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DEFENDING EUROPE, DETERRING RUSSIA

Resources, readiness and resolve

Edited by
Steven Everts and Luigi Scazzieri

With contributions from
Clotilde Bômont, Ondrej Ditrych, Caspar Hobhouse, Nad'a Kovalčíková, Giuseppe Spatafora, Joris Teer

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INTRODUCTION

REBUILDING DETERRENCE

Europe's defence challenge

by
LUIGI SCAZZIERI

Europe is navigating a period of strategic turbulence. Despite the heavy losses it has sustained in Ukraine, Russia continues to adapt and replenish its military capabilities while testing Europe through hybrid operations, sabotage, cyberattacks and military pressure. Intelligence assessments by several Member States suggest that Russia could pose a significant military challenge to NATO allies as early as 2027. At the same time, Europeans can no longer take the depth or durability of US support for granted.

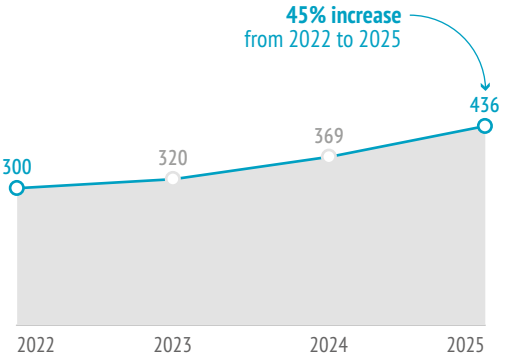
The challenge for Europe is to strengthen the capacity to defend itself against Russia with much less US assistance. This is a demanding task, but Europe is wealthy, populous and technologically advanced. It has the resources to defend itself, provided that it is willing to sustain a long-term political, military, industrial and societal effort. This does not mean replicating everything America does, but rather developing a distinctly European model of deterrence rooted in Europe's resources and political realities.

Europeans face threats and instability from multiple directions. However, Russia is the 'pacing threat': because of the size and capabilities of its armed forces, its proximity, and its demonstrated willingness to use force, coercion and hybrid tactics. Deterring Russia is the most serious test of whether Europeans can defend themselves with much less US support. And if Europeans can deter Russia, they will be better placed to deal with other threats as well.

Europeans are not starting from zero. Over the past few years they have made significant progress in strengthening their military capabilities. Member States have increased defence budgets, defence production is rising, and Europeans are cooperating to fill some of their most urgent capability gaps. A notable success is ammunition production, with production capacity for 155mm ammunition approaching 2 million shells in 2025. However, in many critical areas, European capabilities are still too thin: in domains such as command and control (C2) and intelligence, surveillance and reconnaissance (ISR) Europeans continue to depend heavily on the US; and their procurement systems have yet to fully adapt to the lessons from Russia's war of aggression against Ukraine. Europe spends around half as much as the US on defence, but fragmentation prevents Europeans from translating these resources into comparable collective fighting power.

Ready, steady, go

Military expenditure across European countries, 2022-2025, constant 2021 € billion



Data: IISS, *Military Balance*, 2026; NATO, 2026; EDA, 2026

This *Chaillot Paper* argues that credible deterrence rests on three interlocking foundations: resources, readiness and resolve. Resources encompass not only defence budgets and military capabilities, but also the broader material foundations of defence: the industrial base, technologies, raw materials and critical infrastructure needed to sustain a long-term military effort. Readiness is the ability to turn these resources into usable power. In the military domain, this means that European forces should be able to plan, exercise and operate together smoothly, with a much lighter US backbone. But readiness is also about embedding resilience into critical systems, including energy, and ensuring that civilians and governments are prepared for the possibility of conflict. Finally, deterrence rests on resolve: the willingness of European governments, societies and citizens to bear the costs and risks of collective defence, and to signal that willingness credibly.

Europeans need to ensure that their defence posture communicates credible deterrence.

The various contributors to this *Chaillot Paper* examine Europe's defence challenge from several complementary angles. The first two chapters set out the strategic context. Ondrej Ditrych argues that, alongside its continued aggression against Ukraine, Moscow is rebuilding capabilities, strengthening its military posture and continuing to test Europe through hybrid pressure. Meanwhile, in his chapter Giuseppe Spatafora argues that Europeans remain heavily dependent on the US in many areas and should aim to take charge of all aspects of conventional deterrence. They should also be more proactive in shaping this transition, rather than merely reacting to US policy shifts.

In the third chapter, Luigi Scazzieri examines how Europeans can take greater ownership of building deterrence. Sustaining defence investment in the years to come is important but what matters even more is to focus on the right priorities and to spend in a more coordinated manner. Europeans also need to strengthen their ability to work together efficiently, including through deeper multinational cooperation and greater cooperation in procurement, training and operations. They also need to ensure that their defence posture communicates credible deterrence.

In the fourth chapter, Joris Teer explores how Europeans can secure the necessary material resources to sustain their defence surge, focusing on critical raw materials. Europeans will need to take determined action to de-risk their supply from China, which dominates global supply chains for many of these materials. In the fifth chapter, Clotilde Bômont turns to the question of defence technology. She argues that Europe's ability to defend itself increasingly depends on control over the digital 'infostructure' that enables modern military operations. Europeans should reduce their dependency on foreign capabilities and build up their own, by scaling up European alternatives, harnessing civilian innovation and

procuring 'good enough' systems that can be deployed quickly.

In the sixth chapter, Caspar Hobhouse focuses on energy as an example of critical infrastructure. Without resilient energy systems, Europeans will not be able to credibly sustain deterrence and communicate resolve. They need to diversify their sources of supply, build a more decentralised system and empower civilian operators to defend infrastructure. In the seventh chapter, Nad'a Kovalčíková examines how Europe's security approach and national defence models must continuously evolve to address the expanding landscape of hybrid threats. She argues that fostering societal preparedness, resilience and resolve alongside military capabilities is essential to Europe's ability to effectively defend itself.

Europeans will need to accept the need for more defence integration while remaining pragmatic about its form.

In the concluding chapter, Steven Everts and Luigi Scazzieri reflect on both the stakes and feasibility of Europe's defence effort. Europe has the means to deter Russia with much less US support. But Europeans need to overcome three key challenges: sustaining the financial effort in the face of mounting economic pressures; spending more effectively and collectively; and, above all, overcoming their political fragmentation. None of these challenges is insurmountable, provided Europeans act with both determination and pragmatism.

To sustain Europe's rearmament effort, it will be essential to mobilise additional resources from EU instruments and the private sector. Much will depend on whether defence spending can be framed as an investment in innovation, prosperity and resilience. To spend more wisely, Europeans will need to absorb the lessons of Ukraine in terms of rapid development and fielding of new defence systems. Closer cooperation with Kyiv will be essential, both in terms of defence production and operational adaptation.

To overcome their fragmentation, Europeans will need to accept the need for more defence integration while remaining pragmatic about its form. Efforts by Member States will remain the bedrock of European defence and NATO will remain central to collective defence for as long as the Alliance endures in its current form. The EU has an increasingly important role to play as an enabler: helping to coordinate efforts, supporting industrial expansion and embedding defence considerations across all policy domains. The EU can also play a growing role in helping Europeans counter hybrid threats and in making solidarity more tangible by clarifying how they would assist each other in ambiguous crisis scenarios. This includes giving greater substance to the EU's long-dormant mutual assistance clause, Article 42.7 of the Treaty on European Union (TEU).

At the same time, in many areas, Europe's defence build-up will have to rely on smaller, flexible clusters of countries willing to move further and faster together. These groupings may also provide the most feasible framework for cooperation with key non-EU European partners, above all the UK and Ukraine.

If Europeans can better align resources, readiness and resolve, they will be in a stronger position not only to deter Russia, but also to build a more balanced transatlantic relationship.

CHAPTER 1

‘WE ARE READY RIGHT NOW’

How Russia would fight against the EU

by
ONDREJ DITRYCH

The risk of a Russian military attack on the EU is real – and rising. Putin’s regime sees itself in a confrontation with the ‘collective West’ and believes that its earlier predictions of the 2020s as a decade of global conflict in which adversaries will seek to impose a strategic defeat on Russia have been vindicated [1]. Even if its disastrous campaign to subdue Ukraine ends badly, Russia is unlikely to change course. Its ambition to break the EU and NATO and restore an empire in Eastern Europe to protect its western border will remain intact. Thanks to its large industrial base, support from China and its ability to adapt and innovate, Russia will rebuild its armed forces in preparation for the next war. A halt in hostilities in Ukraine would create new deterrence requirements for Europeans along an extended frontline stretching from Svalbard to Odessa. Russia would use any pause to reconstitute its fighting power and continue to coerce perceived adversaries. The conflict between Russia and Europe cannot be avoided: it is already taking place. A wider war, however, can still be prevented, but this will require serious and concerted efforts.

STRATEGY: EVOLUTION OVER REVOLUTION

A Hobbesian, survivalist reading of the world, where status and influence are key to preserving sovereignty, has long shaped Russian strategic culture. This is accompanied by a deep-rooted siege mentality. Putin’s regime sees Russia as locked in a long-term existential struggle with the West. In the regime’s own words, the West seeks to turn Russia into a ‘dying space’ and ‘finish it off’ [2]. The idea that a clash with Russia is inevitable ‘is hammered into people’s heads’ [3]. However, Russia is ready to fight ‘right

(1) Monaghan, A., *Blitzkrieg and the Russian Art of War*, Manchester University Press, Manchester, 2025.

(2) Office of the President of Russia, Address to the Federal Assembly by President Vladimir Putin, 21 February 2023 (http://kremlin.ru/events/president/news/70565); Ibid., Address to the Federal Assembly by President Vladimir Putin, 29 February 2024 (http://kremlin.ru/events/president/news/70565).

(3) Office of the President of Russia, Expanded cabinet meeting of the Ministry of Defence board, 17 December 2025 (http://kremlin.ru/events/president/news/78801).

now' if necessary [4] and a 'protracted confrontation' is already taking place as a result of Western support to Ukraine [5]. Russia acts primarily in pursuit of its own geopolitical ambitions, and its military theory and practice have long displayed strong offensive elements. However, successive regimes in Moscow have rarely failed to portray Russia's actions as defensive responses to Western pressure – or even as attempts to destroy it.

Even a prolonged freeze in Russia's war against Ukraine is unlikely to alter this fundamentally confrontational posture or Moscow's broader geopolitical ambitions. For the Kremlin, rebuilding a Russian empire serves both to civilise the unruly minions in its neighbourhood and as a means to ensure peace and security in the face of the perceived Western threat. In the Russian strategic mindset, expansion and defence are deeply intertwined. War is conceived as a legitimate instrument of state policy, alongside indirect, deceptive and opportunistic tactics.

In the Russian strategic mindset, expansion and defence are deeply intertwined.

How is Russia's thinking about a possible war with Europe evolving in the light of the lessons from Ukraine? First, experience on the battlefield has reinforced an emphasis on attrition (измор) over lightning war (молниеносная война). The unfolding of the war against Ukraine has made Russian strategists more sensitive to the limitations of fast, combined manoeuvre warfare than their Western counterparts [6]. If Putin's Russia escalates its confrontation with Europe to the military level, it is likely to do so on the assumption that a war against Europe will require whole-of-society mobilisation and societal resilience as well as the occupation of territory [7].

Second, from the Russian perspective, modern warfare is fundamentally hybrid. It features trenches and artillery fire but also drones and sensors as well as new means of political and economic warfare. Russia's concept of warfare therefore places strong emphasis on attrition but also incorporates elements drawn from modernist theories of 'non-contact warfare' (безконтактная война) [8]. This includes a focus on indirect methods like precision missile strikes [9] combined with the mass deployment of low-cost UAVs, as well as 'mental warfare' campaigns, including nuclear intimidation. The objective is to shape the strategic environment before a military conflict begins and to force its termination on conditions dictated by Russia. In this context, Russia's perceived failure to deter Western assistance to Ukraine is likely to lead to

[4] Office of the President of Russia, Press briefing by President Vladimir Putin, 2 December 2025 (http://kremlin.ru/events/president/news/78632).

[5] Office of the President of Russia, 'Answer by President Vladimir Putin to a question from a media representative', 12 September 2024 (http://kremlin.ru/events/president/news/75092).

[6] For a discussion of the continuing appeal of manoeuvre warfare as a supposedly superior alternative to the uneconomical, unheroic and unintelligent logic of attrition, see Tuck, C., 'The future of manoeuvre warfare', in Weissmann, M. and Nilsson, N. (eds), *Advanced Land Warfare: Tactics and Operations*, Oxford University Press, Oxford, 2023.

[7] *Blitzkrieg and the Russian Art of War*, op.cit.

[8] See Slipchenko, V., *Войны нового поколения: дистанционные и бесконтактные* [New generation wars: Remote and contactless], Olma-Press, Moscow, 2004; McDermott, R., 'Russian military thought on the changing character of war: Harnessing technology in the Information Age', The Jamestown Foundation, 29 October 2021 (https://jamestown.org/russian-military-thought-on-the-changing-character-of-war-harnessing-technology-in-the-information-age/).

[9] Trushin, V. V., 'адачи военной науки в условиях специальной военной операции [Tasks of military science in the conditions of the special military operation]', *Военная мысль*, No. 4, 2025.

greater investment in strategic gestures aimed at expanding the escalation ladder. This could include symbolic deployments of non-strategic nuclear weapons (Belarus) or combining nuclear threats with apocalyptic rhetoric to increase their credibility[10].

RECONSTITUTING CAPABILITIES: RUSSIA'S PATH THROUGH THE FOG

For Russia, no conflict since World War II has exacted such a heavy toll in blood, equipment and treasure. The war consumes around 5 % of Russia's annual GDP. Russia has lost up to 1.2 million troops, of whom 415 000 were taken out of combat in 2025 alone[11] (nearly equivalent to the number of volunteers recruited that year[12]). Some of the wounded may eventually return to combat; the estimated 325 000 soldiers killed will not[13]. These losses come in addition to tens of thousands of tanks, armoured vehicles and artillery systems destroyed on the battlefield[14]. Even after resorting to 'Frankenstein' methods of assembling armoured vehicles from spare pieces, Russia is running short of replacements. As a result, Moscow has increasingly sought to limit further equipment losses by accepting even higher human casualties – feeding ever more soldiers into the meat grinder in pursuit of strategically insignificant territorial gains in the Donbas.

However, despite these heavy losses, Russia's ground forces have grown in overall numbers while its air and naval assets are undergoing modernisation, albeit selectively. As a result, Russia's posture *vis-a-vis* the EU has been weakened, primarily due to the redeployment of forces away from Europe, although some capabilities have remained largely unaffected. At the same time Russia continues to expand its military infrastructure in Europe's vicinity (see map on page 9). Moreover, Russia's capacity to reconstitute its forces after the end of hostilities and prepare for future wars should not be underestimated. Estimates on timelines vary (with some divergence due to different force requirements used as benchmarks) but they tend to converge on the next decade[15].

The key assets that Russia can draw on in reconstituting its forces are its large industrial base, centralised economic management, capacity for improvisation and adaptation, and its continued access to components from China. The regime has demonstrated its clear intent not only to modernise but also to enlarge its military forces – with the stated objective of increasing their size to 1.5 million military

(10) Adamsky, D., 'Quo Vadis Russian Deterrence?' *International Security*, Vo. 49, No. 3, 2025.

(11) Ministry of Defence of the United Kingdom, 'Intelligence Update: Ukraine', 14 January 2026 (https://x.com/defencehq/status/2011454582178840667).

(12) TASS, 'About 417,000 Russians have signed military service contracts: Medvedev', 24 December 2025 (https://tass.com/defense/2064095).

(13) Jones, S. and McCabe, R., 'Russia's grinding war in Ukraine: Massive losses and tiny gains for a declining power', CSIS, 27 January 2026 (https://www.csis.org/analysis/russias-grinding-war-ukraine).

(14) Foreman, J., 'Military lessons identified by Russia, priorities for reform, and challenges to implementation,' New Eurasian Strategies Centre, 9 July 2025 (https://nestcentre.org/military-lessons/).

(15) For a concise overview see Bergmann, M. and Svendsen, O., *How Europe Can Defend Itself with Less America*, CSIS, 8 October 2025 (https://www.csis.org/analysis/how-europe-can-defend-itself-less-america).

personnel [16]. This target is likely to be achieved once the hostilities cease in Ukraine. The force restructuring and expansion launched under Shoigu's reform package announced in January 2023 conforms to the traditionalist conception of warfare and points to a strong focus on Russia's border with the EU, with the stated aim to 'neutralise threats' from that direction [17]. The reestablishment of the Leningrad and Moscow military districts reflects an ambition to improve Russia's capacity to deploy and sustain large forces in the westward direction, beyond the immediate demands of the war in Ukraine. New army corps and multiple new divisions have been created by expanding existing brigades – although personnel and equipment shortages mean that they lack standard components and for the time being do not significantly increase Russia's combat readiness.

Russia will continue to pursue tactical and operational innovation, with a focus on drones [18], missiles (of which it could produce around 2 000 in 2026), electronic warfare, air defence and logistics. It is also likely to improve the coordination of complex strike packages featuring drones and missiles and continue adapting its doctrine based on combat experience and military industrial production. However, Russia will also continue to face constraints, including shortages of precursor materials for missiles and explosives, as well as of manufacturing tools, factory space, and labour [19] – and lack the capital necessary to fully overcome them. As a result, reconstitution is likely to rely heavily on modernised legacy systems [20] combined with cheaper UAVs. While Russia's military prowess will improve as a result of tactical and operational adaptation, its track record on innovation suggests that it will find it hard to translate these gains into deeper strategic reform.

Russia will continue to face constraints – and lack the capital necessary to fully overcome them.

Russia's effort to rebuild its armed forces will be shaped by several key factors. These include the state of the economy (closely linked to how sanctions evolve after a potential ceasefire), political relations with critical suppliers (most importantly China), and the number of Russian forces that remain deployed in the Ukraine theatre under any future ceasefire arrangement. Political decisions taken in the Kremlin will be equally important in shaping the process [21]. Given the highly personalised nature of Putin's regime, these decisions will involve major strategic trade-offs. They will include choices between investment in military reconstitution and spending on other

[16] Office of the President of Russia. Decree of the President of the Russian Federation, No. 792, 'On establishing the staffing levels of the Armed Forces of the Russian Federation', 16 September 2024 (http://publication.pravo.gov.ru/document/0001202409160006).

