

| Security environment 2021-2030

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INSTITUTE
150-year think tank
for DEFENCE



UCLouvain

June 2021



DEFENCE

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Summary

Since the 2016 Strategic Vision, the security environment has steadily deteriorated, both on a systemic and a regional level, confirming the volatility of the contemporary strategic context. This requires going beyond individual and one-off events to identify, understand and analyse medium-term trends.

To have a safe and secure Belgium means the absence of war or violent conflict, or of any other threats to Belgium's very existence and its vital and strategic interests. Contrary to popular belief, these kinds of threats have not been eliminated from our security environment. The system of defence alliances and the increasingly conflictual relations between the great powers in contemporary global politics make politico-military security not only relevant but truly vital to take into account. The threat of interstate war, including on a global level, is real and is the result of multiple interrelated factors.

Yet this understanding of security, while fundamental, is too narrow to fully understand and grasp what security really is or the forms that threats to security can take. The structural forces that shape our international environment pose challenges to our security in many different forms and degrees of magnitude. Our security as a country is linked to a stable and prosperous economy, stable and functioning political institutions, a cohesive and unified society and a stable and unthreatening environment, among others. With the significant decrease in inter-state conflicts since the 1990s, and the increase in non-traditional threats to security, our attention has gradually broadened to other types of security issues. These are often transnational in nature and are defined in political or socio-economic terms. Some events or phenomena cause political or social instability, thereby becoming security threats (climate change, scarcity of resources) and affecting the population on an individual and on a societal level. In effect, we have moved beyond a sectoral or narrow understanding of security and now acknowledge that security is cross-sectoral, in that a threat to one sector can spread to other sectors; security cannot be isolated at a single level.

This dual perspective on security, with traditional and non-traditional issues forming our security environment, will be the key to securing Belgium in the next decade and to preparing for both known and unknown threats. In tackling these questions, we aim to reach a level of preparedness that is commensurate with the multiple threats facing the Belgian State and its citizens. We can also seek to protect individuals or social groups from harm and to protect what we value and consider essential as Belgians, be it material (such as our economy or our energy infrastructures) or immaterial (such as our way of life or our political right to self-determination).

In this environment, the State and its Defence apparatus remain the ultimate provider and guarantor of security. Both the EU and the NATO treaties highlight the idea that *self-help* and *mutual assistance* go hand in hand. Since the provision of external security is the core business of the Armed Forces, and Belgium Defence's strategic vision is determined by and shaped to deal with the country's security environment, it is essential to have a comprehensive, precise and exact understanding of what our context is.

To this purpose, we review (1) the global structural forces, (2) the active contestation of the security space, (3) the risk of major power war and (4) different unstable regional environments. In the conclusion, we highlight the different priorities relevant for Belgian Defence, most notably the need to prepare for high intensity conflict, the threat of societal polarisation and the impact of disruptive technologies.

1. Global structural forces

Cross-sectoral trends are structuring the global security environment. These trends shape our strategic context by exacerbating and intensifying existing insecurities or by creating new ones. The COVID-19 pandemic has illustrated the disruptive nature of these structural forces and their impact on Belgium's security environment. They can only be tackled through collective action and cooperation with our partners and allies, which requires from Belgium awareness, engagement, investment and reliability in our security landscape.

These structural forces – environmental trends and climate change, demographics and migration, economic stability and prosperity, resources and energy, and disruptive technologies – will underlie our security environment for the decades to come. More so than their individual evolution, the *intersection* of these forces will have profound impact on our security environment. It is therefore vital that we comprehend and prepare for the full extent of these interactions. The **development of disruptive technologies** is reshaping all aspects of our everyday lives, increasing our resource and energy needs, underpinning and accelerating all other trends. Our **economic development and prosperity** depend on our direct environment and our ability to operate in a stable and predictable context. Yet **climate change and environmental degradations** erode human security and exacerbate existing conflicts, thereby provoking shocks to the international system, contributing to internal and international **migrations**. In turn, the **growing world population** requires more and more **resources and energy**, has a negative impact on climate change and is accelerating the climate crisis. The **risk of infectious diseases** and their global spread is accelerated by these two forces, yet it will be mitigated by technological developments. At the same time, securing our growing resource and energy needs and the fact that we are supporting the pace of technological development, can lead to environmental degradation, thereby deepening the climate crisis. Yet access to resources, energy and technologies are fundamental to our economic development and prosperity.

Environmental forces and climate change

The climate emergency poses a structural, even existential, danger, and erodes human security. Environmental degradations threaten the livelihood and way of life of populations all over the world, including in Europe. As a threat multiplier, climate change exacerbates existing vulnerabilities, including political instability, and has the potential to adversely affect the security environment and interests of Belgium domestically and abroad. Climate change will trigger national and international distributional conflicts and intensify problems that are already hard to manage such as state failure, the erosion of social order, and rising violence. Within Belgium, climate change impacts (with varying degrees of certainty) include, but are not limited to, heatwaves, the perturbation of ecosystems, the possible loss of forests, increased rainfall, rising sea levels, coastal erosion and flooding. The impacts of such changes extend well beyond the physical environment; they stretch across the Belgian economic, political, social and security landscape. Increased numbers of disaster events within Belgium, for example, will require disaster response planning that may entail the support of the armed forces. In a highly globalised world, the impacts of climate change can have knock-on effects that cross borders and even continents. Belgium is, therefore, exposed not only to the regional effects of a changing climate, but also to those materialising in neighbouring regions and in regions where Belgium has strategic or operational interests. Climate change impacts occurring outside of Europe, as well as the responses to those impacts, may cascade into Belgium and interact with major existing and future challenges facing Belgian society, such as energy security, socio-political tensions, polarisation, rising inequality, conflicts and changing security threats. If not accounted and prepared for, these may reverberate through security relations, international trade, financial markets, international aid and military operations as well as migration.

Expeditionary operations undertaken in climate vulnerable areas may be directly affected by the impacts of climate change (e.g. on equipment and technologies), and by the indirect impacts of climate change on local, national, and regional security threats (e.g., border disputes, tensions over energy supply, fragility and radicalisation). These impacts further destabilise fragile and overextended governance structures grappling with conflict, poverty, food insecurity, water shortages, and underdevelopment. The effects of climate change are also providing recruitment tools for jihadist groups, where climate variability, poverty, and insecurity make rural areas ripe for exploitation. Climate change, additionally, fuels competition over resources amongst natural-resource dependent livelihoods and ethnic groups, a security concern that extends well beyond the Sahel. Droughts and desertification, for example, is forcing pastoralists to change routes in search of pasture and access to water, which can lead to friction with host communities over scarce natural resources and eventually to violence.

