framework, prioritising its implementation.

In 2024 Denmark contracted Rheinmetall to deliver 16 Skyranger 30 air defence turrets for integration into 8x8 vehicles by 2026, bolstering brigade air defence (Manuel 2024b). A €1.35 billion deal with BAE Systems Hägglunds secured 115 CV90 combat vehicles under a 15-year maintenance framework. Joint procurement

with Sweden provided 205 CV90s, allocating 115 to Denmark, 50 to Sweden and 40 to Ukraine, replenishing stocks after Danish donations to Ukraine (Defence Industry Europe 2024; AFP 2024). Denmark also awarded Flensburger Fahrzeugbau a contract for Wisent 2 armoured support vehicles for the 1st Brigade, with recovery and engineering variants based on the Leopard 2A7 platform. A loan agreement with Canada facilitates training on similar vehicles (Manuel 2024a). After delays, Denmark received three additional F-35 Joint Strike Fighters in January 2025,³ bringing its fleet to 11, as part of an order for 27. The F-35s will replace aging F-16s, which are to be phased out by 2027 (Ruitenberg 2025). Notably, 2024 was the year Denmark reached NATO's 2% defence spending target – six years ahead of its original timeline, though later than most Allies (Szymański and Tarociński 2024).

Denmark's defence industry

Denmark maintains a small but technologically advanced defence industry focused on niche capabilities. Key firms – Terma (aerospace and radar), Weibel Scientific (Doppler radar), and Systematic (defence software) – supply high-value systems integrated into NATO operations (Terma 2025; Systematic 2025; Weibel 2024).

The first quarter of 2025 marked a significant deepening of Nordic defence cooperation, driven by the continued war in Ukraine and growing uncertainty over transatlantic cohesion – factors that have raised renewed concerns about the credibility of NATO's Article 5. In February 2025 Denmark and Norway issued a joint declaration to substantially enhance bilateral defence cooperation. As Arctic nations and NATO Allies, both countries reaffirmed their shared responsibility for security in the High North and North Atlantic, committing to increased defence investment and full-spectrum operational coordination. The initiative aims to deliver concrete proposals by May 2025, focusing on joint training, multi-domain operational cooperation, expanded defence-industrial integration, and sustained support to Ukraine (Regjeringen 2025). In March, Denmark and Finland reinforced this momentum by signing a Memorandum of Understanding on expanded bilateral defence collaboration. The agreement strengthens NATO's posture in the Nordic–Baltic region, with an emphasis on enhanced maritime coordination, particularly the protection of critical infrastructure in the Baltic Sea. The two countries committed to scaling up joint exercises under NATO, NORDEFCO and the Joint Expeditionary

Force, while deepening cooperation on F-35 operations – including joint training, personnel exchanges, and industry collaboration for maintenance and sustainment. The agreement also outlines plans for coordinated defence acquisitions, improving interoperability and accelerating capability delivery across the Nordic force structure (Forsvarsministeriet 2025b).

SOCIETAL RESILIENCE

As the war in Ukraine continued, societal fears in Denmark escalated, with 49% of respondents in 2023 concerned about the conflict spreading, rising to 62% in 2024. By late 2024, 85% expressed fears for their personal safety, a dramatic shift in public sentiment (Rothen 2024; Eurobarometer 2024).

In June 2024 the Danish National Emergency Management Agency issued new guidelines urging citizens to stockpile essentials such as food, water, medicines, and iodine tablets to ensure at least three days of self-sufficiency. The guidelines emphasised the importance of household preparedness in supporting national resilience during emergencies, stressing that if individuals can manage on their own for 72 hours, authorities can better focus their efforts on the most vulnerable and stabilise the situation more effectively (Wass 2024). Denmark also established the Ministry for Civil Security and Preparedness in August 2024, appointing Torsten Schack Pedersen as its first minister. The ministry focuses on cybersecurity, infrastructure protection and climate resilience, aiming to bolster national preparedness amid escalating geopolitical tensions (Lex 2024). In March 2025 the Ministry expanded its civil contingency efforts through a cooperation agreement with Finland on emergency preparedness and the protection of critical infrastructure (Forsvarsministeriet 2025b).