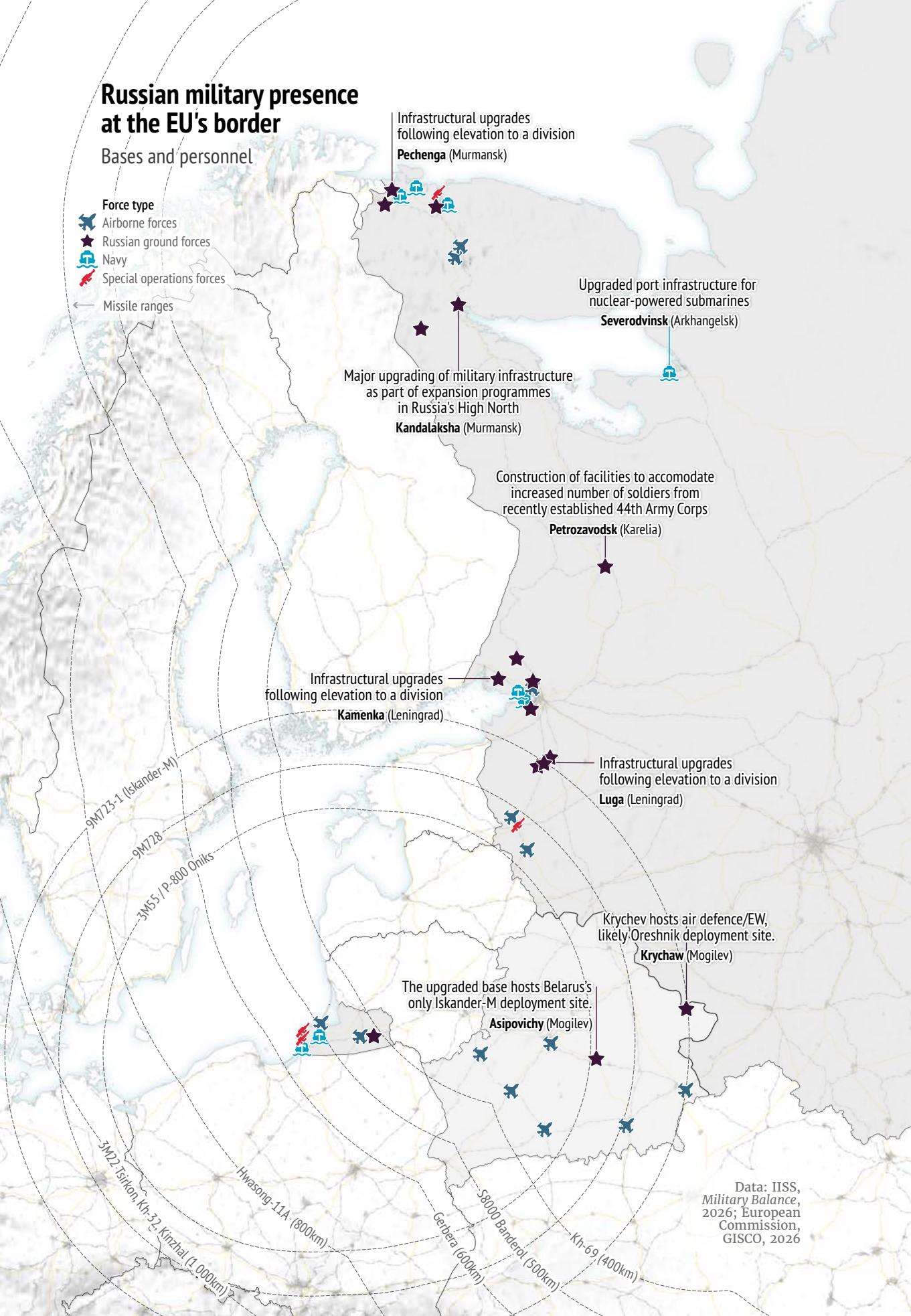
[17] Office of the President of Russia, 'President Vladimir Putin's address to the Federal Assembly', 22 February 2024 (http://kremlin.ru/events/president/news/73585).

[18] Andreika, V., 'Russia's changes in the conduct of war based on lessons from Ukraine', *Military Review*, Army University Press, September/October 2025 (https://www.armyupress.army.mil/Journals/Military-Review/English-Edition-Archives/September-October-2025/Lessons-from-Ukraine/).

[19] Bowen, A. S., 'Russian Military Performance and Outlook', Congressional Research Service, 4 February 2026 (https://www.congress.gov/crs-product/IF12606).

[20] Boulegue, M. et al., *Assessing Russian Plans for Military Regeneration: Modernization and reconstitution challenges for Moscow's war machine*, Chatham House, 9 July 2024 (https://www.chathamhouse.org/2024/07/assessing-russian-plans-military-regeneration).

[21] Luzin, P. and Roshchin, E., 'Russia's strategy and military thinking: Evolving discourse by 2025', CEPA, 24 April 2025 (https://cepa.org/comprehensive-reports/russias-strategy-and-military-thinking-evolving-discourse-by-2025/).


Russian military presence at the EU's border
Bases and personnel
Force type
Airborne forces
Russian ground forces
Navy
Special operations forces
Missile ranges
Infrastructural upgrades following elevation to a division
Pechenga (Murmansk)
Upgraded port infrastructure for nuclear-powered submarines
Severodvinsk (Arkhangelsk)
Major upgrading of military infrastructure as part of expansion programmes in Russia's High North
Kandalaksha (Murmansk)
Construction of facilities to accomodate increased number of soldiers from recently established 44th Army Corps
Petrozavodsk (Karelia)
Infrastructural upgrades following elevation to a division
Kamenka (Leningrad)
Infrastructural upgrades following elevation to a division
Luga (Leningrad)
9M723-1 (Iskander-M)
9M728
3M55 / P-800 Oniks
Krychev hosts air defence/EW, likely Oreshnik deployment site.
Krychaw (Mogilev)
The upgraded base hosts Belarus's only Iskander-M deployment site.
Asipovichy (Mogilev)
3M22 Tsirkon, Kh-32, Kinzhal (1,000km)
Hwasong-11A (800km)
Gerbera (600km)
S8000 Banderol (500km)
Kh-69 (400km)
Data: IISS, Military Balance, 2026; European Commission, GISCO, 2026

state priorities like social welfare or the development of Russia's 'strategic resource base' in the Arctic. The Kremlin will also need to decide on future force design, redeployment plans and their legal foundations – notably the future status of contract military personnel (контрактники). Rather than demobilising this volunteer force, which would further increase the burden of veteran reintegration and the risk of social unrest in the regions, the government will more likely retain them to meet force-size targets and repopulate Russia's military facilities along the border with the EU.

While the regime's overall strategic posture *vis-a-vis* the EU may be assessed with a reasonable degree of confidence, the precise trajectory of Russia's military reconstitution – and, by extension, the likelihood of particular conflict scenarios – will need to be assessed more carefully over time, on the basis of evolving probabilities and emerging signals. Decisions taken by Putin on strategic matters, as well as the forthcoming update of Russia's military doctrine, will provide important signals of intent. Unlike the nuclear or naval doctrines, this key strategic document which sets out the principles governing the use of military force has not been amended for over a decade. More immediate signals will come from the details of the strategic armament plan, the main parameters of which were finalised in December 2025 [(22)]. Public reports suggest a strong focus on capable ground forces, precision-guided weapons, drones and robots, more effective C2 structures as well as higher defence-industrial complex productivity[(23)]. In contrast, weaker signals to watch may include more specific decisions shaping the reconstitution process to meet particular mission requirements. These may include production targets for armoured vehicles or the pace of equipment renewal – for example, whether the government prioritises rapid output, or adopts a more gradual approach that builds in time for the modernisation of production lines. Other indicators could be actual troop redeployments along the border with the EU, as well as credible and verifiable commitments to discuss the future European security architecture. Such developments could suggest a preference for an extended reconstitution timeline rather than preparations for early military action.

The reconstitution process will not unfold in a vacuum. it may initially follow a trajectory determined by strategic choices made in the Kremlin, only to shift later in response to changing circumstances. Its course will be shaped by economic, technological and institutional constraints, as well as by the need to find a balance between the demands of military reconstitution and the stability of Russia's domestic and social model. However, it will also respond to perceived opportunities. These can be defined above all in terms of two variables: (a) the degree of European readiness; and (b) the credibility of US security commitments to European allies. A slow increase in European preparedness combined with rapid weakening of US commitments would likely push Russia towards a faster reconstitution timeline geared towards military action, even at the expense of scale. Conversely, in the event that the two variables combine in a way that would have a stronger immediate deterrence effect, Russia might opt to pursue a slower reconstitution trajectory.

(22) Военный портал, 'Заседание Коллегии Минобороны России' [The Ministry of Defence board meeting], 17 December 2024 (https://milportal.ru/zasedanie-kollegii-minoborony-rossii-2/).

(23) RBC, 'Утверждены параметры госпрограммы вооружения ВС России до 2036 года' [Approved parameters of the state armament programme for the Russian Federation armed forces through 2036], 17 December 2025 (https://www.rbc.ru/rbcfreenews/69429b1b9a79477cde594417).

THREE IMAGES OF FUTURE WAR

Any Russian military action against the EU will likely be accompanied by the use of other coercive instruments already employed by Moscow, including both kinetic (infrastructural sabotage) and non-kinetic (propaganda and disinformation) dimensions. Russia's approach to escalation is holistic, horizontal as well as vertical. Therefore, it may entail deploying new instruments, including military force, alongside an increase in the scale, intensity and geographical reach of existing efforts; or both at the same time. The regime's hostility towards the West is considerable, but so too are its relative constraints. As a consequence, this hostility is being translated into the gradually escalating deployment of various instruments of statecraft, potentially culminating in military coercion. This is not merely an abstract theory: hostile actions by Russia featuring elements of 'non-contact warfare', have already become a reality for Europeans and have expanded in both scope and intensity in recent years.

Russia could still contemplate nuclear use if it concluded that its strategic deterrence assets were threatened.

Achieving strategic surprise and paralysing the adversary have long been prized in Russian military thinking. However, under the current conditions of a transparent battlefield, more vigilant adversaries, and uneven readiness within Russia's own forces [(24)], Moscow is likely to focus instead on sustained efforts to shape the theatre of battle and the wider strategic environment in advance, seeking to create chaos, confusion and paralysis by other means. This would likely entail intensified information warfare and nuclear coercion aimed at undermining a collective European response. At a later point, it could also include shaping the conditions of engagement through cyber operations and precision strikes, among other means, in order to maximise the effects of the subsequent deployment of cheaper drone systems, which Russia may be able to field in abundance.

A war launched by Russia with the aim of breaking NATO and the EU and restoring imperial control over Eastern Europe could initially take the form of a limited operation, either a probing exercise or an attempt at a short, contained campaign. However, such a conflict could develop into a prolonged war of attrition. Given Russia's poor historical record of success in achieving decisive knock-out blows, Moscow would likely consider it a real possibility that even a limited campaign could evolve into a broader regional conflict in Eastern Europe, but it would still seek to deter external engagement. However, while this may seem unorthodox from the perspective of Western military planning, it is conceivable that Russia could prepare for such a conflict as a form of total war from the very outset – short of actual nuclear use. The 'escalate to de-escalate' concept is not an accepted part of Russian military doctrine. However, the regime could still contemplate nuclear use if it were to conclude that Russia's strategic deterrence assets, for example on the Kola Peninsula, were under direct threat.

(24) Pilster, U. and Vinhas de Souza, O., 'Inequality Kills: On Russian combat ineffectiveness in Ukraine and beyond,' NATO Defense College, October 2024 (https://www.ndc.nato.int/download/inequality-kills-on-russian-combat-ineffectiveness-in-ukraine-and-beyond/?wpdmdl=3662&refresh=6968f0198fb291768484889).

Russia's war against the EU

Three basic scenarios

Probe-by-battle	Invasion Ltd.	All-in
Svalbard, Estonia	**Estonia, Suwalki**	**Arctic, Lapland, Karelia, Baltics, Eastern Poland, Gotland** (multiple locations)
Likelihood: **low**	Likelihood: **higher**	Likelihood: **lower**
Timeframe: **short**	Timeframe: **medium**	Timeframe: **medium to long**
A limited escalation of the current conflict, this scenario would involve a conventional hybrid operation combining military and non-military means under a fabricated responsibility-to-protect or national security pretext. It would be accompanied by intensified nuclear coercion aimed at testing NATO's and the EU's willingness to respond collectively. Russia would be ready to take only limited risks and would accept losses if pushed back.	A more extensive campaign, preceded by horizontal escalation in the cognitive and information domains, followed by a short destructive phase featuring combined drone and missile attacks, and then a ground offensive. Strong nuclear intimidation would aim to deter external assistance and consolidate territorial gains. Russia would be ready to accept escalation to a regional conflict, but would seek to avoid a continental war.	A campaign designed around the overwhelming and intimidating use of force, with limited scope for escalation beyond the initial phase. Russia would seek to secure favourable outcomes through lightning strikes at the outset and consolidate them through nuclear coercion. At the same time, it would be prepared for the campaign to evolve into a protracted war of attrition, combining long-range conventional strikes with a comprehensive whole-of-society mobilisation effort.

The diagram above outlines three basic scenarios for Russia's war against the EU. All three assume a sustained cessation of hostilities in Ukraine – although in the *Probe-by-Battle* scenario the ceasefire would not necessarily have to be particularly stable. Meanwhile, the likelihood of the third scenario, *All-In*, could be seen as higher the weaker Ukraine is. Across all three scenarios, the ultimate objective behind the use of military force would remain the same. The difference lies in the logic and scale of escalation. Russia would either pursue a more gradualist approach (*Probe-by-Battle, Invasion Ltd.*), with the intermediate objective of undermining NATO and the EU, to be followed by another round of military action in the future, or opt for a much larger-scale deployment (*All-In*) that would leave little space for future escalation. In all cases, military action would be integrated with non-kinetic tactics, including information warfare.

While the other chapters in this volume offer a number of concrete proposals on how to improve European defences, some general recommendations can follow immediately from this analysis:

> **Europe needs stronger deterrence capabilities to prevent Russian military action against the EU.** Putin's Russia harbours both hostile intentions and paranoia regarding Europe. It makes mistakes, but it is not reckless and, like other authoritarian states, it can be deterred from using military force, even if not from causing harm altogether. Moscow will not hesitate to use force, but is most likely to do so when it judges the chances of success to be reasonable and the risks tolerable. Strong deterrence-by-denial capabilities are key, but so too are longer-range precision-strike systems conveying a credible deterrence message in a language that Russia understands. Deterring Putin's Russia from

attacking the EU will be a long-term task, requiring sustained investment, political resolve and 'multimodal' readiness. At the same time, efforts to strengthen European deterrence cannot come at the expense of support for Ukraine, if only because a Russian victory there would substantially weaken the EU's own defences. If Europeans want to prevent Russian troops from dining in Tallinn, they cannot allow them to have breakfast in Kyiv.

> **The EU must continue to 'unpower' Russia even after the end of hostilities in Ukraine**. In addition to strengthening deterrence, and reducing its costs to a tolerable level, the EU also needs to undermine the regime's aggressive strategy. It should focus on two dimensions in particular: Russia's capacity to conduct non-contact warfare operations, and its ability to rebuild the military capabilities needed for future coercive action against European states within the next decade – and potentially beyond.

CHAPTER 2

REPLACING THE BACKBONE

The challenges of moving away from US-led deterrence

by
GIUSEPPE SPATAFORA

Since the end of World War II, the US has been the backbone of European deterrence. Fears of immediate abandonment of Europe at the start of Trump's second presidency have not materialised. However, Washington's stated defence priorities, strategic developments in other regions – most recently, the Middle East – and recurrent transatlantic tensions point to a significant reduction of the US role in the European theatre. This is intensifying the debate over defending Europe with less America.

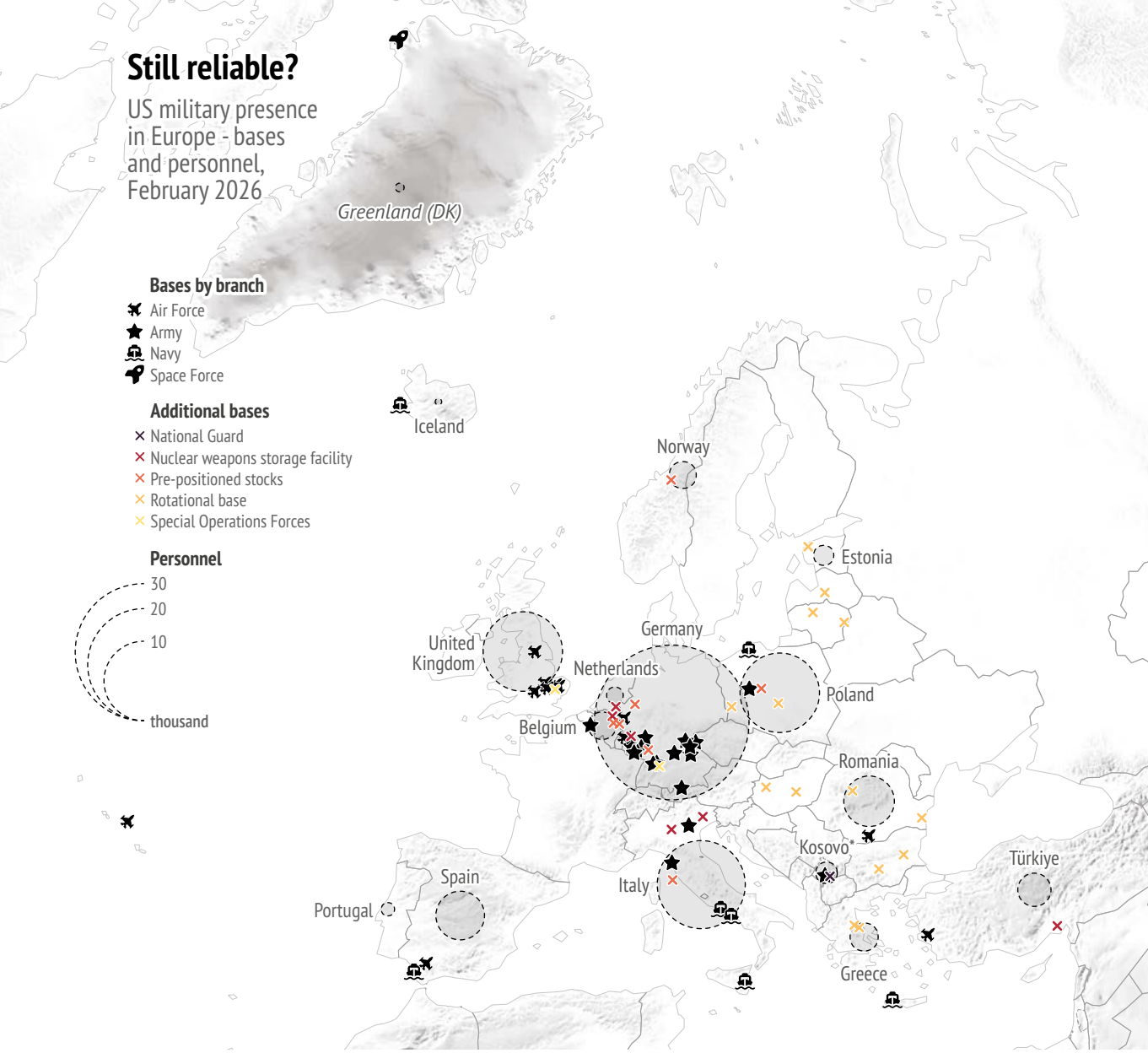
Europe's emphasis so far has been on increasing defence spending and industrial production to compensate for a reduced US role. The conflict over Iran justifies this emphasis: US weapons supplies to Europe, including Ukraine, have fallen sharply, increasing the need for intra-European production [1]. However, US forces perform other key functions in deterring Russia, from nuclear command to enabling NATO operations and conducting vigilance missions. The current trajectory may result in changes across some or all these areas, thereby creating gaps in deterrence.