With the ever-increasing consequences of the globalisation of trade, human mobility, deforestation, extensive agriculture, climate change, urbanisation, population density in limited space, migration, the number, frequency and diversity of pandemics and infectious diseases will continue to increase. Belgium, much like the rest of the world, is vulnerable and relatively unprepared for these natural biological threats. The effects on our daily lives, societies, public health, well-being, economic activities, human security and even our national security are significant, even with advances in research and biotechnology. The expert report of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES), released on 29 October 2020, points out that the current COVID-19 crisis, which originated in animal-borne pathogens, and previous global health pandemics all have one thing in common: their emergence is entirely due to human activities. Changes in land use, the expansion and intensification of agriculture and the trade and consumption of wildlife disrupt ecosystems, promote proximity between humans and wildlife, livestock and humans and thus with the pathogens they carry. The report warns that future pandemics will occur more often, spread faster, do more damage to the global economy and kill more people than COVID-19, unless the overall approach to fighting infectious diseases changes from reaction to prevention.

Resources and energy

Our economic prosperity is highly dependent on access to resources. Climate change and the energy transition towards renewable energy entail security risks that need to be tackled in order to guarantee our economic and trade stability. In the current landscape, renewable energy storage lacks capacity. Meanwhile countries are making commitments to lower their CO₂-emissions. As a result, many governments are changing their respective energy mixes. In the coming decade, conventional oil will diminish in terms of relative importance, provoking crises in the business models of traditional oil producers such as Middle Eastern countries, which will produce societal instability. Natural gas will grow in relative importance as a 'bridge fuel' towards a renewable energy future. In Europe, energy policies have made some countries more dependent on Russia (e.g., Germany). Energy diversification, a key competency of the federal government, remains essential for Belgium's geo-economic and geostrategic position. An additional source of alternative natural gas deposits is being discovered in the Eastern Mediterranean, leading in the horizon 2030 to crises among (extra-)regional powers over natural gas, involving countries such as Turkey, Greece, Cyprus, Israel, Russia, US, France, Italy and Iran. The electrification of transportation in the EU will change Europe's dependencies towards horizon 2030 and beyond. Scarcity and supply problems could emerge over key resources such as nickel, cobalt, copper, silver, scandium, lithium and rare earth materials. The fourth (technological) industrial revolution creates new dependencies on energy sources (renewables, batteries....), as well as on the raw materials that underpin their production. Whether for rare earths or other minerals (lithium, cobalt, coltan, for instance) but also for oil, coal, gas or renewables, increased global competition will have destabilizing effects in parts of Africa, Central Asia, the Middle East and Latin America. Exploration, and soon underwater exploitation (deep sea drilling) and outer space exploitation, will become central to economic and political competition with military assets. Tensions and wars over resources should be expected by 2030. The renewable energy future also entails dangers of Belgian dependence on foreign technologies – and on technologies from China in particular. Economic security and defence will merge even

more as horizon 2030 nears and the fundamental change of our energy mix and its geostrategic consequences become more evident.

Demographics and migration

Human development and demographic trends will shape our security environment. Growing poverty, discontent in socio-economic development, rapid urbanisation, ageing populations in developed countries, surging youth cohorts in developing countries that lack infrastructure or the job market to absorb them and growing socio-economic inequalities will cause instability and lead to insecurity, tensions, and migratory movements. The inability of the EU to design and implement effective migration management policies,¹ the new or increasing fragility of states in the coming decade, the failure to improve and maintain societal cohesion, and the use of migration as a discursive tool for polarisation are among the main threats that are caused by demographic forces. The relationship between migration and security is complex and indirect; however, two main dimensions can be identified: security in the region of origin as it pushes out-migration and displacement, and security issues in destinations that are fuelled by actual or perceived 'threats'. In the former, fragility beyond the borders of Belgium will threaten vital interests by increasing the risk of conflict. Conflict can then create the right conditions for terrorist groups, organised crime and mass migration. Although mass migration² will often then result in internal or cross-border movements, when entire regions are facing multiple and compounding threats including conflicts, weak livelihood opportunities for youth, poverty, the impacts of climate change, and unmanaged population growth, these flows can reach Belgian territory, particularly in the absence of coordinated EU migration management and border control.

Despite a decline in Mediterranean arrivals, there is little evidence that these migration flows act as a conduit for terrorists and extremists; yet the use of migration as a tool for polarisation within Belgium presents its own security threat. The perception that migrants are a security threat, from certain regions like Syria, Afghanistan, Libya, or the Sahel, can create domestic political tension and fuel xenophobic discourses. These, in turn, have a dual effect: first, it increases support for populist-nationalist movements, thereby contributing to social fragmentation and weakening of our democracy. Second, they contribute to coordinated or isolated anti-immigrant attacks, such as those seen in Christchurch, New Zealand. Therefore, rather than migration itself, the real threat to Belgian vital interests lies in polarisation around migration that threatens social cohesion and exacerbates extremist discourses. However, xenophobic discourses, discrimination, and attacks against immigrants can be leveraged by external extremist groups as recruitment tools among Belgian citizens of migrant backgrounds, expanding their international networks and creating terrorist cells on domestic soil.

Economic stability and prosperity

Securing our economic system and guaranteeing prosperity for the Belgian people is a core function of the State. Structural forces have both a direct and indirect effect on our economic stability and disrupt employment continuity. Our economic stability and prosperity are directly affected by and vulnerable to structural forces. The COVID-19 crisis has weakened economies worldwide; the decreasing trend of economic growth is well-documented by the IMF, the OECD or the EU³. It is expected that Belgium's GDP will recover by 2022/2023⁴, while other countries will recover much faster. Measured in USD at constant prices and Purchasing Power Parities (PPPs) of 2010 China already overtakes the US as largest economy in the world

¹ Belgium does not face the same migratory pressures as countries on the EU periphery (Italy, Greece, Spain), but the Schengen Zone's free movement protocol means that Belgium may still be affected by irregular migration to Europe's southern shores (even if most irregular migration results from overstaying of visas rather than irregular entry).

² Including mixed flows of more forced (refugees) and more voluntary movements (migrants)

³ OECD (2021), *Strengthening the recovery: the need for speed*, OECD Economic Outlook, Interim Report, March 2021; IMF (2021), *World Economic Outlook: Policy support and vaccines expected to lift activity*, January 2021; EC (2020), *European Economic Forecast: autumn 2020*, Institutional paper 136, November 2020.

⁴ NBB(2020), *Economische projecties voor België – najaar 2020*, *Economisch Tijdschrift*, 19 pp.

and India is expected to outperform the US in 2036⁵. As these Asian countries outpace Western growth in absolute terms, they will also obtain a larger share in the global economy. Hence, the upcoming years will be characterised by a shift of economic power towards Asia with major consequences for the balance of political and military power. This shift should be met with caution from Belgium, in particular in terms of foreign direct investments. Preserving openness while protecting our critical assets and strategic sectors is only possible by screening incoming FDI. Additionally, foreign countries obtain knowledge and technology by other means, e.g., research collaborations. Countries such as Russia and China use illegal means, among others economic espionage. As technology is an important driver for economic growth, the protection of scientific potential will come to play an increasingly fundamental role.