Denmark maintains a network of shelters and bunkers designed to protect its population in emergencies. As of 2024, the Danish Emergency Management Agency reported that there are approximately 3.6 million shelter spaces available, covering about 61% of the country's population. However, most are World War II-era structures or basement-level 'safe rooms', many sealed, repurposed, or degraded after decades without maintenance. Funding for upkeep was largely abandoned in the 2000s, and responsibility now rests with municipalities. Significant investment is required to restore functionality (Barrett 2024).

Generally, Denmark lacks a formalised public education programme on war and emergency preparedness. While the government has taken steps to improve individual readiness, accessible educational initiatives – such as a standardised curriculum or structured day courses – remain insufficient. As security concerns escalate, addressing this gap is critical to strengthening national resilience and reinforcing public confidence in preparedness measures.



Details with the uniform and flag of German soldiers, 2018.
Photo: MoiraM / Alamy Stock Photo.

GERMANY

The Bundeswehr, the present-day German army founded in 1955, was well-integrated into broader NATO structures from the start and focused primarily on defence and deterrence against Soviet aggression in divided Cold War Europe (Bundeswehr n.d.-b). Following German reunification in 1990 and its merger with the former East German National People's Army, the Bundeswehr was restructured and downsized. The troop count fell from 585,000 soldiers and 215,000 reservists in 1990 to 177,000 soldiers and 87,000 reservists by 2016, while cuts also affected military equipment and infrastructure (Chadwick and Kroet 2016). The military's role shifted from territorial defence to international crisis management and peacekeeping. Between the early 1990s and early 2000s the Bundeswehr participated in missions in Bosnia and Herzegovina and Kosovo under UN and NATO mandates, followed by NATO's mission to Afghanistan (2001–2014), and a number of missions in African countries

(Bundeswehr n.d.-c). Participation in international missions sparked significant public and political debate in Germany at the time, as Germany's Basic Law established on 23 May 1949 defined the Bundeswehr's role as defensive. In 1994 the Federal Constitutional Court ruled that deployments beyond NATO were permissible under collective security frameworks like the UN, but required Bundestag approval, reinforcing the Bundeswehr as a parliamentary army. This was formalised in the 2005 Parliamentary Participation Act, which remains the legal basis for Germany's military deployments since (Bundeswehr n.d.-a).

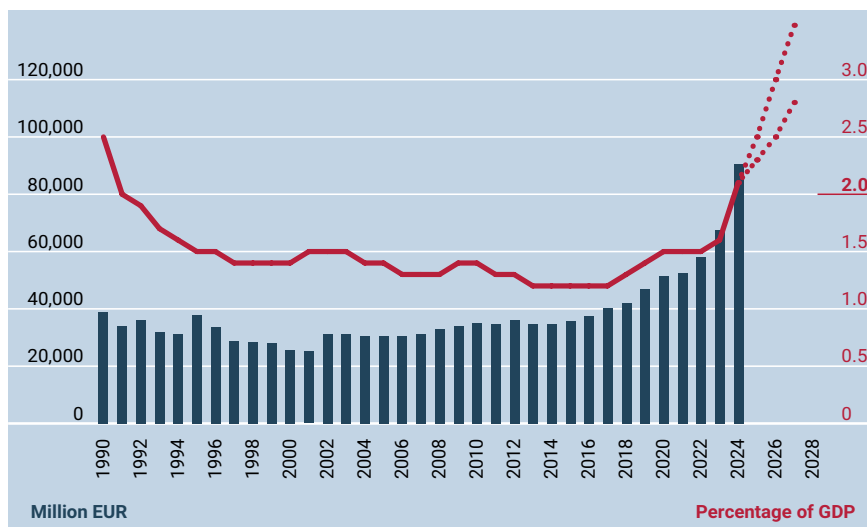
Germany's postwar strategic culture was profoundly shaped by the legacy of World War II and the Holocaust, fostering a deep aversion to military assertiveness and strong public preference for diplomacy, multilateralism and civilian power. Defence policy was framed around restraint, with the Bundeswehr embedded in NATO structures and governed by strict civilian oversight. Unlike other major European powers, Germany refrained from assuming leadership roles in regional security and was cautious in deploying troops abroad – reflecting both political norms and societal hesitations that persisted into the 21st century.