Deterring Russia with less America is hard, but not impossible. It does not mean the end of NATO. Nor does it necessarily entail replacing all US capabilities with European ones. But it does require Europeans to take charge of all aspects of conventional deterrence, from weapons and doctrine to command and control. It also requires that they move beyond reacting to US policy shifts and take a more proactive, ambitious approach to deterrence.

THE STATE OF PLAY

Before the most recent redeployment announcements, US forces deployed in

[1] Scazzieri, L. and Spatafora, G., 'Assessing the damage: What the Iran war really means for Europe's defence', EUISS Commentary, 9 April 2026 (https://www.iss.europa.eu/publications/commentary/assessing-damage-what-iran-war-really-means-europes-defence).



* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

Data: Congressional Research Service, 2024; Heritage Foundation, 2024; CFR, 2025; IISS, 2026; NATO, 2026; European Commission, GISCO, 2026

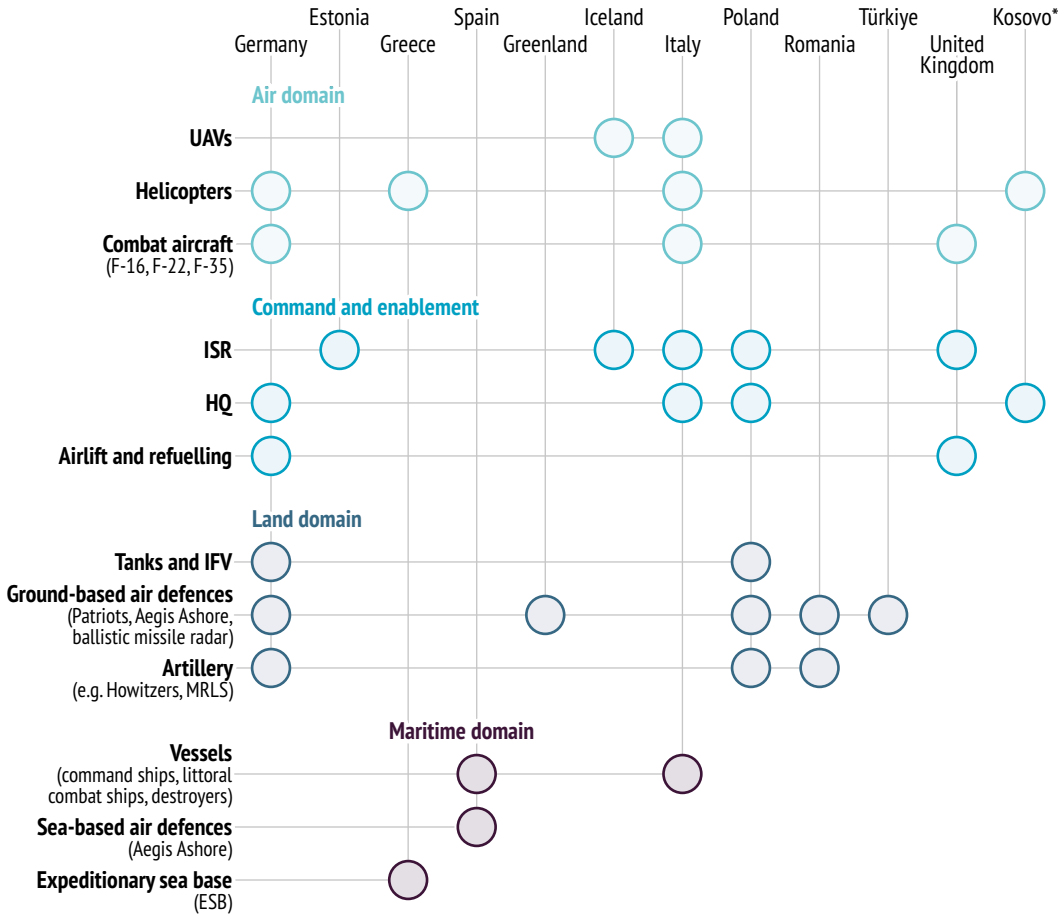
Europe amounted to around 85 000 [2]. Some are permanently assigned to European Command (EUCOM) with its HQ in Stuttgart or to the US Navy's Sixth Fleet near Naples. Other forces are assigned to long-term missions such as Operation *Atlantic Resolve* and NATO's enhanced Forward Presence (eFP), both of which began in 2014 and were strengthened after Russia's full-scale invasion of Ukraine [3]. In 2022 the US activated the forward HQ of the US Army V Corps in Poland. The US also deploys temporary forces to Europe on training exercises.

[2] Spatafora, G., 'The foreign policy-first President?', EUISS Commentary, 4 February 2026 (https://www.iss.europa.eu/publications/commentary/foreign-policy-first-president); Defense Manpower Data Center, *DoD Personnel, Workforce Reports & Publications* (https://dwp.dmdc.osd.mil/dwp/app/dod-data-reports/workforce-reports).

[3] United States European Command, 'Operation Atlantic Resolve fact sheet', as of 6 November 2018 (https://www.eucom.mil/document/39920/operation-atlantic-resolve-fact-sheet).

Power distribution

Location of US assets in Europe, by country



* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

Data: IISS, 2026

These forces operate from a network of US bases across Europe, which provide logistical and operational support for NATO missions. Camp Kościuszko in Poland is an essential logistics hub for the eFP battlegroups on NATO's eastern flank [4]. Many allied HQs – from Allied Command Operations (ACO) in Mons to Joint Force Command (JFC) in Naples, to NATO Support and Training for Ukraine (NSATU) in Wiesbaden – are located in or near US bases.

Of course, these bases are useful not just for deterrence, but also for US power projection across Europe, Africa and the Middle East. Operation *Midnight Hammer* in 2025, in which B2 bombers targeted Iran's nuclear sites, could not have happened without the refuelling aircraft

[4] Hodges, B., 'The return of V Corps', *per Concordiam*, 20 June 2023 (https://perconcordiam.com/the-return-of-v-corps-2/).

which the US had deployed in Europe [5]. During Operation *Epic Fury*, Ramstein, RAF Fairford and Souda Bay were used to fuel and arm bombers, dock ships and coordinate drone sorties in the Gulf [6].

The US also provides key personnel for NATO's command and control (C2) structure. The clearest example is the Supreme Allied Commander Europe (SACEUR), who is dual-hatted as EUCOM Commander. The fact that the same person commanding NATO operations is also in charge of US nuclear forces in Europe significantly strengthens the credibility of deterrence. Following a recent reshuffling of command posts, US officers now lead NATO's three tactical commands: MARCOM in the UK, LANDCOM in Türkiye and AIRCOM in Germany – as well as special operations (SOFCOM) and multi-domain naval forces (STRIKFORNATO) [7].

The implementation of NATO's defence plans further depends on capabilities that the US provides almost exclusively: electronic warfare, space-based intelligence, surveillance and reconnaissance (ISR), command and control (C2), and the suppression and destruction of enemy air defences (SEAD/DEAD) [8]. NATO's nuclear deterrence architecture likewise relies heavily on US nuclear capabilities – including the B-61 gravity bombs stored in six bases across Europe [9]. US Aegis Ashore installations in Poland, Romania and Spain constitute the core of Europe's ballistic missile defence shield [10].

SHADES OF ABANDONMENT

Despite the continued US interest in maintaining a presence in Europe, including for power projection, the US role in European deterrence is undergoing a transition.

First, the Pentagon is modifying the US force posture through gradual changes rather than through a major review. It recalled rotational forces from Romania in October 2025 and cancelled planned deployments to Germany and Poland in 2026 (although Trump later reversed the decision on Poland) [11]. These changes

[5] Taghavee, B., 'Targeting Iran's nuclear sites – Operations Midnight Hammer and Rising Lion', *Key Aero*, 30 June 2025 (https://www.key.aero/article/targeting-irans-nuclear-sites-operations-midnight-hammer-and-rising-lion).

[6] Grynkewich, A.G., 'Statement by General Alexus G. Grynkewich, United States Air Force, United States European Command, before the United States Senate Armed Services Committee', 12 March 2026 (https://www.armed-services.senate.gov/imo/media/doc/grynkewich_opening_statement1.pdf); Colchester, M. and Pancevski, B., 'Europe Is quietly playing a crucial role in the Iran War', *The Wall Street Journal*, 23 March 2026 (https://www.wsj.com/world/europe/europe-is-quietly-playing-a-crucial-role-in-the-iran-war-aad34a00?st=ADzd5p&ref).

[7] Fauroux, M., 'NATO: Washington cedes commands of Naples and Norfolk to Europeans', *La Lettre*, 9 Feb 2026 (https://www.lalettre.fr/fr/politique_executif/2026/02/09/nato-washington-cedes-commands-of-naples-and-norfolk-to-europeans,110624271-fac).

[8] Spatafora, G., 'Fit for purpose? Reforming NATO in the age of Trump 2.0', Brief no. 13, EUISS. 4 June 2025 (https://www.iss.europa.eu/publications/briefs/fit-purpose-reforming-nato-age-trump-20).

[9] NATO, 'NATO's nuclear deterrence policy and forces', updated 20 May 2026 (https://www.nato.int/en/what-we-do/deterrence-and-defence/natos-nuclear-deterrence-policy-and-forces).

[10] NATO, 'Ballistic missile defence', updated 6 March 2026 (https://www.nato.int/en/what-we-do/deterrence-and-defence/ballistic-missile-defence).

[11] U.S. Army Europe and Africa, 'Press release: Department of War announces change to Army unit rotation in Europe', 15 January 2025 (https://www.europeafrica.army.mil/ArticleViewPressRelease/Article/4326550/press-release-department-of-war-announces-change-to-army-unit-rotation-in-europe/); Robertson, N., Birnbaum, M. and Taylor, A., 'Pentagon to pull 5,000 troops from Germany, alarming Republican lawmakers', *The Washington Post*, 1 May 2026 (https://www.washingtonpost.com/national-security/2026/05/01/us-troops-germany-trump-merz/); Beynon, S., Martinez, L., Stoddart, M., Chang, E. and Boccia, C., 'In apparent reversal, Trump says he's sending 5,000 troops to Poland', ABC News, 21 May 2026 (https://abcnews.com/Politics/apparent-reversal-trump-sending-5000-troops-poland/story?id=133203231).

will bring the total number of deployed US troops in Europe back to pre-2022 levels, close to the minimum of 76 000 forces that Congress mandated in the 2025 National Defense Authorization Act[12].

US commanders have said that the redeployments do not affect NATO's overall readiness. But even limited reductions can weaken deterrence by creating capability gaps. As part of the Germany redeployment announcement, the Pentagon decided not to station a long-range fires battalion equipped with Tomahawk and hypersonic missiles under the 2nd Multi-Domain Task Force (MDTF), which was planned for 2026. This decision deprives US forces in Europe of key weapons for deterrence by punishment, at a time when Europeans do not possess deep-strike precision missiles[13].

Washington's central role in the execution of NATO's regional plans is increasingly being questioned.

Notably, these posture changes reflect the views of 'restrainer' thinkers, first discussed in Project 2025[14]. In their view, current US force levels in Europe are not sustainable, and must be reduced to prioritise other objectives, such as homeland defence and deterring China. One proposal to accomplish this suggests removing three brigade combat teams (BCTs) from Germany, Poland and Romania, and cutting US air and naval presence in Europe by half[15]. The Pentagon's redeployments so far are in line with this approach. As Trump's reversal of the decision over Poland shows, uncertainty remains high: rotational forces could easily be redeployed in Europe, but further reductions in troops, naval assets and air power could also take place[16].

Second, even if the bulk of US forces remain in Europe, Washington's central role in the execution of NATO's regional plans is increasingly being questioned. On the one hand, the US posture in Europe is structured in a way that enables forces to fight quickly and effectively, through pre-positioned stocks, logistical nodes and C2 structures. The US Army maintains prepositioned stock across the continent[17], consisting of equipment that can sustain brigade combat teams from day one of war. Exercises such as NATO's *Steadfast Defender* in 2024, the largest allied exercise since the Cold War, or the US Army Europe and Africa's *Sword 26*, demonstrate not only US readiness, but also its ability to move reinforcements rapidly across the Atlantic.

(12) US Congress, *National Defense Authorization Act for Fiscal Year 2026 (PL 119-16)*, 18 December 2026 (https://www.congress.gov/bill/119th-congress/senate-bill/1071).

(13) Spatafora, G., 'Small changes, big impact: How Trump's latest decision removes a key component of European deterrence', EUISS Commentary, 7 May 2026 (https://www.iss.europa.eu/publications/commentary/small-changes-big-impact-how-trumps-latest-decision-removes-key-component).

(14) Roberts, K. (ed.), *Mandate for Leadership – The Conservative Promise*, Project 2025, The Heritage Foundation, Washington, DC, 2023 (https://static.heritage.org/project2025/2025_MandateForLeadership_FULL.pdf); Velez-Green, A. and Peters, R., *The Prioritization Imperative – A Strategy to Defend America's Interests in a More Dangerous World*, Special Report No 288, The Heritage Foundation, Washington, DC, 1 August 2024 (https://www.heritage.org/defense/report/the-prioritization-imperative-strategy-defend-americas-interests-more-dangerous).

(15) Kavanagh, J. and Caldwell, D., 'Aligning global military posture with U.S. interests', Defense Priorities Explainer, 9 July 2025 (https://www.defensepriorities.org/explainers/aligning-global-military-posture-with-us-interests/).

(16) Gordon, M.R. and Gramer, R., 'Pentagon cuts forces earmarked for Europe in event of crisis', *The Wall Street Journal*, 27 May 2026 (https://www.wsj.com/politics/national-security/pentagon-cuts-forces-earmarked-for-europe-in-event-of-crisis-30024891).

(17) U.S. Army Europe and Africa Public Affairs Office, 'Fact Sheet: Army Prepositioned Stock', 2021 (https://www.europeafrica.army.mil/Portals/19/documents/Fact%20Sheets/APS%20Fact%20Sheet%2010262022.pdf?ver=gfg2yCbEhimp3riAj1GBhQ%3D%3D).

On the other hand, a leaked Pentagon memo from mid-2025 argued that the US is 'unlikely to provide any substantial, if any, support to Europe' in the event of Russian military advances [18]. The National Defense Strategy (NDS) states that engagement with allies will take place 'through arms sales, defense industrial collaboration, intelligence-sharing' – without mentioning direct combat support [19]. At one extreme, the US could use the current relationship with Ukraine as a model for its role in a war in Europe: selling weapons and providing key intelligence to allies, while also maintaining its nuclear deterrent, without actively partaking in fighting [20]. Even if this extreme case does not materialise, the 'simultaneity' problem (competing US force requirements in other theatres) could still make it impossible for the US to fulfil its NATO commitments. Given the central role of US personnel and reinforcements in NATO defence plans, this could create major gaps in the Alliance's ability to execute them.

Third, developments in other theatres are already complicating US weapons supplies to Europe. In the first six days of the war against Iran in 2026, the US spent USD 11.3 billion on highly expensive munitions, and had to relocate air defence assets such as Patriots and THAAD to the Gulf from other theatres [21]. Air defences and long-range strikes are among the areas where Europe depends most heavily on the US. They are also key components of the Prioritised Ukraine Requirement List (PURL) purchases that Europeans have funded for Kyiv through US suppliers.

Even if the US intends to honour the purchases, deliveries are taking longer. For instance, replacing the more than 850 Tomahawk missiles fired will take about ten years based on the current production rate of around 85 units per year, and the US will prioritise replenishing its own arsenals over those of European allies. As Under-Secretary of War Elbridge Colby argued at the meeting of the Ukraine Defence Contact Group in April, support to Ukraine 'must not rely on significant U.S. contributions' [22]. The Pentagon has also informed Finland, Estonia and Switzerland that their orders are delayed [23].

Fourth, ongoing US strategic repositioning and transatlantic tensions are making further dents in the credibility of American deterrence. On the one hand, the White House does not share Europe's assessment of Russia as the main threat facing NATO. The second Trump administration has sought to reset relations with the Kremlin and re-establish

(18) Horton, A. and Natanson, H., 'Secret Pentagon memo on China, homeland has Heritage fingerprints', *The Washington Post*, 29 March 2025 (https://www.washingtonpost.com/national-security/2025/03/29/secret-pentagon-memo-hegseth-heritage-foundation-china/).

(19) US Department of War, *2026 National Defense Strategy*, January 2026, p. 12 (https://media.defense.gov/2026/Jan/23/2003864773/-1/-1/0/2026-NATIONAL-DEFENSE-STRATEGY.PDF).

(20) Interview with US policymakers and think tankers, Washington D.C., November 2025.