The rising government debt, deepened by COVID-19 economic recovery packages, will form a burden on our future generations and could expose them to rising interest rates that could impede economic growth in the longer term. The protectionist and nationalist increase in the economic policies worldwide risks hindering flows of goods, services, capital and people. Belgium's open and globalised economic and trade architecture makes the country vulnerable to these policies. In addition, given the structure of our export-oriented economy, the Sea Lines of Communications (SLOCs) will remain critical for world trade, since 80 to 90% of world trade will continue to be carried by sea. The incident of the container ship *Ever Given* (Evergreen) in March 2021 running aground in the Suez Canal and blocking maritime traffic is a useful reminder that our economies are dependent on the sea. In addition to this type of accidents, we need to account for the possibility of such deliberate disruptions in the future, in particular in narrow strategic passages for the world economy such as the Panama Canal, the Strait of Hormuz or parts of the Strait of Malacca. Technological developments such as autonomous military technology or mines will further make our economic system vulnerable in the near future. Finally, the expansion of powerful companies (GAFAnomics or BATXnomics⁶) will continue to reshape the architecture of the global economy and trade, further fragmenting the international trade environment.

Disruptive technologies

Running beneath these trends, technological developments are reshaping most aspects of our daily lives, providing both opportunities and threats to our security environment. Technological developments form opportunities that will help us tackle climate change, fight infectious diseases, or move towards renewable energy. Yet technology is also a disruptive force, creating new tensions and exacerbating existing ones. Global competition for resources and technological leadership will become fierce and will include military assets. The level of technological penetration in every aspect of our lives means that GAFAnomics/BATXnomics will become one of the major trends by 2030 and will be characterised by highly concentrated know-how, supply chains and economic resources. The transition of power not only worldwide but also to these non-state actors will have far reaching security impacts and will place an unprecedented level of political and economic power in the hands of the companies concerned.

Privacy and security have become the two cornerstones of disruptive technologies. The exponential increase in technological development is creating a situation in which artificial intelligence and quantum computing form key components of these disruptive technologies, due to the fact that the cyber environment is becoming increasingly too complex and too fast-moving to be managed by humans directly. The security of our data and digital identities will remain paramount by 2030, as the world becomes increasingly hyperconnected through the 5G network and the Internet of Things.

⁵OECD (2021), Real GDP long-term forecast (indicator). doi: 10.1787/d927bc18-en (Accessed on 09 March 2021). In 2020 these countries had a GDP of US\$ 10,074 (India), US\$ 18,587 (US) and US\$ 24,896 (China) trillion.

⁶GAFA: Google, Amazon, Facebook and Apple – BATX: Baidu, Alibaba, Tencent and Xiaomi.

Digital threats (in which competing digital ecosystems are fracturing our supply chains, data networks, societal awareness of social and political challenges, and our very way of life) will only increase in the next decade and will make our societies increasingly vulnerable. Belgium's fragmented approach to technologies make it vulnerable to their disruptive aspects, especially in the face of our adversaries' integrated approach. Our security environment will be shaped by who leads the competition in the area of advanced technologies, data collection, management and storage, and who controls the supply chains. Because there is no homogeneous policy at the EU level, this will undoubtedly have consequences for defence matters at both European and NATO levels, such as in terms of information sharing and interoperability.

2. An increasingly contested security space

These structural forces underpin growing challenges and disruptions that question the existing traditional order that has been put in place to guarantee our security and stability. They are increasing the disruptive capacities of transnational trends that are exposing the rules-based international system to increasing contestation and challenge. Multilateralism is eroding and fragmenting, as Russia, China or Iran among others rise up and challenge the rules-based order on which Belgium's security is grounded. This will contribute to gridlock in the UN Security Council, eroding the place of multilateralism as a mechanism for crisis and conflict management. Besides state competitors and adversaries, non-state actors now account for a larger proportion of security-related issues.

Retreat of democracies and social polarisation

The splintering of the rules-based international order, the declining number of democracies and the strengthening of authoritarian regimes have the potential to paralyse multilateral cooperation and international institutions, without which global challenges cannot be resolved. New poles of power, together with a growing number of non-state actors, are trying to redefine their role within the current system of global governance. Furthermore, the degradation of Western democracy, including in Belgium, and the advance of authoritarianism could lead to political paralysis at national, EU or NATO level, economic crisis, and even domestic unrest. As inequalities will continue to increase in our society, leading to social and political dissatisfactions, governments may struggle to satisfy their populations' demands for security and prosperity. External powers will not hesitate to exploit these forces to increase domestic polarisation and further their interests.

State challenges to the rules-based order

Even though no direct military confrontation with Belgium or its allies has occurred in the 21st century, Russia, China and other contesters make use of hybrid means such as guerrilla tactics, terrorism, economic pressure, information warfare, cyberattacks, paramilitarisation and lawfare (reinterpretation of norms and standards), to weaken the West. In doing so, they remain below the threshold of actual war in order to produce their strategic effect while preventing the activation of *jus ad bellum*. This approach blurs the threshold between peace and war that we have come to adopt as a basic understanding of interstate relations. Belgium must expect that potential adversaries will increasingly resort to this form of warfare, which is accessible and not expensive, either in support of more conventional military operations or autonomously to defend their interests.

Cybersecurity environment

More than two million cyberattacks are launched every day in the world⁷, and that number will increase by 2030. Despite recent examples of cyberattacks⁸, investment in Belgium to protect our infrastructures and software remains insufficient; not only could a well-orchestrated and precisely targeted cyberattack paralyse our society, but cyber espionage would make it possible to steal patents, research, or personal information. Furthermore, the question of attribution poses a major problem. Not finding out the identity of an assailant makes it extremely difficult to come up with an appropriate, legitimate, legal and proportionate response – four fundamental criteria for the right to self-defence. Cyberattacks may increasingly be orchestrated by both

⁷ See Threat Map Checkpoint website.

⁸ In November 2019, phones and computers of members of the Belgian economic mission traveling to Beijing and Shanghai were hacked; In December 2020, SolarWinds software was used to attack many agencies, institutions, companies around the world through Exchange 2021, exposing more than 1200 Belgian enterprises. In May 2021 a coordinated cyber-attack was carried out against Internet service provider Belnet. In their 2020 Internet Crime Report 2020, the FBI ranks Belgium as the 11th state most likely to be a victim of cyberattacks.

state and non-state actors alike. Their form will be diverse and target our state and non-state assets, ranging from botnets and man-in-the-middle to zero-day vulnerability and zero-click infections⁹. As technological developments proliferate and the sophistication required to manipulate these technologies decreases, the impact of cyberattacks will intensify and multiply the attack surface, while attack vectors are also more numerous.

As we increase our dependence on cyberspace, our digital identities become significant in both number and depth. This will increase our vulnerability on an individual, community, institutional and state level. Data security will become an ever more crucial part of a functioning and secure Belgium.