In 2011 Germany suspended compulsory military service, which had been in place since 1956. The suspension applied only in peacetime, allowing conscription to be reinstated in crises (German History 2025). The Bundeswehr then transitioned to a volunteer-based military, offering enlistments of 7 to 23 months for both men and women.

GERMANY'S DEFENCE POLICY POST-2014

By 2014 Germany's defence posture faced renewed scrutiny as geopolitical tensions in Europe escalated, particularly following Russia's annexation of Crimea. However, the changing geopolitical situation did not have significant impact on the German military sector. Berlin's defence spending only grew marginally from 1.2% of GDP in 2014 to 1.5% in 2021, significantly below NATO's 2% target (see Figure 4). Lack of additional funds was reflected in the stable numbers of German military personnel, which increased slightly from approximately 179,000 in 2014 to 184,000 in 2021 (NATO 2024). Despite growing threats from Russia, Germany prioritised diplomacy and deterrence over military buildup. Berlin also maintained economic ties with Russia, notably through the Nord Stream 2 pipeline project developed in the 2010s.

Figure 4. Defence spending in million EUR and as a percentage of GDP



Source: Dataset compiled by Slakaityte 2025d.

Since 2017 Germany has led the NATO battlegroup in Lithuania under the Enhanced Forward Presence (eFP) framework, established at the 2016 Warsaw Summit to strengthen deterrence in Eastern Europe following Russia's 2014 annexation of Crimea (NATO n.d.). Berlin also contributes to NATO's Very High Readiness Joint Task Force (VJTF), a rapid reaction force formed at the 2014 Wales Summit for swift crisis deployment. Furthermore, Germany hosts the NATO Joint Support and Enabling Command (JSEC) in Ulm. Established after the 2018 NATO Summit and declared fully operational in 2021, JSEC is responsible for coordinating and securing the rapid movement of Allied reinforcements across Europe during times of crisis.

While Berlin committed to leading the NATO battlegroup in Lithuania and contributing to the VJTF, its ability to sustain these roles was limited by its domestic force posture. Germany's domestic defence apparatus was plagued by structural weaknesses and chronic underfunding. The 2016 'White Paper on German Security Policy and the Future of the Bundeswehr' acknowledged critical gaps in operational readiness, underfunding and slow modernisation efforts (The Federal Government 2016). It also highlighted procurement inefficiencies, equipment delays and cyber vulnerabilities while calling for better-equipped, deployable forces and a stronger German role in NATO and EU security. Subsequent reports highlighted persistent issues, including the limited availability of operational tanks, aircraft and naval vessels (Allison 2018). It was reported in 2018 that German military had access to

less than half of many of its major weapon systems (DW News 2018). A December 2021 report on the state of the Bundeswehr revealed that many of the fighter aircraft were unfit to fly, fewer than 30% of naval ships were fully operational, and only 40 out of 350 Puma combat vehicles were 'fit for war' (The Economic Times 2022).

These systemic deficiencies, shaped by years of underinvestment and a sustained focus on expeditionary operations, left the Bundeswehr ill-prepared for high-intensity collective defence in the European theatre. Despite these shortcomings, it was not until 2022 that Germany's defence policy truly shifted.