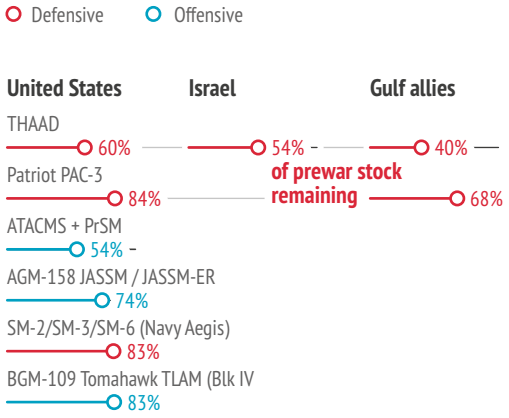
(21) Cancian, M. F. and Park, C. H., 'Iran war cost estimate update: $11.3 billion at day 6, $16.5 Billion at day 12', CSIS, 13 March 2026 (https://www.csis.org/analysis/iran-war-cost-estimate-update-113-billion-day-6-165-billion-day-12).

(22) Colby, E., 'Remarks by Under Secretary of War for Policy Elbridge Colby at the Ukraine Defense Contact Group', US Department of War, 13 April 2026 (https://www.war.gov/News/Speeches/Speech/Article/4461862/remarks-by-under-secretary-of-war-for-policy-elbridge-colby-at-the-ukraine-defe/).

(23) 'Finland, Estonia say US defence deliveries delayed over Middle East war', Reuters, 28 April 2026 (https://www.reuters.com/world/europe/finland-estonia-say-us-defence-deliveries-delayed-over-middle-east-war-2026-04-28/); 'Switzerland says cancelling US Patriot missile system order an option', Reuters, 1 April 2026 (https://www.reuters.com/business/aerospace-defense/switzerland-says-cancelling-us-patriot-missile-system-order-an-option-2026-04-01/).

Europe's supplier no more?

In the war against Iran, US, Israel and Gulf allies depleted US-manufactured munition stocks that would be important to Europe's deterrence



Data: RUSI, Payne Institute for Public Policy, 2026

'strategic stability' with Moscow [24]. As part of that approach, the US could choose to withdraw assets from Europe that Russia finds provocative or threatening. This could impact elements of forward defence and deterrence by punishment.

On the other hand, tensions between allies on the two shores of the Atlantic – including over Greenland and Iran – are undermining the unity of the alliance and by extension the credibility of its deterrence. Administration officials have even raised the possibility of punishing allies who are perceived to be 'uncooperative' in the war against Iran [25]. The decision not to deploy long-range missiles took place in the aftermath of a spat between Trump and German Chancellor Merz. If the US were to follow up on these threats, it could create splits between allies, further eroding deterrence.

Europeans may believe that these tensions are only going to last for the remainder of the Trump 2.0 administration, and that transatlantic relations will become more stable and predictable with the next president. But even a more pro-European administration would face similar resource constraints and competing priorities in other theatres. Some of these changes are structural and unlikely to disappear. For example, an Indo-Pacific contingency could place far greater demands on US resources than the recent conflict in the Middle East, resulting in greater shortages for the European theatre. Europeans therefore should not hope for a return to the *status quo ante.*

RAISING EUROPE'S LEVEL OF AMBITION

The changing US role in transatlantic defence means that Europeans must assume responsibility for the full spectrum of deterrence and warfighting in the continent. This entails several challenges, both political and operational.

First, Europeans must prepare to uphold deterrence across the continent in all contingencies – whether the US force posture in Europe remains broadly unchanged, is partly reduced, or is significantly scaled back. Even if the US does not relinquish its bases on the continent, it may play only a limited role in combat operations, and provide no major reinforcements from across the Atlantic. Europeans must

[24] The White House, *US National Security Strategy*, 2025, p. 25 (https://www.whitehouse.gov/wp-content/uploads/2025/12/2025-National-Security-Strategy.pdf).

[25] Detsch, J. and McLaery, P., 'Trump weighs consequences for NATO allies on "naughty' list"', *Politico*, 22 April 2026 (https://www.politico.com/news/2026/04/22/trump-nato-allies-consequences-list-00883619).

prepare for – and war-game – various scenarios of disengagement[26].

Pentagon officials have said that they expect Europeans to take over the bulk of NATO's conventional deterrence capabilities[27]. That would require a major overhaul of planning process, which currently relies heavily on US forces and capabilities. Europeans should take the lead in this transformation.

From a C2 standpoint, Europe's goal should be to transition from a US backbone to a European-led structure to which the US can contribute without necessarily taking the lead. Europeans must also consolidate their forces into large-scale, multinational forces ready to fight in a high-intensity conflict, deploy at short notice, and perform functions currently carried out by US troops[28]. That would ideally happen within NATO. However, if the US maintains control of allied structures and strategic divergence across the Atlantic persists or deepens, Europeans should consider alternative frameworks outside NATO.

Europeans should be in the driver's seat, actively shaping the transition.

From a defence-industrial standpoint, Europeans should assume that certain US-provided weapons will no longer be available, and that the European defence industry will not be able to rapidly replace the same capabilities, particularly in areas such as deep precision strike. As part of the process, European leaders will need to decide which capabilities are essential and need to be replaced; for which continued US supply could be ensured (for example, through co-production); which could be dispensed with; and which makeshift or temporary solution could be adopted while production ramps up. Europe has many tools to make up for these shortages, including EU financing instruments, while Ukraine's wartime experience offers valuable lessons which must be integrated in all aspects of war planning. The next chapter will provide more details on how this can be achieved.

These challenges require a shift from reactive to proactive mode. Until now, Europeans have been waiting for the US to share its plans for burden-shifting and disengagement. However, given the unpredictability of this administration, any clarity from Washington may come too late – or not at all. A full posture review may or may not be released, but the US is making changes to its posture nonetheless. And even if such a review is published, Europeans would still be responding to US choices rather than steering the process themselves. Instead, they should be in the driver's seat, actively shaping the transition.

Europeans should not allow fears of alienating Washington to prevent more proactive planning. There is no downside to taking a more active role in replacing US capabilities. In the best-case scenario, doing so would make Europeans the 'ideal' allies described in the NDS, taking greater responsibility for the defence of the continent. In the worst-case

(26) Simón, L. and Boswinkel, L., 'What if hell breaks loose? Imagining a post-American Europe', CSDS Policy Brief No 17/2025, CSDS, 11 June 2025 (https://csds.vub.be/publication/what-if-hell-breaks-loose-imagining-a-post-american-europe/).

(27) Slattery, G. and Pamuk, H., 'Exclusive: US sets 2027 deadline for Europe-led NATO defense, officials say', Reuters, 5 December 2025 (https://www.reuters.com/business/aerospace-defense/us-sets-2027-deadline-europe-led-nato-defense-officials-say-2025-12-05/).

(28) Ruiz Palmer, D. and Simón, L., *Rebalancing NATO's command: European operational responsibility and transatlantic defence*, CSDS In-Depth Paper No 22/2025, January 2026 (https://csds.vub.be/publication/rebalancing-natos-command-european-operational-responsibility-and-transatlantic-defence/).

scenario, it would minimise deterrence gaps should the US be unwilling or unable to contribute. The alternative – ignoring the risks, assuming continued American engagement and not making the necessary preparations – would leave Europe woefully undefended.

CHAPTER 3

EUROPEANISING DETERRENCE

From capabilities to credibility

by
LUIGI SCAZZIERI

Europe's central strategic challenge is to 'Europeanise' deterrence by strengthening European military capabilities sufficiently to deter Russia with much less American involvement. To do so, Europeans will need to make progress on three fronts at once. First, they must fill long-known critical capability gaps and adapt to the transformation of warfare revealed by Russia's war of aggression against Ukraine. Second, they need to develop the connective tissue required to operate effectively together with less US support. Third, they must adopt a more credible posture to signal resolve, including in the nuclear domain. Timing is critical: Europeans must move as quickly as possible.

Europeans have made significant progress in strengthening their defences since 2022. Defence spending has increased by 40% since 2023 and the EU has begun to play a more significant role, especially by using funding instruments to support procurement and industrial expansion.

Rising budgets have resulted in expanding European defence production, with the sector's manufacturing index up by over 40% since 2021 [(1)]. A notable success is the production of 155mm artillery ammunition, which has increased sixfold since 2022 [(2)]. Meanwhile, missile maker MBDA has doubled production since 2023 and production of interceptors for Germany's IRIS-T air defence system has increased tenfold since 2021 [(3)].

Europe is also developing capabilities in emerging domains: several Member States, such as France and Germany, are acquiring new drones, and Europeans are thinking about how to effectively integrate them into military operations. Europe's defence industrial base is becoming more innovative: newer defence

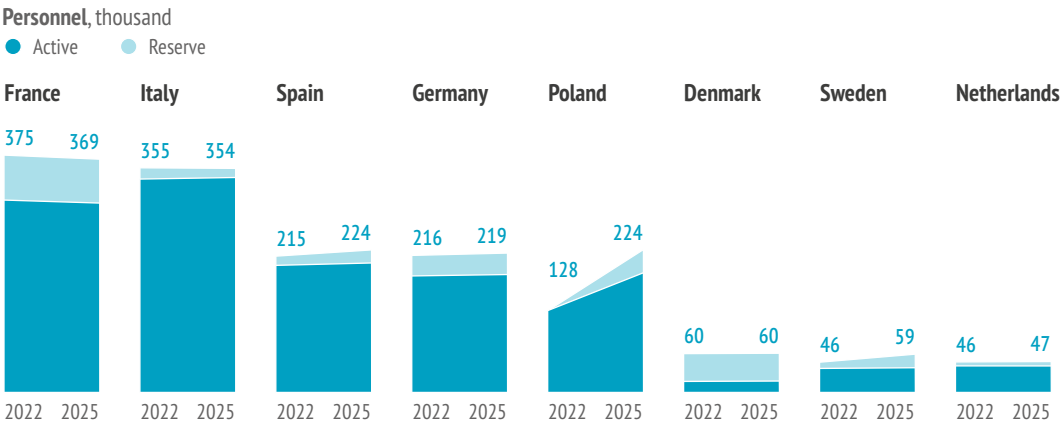
(1) Romei, V., 'European manufacturing misery? Some sectors have never had it so good', *Financial Times*, 19 March 2026 (https://www.ft.com/content/a892277b-e419-4543-bea8-04cfdd052856).

(2) NATO, 'Speech by Secretary General Mark Rutte at the Rheinmetall artillery plant in Unterlüß', 27 August 2025 (https://www.nato.int/en/news-and-events/events/transcripts/2025/08/27/speech).

(3) 'Diehl to boost production of IRIS-T air defence used in Ukraine, CEO says', Reuters, 22 January 2026 (https://www.reuters.com/business/aerospace-defense/diehl-boost-production-iris-t-air-defence-used-ukraine-ceo-says-2026-01-22/); MBDA, 'MBDA on track with its acceleration of ASTER missile production', 30 July 2025 (https://www.mbda-systems.com/mbda-track-its-acceleration-aster-missile-production).

Quiet, uneven growth in the ranks

Military personnel in the top eight European military spenders increased by over 100 000 (or 8%) from 2022 to 2025



Data: IISS, *Military Balance*, 2023 and 2026

technology firms such as Destinus, Frankenburg and Helsing have emerged, while existing players like Rheinmetall and MBDA are also moving into new capability areas.

Perhaps the most encouraging development is the gradual emergence of a growing web of defence-industrial partnerships with Ukraine. Kyiv has gained huge expertise both in industrial and operational terms and Europeans are drawing more effectively on this experience. Cooperation takes many forms, including European funding for production in Ukraine (for example through the Danish financing model). Increasingly, however, it also involves joint ventures and production of Ukrainian or Ukrainian-derived equipment in Europe. Examples include productions lines for missile components in Denmark and drones in several other countries such as the Netherlands [4].

Progress in strengthening Europe's defences has been slower in other areas. For example, several European countries have placed large orders for air defence equipment, but these capabilities will not be available for years. Long-range strike follows a similar pattern. France, Germany, Italy, Poland, Sweden and the UK are working to develop novel capabilities through the European Long-Range Strike Approach (ELSA) initiative, and other countries are acquiring such systems for the first time. Yet these improvements will only materialise towards the end of this decade, and existing European stocks are limited [5].

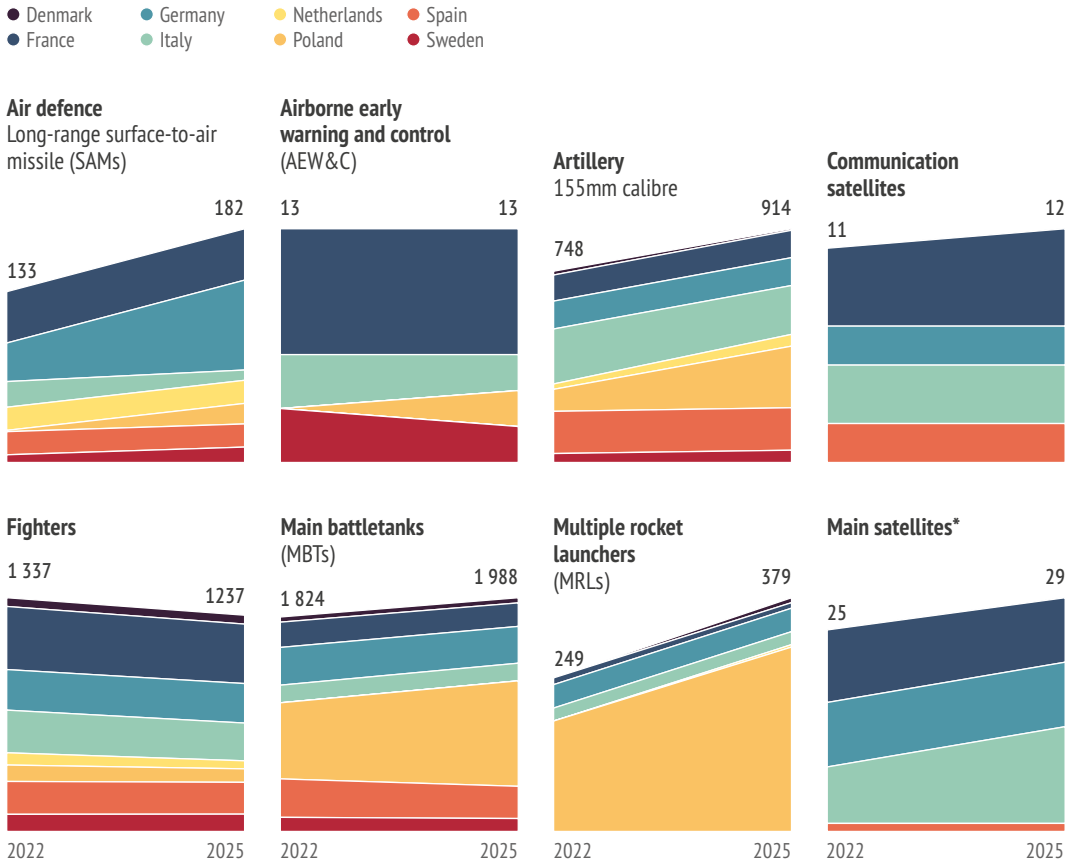
Crucially, since 2022 many European countries have bought US-origin systems to bolster air defence and long-range strike capabilities. However, delivery timelines are slipping as the conflict in the Middle East pushes Washington to replenish its own stockpiles first. Europe's domestic production capacity in both

[4] Ukrainian Ministry of Defence, 'Defence Minister announces launch of joint Ukrainian–Dutch drone production', 1 December 2025 (https://mod.gov.ua/en/news/ukraine-s-defence-minister-announces-launch-of-joint-ukrainian-dutch-drone-production).

[5] Barrie, D., Gwadera, Z. and Hinz, F., , 'Deep Precision Strike: Europe's quest for long-range missile capabilities', Research Paper, IISS, November 2025 (https://www.iiss.org/research-paper/2025/11/deep-precision-strike-europes-quest-for-long-range-missile-capabilities/).

The long road to readiness

Military capabilities among Europe's top eight spenders, 2022-2025



* Intelligence, Surveillance and Reconnaissance (ISR), Signals Intelligence (SIGINT) and Electronic Intelligence (ELINT)

Data: IISS, *Military Balance*, 2023 and 2026

deep strike and air defence has started from a relatively low base. For example, France and the UK placed their first order for SCALP/Storm Shadow missiles in around 15 years in 2025, while Germany only moved to restart serial production of its Taurus missile at the end of 2025.

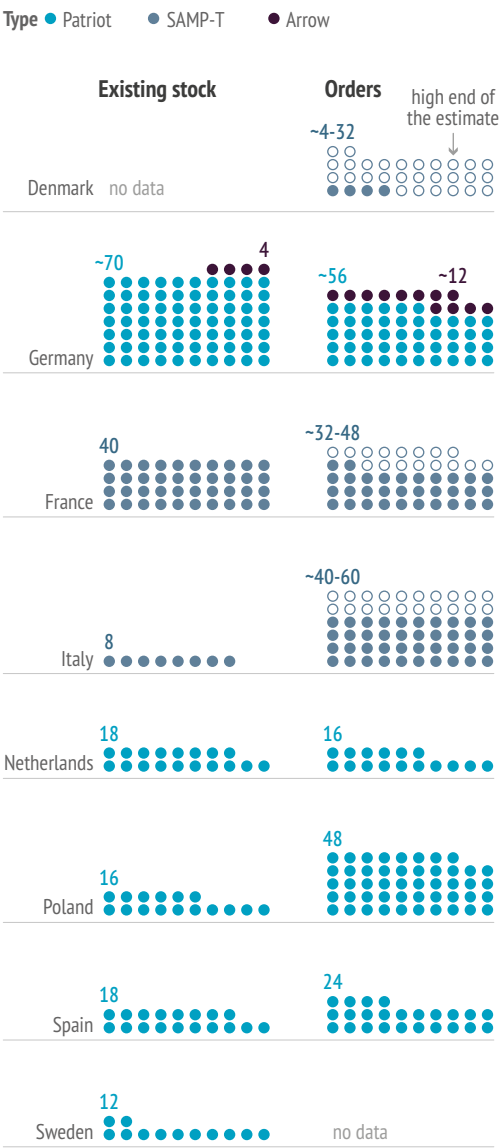
Finally, European progress in filling some key gaps has been slow. For example, Europeans currently operate 29 ISR/ELINT satellites, compared to America's 241. There are plans to strengthen European space capabilities, notably through the EU's IRIS² system and Germany's €35 billion military-space programme. But neither effort will quickly close Europe's space deficit: IRIS² is unlikely to become fully operational before around 2030, while the benefits of Germany's broader military-space expansion will emerge only gradually [6]. Progress in filling other gaps, such as electronic warfare and airborne early warning and control, has been limited. Europeans also face a €70 billion investment shortfall in military

[6] Bronk, J., 'Airborne electromagnetic warfare in NATO: A critical European capability gap', RUSI, 19 March 2025 (https://www.rusi.org/explore-our-research/publications/occasional-papers/airborne-electromagnetic-warfare-nato-critical-european-capability-gap).

mobility to upgrade the infrastructure needed to move troops and *materiel* quickly across Europe[7].