Information warfare

Technological developments have amplified the importance of information and data in our security environment. Information is a resource that is being and will increasingly be used to destabilise countries, in particular democracies. While they are not new, disinformation campaigns, fake news, or conspiracy theories, are used to fragment Western states and polarize the public opinion, thereby weakening our democratic values and systems, increasing distrust and discontent towards political systems, and promoting populist and nationalist movements. The rise of populist leaders and increasing support for digital authoritarianism worldwide illustrates the penetration and success of influence operations and information warfare by authoritarian states. Our democratic and open information society will increasingly be targeted by such operations of information manipulation. Disruptive technologies will increase this trend, as the operational surface and speed increase tenfold with artificial intelligence (AI) and quantum computing.

The human brain is the battlefield of the 21st century¹⁰: by relying on human cognitive flaws such as confirmation bias or our natural intellectual laziness (leading to an absence of critical thinking), manipulating information through the information environment will continue to be a preferred means to weaken our democracies. These clashes of narratives, storytelling and communication will be an integral part of the operational strategy in future conflicts.

Espionage

Cyberspace and technologies offer new opportunities with regard to our adversaries' intelligence activities against Belgian interests and institutions. These activities will intensify over the next decade and combine human and cyber-based intelligence. The main threats at present come from Russian, Chinese and Iranian intelligence and to a lesser extent from other countries that have a specific interest in the European or Belgian decision-making process. In the case of security issues relevant to defence, their priority targets are personnel involved in decision-making processes (political, diplomatic, security, military), critical infrastructures related to energy, communications and transport, research and development centres for advanced technologies, universities and defence suppliers, in order to be able to carry out information-gathering operations, to conduct influence operations, to carry out cyberattacks, to set up disinformation campaigns or to spread false news. The expansion of teleworking caused by the COVID-19 crisis is providing additional opportunities for intelligence gathering, disruption and the escalation of cyber activities by state and non-state actors.

Chemical, biological, radiological & nuclear

Nuclear weapons and associated strategies will remain a fundamental factor in international relations. Nuclear states are currently modernising or intend to modernise their arsenals, some of them by increasing their number of warheads. Beyond national strategies and despite the recent entry into force of the Treaty

⁹ Do not require human interaction.

¹⁰ "Mwi Video: The Brain is the Battlefield of The Future – Dr. James Giordano", *Modern War Institute*, 29 October 2018.

on the prohibition of nuclear weapons, the next ten years will be characterised by a number of trends. First of all, new types of systems (maritime and hypersonic) could lead to destabilising first-strike strategies calling into question the stability of nuclear deterrence, therefore requiring its reinsurance. The abandonment of the INF and the Russian deployment of long-range cruise missile systems has undermined European security. This could indirectly impact Belgium as the port of Antwerp (together with Zeebrugge, Rotterdam, Hamburg, Bremerhaven and Dunkirk) constitutes a key logistical artery for shipping in and sustaining reinforcements of allied forces operating in Central and Eastern Europe. Secondly, new nuclear powers could emerge. Thirdly, the use of radiological weapons by a regular or irregular actor remains a theoretical possibility. Fourthly, as shown during the Syrian civil war, the use of chemical weapons, whether actors are acting lawfully or not, remains a threat to civilians and to expeditionary forces. The Salisbury attack also showed they can be used in clandestine operations in Europe. The use of chemical or biological weapons by non-state actors against Belgium or allied countries cannot be ruled out. As far as Belgium is concerned, its role as a DCA ally in the NATO Nuclear Planning group will remain important for both our country and its allies and as a means of reinforcing multilateralism.

Space

Technological developments and the economic expansion of private companies have shaped the *New Space*¹¹ and have encouraged the exploration and exploitation of outer space as an increasingly contested and competitive domain in which the presence of States is greater now than at any point in the past. The space economy that has flourished in the past twenty years will expand and become a major industrial stake for Belgium and its allies and partners. Our and our allies' economies and armed forces are increasingly dependent on space. Those trends will strengthen by 2030, especially with the proliferation of mega-constellations linked to communications and data flows, geonavigation and observation, and the race for outer space resources – an increasing domain of activities due to the climate crisis and the need to secure resources and energies to guarantee our economic prosperity and technological development. A large number of States have or will have capabilities (cyber or kinetic) to target launch bases and satellite ground control centres. The 2020s could see the first military engagement in space. Alongside this militarisation of space, space debris forms a risk to the normal operations of capabilities.

Space is also a place of cooperation, whether to develop capabilities on a bilateral or European basis (ESA, MUSIS satellites, Galileo constellation, PESCO's space surveillance awareness project) or to develop new policies.

Privatisation of security

The privatisation of security has grown exponentially over the last twenty years and will maintain its current trend by 2030. The activities of private security companies, besides their traditional logistical tasks (80 to 90%) such as the upkeep of green spaces, cleaning, waste collection and cooking, include more and more core security missions (10 to 15%) such as military training and advice and direct military intervention in support or in place of national troops. The latter will remain a minority, but they will develop as the armed wing of some governments (such as the Russian Wagner Group), challenging our armed forces in theatres of operations and raising difficult questions about the rules of engagement or the status of prisoner of war. Technological development will increase this trend, as private companies will be put in charge of cybersecurity and public-private partnerships in the security domain will multiply.

¹¹ The emergence of a private initiative space industry.

Piracy

Due to its trade and economic architecture, Belgium has a direct interest in guaranteeing safe passage at sea. Incidents of piracy and maritime robbery have decreased overall during recent years. Yet, these developments will need to be monitored further, especially in the wake of economic crises, since local populations often engage in acts of piracy as a result of dire socio-economic situations, and they can also be linked to ideological fundamentalism. Military operations will remain a key component in fighting piracy.

Terrorism and irregularity

Terrorism will remain a serious security threat worldwide, including in Belgium, as both our state and non-state adversaries will keep using this tactic to destabilise Belgium and/or achieve their political objectives. Islamist fundamentalist groups will keep using terrorism as one of their main tactics, with ISIS and Al-Qaeda being the two most prolific groups, facilitated by weak or failed states. Those groups in quasi-constant reconfiguration are joined by smaller groups worldwide. If they are able to strengthen their basis, these groups will combine terrorism with guerrilla and techno-guerrilla tactics to establish proto-states, by depending on advanced technologies and the individualisation of firepower to do so. Given the unstable political situation, the future withdrawal of NATO contingents from Afghanistan will increase the Islamist terrorist threat in the future.

Furthermore, due to populism and xenophobia, the rise of right-wing or left-wing extremism could lead to an increase in domestic terrorist activities in Western societies, including in Belgium. Ecoterrorism and anti-tech terrorism should also be monitored closely in the next decade. Terror-based activities will take advantage of disruptive technologies, either for propaganda and recruitment purposes (social networks and online forums) or to carry on their activities (cyberterrorism, military operations). The development of blockchain and crypto-currency could facilitate their financing, thereby expanding their platforms for attacks. Actions in cyberspace will probably increase and inspire attacks in Belgium and Europe, targeting military and civilian infrastructures and systems, electricity and communication networks, the financial and banking system, food and water supply infrastructures.