MILITARY SECTOR TRANSFORMATION: MODERNISATION, DEFENCE SPENDING AND PERSONNEL

While Germany has consistently fallen short of NATO's 2% target over the last decade, it achieved the goal for the first time in 2024, reaching an estimated 2.1% of GDP. In 2024 defence spending surpassed €90 billion — more than double the amount in 2014 (see Figure 4). This milestone was made possible due to *Zeitenwende*, a historic shift in Germany's foreign and defence policy declared by German Chancellor Olaf Scholz after the Russian invasion of Ukraine in February 2022 (Bundesregierung 2022a). *Zeitenwende* was meant to reshape Germany's alliances and signal a departure from its traditionally restrained military and defence posture since World War II. As such, it marked a commitment to increased military spending with the goal of meeting NATO's 2% GDP defence spending target (Bundesregierung 2022b) that included a €100 billion special fund to modernise the Bundeswehr, which supplements the Defence Ministry's budget through the end of the current legislative period (O'Neal 2024).

However, according to a 2022 analysis by the German Economic Institute, Germany was projected to fall €9.7 billion short of the 2% defence spending target by 2026 and €39 billion short by 2027 if the €100 billion special fund was depleted. This could lead to the share of GDP spent on defence dropping to 1.8% in 2026 and 1.2% in 2027 (Bardt and Röhl 2022). The fund was expected to be fully committed before 2028 as it finances key projects like the procurement of F-35 fighter jets and transport helicopters (Heiming 2024). Moreover, due to rising interest rates, the available amount in the fund has been already reduced to approximately €87 billion. Recognising this challenge, in December 2024 German Defence Minister Boris Pistorius stressed that an annual €80 billion defence budget would be needed from 2028 to ensure adequate long-term spending (Goury-Laffont 2024).

In March 2025 Germany approved a significant increase in defence spending by amending its constitution to exempt military expenditure above 1% of GDP from the national debt brake. The move – endorsed by both government and opposition parties – permits expanded borrowing and signals a rare political consensus on the need to strengthen Germany's defence posture amid escalating security concerns (Marsh and Williams 2025). While the reform is a crucial step toward meeting NATO's 2% GDP target, fiscal sustainability and structural challenges within the Bundeswehr could temper the long-term impact of increased funding. Not unexpectedly, Berlin rejected the US proposal to raise defence spending further – to 5% of GDP (DW News 2025).

Beyond fiscal adjustments, strengthening the Bundeswehr's personnel base has also become a pressing priority. Germany's military personnel numbers, which have not seen significant increases over the years, are now expected to grow. According to NATO estimates the troop count reached approximately 185,600 in 2024 (NATO 2024), with a target of 203,000 soldiers by 2031 (Army Technology 2024). Amid opposition to reinstating conscription, Germany is reforming its voluntary military service. In November 2024 the government approved a digital survey targeting 300,000 18-year-old men annually to assess interest in military service, while women may participate voluntarily. The initiative aims to enhance recruitment and expand the reservist pool (Marsh 2024). Doubts remain over the Bundeswehr's ability to grow by 18,000 within a decade, given Germany's demographics and the annual loss of 20,000 personnel. Meeting the 2031 target necessitates nearly 22,000 new recruits annually (Gebauer and Hammerstein 2023).

Since Russia's invasion of Ukraine Germany has also undertaken more decisive steps to modernise its military equipment. In December 2022 it approved the procurement of 35 F-35A Lightning II jets to replace its aging Tornado bomber fleet. The Lockheed Martin-manufactured aircraft are scheduled for delivery in 2027–29 (AP News 2022). Also in December 2022, Germany, Sweden and the United Kingdom jointly agreed to purchase 436 BvS10 all-terrain vehicles from BAE Systems, with 140 units allocated to Germany (BAE Systems 2022). Subsequently, in April 2023, Germany ordered an additional 227 BvS10 vehicles, bringing its total to 367 units, with deliveries scheduled from 2024 through 2030 (BAE Systems 2023a). Other key acquisitions include 105 Leopard 2 A8 tanks, 200,000 artillery shells, and four Patriot air defence systems, approved in July 2024 as part of a €6 billion defence package (Martinez 2024).