Long-range air defence capabilities

Number of launchers



Data: EUISS analysis based on open-source data as of early May 2026

STRENGTHENING EUROPE'S MILITARY FOUNDATIONS

To fill long-standing capability gaps and generate military mass quickly, Europeans need to maintain strong defence spending, invest in the right priorities, and spend in a more coordinated way.

The brunt of the financial effort will continue to weigh on national budgets. However, many governments will be under intense pressure, not least if the conflict in the Gulf leads to an economic recession and sustained inflation. European-level instruments could play a larger role in filling the funding gap. There is a strong case for the EU to repeat the SAFE loan mechanism, allowing Member States who wish to spend more on defence but face high borrowing costs to do so. The next EU budget also presents a potentially large source of defence financing. The Commission's proposal to dedicate €131 billion specifically to defence would mark a significant step forward. The challenge will be to strike the right balance between the need to support immediate readiness and long-term development efforts that are important but may take many years to materialise. The EU should also unlock greater financial resources for defence by embedding defence considerations horizontally across all its funding instruments. Looking beyond the EU budget, completing the capital markets union would help channel more investment into defence companies, while extending more lending from the European Investment Bank (EIB) and other public entities to the defence sector would provide a further boost. Together,

(7) Scazzieri, L., 'The road to readiness: How the EU can strengthen military mobility, Brief no. 25, EUISS, 23 October 2025 (https://www.iss.europa.eu/publications/briefs/road-readiness-how-eu-can-strengthen-military-mobility).

these steps would also send a strong signal of resolve.

Sustaining spending is only part of the answer. The fighting in Ukraine has led to a new revolution in military affairs. Cheap and fairly accurate unmanned systems are proliferating, troop movements are severely constrained and the ability to collect, process and integrate information quickly has become a decisive advantage. Europeans have not yet adapted sufficiently to this new reality. Their approach often remains overly perfectionist, focused on acquiring expensive capabilities that take years to develop and produce and are available only in small numbers. Europeans need to learn more systematically from Ukraine's experience, embracing solutions that are 'good enough' and upgradable over time. Defence ministries should also be more willing to use modular contracts, spiral development and rapid procurement, and to accept more risk in deciding which systems to field.

Beyond spending enough and on the right *materiel*, the key challenge is coordination. Europeans currently lack effective coordination mechanisms, which risks dissipating efforts. NATO's defence planning process is still based on the assumption that the US will deliver a third of capabilities by 2032, which limits its effectiveness in driving European coordination [8]. Meanwhile, the EU lacks a comparable capability planning framework. Defence cooperation among 27 Member States is inherently difficult, given their differing threat perceptions, strategic cultures and varying degree of willingness to cooperate across various domains. As a result, smaller groups of countries have increasingly emerged as the main framework through which Europeans cooperate in developing and procuring defence systems, like joint procurement of IRIS-T air defence systems or joint development of long-range strike capabilities within the European Long-Range Strike Approach.

However, a network of minilateral frameworks across different capability areas does not necessarily add up to a coherent whole. Europeans need a mechanism that brings together EU and non-EU partners to coordinate Europe's defence ramp-up and rapidly deliver force packages across the full spectrum of capabilities. Such a mechanism could sit within NATO, within the EU, or alongside both. What matters most is the function: it should allow European countries that share a sense of urgency, including non-EU allies and partners such as the UK, Norway and Ukraine, to jointly fill gaps with solutions that are available quickly.

Funding from EU-level instruments can be a powerful driver of cooperation.

Funding from EU-level instruments can be a powerful driver of cooperation. The examples of the European Defence Industry Reinforcement through Common Procurement Act (EDIRPA) and SAFE show that even small amounts of EU funding can catalyse cooperation. But EU instruments would have greater impact if they were deployed more strategically, by focusing funding on key capability gaps such as airborne surveillance, and by using eligibility criteria that act as a stronger incentive for Member States to work together.

To deliver the capabilities they need, Europeans also need a more integrated and agile defence industrial base. National

[8] NATO, 'Address by NATO Secretary General Mark Rutte to the NATO Parliamentary Assembly', 26 May 2025 (https://www.nato.int/en/news-and-events/events/transcripts/2025/05/26/address).

procurement decisions will be critical in embracing faster and more flexible forms of procurement. While key decisions are the prerogative of national governments, the EU can help mainstream more agile procurement practices through its funding instruments and by strengthening links between Ukraine's defence ecosystem and Europe's industrial base through dedicated networks and funding. The EU can also help reduce fragmentation in Europe's defence market by promoting the mutual recognition of testing and certification in individual capability areas and by opening national procurement to greater competition. Drones and other emerging technologies could serve as a testing bed for these approaches, as these sectors have fewer entrenched national champions and less-established market structures.

Deeper cooperation is likely to emerge first among smaller groups of countries with common priorities.

BUILDING OPERATIONAL COHERENCE

To Europeanise deterrence, European countriess need to ensure that their armed forces can operate together smoothly with much less US support. Normalising and deepening multinational military cooperation is essential. There are already many examples of successful cooperation, from Belgian-Dutch naval cooperation in procurement, training and logistics to the pooling of air transport and air-to-air refuelling through the European Air Transport Command (EATC). At the most ambitious end of the spectrum are arrangements involving the integration of units or commands, such as the incorporation of Dutch mechanised land forces into their German counterparts or the growing integration of Nordic air forces.

Europeans should deepen cooperation across all of these models, both in established capabilities and emerging areas, to build interoperability. The exact model will depend on the specific capability, with enabling capabilities such as airborne early warning and control or satellites most suited to sharing and pooling arrangements, while frontline combat capabilities such as rocket launchers are most suited to cooperation on logistics or force integration. Military cooperation cannot be imposed: it depends on aligned needs, high levels of trust and a shared sense of urgency. In practice, deeper cooperation is therefore likely to emerge first among smaller groups of countries with compatible strategic cultures and common priorities. These small groupings can serve as practical building blocks for a more coherent European deterrence posture, with others potentially joining later [9].

Europeans also need greater resilience in their command arrangements, to allow them to plan and conduct operations with much less US support. The most obvious path is to 'Europeanise' NATO, as the alliance is the established framework through which European collective defence is organised. This process is already underway, with the most visible example

[9] Scazzieri, L., 'The power of the few: How clusters can strengthen European defence', Brief no. 3, EUISS, 20 February 2026 (https://www.iss.europa.eu/publications/briefs/power-few-how-clusters-can-strengthen-european-defence).

being the transfer of command responsibilities to Italy in Naples and to the UK in Norfolk[10]. The end point would be an alliance in which Europeans provide the backbone, with the US no longer serving as the indispensable framework nation. Europeans should also prepare for a less orderly transition by building up the necessary staff capacity and conducting exercises to ensure that NATO structures could continue to function with a greatly reduced US contribution.

The path towards Europeanising NATO also has limits, however. Europeans cannot be certain that they will always be able to rely on NATO's command structure because access to it depends on unanimity. There are conceivable scenarios in which Europeans are unlikely to be able to use NATO structures: for example, a post-ceasefire stabilisation mission in Ukraine in which the US would be unlikely to participate. Europeans need options to act in such scenarios. One option is strengthening EU structures, particularly the Military Planning and Conduct Capability (MPCC), which is currently only able to command small operations. Member States have limited appetite to turn the MPCC into a full HQ, due to costs, political sensitivities around duplicating NATO and relative scarcity of personnel. Even so, it may be feasible to strengthen the MPCC sufficiently to allow it to be scaled up further in case of need.

However, strengthening the MPCC would not fully solve the problem, since using it would depend on unanimous agreement among Member States. For that reason, Europeans should invest more heavily in multinational command arrangements built around existing national or multinational headquarters, such as the Eurocorps or France's 1st Army Corps headquarters. These structures would allow groups of willing states to organise around an existing command framework without depending on consensus within the EU or NATO. However, such arrangements would need to be significantly reinforced, staffed and exercised to command high-intensity operations smoothly.

ANCHORING DETERRENCE IN A CREDIBLE EUROPEAN FRAMEWORK

To defend themselves, Europeans will also need to signal their resolve. Filling capability gaps and deepening cooperation both contribute to that objective, but Europe's main vulnerability remains its political fragmentation. Europeans need to convince Russia that an attack on one of them would really be an attack on all. Greater clarity about how the EU's mutual assistance clause, Article 42.7, would be interpreted and applied in different scenarios could reinforce this message by signalling that Europeans are prepared to act collectively not only in the event of open war, but also in more ambiguous contingencies.

Operationalising Article 42.7

Article 42.7 TEU states that if a Member State is the victim of armed aggression on its territory, the other Member States have an obligation to aid and assist it 'by all means

(10) NATO, 'European Allies to take on new leadership roles in NATO's Command Structure', 6 February 2026 (https://www.nato.int/en/news-and-events/articles/news/2026/02/06/european-allies-to-take-on-new-leadership-roles-in-natos-command-structure).

in their power'. Yet the clause remains politically and operationally underdeveloped. This leaves room for ambiguity over how Europeans would respond in a crisis.

Clarifying how Article 42.7 would function in practice matters as there are plausible contingencies in which NATO's Article 5 would not be activated, or NATO's command structures would not be available to Europeans. One such scenario would involve a hybrid campaign with activities that fall below the threshold of Article 5. In another scenario, there could be an attack on an EU Member State that is not part of NATO. Defining more clearly how Article 42.7 would apply is also relevant as the credibility of deterrence extends beyond the military domain. An attack could be aimed at European energy and transport networks, digital infrastructure, financial stability and the functioning of the single market. These are all areas in which EU-level coordination could enhance the effectivenss of national efforts.

Giving substance to Article 42.7 would mean clarifying how European mutual assistance would function, alongside NATO or independently. One priority would be thinking through the EU's responses to various scenarios, particularly grey-zone aggression. Following the tabletop exercise held in early May, more exercises involving a broader range of scenarios could be held. These could help flesh out thinking about the capabilities and mechanisms needed to implement Article 42.7 in different scenarios. Exercises could then be turned into a series of tested coordination mechanisms and assistance packages for different circumstances.

A second priority would be clarifying the EU's coordinating role, as Article 42.7 does not automatically engage the EU institutions. What would the role of the various EU institutions be, what instruments would they use, and what would Member States expect? Member States could collectively decide to task EU institutions with a specific function. Depending on the precise nature of the attack and the needs of the concerned Member State(s), the EU could help coordinate assistance, help to keep communications and energy grids running, counter FIMI and hybrid attacks and support the management of any refugee flows.

Looking at the military sphere, conveying credibility requires more frequent and demanding European exercises. The exercises carried out within the framework of the Joint Expeditionary Force are a good example. At the same time, more deployments and exercises by a wider group of Europeans in vulnerable areas, from the eastern flank to the High North, would strengthen deterrence further by making clear that a crisis would immediately engage a broader coalition. Not all Europeans will be willing to emulate Germany's decision to permanently station a brigade in Lithuania, but even smaller and more rotational contributions would have political and military value.

A stronger European nuclear deterrence posture is also an essential part of a European deterrence framework. The key challenge for European nuclear deterrence is not the overall number of warheads. France and Britain between them have around 500 warheads while Russia has over 4 300. Despite this disparity, French and British national nuclear arsenals taken together are sufficient to impose unacceptable costs on Russia, as they could survive a first strike and still cause incalculable damage. The key issue is whether Russia believes that France

and the UK would be willing to risk nuclear use to defend their allies. Extended deterrence arrangements are never immune from such doubts. Deepening nuclear exchanges and cooperation is the only way to mitigate uncertainty and make deterrence more resilient to domestic political shifts. The changes in France's nuclear posture announced in March 2026 mark an important step in that direction. Building on recently expanded cooperation with the UK, Paris will deepen strategic dialogue and operational cooperation with Belgium, Denmark, Germany, Greece, the Netherlands, Norway, Poland and Sweden. Cooperation could include conventional contributions by allies to French nuclear operations, for example air-to-air refuelling or suppression of enemy air defences. In addition, French nuclear-capable jets could be deployed on partners' territory.

Strengthening the credibility of European nuclear deterrence is not easy but it would pay large dividends for European security. If enhanced nuclear cooperation between France and its partners succeeds, others may eventually join the arrangement, further reinforcing it. Conversely, if doubts persist, some European governments may begin to consider national nuclear options more seriously, no matter how high the financial and technical hurdles are.

CONCLUSION

The more progress Europeans make in strengthening their defences, the more capable they will be of withstanding uncertainty in American policy and deterring Russia from coercion and aggression. A stronger European deterrence posture will neither preclude continued US engagement nor weaken NATO, but it will ensure that Europeans can defend themselves whatever course the transatlantic relationship takes.

CHAPTER 4

SECURING THE FOUNDATIONS OF DETERRENCE

Defending Europe requires breaking China's chokehold over critical materials

by
JORIS TEER

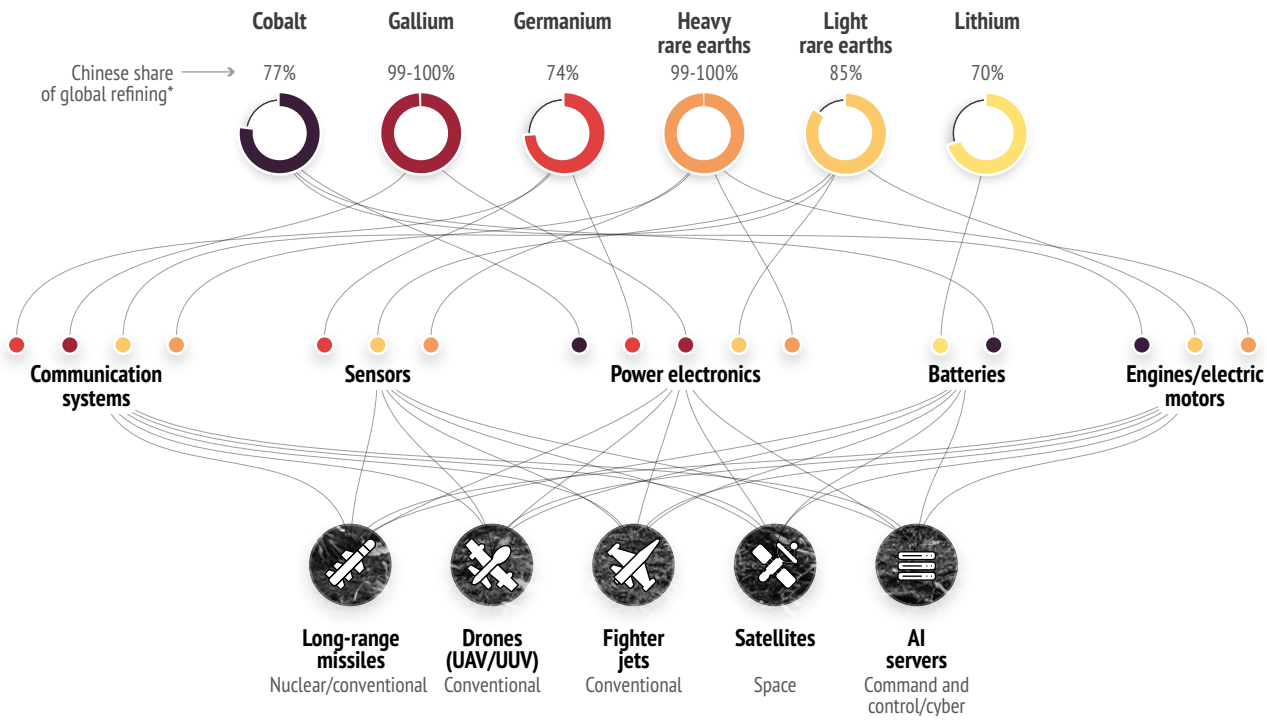
Securing access to critical materials for Europe's defence manufacturers is vital to maintain deterrence *vis-à-vis* Russia. This is even more true at a time of growing uncertainty about the US commitment to NATO. The scale and pace of the continent's rearmament will co-determine whether Europe succeeds in keeping the peace. Expanding production of long-range missiles, drones, fighter jets and other weapon systems is essential. Modern warfare also depends on satellites. Semi-autonomous weapon systems and next-generation cyber warfare rely on AI servers. Building any of these capabilities requires access to an advanced and broad manufacturing base that can produce motors, batteries, power electronics and other key components at scale. Critical raw materials are indispensable to the production of all these inputs.

Europe's defence surge depends on reliable access to large volumes and a wide range of critical raw materials and processed components, the majority of which are China-controlled. For 17 of the 34 raw materials the EU classifies as critical, Beijing accounts for more than 70% of global production at either the mining or refining stages (see diagram on page 33). Beijing has used export controls to curtail supply of many of these materials throughout 2025 and early 2026, categorically rejecting export licences for European, American and other partner-country defence end-users. Beijing-induced scarcity has already aggravated European arms manufacturers' longstanding production constraints. Leonardo DSR, an Italian defence company, ate into its 'safety stock' of germanium in August 2025, fearing production disruptions later that year[1].

[1] Emont, J., Somerville, H. and MacDonald, A., 'China is choking supply of critical minerals to Western defense companies', *The Wall Street Journal*, 3 August 2025 (https://www.wsj.com/world/asia/china-western-defense-industry-critical-minerals-3971ec51).

China-dominated materials in European weapon systems

No critical raw materials = no weapon systems



* This diagram's representation of critical raw materials used per component is non-exhaustive. In reality, a greater variety of materials is used to produce these weapon systems.

Reference years for data: Gallium (2025), Germanium (2024), Light rare earths (2023), Heavy rare earths (2025), Cobalt (2024), Lithium (2024)

Data: SFA Oxford, *Critical Raw Materials and Defence Technologies*, [no date]; International Energy Agency, *Share of top refining country for 20 energy-related minerals*, 2025; US Geological Survey (USGS), *Mineral Commodity Summaries 2026*, 2026; European Commission, *Study on the Critical Raw Materials for the EU 2023*, 2023; Expert interviews

The European Commission has urged Member States to use all available means to reduce these dependencies on China in defence-industrial value chains, advocating the use of defence funding to kickstart this process [2]. The challenge is compounded by the fact that the production of essential components (which themselves depend on critical raw materials) remains highly globalised. Building European weapon systems therefore also depends on securing supplies of critical raw materials for producers of batteries, semiconductors, and other essential components in the United States, Japan, and other partner economies. This chapter proposes an emergency action plan to prevent shortages of raw materials and related components from derailing

[2] European Commission, Communication to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, *RESource EU Action Plan*, 3 December 2025, p. 13 (https://single-market-economy.ec.europa.eu/document/download/01c448d6-dc93-40d7-9afe-4c2af448d00c_en),

Europe's much needed surge in defence production [3].