Transnational crime

Transnational crime will continue to expand in the next decade, using the opportunities provided by technologies and the intersection of environmental forces and demographic trends. During operations abroad, our armed forces are often confronted with transnational criminal activities, including arms trafficking, illegal migration routes, human trafficking and the production, smuggling and trafficking of drugs. Whenever the money collected allows the corruption of local authorities or the support of terrorist or insurgent groups, these activities pose a threat to the security of our troops, our military assets and our population. These criminal networks, with their significant financial resources, exploit the possibilities offered by technology (cybercrime, phishing, ransomware, crypto-currencies, encrypted communication), and are often linked to terrorist organisations – which also finance their activities by carrying out activities that take the form of organised crime.

3. Great power competition and the prospect of major power war

While we entered into the 21st century believing that major power wars were of the past, we enter the 2020s with the prospect of a major power war. Western influence is being challenged, and China's power is expanding. In the shadows of this great power duo are regional powers such as the EU, India, Russia, Japan, Brazil. While meetings of the BRICS¹² countries have created the idea of a multipolar order, the fact is that China's economy now dwarfs its other members. The EU still remains primarily an economic and trade market with hesitant geopolitical pretensions. This power shift is detrimental to the West. These developments mean that three major consequences are now on the horizon for 2030. The first is that Western countries will find it much harder to preserve their security, influence and prosperity. The second is a new contest for primacy between China and the United States. The third involves much greater volatility in the positioning of the regional powers, which will be more inclined to use the decay of the previous superpower to maximise their freedom of action and influence.

As a significant degree of technological and industrial decoupling will have occurred by the time China becomes the largest economy in the world, the US will have to rely on its innovative edge in advanced technologies and its network of alliances to offset China's advantage of scale. While the US will stay involved in European affairs, the shift of the economic centre of gravity to the Indo-Pacific suggests that the US will increasingly look at Europe as a secondary theatre of operations. As such, it will interpret and shape its bilateral relations with European allies through a prism shaped by its cross-domain competition with China. Given the high degrees of security dependence and economic interdependence, this will pose a significant challenge for Europe as a whole to accommodate.

Never since the era of the Soviet Union has the military build-up in Eurasia been so fast and formidable. Even if China remains the centre of gravity in the region, many Eurasian countries, such as Russia and Iran, have a similar objective to undermine American preponderance and to enhance their military freedom of action from the Eurasian continent to its maritime margins. They will therefore increase their numbers of conventional guided missiles, modernise their conventional forces and strengthen their nuclear deterrence in the case of nuclear-armed states. This military power will remain an umbrella under which they conduct hybrid operations, well aware that Western countries will back down from substantial countermeasures, as they consider the risk of escalation in full-blown conflict. One of the consequences will be that Europe will lose military advantages in its neighbourhood. Additionally, American military focus will inevitably continue to shift to the Indo-Pacific. This does not mean that it will forgo its presence in Europe; but it will be more modest and if tensions in the Indo-Pacific increase, capabilities will inevitably be reoriented and expose European countries to the assertiveness of regional powers in its neighbourhood.

US-China rivalry is also leading to a situation in which China will independently try to protect its global interests. China will continue developing global power projection capabilities like those of the US, including sea-lift, strategic air transportation, long-range bombers, and so forth. China and Russia will keep exercising to advance their trans-regional room to manoeuvre and mobility. China's slow building of a network of support hubs and bases overseas will expand, with a long-term vision to increase its presence in the Mediterranean, Africa, the Atlantic, Latin America and Europe itself.

The Sino-American contest accelerates military technology modernisation, to the point that European countries struggle to keep pace. European platforms will be increasingly exposed to missile systems, advanced sea mines, electronic and digital warfare. This qualitative build-up is complemented by a quantitative one. Technology and advanced systems are enablers for traditional efforts to get boots on the ground. Technology can help win modern wars, but in the end, war is won by taking territory or preventing others from doing that. Mass manoeuvre remains important.

Major power visions for warfighting place an emphasis on long-range firepower, long-range unmanned aerial combat vehicles and underwater combat vehicles, and spill-over into the space, cyber, and deep ocean

¹² Brazil, Russia, India, China and South Africa

domains. It is directed against high-value military and political targets. These capabilities are being developed to destroy critical infrastructure, such as ports, power plants, communication centres, and centres of government at the beginning of a conflict or even pre-emptively. They pose a challenge to the survivability of European command, control, and intelligence networks. Belgium will remain an evident strategic target for Russia and China, with crucial ports, energy infrastructure, and seats of international organisations, and virtually no air and missile defence capabilities. Its openness to influence operations and information warfare, its reliance on international norms and rules, and its relative neglect of counter-intelligence – if allowed to continue – will make Belgium increasingly vulnerable to the use of hybrid means by major powers.

Between now and 2030, the return of a prospect of major power conflict will stretch the spectrum of violence. While low-intensity conflicts and non-traditional threats will remain, European armed forces will also have to prepare for high-intensity scenarios. Moreover, high- and low-intensity will increasingly blend. Many low-intensity threats will have to be answered in a context of heavily armed, ambitious major powers. Many small conflicts will likely be decided using advanced weapons supplied by major powers. The burden on European countries to preserve the security of their soldiers and their freedom of action has probably never been so large.

Now that Moscow has locked itself into a confrontational course, change is unlikely under the current Russian regime, which may not change until 2036. Internal turmoil could intensify because of increasing socio-political unrest. While this is unlikely, President Putin may step aside in the future, instead ensuring that one of his loyalists takes over, while he remains behind the scenes as *de facto* leader. We cannot exclude either the possibility that the national elites may fraction and lead the country into instability.

In China, if President Xi stays in power in the next decade, we should not expect major changes in the direction of Chinese foreign and defence policy. We cannot exclude however that clan divisions within the CCP lead to President Xi's removal from power, or that the CCP itself fractures and loses its political leadership. The relationship between the EU and China has evolved into rivalry, with China pursuing its global interests in an assertive way. The impact on the interests of Belgium and the EU can only increase, whatever the evolution of China's domestic politics. The future of the relationship will also depend on how the EU and thus Belgium will handle matters such as human rights issues (Xinjiang, Hong Kong), Taiwan, the South China Sea and our dependence on China for our strategic industries/sectors. While the relationship between the US and the EU will improve in the coming years, a populist victory in the next US presidential elections cannot be ruled out, which could lead to new tensions in the transatlantic relationship. Finally, competition does not mean that cooperation is not possible in connection with common interests and threats such as global economic stability or climate change.