In December 2024 the government authorised a €20 billion equipment package covering four submarines, a new frigate, Patriot missile defences, and rocket artillery, along with investments in cybersecurity (The Defense Post 2024). Germany also procured five P-8 Poseidon maritime patrol aircraft to enhance surveillance and strike capabilities in the Baltic and North Sea (Meier 2025). In January 2025, German lawmakers greenlit an additional €2.5 billion for defence, including a €1.8 billion military communication system, €417 million in infantry supplies, and €100 million for anti-tank weapons (Reuters 2025a).

Despite increased funding, Bundeswehr readiness remained uneven across service branches as of 2022–23. The Air Force faced spare part shortages and low availability of key aircraft such as the A400M and CH-53. Naval forces operated advanced platforms but struggled with maintenance delays, while the Army – though modernising its vehicles and artillery – lacked critical enablers such as strategic lift, logistics, and secure communications. No brigade was considered fully equipped for sustained combat deployment without significant preparation time. Under short-notice readiness scenarios, only a small number of light and airmobile battalions were deemed capable of rapid deployment (Engström 2024).

In March 2024 Eva Hoegl, the Parliament Commissioner for the Armed Forces, highlighted that despite an increased defence budget, the Bundeswehr still faced critical shortages in ammunition, spare parts, radio equipment and essential personnel, as well as tanks, ships and aircraft necessary for maintaining military readiness (Saballa 2024), leaving key defence systems often well below early 2000s levels (Wolff et al. 2024). The situation is compounded by aging infrastructure and the slow pace of procurement, as complex regulations and bureaucratic hurdles often slow down the acquisition of essential military equipment. The Procurement Acceleration Act, introduced in March 2023, aims to expedite military procurement contracts (Bundesregierung 2022c). Moreover, Germany's military procurement remains slow despite increased spending, also partly because funds are frequently used to replace equipment sent to Ukraine rather than to expand Bundeswehr capacities. After initially hesitating to send military support to Ukraine, including heavy weapons like tanks (e.g. Leopard 2 tanks) and advanced artillery, Berlin changed its stance and began delivering military equipment, including air defence systems (e.g. IRIS-T), as the situation in Ukraine worsened.

German defence industry

Germany's defence industry is one of Europe's largest and a key pillar of NATO's procurement base. If procurement processes are improved and production scaled, German industry could play a central role in expanding Europe's ammunition stockpiles, vehicle fleets, and sensor systems in the coming years. Rheinmetall leads in ground systems and ammunition, producing key assets like the Leopard 2 tank upgrades, the Lynx infantry fighting vehicle, and 155mm artillery shells (Rheinmetall 2025). Hensoldt is a major player in radar and sensor technologies, while Diehl Defence is best known for its IRIS-T air defence systems (Diehl Stiftung & Co 2025; Hensoldt 2025b). Thyssenkrupp Marine Systems remains a top naval builder, supplying advanced submarines and surface vessels (Thyssenkrupp 2025). Airbus Defence and Space – a multinational company with significant German involvement – contributes to transport aircraft, satellites and the Eurofighter programme, while Krauss-Maffei Wegmann manufactures heavy armour systems, including the PzH 2000 howitzer (KNDS Deutschland n.d.; Airbus 2025b).

Following the Russian invasion of Ukraine in February 2022 Berlin also signalled its intention to place greater emphasis on territorial defence and take a more active role in EU and NATO collective security efforts.

In 2022 Germany launched the European Sky Shield Initiative, which now includes over 20 NATO countries working to establish a layered missile and air defence system using platforms such as IRIS-T, Patriot and the Israeli Arrow-3 (Hensoldt 2025a). Germany also reaffirmed its leadership role in the Future Combat Air System project alongside France and Spain, aimed at developing a next-generation air combat platform, including a new fighter jet, autonomous drones and a secure combat cloud, with a demonstrator planned for the late 2020s (Airbus 2025a).