NO RAW MATERIALS = NO REARMAMENT

The dependence of European militaries on China-produced materials is far broader than the often-cited case of rare earth magnets. Take drones for example. Unmanned Aerial Vehicles (UAVs) cause 60-70% of all fatalities in the war against Ukraine [4]. A drone consists of an engine or electric motor containing permanent magnets, a battery, sensors (including radars), communications systems, and power electronics that connect everything together [5]. The production of these components relies on a combination of China-dominated heavy and light rare earths, gallium, germanium, cobalt, and many other niche materials, each fulfilling unique but essential functions. Long-range missiles, fighter jets, satellites, and AI-servers contain broadly the same components and thus ultimately the same China-controlled materials (see diagram on previous page).

In 2025 Beijing tried to pull the rug from under Europe's entire rearmament effort. Although China's export controls initially sought to disrupt the US defence-industrial base in response to Trump's 'reciprocal tariffs', Beijing also systematically rejected export licences for rare earths and other critical materials to military end-users in Europe, Japan and other partner countries. But European defence industries rely only partly on direct Chinese suppliers. In the future, China can disrupt Europe's rearmament more radically by going after intermediary (often non-Chinese) companies that produce general components – like batteries, semiconductors, and permanent magnets – for defence industries. Beijing has already threatened to cut these component producers off entirely if it catches them supplying military end-users.

THE DIFFICULTIES OF DE-RISKING

Deterring Russia's aggression and protecting Europe's rearmament effort against Beijing's weaponisation of supply chains requires an emergency policy package to break China's chokehold on critical material production. European diversification efforts so far have failed to address the key challenge: how to make non-Chinese supply chains financially viable, despite Beijing's large-scale state support for its industries.

China's real advantage is political. Rare earths illustrate this point. Beijing provided USD 9-10 billion between 2010 and 2019 in support to rare earth producers alone [6], combined with an extensive stockpiling system and lax environmental

[3] For the complete action plan and risk assessment, see Teer, J., *Beijing's Critical Raw Material Weapon – And how to dismantle it*, Chaillot Paper No 189, European Union Institute for Security Studies, Paris, May 2026 (https://www.iss.europa.eu/publications/chaillot-papers/beijings-critical-raw-material-weapon-and-how-dismantle-it).

[4] Tourret, V., *Design, Destroy, Dominate: The mass drone warfare as a potential military revolution*, Ifri, 18 June 2025 (https://www.ifri.org/en/papers/design-destroy-dominate-mass-drone-warfare-potential-military-revolution).

[5] Smith, N., 'Why every country needs to master the Electric Tech Stack', Substack, 23 September 2025 (https://www.noahpinion.blog/p/why-every-country-needs-to-master).

[6] Rare Earth Exchanges, 'China's rare earth industry: Subsidies and state control over the last decade', 14 August 2025 (https://rareearthexchanges.com/news/chinas-rare-earth-industry-subsidies-and-state-control-over-the-last-decade/).

constraints. Today, two state-owned enterprises control all of China's rare earth mining and refining, while operating under production quotas set by Beijing.

The result is that Beijing can drive many non-state sponsored producers around the world out of business by flooding global markets [(7)]. Industries outside of China lack confidence that projects which require years (if not decades) to cover initial costs will be profitable. Globally, it takes on average 15.7 years to open a mine [(8)]. Reshoring material production to Europe specifically is an even greater challenge. Europe struggles with high energy prices and ambitious emissions reduction targets, long permitting procedures, stringent Environmental, Social and Governance (ESG) regulations, and a shortage of skilled labour in the mining industry [(9)].

Europe lags behind key partners in developing alternatives to Chinese supply.

If European and partner governments do not commit additional resources to secure alternative supplies of critical raw materials and midstream components, their rearmament efforts will remain hostage to China. Europe lags behind key partners in developing alternatives to Chinese supply. The United States and Japan have used grants, equity investments and, most promisingly, price floors to support new projects. These projects will produce modest production volumes of rare earths, gallium, germanium and other materials outside of China before 2030. Europe has provided some state support, but on a far smaller scale (see diagram on page 36 for an overview of the rare earth 'mine-to-magnet' pipeline).

Despite setting ambitious targets under the 2023 Critical Raw Materials Act and identifying 60 strategic projects in 2025, the EU has not made these financially viable in the face of China's state-backed competition. Unsurprisingly, the European Court of Auditors concluded in February 2026 that the EU's 'import diversification' strategy has delivered no 'tangible results' [(10)]. Additional state support is uncertain: the December 2025 ResourceEU action plan '*should* mobilise EUR 3 billion […] within the next 12 months […] in direct support of the critical raw material value chain' [(11)]. According to the International Energy Agency (IEA), diversifying enough supply to meet non-Chinese industrial demand for just magnets by 2035 will require an additional USD 60 billion in public and private sector investment in rare earth mining, refining, and magnet production over the next decade [(12)]. The current US-Japan-EU 'plugging holes' approach to onshoring material chains alone is very unlikely to immunise Europe's rearmament effort against Chinese export restrictions.

(7) Mancheri, N.A., Sprecher, B., Bailey, G., Ge, J., and Tukker, A., 'Effect of Chinese policies on rare earth supply chain resilience', *Resources, Conservation and Recycling*, Vol. 142, March 2019, p. 111 (https://www.sciencedirect.com/science/article/pii/S092134491830435X).

(8) S&P Global Market Intelligence, 'Discovery to production averages 15.7 years for 127 mines', 2023 (https://www.spglobal.com/market-intelligence/en/news-insights/research/discovery-to-production-averages-15-7-years-for-127-mines).

(9) Teer, J. and Seaman, J., 'Starting with the end in mind: De-risked gallium, germanium, and rare earth value chains by 2030', EUISS, 9 December 2024 (https://www.iss.europa.eu/activities/events/starting-end-mind-fully-de-risked-gallium-germanium-and-rare-earth-value-chains).

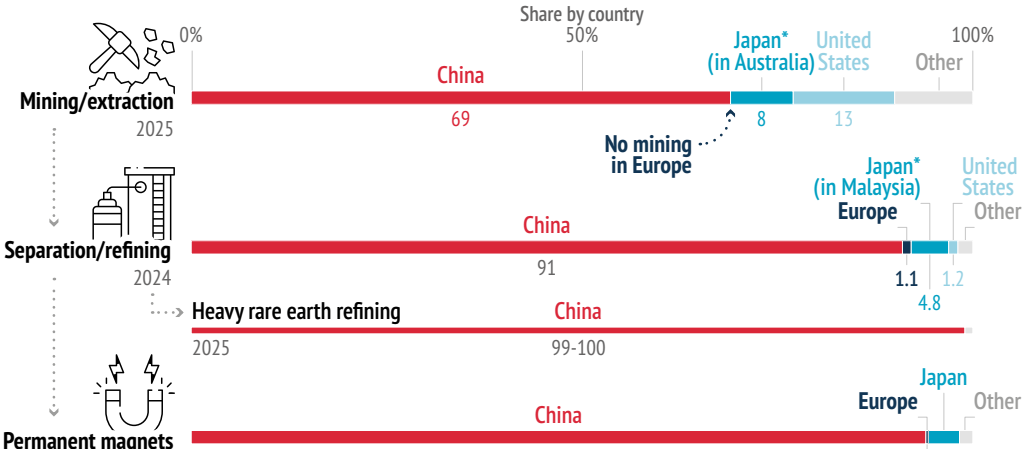
(10) European Court of Auditors, Special Report No 4/2026, *Critical Raw Materials for the Energy Transition – Not a rock-solid policy*, April 2026 (https://www.eca.europa.eu/en/publications?ref=SR-2026-04).

(11) *RESourceEU Action Plan*, op.cit., pp. 2, 5, 6.

(12) International Energy Agency (IEA), *Rare Earth Elements; Pathways to secure and diversified supply chains*, IEA, Paris, 8 April 2026, p. 52 (https://www.iea.org/reports/rare-earth-elements).

Rare earth production ('mine-to-magnet')

Countries' share in production steps



* Lynas, an Australian company, executes these projects but state support from the Japan Organization for Metals and Energy Security (JOGMEC) made these projects financially viable.

NB: This diagram is a simplification of a supply chain. 'Metallisation' and 'alloy-making', two more indispensable and China-dominated production steps, take place between the refining and permanent magnet production stages.

Data: US Geological Survey, 2026; International Energy Agency; European Commission; Expert interviews

CLOSING THE CRITICAL RAW MATERIALS GAP

Europe needs to adopt a strategy of *European indispensability* and *allied autonomy* to diversify the material supplies needed to deter Russia. Considering the wide variety and large volumes of critical raw materials that are difficult to onshore, Europe will inevitably need to rely in part on partner countries' efforts to secure supplies for its rearmament.

Europe should emulate some of its partners' best practices. Through sizeable Department of War support and Japan's state investment vehicle JOGMEC, Washington and Tokyo will likely onshore (or friend- or neutral-shore) production of specific raw materials more rapidly than Europe. Japan invests heavily in rare earth mining in Australia, and refining in Malaysia. The US government supports refining through partnerships with Solvay and other European companies. It also invests in mining projects across a wide range of countries including the Democratic Republic of Congo, Canada, Australia, Argentina, and even Brazil and Greenland. The United States has also concluded a joint mineral production deal with Ukraine, but this is unlikely to bring large-scale production online anytime soon. Mining projects linked to the country's potentially large critical raw material deposits remain underdeveloped, underexplored, and underinvested. Many are also located in or near contested territory.

Japan and the US both maintain stockpiles – defence-focused in the case of the US – while European efforts remain at the pilot stage. Yet given the wide range of critical raw material (and midstream component) dependencies on China, even the US and Japan are on track to only achieve partial success.

Europe can secure the full range and volume of critical raw materials needed for its defence only by de-risking together with partners. To do so, Europeans and their partners need to close the cost gap across the entire spectrum of critical raw materials and related components together. State support to kickstart production outside China is inevitable. But to sustain mining and refining over the long term, governments will need to shift the costs from taxpayers to European and partner end-industries through tariffs on Chinese materials and other demand-side measures.

Europe can contribute to this in three ways:

1. **Europe should take a page out of the US Department of War's playbook: use defence funding to kickstart critical raw material production, and sustain this with price floors and private sector offtake agreements**: Amidst the fiscal pressures created by ageing populations, European defence budgets are likely to remain the only sizeable source of public funding available to make up the cost gap. These budgets should complement initiatives such as RESourcEU and Germany's Raw Materials Fund. European ministers of defence can help close key technological gaps by directing spending under NATO's 3.5% core military expenditure target. After all, allies can spend this funding on dual-use research 'when the military component can be specifically accounted for or estimated' [13]. Meanwhile, NATO allies can 'strengthen the defence-industrial base', which ultimately depends on secure access to critical raw materials, under the alliance's 1.5% defence spending target [14]. Once new supply comes online, defence industries should invest together with the automotive, wind energy and other major end-use industries to help scale up material production projects outside of China.

Failure to close the critical raw materials gap is likely to impose even higher costs on defence ministries.

Beyond eroding deterrence, failure to close the critical raw materials gap is likely to impose even higher costs on defence ministries. Production disruptions linked to shortages of critical raw materials will cause defence-industrial cost overruns, at the taxpayer's expense. To more deeply anchor industrial policy and supply chain security within European defence policymaking, all 27 EU Member States should appoint a junior minister responsible for the defence-industrial subbase in defence ministries. To protect against disruptions before diversification has been completed, European governments should oblige defence firms to expand their component stockpiles.

2. **Support the most advanced diversification projects, even if outside of Europe:** Time is of the essence. In the case of gallium and heavy rare earths, intra-EU de-risking holds a lot of promise, because Europe can leverage its dormant expertise as European companies mothballed their refining activities recently (on one occasion as late as the mid-2010s). For rare earth mining, the Mountain Pass Mine in California and the Japanese/American-backed project in

[13] NATO, 'Defence expenditures and NATO's 5% commitment' (https://www.nato.int/en/what-we-do/introduction-to-nato/defence-expenditures-and-natos-5-commitment).

[14] NATO, 'The Hague Summit Declaration', 25 June 2025 (https://www.nato.int/en/about-us/official-texts-and-resources/official-texts/2025/06/25/the-hague-summit-declaration).

Australia are far more advanced in bringing substantial non-China supply online, including for heavy rare earths. (Europe itself is likely more than a decade away from bringing online any rare earth mining.) European co-investment, offtake agreements and contracts for difference could provide the certainty needed for joint projects with partner countries to scale up production. 'Buying-in' can help ensure that Europe's defence industries enjoy timely access to critical raw material production once supply volumes expand. Meanwhile, the United States has more leeway in reviving these industries: energy prices are lower, climate targets have been abolished, and the country's lower population density allows mining and refining operations to be located further away from population centres.

Washington and Japan are seeking allied demand to help scale (and sustain) their nascent critical raw material projects. Europe, which remains committed to both rearmament and the raw material-intensive energy transition, can channel demand towards European and partner-country industries. In return, the EU should seek guaranteed access for European companies to US and Japanese stockpiles at times of crisis.

3. **Demand-side reforms (rather than *ad hoc* state support) are needed to sustain diversified critical raw material production in the longer term. Unlike subsidies and price floors, these measures can be replicated in other essential enabling sectors for defence industries, such as chemicals, batteries and semiconductors, where China's market share is also expanding:** The EU should introduce a procurement preference for European and partner-country suppliers, both for material-intensive defence and non-defence products (e.g., wind turbines). Over time, price floors can be reinforced (or preferably even replaced) by tariffs coordinated through a G7 and key partner coalition representing almost 60% of global GDP. Spearheading these efforts first through the ongoing US-Japan-EU negotiations on joint protection of raw material markets is the quickest way forward. This trilateral framework should prioritise inviting resource-rich countries like Malaysia, Brazil and Indonesia, as well as countries with large technically-skilled workforces like India, to join provided they put in place similar protections. The likely failure of a 'Europe-alone' approach to securing critical raw material supplies for rearmament would leave Europe unconditionally dependent on the US, Japan and China for critical raw materials.

   To ensure influence over how European and partner-country critical raw materials are distributed at times of scarcity, Europe should not seek full autonomy by replicating all critical industries at home. Rather it should focus on strengthening its ability to keep the Trump administration in check. The January 2026 Greenland saga suggests that Europe has the means to rattle Washington. Threatening tariff retaliation through the Anti-Coercion Instrument, while jeopardising the profits of New York banks, Silicon Valley and US defence firms, appeared to restore Europe's economic deterrence – at least for now[15].

[15] Expert interview with Max Bergmann, Director, Europe, Russia, and Eurasia Program at the Center for Strategic and International Studies (CSIS), 1 April 2026.

CHAPTER 5

FROM EDGE TO CORE

Operating the whole defence 'infostructure'

by
CLOTILDE BÔMONT

Europe's ability to defend itself in a context of uncertain US support depends as much on kinetic capabilities as on control over the data flows that underpin military operations. Russia's war against Ukraine has underscored that military effectiveness rests not only on technological innovation and cutting-edge capabilities, but also on the existence of a robust and fully controlled defence 'infostructure'. This infostructure comprises the digital backbone that sustains force employment and coordination: data storage and processing infrastructures, connectivity (communication networks and transmission systems), software environments, sensors, command systems and cloud architectures.

European forces are nevertheless constrained by structural technological dependencies on foreign providers and by persistent internal shortcomings in aligning technological development, industrial cooperation and procurement around common priorities. These weaknesses may ultimately affect Europe's overall military power and, consequently, the credibility of its deterrence. Addressing them is therefore essential to strengthening Europe's military readiness. This requires a systemic approach to digital capabilities, combining the development of 'core' and 'edge' technologies and a transformation of the defence technological and industrial base supporting them.

UKRAINE AND THE TECHNOLOGISATION OF WARFARE

The introduction of information and communication technologies (ICTs) into military systems in the 1970s and 1980s fostered a transformation associated with the late Cold War Revolution in Military Affairs, whereby Western militaries sought to offset their quantitative inferiority through information superiority, precision-strike and networked capabilities. This approach spurred sustained investment in advanced technologies, but often placed less emphasis on the integration of the underlying digital capabilities on which these technologies depend.

The war in Ukraine has exposed the implications of this technologisation of warfare centred on high-end capabilities. First, high-tech warfare does not

remove the need for military mass and entails particularly high costs as well as long delivery timelines for equipment. As technologies become more sophisticated, additional performance gains require increasingly advanced R&D, integration into weapon systems becomes more complex, and operational sustainment and life-cycle support become more demanding – therefore generating financial and industrial pressures. Second, 'sidewise' technologies [1] – improvised and inexpensive devices developed from existing technologies and outside traditional military procurement systems – still play a decisive role on the battlefield. Commercial drones adapted for combat, improvised payloads, off-the-shelf communications tools, or rapidly modified software solutions have proven particularly effective. Third, the use of dual-use technologies in combat has highlighted the growing role of private technology actors, which have become critical enablers of military operations, providing satellite communications (Starlink), cloud infrastructure (AWS, Google Cloud, Azure) or data analytics (Palantir, Clearview AI). Fourth, hybrid warfare is a defining feature of contemporary conflicts and is conducted in part through digital means, including persistent (rather than episodic) cyber-attacks and electromagnetic activities (jamming, spoofing, etc.).

These trends highlight the importance for European defence of relying on a robust digital architecture that extends beyond the battlefield itself, is supported by a strong industrial ecosystem, and constitutes both an enabler of capabilities and a capability in its own right.

EUROPEAN STRUCTURAL DEPENDENCIES ON STRATEGIC ENABLERS

This architecture today relies to a large extent on American solutions and products. This results in deep and structural dependencies on the United States across the entire technological stack, from connectivity and platforms to cybersecurity, cloud computing, data collection and data analytics. These dependencies are largely the outcome of past European capability shortfalls rather than deliberate strategic choices, even if the requirement for interoperability has accelerated – and in some cases encouraged – the adoption of US systems. They affect key military functions, notably intelligence, surveillance and reconnaissance (ISR) and command and control (C2), and usually apply to strategic enablers.