4. Unstable regional environments

Transatlantic relations: UK and US

Following its departure from the EU in 2020, the UK has reconfigured its relationship with the European continent and the wider world. Its emerging foreign policy is articulated around (a) the wide-sweeping 'Global Britain' agenda, (b) an enduring security commitment to its European allies articulated through NATO and (c) the ongoing search for a workable economic relationship with its trading partners in the EU. Looking ahead to 2030, the UK will present itself simultaneously as a security partner and as an alternative political and economic model to the EU. Building on the comparative advantages of agile decision-making and technology and innovation prowess, the UK may surprise in its relative ability to thrive outside the EU. Belgium's interest in dealing with the UK thus exists in keeping security cooperation intact whilst avoiding the EU-UK relationship spiralling into political acrimony and trade conflicts.

The domestic polarisation of American society, combined with the contestation of its global leadership in particular by Russia and China, will increasingly pose considerable challenges for its network of alliances spanning across Europe, the Middle East and the Indo-Pacific: the US will be less and less able to shoulder by itself the many security requirements these alliances generate.

For Belgium in particular, it will be difficult to stay outside the crosshairs of US-China competition. This is the natural result of the fact that the US constitutes by far Belgium's most important trade and investment partner outside the EU.¹³ It also follows logically from Belgium's central location and status as a hub in all sorts of networks (in particular those relating to digital infrastructure, global communications and financial transactions). Provided the US stays committed to the idea of European unity the practical implication is a growing need to address the lack of equilibrium in NATO and to work towards EU-US alignment on updating the rules of global trade. Whilst the former relates to trading greater defence investment for more responsibility, the latter is geared towards not excluding China per se but obliging it to play by the rules on a level playing field. Ultimately, this balancing act hinges upon the appreciation of the fact that the US security guarantee is of critical importance for the European equilibrium itself.

Eastern Europe & Balkans

Europe's broader Eastern region, which incorporates several European countries including Belarus, Hungary, Serbia, Greece, and Cyprus, is displaying a tendency towards tacit hedging between the West and the East, and part of the elite in some of these countries consider state capitalism and authoritarianism from the East more attractive than the liberal democracy from the West. Because of Russia's search for a buffer zone between its territory and the West, the situation in Ukraine and Belarus will remain highly unstable, as Russia continues its subversive actions in the next decade to weaken NATO and the EU. The Chinese presence in the region through the "17+1 initiative" will also be a destabilising factor for the unity of the EU, and for the EU as a global actor on the systemic level.

In the Western Balkans, political instability and persistent inter-ethnic tensions will continue to slow down political and economic reform processes for a long time to come and will have a negative impact on regional relations. EU integration is likely to remain the main political objective, regardless of the political parties in power. However, the likelihood of achieving this in the short to medium term is low. Corruption will remain a widespread problem in society and organised crime will continue to flourish. Given the convergence of a number of political and economic interests, the fight against these two phenomena will be slow and difficult. Changes in the demographic structure in the region will influence inter-ethnic relations and will need to be closely monitored. As the prospects for EU membership remain vague, it may favour nationalist movements

¹³ After Brexit, the US has now taken 4th place amongst Belgium's trading partners (after Germany, France and the Netherlands), for data see <https://www.abh-ace.be/>. Note that Belgian exports to the US are over three times greater than those to China, and that the trade balance with the US traditionally favours Belgium (whereas the one with China favours China).

that traditionally fuel ethnic polarisation and separatist aspirations. Although inter-state armed conflicts are unlikely to happen between now and 2030, the high probability of internal inter-ethnic violence remains a threat, as this could lead to migration flows to the EU. Several international actors (Russia, China, Turkey, the Gulf monarchies, Iran), each in a different register, could exploit regional divisions and vulnerabilities in order to maintain or extend their influence and/or use regional actors as proxies for hybrid actions against European interests.

The Caucasus & Turkey

In the Caucasus, instability will endure. Economic issues (this is a transit region for many pipelines), ethnic tensions, the influence of countries such as Turkey, Russia, Iran and Israel will continue to destabilise the region in the years to come. This could have an impact on the security of the EU in the Black Sea region and on the transit of oil and gas to the EU.

Turkey' assertiveness and unpredictability will persist, increasing the risks that its rhetoric and actions are already causing in the Eastern Mediterranean, the Aegean Sea, North Africa, the Caucasus and the Western Balkans. The country is seeking to impose itself, moving from the status of ally or partner to that of competitor or even rival, both within NATO and in its relations with the EU. In Africa, Ankara will pursue obvious geopolitical interests, concluding agreements with Russia and/or Iran, thereby challenging Americans, Israelis and Europeans. In Turkey, the Kurdish question is and will remain central. In northern Syria and Iraq, Ankara will take all necessary initiatives to prevent the PKK and its proxies from controlling areas along its southern border and will continue to use refugees and energy as a weapon in its relations with Europe. Ankara will also continue developing its intelligence, military and industrial capabilities, while using soft power tools (state-sponsored institutions and NGOs active in the fields of education, religion, humanitarian aid, business, academic research and media), as well as its numerous diasporas scattered across Europe, in countries such as Belgium, the Netherlands and Germany. Turkey will most likely intensify its disinformation and propaganda activities vis-à-vis the EU and its member state governments, targeting its diasporas, but also countries, regions or cities with significant Muslim communities. Finally, Turkey will most likely continue to develop its unconventional warfare capabilities (paramilitary groups, proxy groups, including terrorist organisations).

The Mediterranean

North Africa and the Levant will continue witnessing very serious societal turmoil and political instability in the next decade. The so-called 'Arab Spring' did not materially change the structural factors at the basis of these upheavals, which mainly consisted of a young and growing population confronted with an economic environment in which there are very limited economic opportunities and demands for more political freedom and democratic processes. In is doubtful that the Israeli-Palestinian conflict will find a solution by 2030. Several regimes in the region will remain either autocratic and/or inept in their relationship with the majority of their peoples, such as Algeria and Egypt. In other countries such as Libya or Syria, civil wars and (extra-)regional power struggles will continue to rage. In the wake of the turmoil in the 2010s and Western interventions, terrorism, internal displacement of population and migration have become major security problems which directly affect European stability. Moreover, if we look to see what is on the horizon from now up to 2030, the combination of population growth, lack of economic opportunities, eroding human security and nepotism may be aggravated by climate change. This will put further strain on resources and may result in subsequent security crises. What happens in security terms in Northern Africa and the Levant is of a direct security interest for European countries.

In terms of Belgian energy security, new opportunities for cooperation may also arise with countries in the region in connection with natural gas, new deposits of which are being found in several countries' EEZs. These new deposits will however increase existing rivalries or create new ones.

Sub-Saharan Africa

Structural forces will raise challenges for Africa in the coming decades: a major demographical challenge and increased urbanisation; climate change and ensuing food insecurity; the expansion of violent extremist networks, and linked to the latter, more interventions from external actors; growing authoritarianism leading to more popular uprisings and risks of civil wars. All of these challenges are in turn likely to result in increasingly high numbers of internally displaced populations and refugees, taking place in contexts affected by widespread poverty and the COVID-19-induced economic recession. Africa is facing a major demographic challenge, with a significant part of the population being less than 25 years old, which raises urgent questions about the continent's capacity to absorb millions of new arrivals to its job market. The African continent is already experiencing massive youth unemployment and widespread reliance on precarious jobs. This situation could result in social uprisings and forced mobility, especially in states and regions characterised by increasing authoritarianism. Massive population growth means rapid urbanisation.