In response to the ongoing war in Ukraine, Germany has also pledged to increase its military presence in Lithuania, including additional troops, enhancement of infrastructure as well as capabilities of the forces stationed there. However, whereas the NATO battle group in Lithuania has been boosted to over 1,000 soldiers post-2022, Bundeswehr encountered issues with sending artillery units to Lithuania (Gebauer and Hammerstein 2023).

A 2022 deployment of just 350 soldiers and 130 vehicles already strained the Bundeswehr's logistics, as limited rail capacity continues to hamper Germany's ability to move forces and heavy equipment, including artillery, to the eastern flank at scale (Engström 2024).

Germany has committed to being able to mobilise a mechanised division by the beginning of 2025, an airmobile infantry brigade by 2026, and a second operational division by 2027 (Gebauer and Hammerstein 2023). However, as of February 2025, internal assessments revealed that the Bundeswehr's battle-readiness had dropped to around 50%, down from 65% in early 2022. This decline has raised serious doubts about Germany's ability to meet its NATO pledge to provide a fully operational division by 2025 and a second by 2027 (Siebold 2025).

The German armed forces is simplifying its chain of command with a single operational leadership centre and establishing cyber and IT military branches on a par with other forces (Alipour 2024). These changes are meant to improve command efficiency, enhance Germany's cybersecurity and digital capabilities, and enable faster responses to emerging threats.

SOCIETAL RESILIENCE

As of autumn 2024, 76% of Germans viewed Russia as a national security threat. Support for stronger EU defence was high, with 72% favouring increased military production, 68% backing higher defence spending, and 85% advocating greater military cooperation (Eurobarometer 2024). A concurrent Koerber-Stiftung survey found that while a majority of Germans support increased defence spending, 57% oppose cutting social programmes to fund it. Additionally, 65% of respondents did not support Germany taking on a military leadership role in Europe (Körber-Stiftung 2024). A spring 2024 survey found that only 32% of Germans would actively participate in defensive combat operations, while 75% lacked confidence in the Bundeswehr's ability to protect Germany (Vandiver 2024).

In May 2022 the Federal Office of Civil Protection and Disaster Assistance (BBK) published the *Disasters Alarm* brochure, which guides citizens on emergency preparedness, including stockpiling supplies, creating plans, and responding to threats like severe weather, fires, floods and hazardous substances. The brochure emphasises the importance of personal preparedness and self-reliance, noting that

in large-scale disasters, emergency services may not be immediately available, thus citizens are encouraged to familiarise themselves with local communication channels to receive timely instructions from authorities during a crisis (The Federal Office of Civil Protection and Disaster Assistance 2022).

Germany is also developing a phone app with a digital directory of emergency shelters, including bunkers, underground train stations, car parks, state buildings and private properties. The app will help people locate shelters quickly, while citizens will also be encouraged to convert basements and garages into protective spaces (The Guardian 2024). However, as of 2025 Germany does not have sufficient civil defence infrastructure in the event of a large-scale conflict, including bunkers and shelters. Of the 2,000 Cold War-era bunkers, approximately 579 could still be used as public shelters, but they can only accommodate about 478,000 people, or 0.56% of the population (Cole 2024). And even these bunkers have been out of use and unmaintained since the federal government abandoned the previous shelter system in 2007. The German Association of Towns and Municipalities has recommended that the government spend €10 billion over the next decade to revive the Cold War-era bunkers and develop modern shelters (Knight 2024). Protecting Germany's 85 million citizens would require 210,000 larger bunkers, costing €140.2 billion and taking 25 years to complete. While a new bunker concept is in the early planning, some argue that home shelters are a more viable long-term solution given the minimal warning time of modern precision weapons (Cole 2024).

In July 2022 the federal government enacted the 'German Strategy for Strengthening Resilience to Disasters', aiming to enhance cooperation among federal, state and local authorities to improve crisis resilience. In February 2023 Germany also launched the Cell Broadcast warning system, allowing authorities to send real-time alerts to mobile phones in specific geographical areas. Complementing sirens and digital platforms, it enhances emergency communication for natural disasters and other crises (Euro Security 2024).