External dependencies for strategic enablers affect key military functions, notably ISR and C2.

These dependencies are visible in military equipment itself. The US F-35 fighter aircraft, widely operated across European fleets, is a particularly emblematic case. Its operational effectiveness depends not only on hardware, but also on continuous software updates, mission data and maintenance systems largely controlled by the US, notably through the ALIS/ODIN architecture. The main risk is thus that, in the event of political tensions with the US, software updates may no longer be ensured, directly affecting the aircraft's performance and

[1] Bracken, P., 'Sidewise technologies: National security and power implications', Working Paper#35, Yale School of Management, 2004.

safety, ultimately limiting its operational use. This type of software and sustainment vulnerability can also be observed in other weapon systems, such as naval platforms or missiles.

Reliance on the US can also manifest in less visible but equally critical ways, when strategic enablers are embedded within broader capability architectures. It is, for instance, particularly significant in satellite connectivity. The Ukrainian theatre has underscored the crucial role played by Starlink, which, from the first weeks of the full-scale invasion, enabled Ukraine to withstand large-scale communication disruptions and internet blackouts [(2)]. European forces also rely extensively on American providers in cybersecurity and cyber threat intelligence (CTI) [(3)], including companies such as CrowdStrike, IBM, Google (Mandiant) and Recorded Future. Similar patterns can be observed in data analytics, where firms such as Palantir are deeply embedded in European defence ecosystems, with government contracts across a number of Member States, including Austria, Denmark, Finland, Germany, Greece, France, Lithuania, the Netherlands, Poland and Sweden [(4)]. Yet connectivity, CTI and data analytics directly underpin ISR and targeting functions. As such, dependencies in these areas do not merely affect support functions or kinetic action; they shape the very conditions under which European forces can generate situational awareness, make decisions and conduct operations.

A FRAGMENTED AND SLOW-ADAPTING EU DEFENCE INFOSTRUCTURE

The European Commission and the High Representative warned in 2022 [(5)] that years of underinvestment in defence and low participation in collaborative defence programmes [(6)] had produced financial, industrial and capability gaps, compounded by uncoordinated demand [(7)]. That diagnosis still holds [(8)] and, in the digital domain, fragmentation of standards, procurement and policies among Member States has direct practical implications: it produces separate clouds, incompatible interfaces, siloed and non-interoperable data architectures, duplicated integration costs and uneven levels of cybersecurity maturity.

(2) Radin, A. et al, 'Lessons from the war in Ukraine for space: Challenges and opportunities for future conflicts', RAND, 21 May 2025 (https://www.rand.org/pubs/research_reports/RRA2950-1.html).

(3) Paulus, A., 'An Achilles heel of today's armed forces: Managing software supply chain risk in the military sector', SWP Research Paper, 17 November 2025 (https://www.swp-berlin.org/10.18449/2025RP06/).

(4) 'Palantir is well on its way to conquering Europe,' Euractiv, 8 August 2025 (https://www.euractiv.com/news/palantir-is-well-on-its-way-to-conquering-europe/).

(5) European Commission/High Representative of the Union for Foreign Affairs and Security Policy, Joint Communication on the Defence Investment Gaps Analysis and Way Forward, JOIN(2022) 24 final, 18 May 2022 (https://commission.europa.eu/document/download/4bcf9a69-ed82-4a74-836f-b85bb16725f6_en?filename=join_2022_24_2_en_act_part1_v3.pdf).

(6) In 2022, only 18% of Member States' defence investment was targeted at defence programmes conducted in cooperation. See; European Defence Agency (EDA), '2022 Coordinated Annual Review on Defence Report', November 2022 (https://eda.europa.eu/docs/default-source/eda-publications/2022-card-report.pdf).

(7) European Parliament, 'Reinforcing the EU's defence industry', Briefing, 2026 (https://www.europarl.europa.eu/RegData/etudes/BRIE/2023/749805/EPRS_BRI%282023%29749805_EN.pdf).

(8) European Commission, 'Proposal for a Council Regulation establishing the Security Action for Europe (SAFE) through the reinforcement of European defence industry Instrument', COM(2025) 122 final, 19 March 2025 (https://defence-industry-space.ec.europa.eu/document/download/6d6f889c-e58d-4caa-8f3b-8b93154fe206_en?filename=SAFE%20Regulation.pdf).

National trajectories illustrate the point. A survey conducted by the Royal United Services Institute (RUSI) in 2025[9] shows that France has pursued domestic programmes in cloud, AI and battle management, but its emphasis on sovereignty can complicate European interoperability, due to a focus on national vendors and domestic technical standards. Germany has advanced enterprise-level digital capabilities, yet still struggles to implement them in operational systems. Poland is modernising rapidly through major acquisitions in air defence and C4ISR, but remains reliant on US technologies. Spain has launched enterprise-wide data integration and digitalisation initiatives but has yet to achieve capabilities comparable to leading Member States. Member States thus seem to be moving along parallel digital defence pathways with no real convergence towards a coherent and common European infostructure.

In addition, European forces struggle to adapt to software-intensive warfare. Legacy programmes, slow procurement cycles and hardware-centric acquisition models hinder the continuous updating and regular modernisation of digital tools, to the point that some capabilities risk obsolescence by the time they enter service. A force may acquire advanced equipment and still remain unready if it cannot update, integrate, secure and sustain it at the pace contemporary operations require.

These internal challenges compound reliance on external providers, ultimately constraining European armed forces' freedom of decision and action, resulting in only conditional autonomy. This weakens the EU's deterrence capacity[10], as a credible defence posture presupposes better coordination and control over Europe's defence digital backbone.

ENHANCED DIGITAL CAPABILITIES AS A PREREQUISITE FOR EU DEFENCE READINESS

Enhanced digital capabilities and effective integration of innovation are therefore prerequisites for European defence readiness. Over the long term, harmonising digital standards and governance frameworks remains essential. In the near term, however, a key priority is to better align Europe's defence and technology industrial programmes[11]. The EU has recently begun to move in that direction, reframing defence readiness, digital competitiveness and industrial policy within the same strategic agenda. It already possesses a significant industrial and technological base in both digital technologies and defence. But its development lacks coherence: resources are dispersed across a dense and partly overlapping landscape of defence, digital and research programmes. This creates potential synergies but also limits

A key priority is to better align Europe's defence and technology industrial programmes.

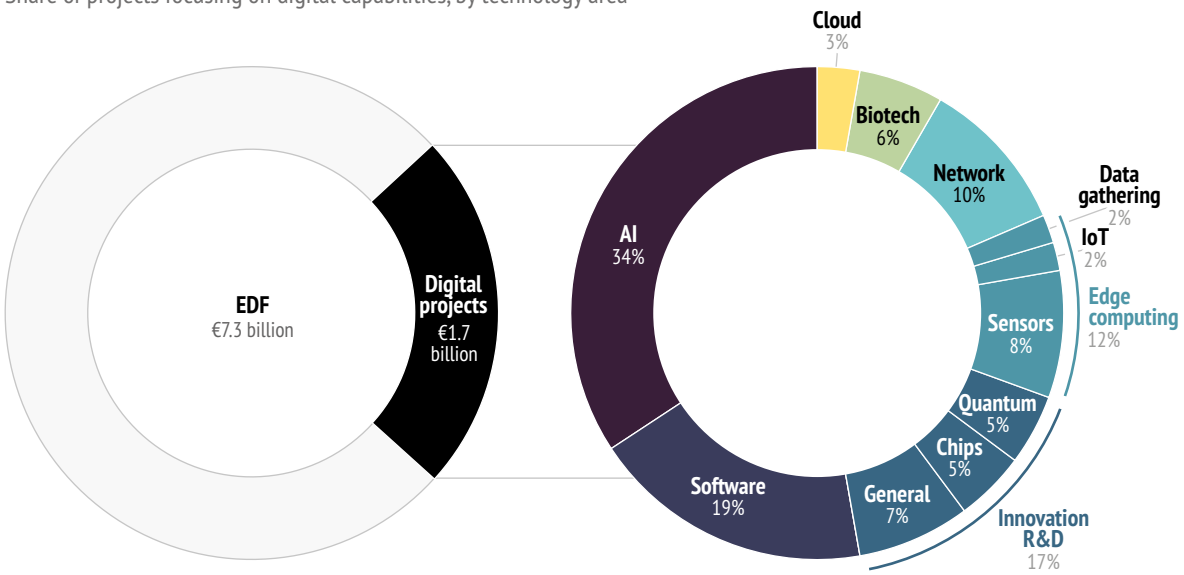
[9] Sylvia, N., 'European digital defence priorities in an uncertain world', Royal United Services Institute (RUSI), 25 March 2025 (https://static.rusi.org/european-digital-defence-priorities-march-2025.pdf).

[10] European Commission, *White Paper for European Defence-Readiness 2030*, 2025 (https://commission.europa.eu/document/download/e6d5db69-e0ab-4bec-9dc0-3867b4373019_en?filename=White%20paper%20for%20European%20defence%20-%20Readiness%202030.pdf).

[11] Ibid.

Digital projects in the EDF

Share of projects focusing on digital capabilities, by technology area



Data: EU Funding & Tenders Portal, 2026

strategic prioritisation, reduces funding visibility and constrains the effective pooling of investment and R&D efforts.

In the defence sector, the EU has gradually assembled a policy portfolio that partly addresses internal shortcomings affecting the European defence infostructure. The European Defence Fund (EDF) [12], for instance, supports collaborative defence research and capability development, with a budget of nearly €7.3 billion for 2021–2027, including €1.7 billion allocated to projects focusing on digital and disruptive technologies. It primarily targets the early phases of R&D, where the challenge is to generate prototypes, demonstrators and cross-border industrial cooperation. The European Defence Industrial Strategy (EDIS) and its implementing instrument, the European Defence Industry Programme (EDIP), have sought to move beyond research funding towards industrial readiness and supply security. The EDIP is designed to 'bridge the gap between emergency measures such as ASAP and EDIRPA' [13] and aims to enhance collaborative procurement and intra-EU trade in defence equipment, including technologies. It is complemented by the Security Action for Europe (SAFE) instrument, which seeks to tackle the scale problem by incentivising joint procurement and expanding production capacity [14]. These initiatives address one of Europe's main weaknesses in the development of digital technologies and defence innovation: insufficient common demand across a highly fragmented industrial base.

[12] European Commission, 'EDF: Developing tomorrow's defence capabilities' (https://defence-industry-space.ec.europa.eu/eu-defence-industry/european-defence-fund-edf-official-webpage-european-commission_en).

[13] European Commission, 'EDIP: Forging Europe's defence' (https://defence-industry-space.ec.europa.eu/eu-defence-industry/edip-dedicated-programme-defence_en).

[14] European Council, Council of the European Union, 'What is Security Action for Europe (SAFE)'? (https://www.consilium.europa.eu/en/policies/safe/#:~:text=Explainers-,Security%20Action%20for%20Europe%20(SAFE),defence%20investments%20through%20common%20procurement).

Beyond defence programmes, the EU is also investing in key layers of the broader digital infrastructure that underpins military capabilities. The satellite constellation IRIS² is explicitly designed to ensure secure connectivity 'without third-party dependencies [15]'; EuroHPC pools European resources to 'make Europe a world leader in supercomputing [16]'; the European Cybersecurity Competence Centre (ECCC) aims to increase Europe's cybersecurity capacities and competitiveness and 'enhance technological sovereignty through joint investment in strategic cybersecurity projects [17]'; the Chips Act is meant to reinforce the semiconductor ecosystem, 'ensure the resilience of supply chains and reduce external dependencies [18]'; and STEP now provides an umbrella for investment in critical technologies across digital, clean, defence and biotech sectors, both to strengthen European capabilities and '[reduce] its dependence on other countries [19]'.

These initiatives demonstrate that Europe does possess technological and industrial potential. But they also confirm that when it comes to defence technologies and digital capabilities, the EU still struggles to orchestrate programmes, industries and national efforts into a coherent whole. Until it closes that coherence gap, it will be unable to fully convert this potential into defence readiness, and readiness into credible deterrence.

CLOSING EUROPE'S DEFENCE INFOSTRUCTURE GAP

To adapt to new forms of conflict and regain control over its defence infostructure, Europe must transform its DTIB. It must become more responsive, less dependent on external actors and better suited to software-intensive warfare.

The war in Ukraine has underscored the importance of shortening the path from innovation to capability.

The war in Ukraine has underscored the importance of shortening the path from innovation to capability. For the EU, this means reducing development cycles and accelerating the integration of civilian innovation ('spin-in') by better connecting defence and deep-tech ecosystems. It also requires stronger links between established defence primes and emerging tech actors. BraveTech EU [20] and the EU Defence Innovation Office in Kyiv [21] point in that direction: by building on battlefield-proven technologies, facilitating testing and deployment, and

[15] European Commission, 'IRIS²: The new EU Secure Satellite Constellation' ('https://defence-industry-space.ec.europa.eu/eu-space/iris2-secure-connectivity_en).

[16] EuroHPC, 'The European High Performance Computing Joint Undertaking (EuroHPC JU)' (https://www.eurohpc-ju.europa.eu/about_en).

[17] ECCC, 'European Cybersecurity Competence Centre and Network' (https://cybersecurity-centre.europa.eu/about-us_en).

[18] European Commission, 'European Chips Act' (https://digital-strategy.ec.europa.eu/en/policies/european-chips-act).

[19] European Union, 'Strategic Technologies for Europe Platform: STEP in a nutshell' (https://strategic-technologies.europa.eu/about/step-nutshell_en).

[20] European Commission. 'BraveTech EU: Advancing defence innovation hand-in-hand with Ukraine' (https://defence-industry-space.ec.europa.eu/eu-defence-industry/bravetech-eu_en).

[21] EEAS, Delegation of the European Union to Ukraine, 'EU Defence Innovation Office' (https://www.eeas.europa.eu/delegations/ukraine/eu-defence-innovation-office_en).

connecting Ukrainian actors to EU programmes and industrial networks, they help introduce a faster and more iterative innovation logic into the European defence ecosystem.

At the same time, the EU must do more to scale European alternatives across the technological stack while preserving an edge in strategic sectors. Reducing dependency in its defence infostructure requires strengthening European capabilities in cloud and data environments, cyber, software, connectivity and AI-enabled processing, alongside targeted investment in areas of potential comparative advantage such as quantum computing, high-performance computing and biotechnologies – three sectors still under-targeted in the EDF. The challenge here lies in scaling. Much of Europe's digital and defence-tech dynamism comes from SMEs, startups, scaleups and small mid-caps. Yet a lack of growth capital – rooted in the structural weaknesses of European capital markets – prevents them from scaling up. The response must therefore combine industrial and financial measures: stronger synergies between EU defence, digital and tech funding programmes; more systematic use of the Defence Equity Facility; and wider mobilisation of EIB/EIF instruments and private growth capital. Procurement must also be treated as an industrial policy tool. Public procurement, which accounts for roughly 15% of EU GDP[22], is a powerful but underused lever for building resilient and scalable industrial capacity. Faster and joint procurement not only shortens time-to-market, but also stabilises and aggregates demand, thereby improving market access and enabling scale. Instruments such as SAFE and EDIP should therefore be fully exploited. A logical next step would be to link procurement more systematically to EU-supported projects. Greater visibility over the European digital and defence-tech industrial base would further support this effort, including through catalogues and marketplaces such as the Tech Sovereignty Catalogue[23], the European Tech Map[24] or the EUDIS Tech Alliances.

Finally, EU militaries should not neglect 'good enough' solutions. These are capabilities designed to meet specific operational requirements without pursuing maximal performance, thereby reducing demands in terms of R&D, cost, production timelines and lifecycle sustainment. They may include purpose-built AI models, commercial communication tools and sensors, or mission-specific data platforms. Such solutions are not specific to the military domain and are likely to expand in the coming years. Specialised AI models, in particular, may play an important role in industrial processes, including the automation of production lines, thereby supporting mass production.

Ultimately, a cultural shift is required, both strategically and doctrinally. The EU cannot content itself with developing isolated digital tools while relying on the United States to fill the gaps in the underlying system. Capability planners, military staffs, procurement authorities and defence-industrial actors must adopt a systemic vision, understanding that these technologies function as an integrated whole and must be developed and operated accordingly. This has implications on the battlefield – as reflected

[22] European Commission, 'The EU Startup and Scaleup Strategy: Choose Europe to start and scale', Communication, COM(2025) 270 final, 28 May 2025 (https://research-and-innovation.ec.europa.eu/document/download/2f76a0df-b09b-47c2-949c-800c30e4c530_en?filename=ec_rtd_eu-startup-scaleup-strategy-communication.pdf).

[23] Tech Sovereignty Catalogue, 'The pillars of European digital sovereignty' (https://techsov-catalogue.eu/).

[24] European Tech Map (ETM), 'European tech alternatives' (https://europeantechmap.eu/).

in the 'system of systems' doctrine and in the development of integrated weapon systems [25] – but also for the EDTIB itself. The EU must therefore simultaneously reinforce 'edge' technologies, as sources of strategic advantage, and 'core' – or 'back-end' – technologies that underpin the entire defence infostructure. Only this combination can strengthen Europe's operational capacity, reduce asymmetrical dependencies and support credible deterrence.

[25] Owens, A. (Admiral), 'The emerging US system-of-systems', Institute for National Strategic Studies (INSS) Strategic Forum No. 63, February 1996 (https://apps.dtic.mil/sti/tr/pdf/ADA394313.pdf).

CHAPTER 6

UNDERPINNED BY STRENGTH

The energy system and European resolve

by
CASPAR HOBHOUSE

Europe's ability to defend itself against Russia depends on a resilient energy system. Everything – from the defence industry to military supply chains and normal civilian life – relies on secure and stable energy flows. Yet Europe's energy system remains a weak point. It is vulnerable to geopolitical shocks, demonstrated most recently by externally induced supply shortages in 2022 and 2026. It is also a prime target for adversaries, exposed to hybrid warfare and cyberattacks by actors including Russia and China. The war in Ukraine shows how a kinetic conflict would likely involve direct attacks on energy infrastructure, posing serious risks to both civilian and military readiness. Energy system resilience is therefore an integral part of deterrence, underpinning wartime endurance, civilian morale, industrial continuity and military effectiveness.