Africa is likely to be disproportionately affected by climate change due to a weak adaptive capacity, high dependence on agricultural goods for livelihoods and less developed agricultural production systems. For sub-Saharan Africa in particular, temperature increases are projected to be higher than the global mean temperature increase. This will have damaging effects on sensitive sectors such as agriculture, which employs 60% of Africa's population. Droughts, floods and desert locusts are incidents linked to climate change and disrupt food production on a large scale, contributing to food insecurity.

The rapid expansion of violent extremism across the continent will continue, thriving in poor areas where state institutions are incapable of delivering basic services like health care and security. The Sahel region will remain one of the worst affected by terrorism on the continent, from groups such as al-Qaeda and ISIS related groups. Violent extremism in the East of the DRC and Mozambique is likely to escalate, given the extent of poor governance, poverty and grievances in this region, while Somalia's Al-Shabaab will continue to destabilize the country. Extremist groups expand in part due to their entanglement with local and transnational criminal networks that facilitate various types of trafficking, in part due to the lack of state authority and control in border regions. Local security forces' mixed human rights track record continues to undermine efforts to effectively respond to these networks and discourage recruitment. The expansion of violent extremism will reinforce the presence of external military actors, in particular in the Sahel region, given its geostrategic location as a transit hub for refugees to Europe. China and Russia's presence will increase, as will counter-terrorism initiatives by Western and local actors.

Middle East

The Middle East will remain a complex geopolitical and geostrategic theatre. Continued instability, demographic growth, lack of economic prospects and fundamental geo-economic changes together with climate change constitute some of the fundamental drivers of change. Religion will remain a discursive tool for political engagement. Structural instabilities created by the wars in Iraq, Syria and Yemen will likely remain by 2030, leading to further migration and internal displacement.

Against this backdrop of continued unpredictability, the regional competition between Saudi Arabia and Iran will continue to shape the region's geopolitics. Saudi Arabia's business model based on oil will further erode. Iran's young population and the country's natural gas deposits may very well position it as having better cards in the next decades. Turkey will assert itself as an alternative third power in the region.

The area remains of interest for Belgium and Europe for geo-economic, geopolitical and geostrategic reasons. Religious radicalisation, in whatever form, constitutes a security threat to countries such as Belgium.

Countries such as Qatar or Israel may increase in geo-economic significance by 2030, as natural gas will become relatively more important than oil in the energy diversification strategy.

Strategic in terms of its location is the Gulf of Aden. It constitutes the entrance to the Suez Canal towards European territories and will remain vital for freedom of navigation and trade security. As highlighted by its support base in Djibouti, China's economic and political footprint will increase, shifting spheres of influence.

Human security is low in the region, and poor socio-economic development and future conflicts will erode it further. These will also create waves of migration and internal displacement and aggravate the kidnappings for ransom and human trafficking phenomena already taking place. Climate change further aggravates the overall situation.

Central and South Asia

Located between and subject of competition mainly between China and Russia to expand their sphere of influence, Central Asian countries will be increasingly connected to the global economy, mostly due to the Chinese Belt and Road Initiative that places them as a key link towards European markets. The correlation of ethnic and religious diversity with climate change could lead to conflicts over resources such as water or food. The interest of and impact on Belgium is however minimal. Further east, Mongolia could become a geo-economic pivot for technological developments due to its rich mining resources.

Regional security and geopolitics will continue to be dominated by developments in Afghanistan and the Pakistan-India-China geopolitical triangle. The India-Pakistan adversity on the one hand, and India-China competition on the other, will continue to thwart any attempt at regional integration. Due to its economic growth and important technological investments, India will be a crucial partner for EU countries, including Belgium. South Asia is one of the fastest growing economies in the world, while remaining very much fragmented in terms of regional economic integration. An open conflict between India and Pakistan or between India and China is a possibility, with worldwide repercussions due to its nuclear potential. Military spending in all countries will increase in terms of manpower and equipment. Pakistan is unlikely to curb its homegrown anti-India terrorist groups and increased nationalistic politics in India will further destabilise the situation.

In Afghanistan, the planned withdrawal of international troops by September 2021 will weaken the Afghan government and provide momentum for the Taliban to gain greater control over the south-eastern provinces, although control over the entire country is unlikely. In this situation, the country would be further fragmented along ethnic, linguistic and religious lines, with warlords providing the bulk of governance and security in the North. While it is unlikely that Taliban territory would be a sanctuary for the Khorasan branch of the Islamic State (IS-K), the unstable security context would allow the latter to gain access and develop a greater footprint in the region. A US/NATO withdrawal from Afghanistan will benefit al-Qaeda's agenda. Additionally, the important mining resources in the Afghan subsoil, among which lithium, will make Afghanistan home to a fierce geo-economic competition between the world's top players in the technology field for control over mining resources – state actors such as China, the US, Russia, India, but also private actors, including, but not limited to, GAFAM and BATX, or PSCs – leading to further destabilising the country and increasing the already endemic corruption and drug trafficking.

Climate change will have a dire impact, greater than in most regions: a rise in temperatures, severe droughts, catastrophic climatic events, flooding, landslides, leading to population displacement, water and food scarcity, disease, overall dire human conditions. Poverty and inequality will endure in the South Asian countries, eroding human security. The difficult economic situations, caused by and adding to climate change consequences, will result in massive population displacements within the region, but also towards Europe, as the European continent continues being viewed as offering economic opportunities and one of the less climate-change-affected regions.

East Asia

By 2030, North Korea may achieve full nuclear capabilities, including operational submarine-launched ballistic missiles. This nuclear arsenal, capable of reaching the mainland USA, will further increase the tensions in the peninsula and set back the possibility of an agreement. In this context, South Korea will increase its policy of reaching out to North Korea to avoid an all-out war against a nuclear-armed adversary. The Korean Peninsula will in all likelihood maintain its current status quo: North Korea will remain isolated and nuclear armed. Unification of the peninsula is highly unlikely, although it should not be ruled out. Another possibility is the collapse of the country, which could be caused by the sudden death of the current leader for example. This scenario would result in a humanitarian disaster, and would lead to South Korean, American and Chinese interventions in the country, most importantly to secure its nuclear arsenal in a civil war-like context. While the Korean Peninsula is not vital to Belgian interests, it is nonetheless important to bear in mind the following possible fall outs: an act of aggression on South Korea by its northern neighbour would implicate the US, due to the Seoul-Washington alliance. An act of aggression directed against US territory would implicate NATO under Article 5.