CONCLUSION

The Baltic Sea region is undergoing a profound strategic shift, marked by a decisive move toward deterrence, territorial defence and deeper NATO integration in response to growing geopolitical instability. The accession of Sweden and Finland to NATO constitutes a historic transformation in the region's security architecture. Their inclusion closes a critical geographic gap, effectively turning the Baltic Sea into a 'NATO lake' and complicating the Russian operational calculus. Finland brings a 1,340 km border with Russia, a formidable artillery force and a well-entrenched territorial defence model. Sweden, through its control of Gotland, offers enhanced maritime domain awareness and strategic depth in the central part of the Baltic Sea. Both nations contribute advanced capabilities, modernised militaries and highly developed civil preparedness infrastructures. Their accession also enables deeper Nordic defence integration across air, maritime and logistical domains. However, the full realisation of their integration into NATO's operational planning, command structures and force posture will take time, which will require continued coordination and institutional adaptation.

Russia's full-scale invasion of Ukraine in 2022 further catalysed urgency across the region to close lingering capability gaps, strengthen national resilience, and reverse decades of underinvestment. All four countries examined in this report – Finland, Sweden, Denmark, and Germany – have significantly increased defence spending in response. Finland is on track to surpass 3% of GDP, while Sweden aims for 2.6% by 2028. Denmark reached the 2% benchmark ahead of schedule and Germany has committed to meeting the NATO target through its €100 billion *Zeitenwende* fund, with both states hitting the 2% target in 2024. These fiscal shifts reflect a shared recognition of elevated threat perceptions and the need for long-term investment to rebuild credible force structures.

Despite increased spending, all four countries face serious structural and industrial bottlenecks that hinder the rapid translation of budgets into operational capabilities. Finland, starting from a position of high readiness and strong domestic production, has focused on border defence and acquisition of platforms such as F-35s, CV90s and K9 howitzers. Sweden is rebuilding from a post-Cold War nadir – remilitarising Gotland, reintroducing conscription and investing in next-generation systems. Denmark is pivoting from an expeditionary to a territorial model, but continues to face constraints in manpower, procurement processes, and readiness. Germany, despite its size, economic weight and large budget in absolute terms, is encumbered by legacy systems, low readiness, and procurement inefficiencies. *Zeitenwende* has unlocked funding but industrial inertia, supply chain dependencies, and munitions shortages continue to undermine progress.

These national challenges are compounded by a broader European defence landscape that remains fragmented and inefficient. Europe's 172 distinct weapons systems contrast sharply with the US's 32, driving up costs, complicating logistics, and impeding interoperability. The lack of standardisation slows joint procurement, multiplies maintenance demands, and weakens NATO's capacity to sustain high-intensity operations. Germany's large but slow-moving defence industry stands in contrast to the smaller, more agile ecosystems of Finland, Sweden and Denmark – each operating at limited scale, with niche capabilities and growing interoperability needs. Without coordinated approaches – especially in air defence, missile systems and armoured platforms – national efforts risk being siloed, duplicative and overly reliant on external suppliers.

Civil preparedness presents another critical axis of differentiation. Finland and Sweden offer deeply institutionalised 'total defence' models, integrating civil and military planning and fostering high public resilience. Finland's shelter infrastructure covers 90% of the population and is backed by public training and trust. Sweden has modernised shelters for 85% of the population, invested significantly in civil defence, and established dedicated agencies to address hybrid threats. Denmark, historically underinvested in civil preparedness, began reversing course in 2024 by establishing a Ministry for Civil Security and Preparedness and initiating infrastructure upgrades. Germany remains the most vulnerable, with shelter coverage below 1% and nascent social preparedness initiatives, constrained by funding, implementation, and lack of public trust. Strengthening civil preparedness across the region will be vital not only for resilience in crisis but also for sustaining defence commitments politically and socially. Societal resilience must become a central pillar of national defence planning. While Finland's and Sweden's models cannot be replicated wholesale, their core

elements – such as civil training, shelter infrastructure, disinformation preparedness, and public engagement – can and should be adapted across the region. These models demonstrate that defence credibility rests not only on military hardware but on institutional trust, national unity and the capacity of societies to endure and respond to crises.