East Asia is home to the world's booming technological powers. Seoul, Tokyo and Beijing will remain Asia's leading investors in robotics and automation, placing them at the forefront of the AI race, including in core issues such as data management and protection, changes in the workplace, and application to military uses. Given the technological advancement of these countries, it is likely that their competition will also take place in the cyber domain, with a potential spill-over effect world-wide. Increased nationalism, fuelled by mutual historic grievances, will complicate the geopolitical and security situation by further polarising political and social contexts. Maritime territorial disputes and the increased spending and development of military power in all countries will prevent the stabilisation of the region and increase tensions and distrusts amongst regional players, including the US. The ageing population will prove to be a challenge, with increasing life expectancy and low birth-rates. The socio-economic situation will require greater government investments in the welfare system. Climate change, increased food insecurity and water scarcity will cause unstable socio-economic situations.

Southeast Asia and Oceania

The South East Asian region is crucial for the global economy, home to the busiest shipping routes in the world (importance of the Malacca Strait and its security). The region is home to several emerging economies and will remain crucial for Belgium's economic stability and prosperity in terms of trade routes security. While the region lacks any type of collective security mechanism, open conflicts are unlikely due to growing economic interdependence among ASEAN countries. East Asian countries will continue to deal with their competition in a pragmatic manner to avoid negative fallout on their national economies. Nonetheless, the geopolitical competition in the region will likely be intense among regional players. Territorial and maritime claims in the South China Sea and the One-China policy have a highly destabilising potential. China will be increasingly assertive, if not aggressive, in its territorial claims, including towards Taiwan. Given the security and defence alliances of a number of countries with the US in the region, an open conflict could implicate the US, and have an impact on transatlantic relations. Moreover, a conflict-ridden South China Sea would destabilise the world economy, given the crucial importance of the sea lines of communication in the region.

In Oceania, the influence of China will continue to increase in the next decade. Although the relationship with Australia has deteriorated since at least 2018, Chinese influence in the South Pacific islands has increased, with China's interests focusing on fish stocks, potential reserves of raw materials on the seabed, maritime routes, and isolating Taiwan internationally. China is also interested in establishing a potential military base in the region. Although Belgium has no direct interests in the region, except for economic trade with Australia and to a lesser extent New Zealand, Belgium's allies, in particular Washington, London and Paris, have regional interests.

South and Central America

South America and the region of the Caribbean constitute a geopolitical area that is farther away in terms of Belgian interests. Nevertheless, the continent is and will remain the subject of geoeconomics and geostrategic competition between the US and China. This rivalry will increase in the coming decade, affecting external policy options of European countries. The rise of populism in some of these South American countries such as Brazil and Venezuela may result in making them more susceptible to overall Chinese influence, which may in turn divert economic activity away from Europe towards Asia.

With the increasing importance of renewable energy, the South and Central American region will become more important for Belgium's energy diversification, due to the presence of minerals such as lithium, copper, or silver, among others.

The region is home to vital trade choke points, such as the Panama Canal, that will require close monitoring and working with our partners to guarantee their security. Economic security will also be increased by developing maritime economic cooperation, such as the efforts of the (soon to be fully) integrated harbour Antwerp-Bruges with several ports, for instance in Brazil.

Additionally, South America constitutes one of the most important fronts in terms of humanity's fight against environmental degradation and the rapid decrease of biodiversity. Following the general increase of transnational organised crime, the security risks posed by transnational criminal networks such as Colombian drug cartels in the Antwerp region will increase and will need to be tackled.

Arctic

New climatic realities provide geostrategic and geo-economic opportunities in the Arctic region. From Alaska to the Sakhalin Islands, a potential new energy belt (gas and oil) could be formed. The vast majority of resources are in the EEZs of the five bordering countries. Oil and gas exploitation in the region is still limited because of financial investments, climatic conditions and the current lack of profitability due to the price of gas and oil, and the development of shale oil and gas. Other raw materials are present in significant quantities: diamond, manganese, copper, cobalt, gold, phosphate, nickel, aluminium and uranium, gallium, indium, among others. The region is rich in fish, and present opportunities for additional maritime routes. By 2030, the 2-to-3-months a year navigable passages could become accessible for three to six months. However, the many obstacles in these two routes, North-West and North-East, are unlikely to change by 2030; in the longer term, this could change if the melting of the Arctic ice cap continues over an extended period of time. For Belgium, the current development of the maritime routes remains economically very limited: maritime routes via the North coming from Asia will be potentially attractive in the future but only if all economic and environmental conditions are met. This development is particularly significant for Russia, for whom current and future economic advantages caused by the melting of the Arctic ice cap will turn into more resources to sustain military investment. Furthermore, Russia's current military build-up in the Arctic could lead to increased militarisation by EU or NATO member states. China is also increasing its footprint in the region, via a partnership with Russia to export gas. Greenland's evolution should be closely monitored, in particular China's role in the territory, its interest in raw materials, and potential Chinese military role in the region.

Conclusion

Regional and systemic security and stability have been deteriorating in the last decade. For the 2020-2030 decade, we can expect that some management mechanisms will have been established to deal with structural forces ranging from pandemics to disruptive technologies to climate change and demographics. The coming decade will also see all types of conflict taking place – kinetic and non-kinetic. These conflicts will in all likelihood include indirect and direct confrontation between great powers; a volatile geopolitical and geo-economic environment means that regional powers are likely to be parties to conflicts as well.

The hyper-connectivity of the world is both an opportunity and a destabilising force. Most significantly, the polarisation of societies will increase tribalism within social groups – and vice-versa in a vicious circle; it will also foster the conditions to question the legitimacy and authority of governments and political institutions in both democracies and authoritarian regimes. The contestation of political power and security management mechanisms on an international level will continue over norms, standards and institutions, eroding multilateralism and encouraging unilateral actions and the use of force as a legitimate mechanism of political action.

In this deteriorating security environment, Defence will need to adapt and prepare for both low and high intensity conflicts; it will have to be equipped to face state and non-state actors in theatres of operations which are being made increasingly complex by urbanisation, climate change, new and affordable technologies, among other forces.

Yet with limited resources and capacities, Belgian Defence cannot possibly take all these elements into consideration. We therefore believe that an emphasis should primarily be placed on the following priorities:

- The competition between great powers and the possibility of a war may call for Belgian involvement with its allies in high intensity kinetic conflicts.
- The security, political, socio-economic and environmental situation in the MENA region may require active crisis management.
- The increasing attacks on Western societies to increase polarisation, especially via the use of disruptive technologies and information warfare, calls for an enhanced role of Belgian Defence in these domains.
- Guaranteeing maritime security (sea trade, submarine cables, conducting military activities alone or with our allies) remains vital for Belgian security and economic prosperity.
- The climate crisis and its multiplying effects will increasingly impact Belgium's security environment and need to be central in our strategic thinking.
- Likewise, disruptive technologies and their all-encompassing effects on our lives will continue to be a destabilising force that will be used by our adversaries to weaken the Belgian State and Belgian society.

Security environment 2021-2030



Photo source: DG StratCom

Responsible publisher: Ludivine Dedonder, Minister of Defence

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