The scale of this rearmament brings inevitable trade-offs. In Denmark and Germany, rising defence budgets compete with social spending, generating political friction. In all four countries, the pace of expansion risks outstripping institutional absorption capacity. Procurement bottlenecks, strained stockpiles and overreliance on external suppliers remain unresolved. National industrial policies sometimes clash with NATO-wide integration efforts, particularly as countries seek to retain production sovereignty while contributing to collective deterrence. Meanwhile, ongoing support to Ukraine and forward deployments stretch limited resources, raising questions about long-term sustainability and regeneration capacity at home.

Looking ahead, the Baltic Sea region stands at the forefront of Europe's defence recalibration. Sustaining momentum will require more than high spending. It will demand strategic reforms to procurement systems, expansion of industrial capacity, and new models of joint planning and production. NATO and EU frameworks must work in tandem to facilitate coordination in logistics, air defence, and training to reduce duplication and enhance interoperability. Regional cooperation structures – such as NORDEFCO and the Joint Expeditionary Force – should be leveraged to deepen integration and operational coherence beyond the NATO core. Sustained readiness will also hinge on NATO's ability to operationalise national capabilities at speed—through integrated logistics, pre-positioning, and theatre-level command planning. Without this, even well-funded forces risk being fragmented in a crisis. These efforts are also essential to reinforcing the security of the Baltic States, whose defence remains a cornerstone of NATO's eastern posture.

Manpower and demographic pressures also pose a looming challenge. Germany's voluntary recruitment continues to fall short, while Sweden has only recently begun to rebuild personnel strength through selective conscription. Unless addressed through creative force-generation policies and long-term planning, shrinking youth cohorts will constrain defence ambitions and readiness levels in all four countries.

Together, Finland, Sweden, Denmark and Germany now form the backbone of NATO's northern flank. They are not just adjusting to a new strategic reality – they are helping to shape it. But moving from posture to capability, and from capability to

credibility requires more than declarations. It will require scale, speed and staying power. As the regional security environment deteriorates further, success will depend not only on sustained investment, but on aligning institutions, industries and societies to deliver credible deterrence at speed and scale.

To translate strategic ambition into sustained readiness, four areas of policy action should now take priority. First, national procurement frameworks must be overhauled to streamline decision-making, reduce delivery timelines, and enable joint purchasing across the region – particularly for high-demand systems such as air defence, artillery and munitions. Second, the Baltic region would benefit from integrated logistics and sustainment hubs – coordinated through existing frameworks such as NATO and NORDEFCO – to enhance forward deployment and interoperability. Third, governments should institutionalise civil preparedness by embedding total defence principles into national education, municipal planning and crisis communications. Fourth, personnel generation requires structural innovation – whether through hybrid conscription models, incentives for skilled recruits, or regional exchange programmes to pool training capacity. Together, these measures can anchor rearmament efforts in durable institutional frameworks, ensuring that short-term investments yield lasting strategic effect.

NOTES

- 1 All values were converted using generative AI provided by OpenAI. Exchange rates were based on publicly available information and are subject to fluctuation over time.
- 2 Subsequently updated in 2006, 2010 and 2017.
- 3 Denmark's first F-35A was unveiled in 2021 and stationed at Luke Air Force Base, Arizona for pilot training. The Royal Danish Air Force is set to receive 27 F-35As by 2027 to replace its aging F-16AM/BM fleet (Lockheed Martin 2023; Jennings 2023).

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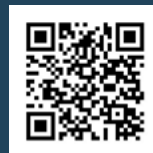
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