Achieving greater resilience requires two things. Firstly, Europe must rapidly build an energy system which plays to its strengths. This should take the form of a diffuse, distributed system with multiple points of failure and inbuilt resilience, underwritten by widespread electrification. Secondly, there must be a clear division of labour between system operators (transmission and distribution), citizens and the military. All actors have a role to play, from developing dispersed generation to constructing infrastructure that is resilient by design. System operators should be empowered to protect their networks against attacks. In some cases, clearer delineation is needed to determine when military assets should be deployed once civilian capabilities have been exhausted.

THE VULNERABILITIES

Europe's energy system should be a source of strength, ensuring reliable supply for military, civilian and industrial consumers alike. Yet years of peacetime thinking and structural dependencies have made it increasingly vulnerable to wartime shocks and coercion. Russia is already exploiting these weaknesses through activities including mapping operations and grey-zone attacks on energy infrastructure. Its war of aggression against Ukraine shows that Europe cannot rely on international law alone to protect its critical infrastructure. At present, a coordinated attack on

European energy infrastructure would seriously weaken the system, given single points of failure including interconnectors, subsea pipelines and cables, gas processing facilities and refineries that are not designed to withstand physical attack. This would profoundly affect societal resilience and morale, as well as military capabilities, given the military's reliance on the civilian energy system. To harden European resolve and enhance deterrence, Europeans need a more resilient and better-prepared energy system. This requires addressing two major weaknesses: dependence on imported fuels and overly centralised infrastructure.

A coordinated attack on European energy infrastructure would seriously weaken the system.

Europe's two major import vulnerabilities stem from its dependence on oil and gas, compounded by the concentration of critical processing facilities such as LNG terminals, pipelines and oil refineries. For oil and petroleum products, the EU imports over 90% of its supply, almost entirely via seaborne shipments. Oil products are currently vital for military operations, especially in aviation (85%), but also for over 90% of civilian transportation. The closure of the Strait of Hormuz, through which 50% of jet fuel transits every year, has exposed this vulnerability even further.

By the second half of 2025, liquefied natural gas (LNG) accounted for 46% of the EU's natural gas imports into the Union [(1)]. As pipeline gas from Russia is phased out by 2027, this share is expected to rise to nearly 60%. On current trajectories, by 2030, 80% of the EU's LNG supply will come from a single supplier, the United States [(2)]. A sudden rupture in supply would quickly draw down storage: in January 2026, for example, reserves stood at 50% capacity, equivalent to around 45 days of normal consumption. Beyond that point, some critical industries would shut down and homes would go unheated – hardly a recipe for resolve. For example, in the Netherlands only 11.2% of homes relied on sources other than gas for heating in 2024 [(3)].

The problem of centralised infrastructure is broader but remains heavily concentrated in the oil and gas sectors. Centralised infrastructure creates single points of failure which can cause cascading disruptions across entire networks. Most European infrastructure was not constructed with physical security in mind, the *N-1* principle relating to technical not physical resilience, meaning that many Member States still depend on a handful of critical nodes. As of 2026, there are 66 oil refineries operating in the EU. This number is likely to decline further, as Europe has lost 37% of its refining capacity in the last decade, with another 40–50 sites at risk of closure by

(1) European Commission, Directorate-General for Energy, *Quarterly Report on European Gas Markets*, Vol. 18, issue 2, covering second quarter of 2025, Brussels, 2025 (https://energy.ec.europa.eu/document/download/d80fd3b6-6f3d-48b0-bd6e-db2f21dcd796_en).

(2) Jaller-Makarewicz, A.M., 'EU risks new energy dependence as US could supply 80% of its LNG imports by 2030', Institute for Energy Economics and Financial Analysis, 19 January 2026 (https://ieefa.org/resources/eu-risks-new-energy-dependence-us-could-supply-80-its-lng-imports-2030).

(3) 'Dutch homes moving fast from gas: 11% fully electric, hybrids up from 1.5% to 3.7%', *NL Times*, 9 December 2025 (https://nltimes.nl/2025/12/09/dutch-homes-moving-fast-gas-11-fully-electric-hybrids-15-37).

2035 [4]. In security terms this leaves an ever-shrinking number of critical chokepoints in fuel supply, especially jet fuel [5], which is vital for military operations. Similarly, as of April 2025, Europe has 29 large-scale LNG gas facilities, a small number which currently underpins a vital part of its energy system, from heating homes to supporting industrial production and peak-time electricity generation [6]. Gas pipelines furthermore rely on compressor stations to function, creating additional singular points of failure. For example, the Baltic Pipe, a pipeline between Norway and Poland, relies on five such stations [7].

Beyond oil and gas infrastructure, other vulnerabilities and chokepoints exist, including in the electricity system. The war against Ukraine has exposed weaknesses across the electricity network, with substations, transformers and transmission cables emerging as critical points of vulnerability. Offshore facilities are particularly exposed, often protected only by their isolation at sea. Similarly, centralised power plants, especially thermal facilities which still underpin much of the EU's network, have proven particularly vulnerable to missile and drone strikes that can cause irreparable damage. In November 2025, all of Ukraine's thermal power plants were disabled after coordinated Russian attacks [8].

Europe's dependency on fuel imports is a key source of vulnerability.

PRIORITISING STRENGTH

Reducing import dependence

Europe's dependency on fuel imports is a key source of vulnerability, exposing the EU to potential coercion and leaving vital supply lines open to disruption and even severance. In a heightened hybrid or wartime scenario, such supply shocks would be devastating for both military preparedness and societal resilience, underscoring the need to lower fossil fuel demand today so as to be ready for tomorrow. The solution lies in accelerating electrification, particularly in three areas: transport, industry and heating. With civilian vehicles no longer requiring fuel, existing infrastructure and remaining imports could be redirected to the military without triggering a collapse of civilian life. A similar logic applies to gas, with industry and households currently consuming close to two thirds of supply. While of course rapid electrification will not be feasible across all sectors, especially in some industries, reshoring supply as much as possible, notably to Norway and the UK, would dramatically reduce the risk of supply shocks.

[4] 'A new era for oil refining and chemicals as three major forces emerge', Blooming, 17 October 2025, (https://www.bloomingglobal.com/media/detail/a-new-era-for-oil-refining-and-chemicals-as-three-major-forces-emerge); Gelder, A., Sehmi Singh, A. and Gaonkar, A., 'Global refinery closure outlook to 2035', Wood Mackenzie, 31 March 2025 (https://www.woodmac.com/news/opinion/global-refinery-closure-outlook-2035/).

[5] FuelsEurope, *Statistical Report 2023*, Figure 36, p. 53, 2023 (https://www.fuelseurope.eu/uploads/files/modules/documents/file/1688471212_t5jVec6rmH5nDGJcVke0i3SdpRp7S5XB3fRNXXcf.pdf).

[6] Eurogas, *Navigating Towards 2040 – The critical role of the LNG industry in achieving the EU's climate targets*, April 2025 (https://www.eurogas.org/wp-content/uploads/2025/04/LNG-Protocol-Brochure-12-pages.pdf).

[7] GAZ-SYSTEM S.A., 'Baltic Pipe Project' (https://www.gaz-system.pl/en/transmission-system/eu-support/investments-co-financed-with-eu-funds/baltic-pipe.html).

[8] 'All Ukraine's state-owned thermal power plants stop working after Russia's largest-ever attack', *The Kyiv Independent*, 8 November 2025 (https://kyivindependent.com/all-ukraines-state-owned-thermal-power-plants-stop-working-after-russias-largest-ever-attack/).

Decentralising infrastructure

Accelerating electrification would also dramatically increase the scope for a more decentralised generation infrastructure built around renewables. Ukraine has demonstrated the significantly greater resilience of renewable energies, especially wind and solar. Both these technologies flip the military calculation of cost efficiency on its head. A swarm of Shahed drones, with a price tag of around €60 000, or even an Oreshnik missile costing €25 million, is a worthwhile weapon against a non-military target costing hundreds of millions of euros. It is far less effective to expend such weapons against a few solar panels costing around €300 each. Wartime experience in Ukraine also highlights the value of wind power, with 372MW of power added in 2025 alone, including large privately funded wind farms. Generation from locally powered sources based on abundant natural resources undoubtedly offers greater resilience against military threats.

However, generation is the easy part. Securing grid infrastructure presents a bigger challenge. Electricity infrastructure, especially offshore, is high value and highly exposed. Transformer stations and substations, often costing hundreds of millions of euros or even several billion euros, are particularly tempting as military targets.

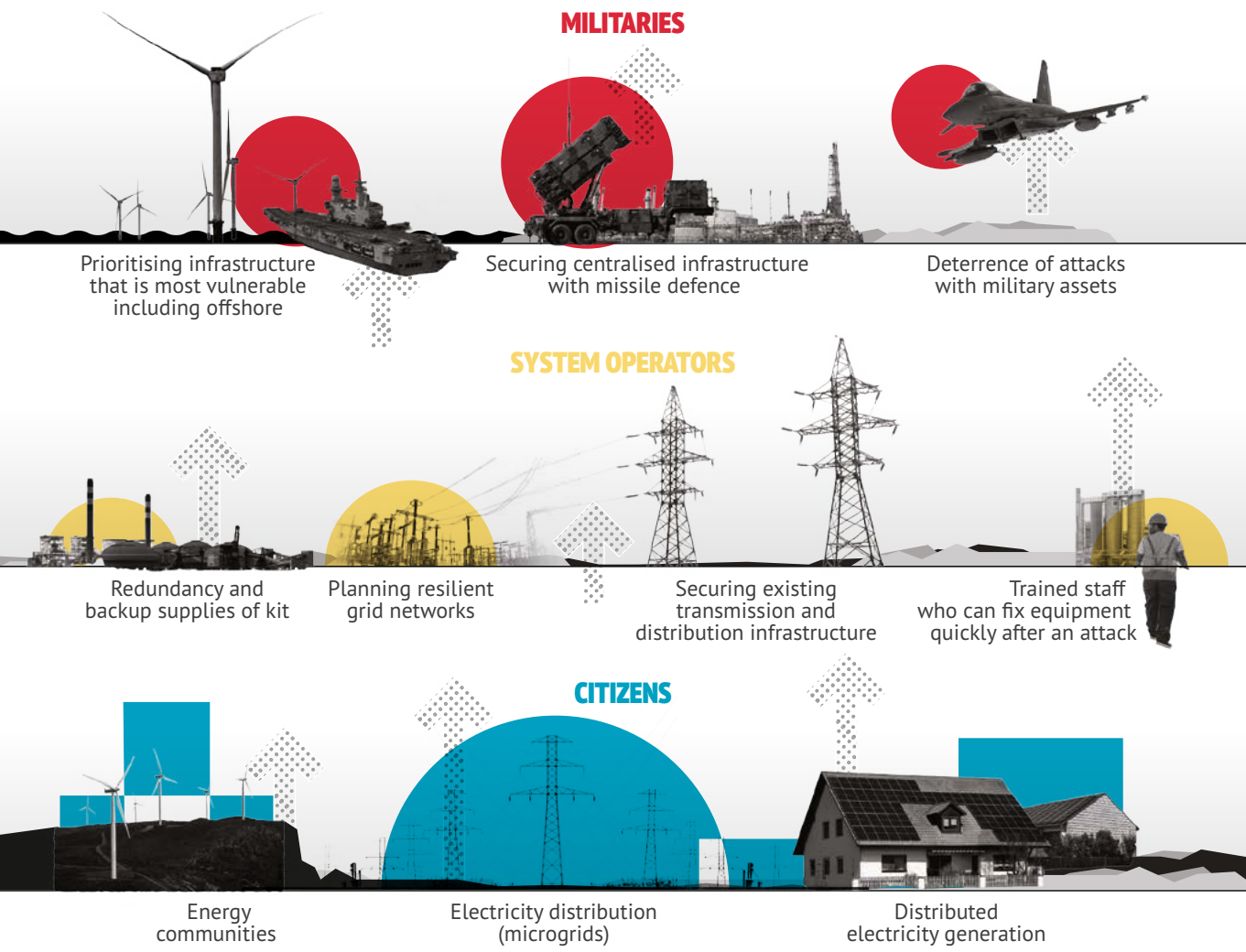
Building more infrastructure, and strengthening replacement and repair capabilities, is essential.

Building more infrastructure, and strengthening replacement and repair capabilities, is essential. In several EU Member States, this is already the norm, with portable substations that can be deployed quickly as well as stockpiles of critical equipment. Member States should extend regional cooperation, such as coordinated information sharing, pooled stockpiles, repair equipment and supply chains, as seen in the Baltic and the Nordic regions, to other parts of the Union. In the medium term, system operators should jointly develop a shared framework for physical security, reflecting the highly interconnected nature of the system and reducing the risk of a single transmission system operator (TSO) becoming a weak link in the system. This could be accomplished through a new network code under the European Network of Transmission System Operators for Electricity (ENTSO-E), similar to the cybersecurity network code introduced in 2024.

THE DIVISION OF LABOUR FOR DEFENCE

Even with greater resilience measures, the existing infrastructure will still need to be defended. While some responsibilities, such as missile defence, will continue to fall under the remit of the military, a clearer division of labour is needed to make better use of the capacities of other actors to contribute to the wider framework of European defence. Broadly there are three sets of actors. The first consists of citizens and industries, who consume energy but can also generate and store it, notably through solar panels, batteries and electric vehicles. The second comprises system operators both at the transmission and distribution levels whose core job until now has been to keep the lights on and bills low. The third is the military, tasked with protecting vital infrastructure in a wartime scenario. Yet the military also has to contend with competing priorities, including the defence of other critical infrastructure, population centres and military facilities.

A division of labour between three groups



The first group, citizens, regional governments and industry, should be empowered to play an active role in defending Europe. The greatest security gains lie in localised energy hubs, such as district heating systems and community-driven electricity projects. The Szeged project in Hungary, for example, has brought abundant local geothermal energy to the city's population through a distributed network of 27 different wells and 9 local heating plants. Similarly, Ecopower, an energy cooperative in Belgium, constructs hyper-local energy projects, including solar, wind, hydro and bioenergy, to provide distributed renewable energy to local communities.

Such localised energy hubs have an added security benefit which could rapidly be scaled up. In many Member States, citizen-led initiatives driving the adoption of new technologies have spurred resilience in the energy system. Energy communities, often community-level groups who pool resources to build energy generation facilities for a local area, not only provide cheaper energy and greater consumer empowerment and democratise energy production but also strengthen collective resolve. The role of citizens in this new division of labour would be to pursue greater energy self-reliance, an approach which has already proven effective even in the absence of a security imperative.

The second group, system operators, also need to be empowered to perform a more active role in protecting the system. This is particularly important when responding to hybrid threats, such as drones or criminal gangs targeting critical assets. Several system operators have noted the rise in more organised criminal attacks on substations since 2022, ostensibly aimed at stealing metals but also serving the hybrid purpose of damaging critical infrastructure. In January 2026, an attack on a substation in the Berlin suburb of Zehlendorf cut off electricity supply to thousands of citizens during freezing temperatures [(9)]. Although attributed to a far-left group, the incident also exposed the vulnerability of infrastructure to targeted attacks.

In most Member States, however, system operators tend to sit below the level of national defence structures. As a result, they often lack access to intelligence reports, security clearances and protection equipment. As threats to energy infrastructure increase, it no longer makes sense to maintain a strict barrier between system operation and system defence.

The third group, the military, has at least two clearly defined roles. First, the military should redefine which infrastructure is deemed worthy of protection. Historically efforts have focused on protecting centralised generation sites such as nuclear power stations [(10)]. However, in countries bordering the North Sea, offshore wind is increasingly the source of up to 70% of expected domestic electricity supply. One system operator was informed that it would take over 90 minutes for military support to arrive in the event of an attack on an offshore installation [(11)]. At this point the enemy could be long gone and the asset permanently damaged. Defence planning at the national level therefore needs to adapt to the changing nature of the energy system. While already the case in some Member States, a more consistent approach is needed across Europe given the highly interconnected nature of the modern European energy system.

Defence planning at the national level needs to adapt to the changing nature of the energy system.

The military also needs to place greater trust in system operators. Energy assets can serve a dual function, for example by hosting radar installations that improve military visibility in the high seas. On a case-by-case basis, militaries should have the option of installing radar systems or other military equipment on energy infrastructure for use in wartime or near-war scenarios. This would also help reconcile competing defence and energy infrastructure priorities. In peacetime, however, such infrastructure should remain under civilian control, thereby mitigating insurance, regulatory and liability concerns.

The second role is active deterrence. Attacks on critical infrastructure by actors including Russia, particularly in the context of hybrid operations, must carry clear costs and consequences. NATO's *Baltic Sentry* operation, initiated after a series of undersea cable sabotage incidents, proved effective for a time, although a renewed wave of attacks in December 2025 suggests that it prompted tactical adaptation rather than achieving

(9) 'Berlin power outage hits homes after suspected arson attack', *The Guardian*, 3 January 2026 (https://www.theguardian.com/world/2026/jan/03/berlin-power-outage-hits-homes-suspected-arson-attack).

(10) Author's conversation with European System operators, 9 February 2026.

(11) Ibid.

deterrence. The military should therefore take a more active role, especially in countering grey-zone threats. At sea, this means increasing pressure on Russia's shadow fleet, which facilitates sanctions evasion and other hybrid activities, including through the long-term seizure of vessels that violate international rules.

CONCLUSION

Russia will continue to look for ways to test European resolve, and energy infrastructure is one of the most obvious pressure points, having been built for an age of peace and stability. Europeans need to think of their energy system as a pillar of deterrence and embrace resilience by design. The aim is not to make disruption impossible, but to ensure that Europe can absorb shocks with minimal lasting harm.

CHAPTER 7

EUROPEANS' PREPAREDNESS AND TOTAL DEFENCE

Building resolve against hybrid threats

by
NAĎA KOVALČÍKOVÁ

The majority of Europeans believe the security of their country is under threat [(1)]. However, their willingness to fight in the event of war varies significantly. Russia's ongoing war of aggression against Ukraine, together with its escalating hybrid actions against several EU Member States [(2)], has shown that civilians are on the frontlines of modern conflict. No longer confined to conventional warfare on the traditional battlefield, such aggression also targets energy networks, healthcare and transport systems, digital infrastructure, public institutions and the morale of societies themselves.

To deter Russia amid changing US engagement in Europe, Europeans need to invest much more in their resilience and prepare to withstand a broad range of threats and risks by structurally embedding whole-of-society preparedness into their defence models. This chapter argues that, for a holistic European approach to security to be effective and credible, existing national defence models must evolve through greater investment in societal resilience and resolve alongside military capabilities. To successfully develop such an approach, Europeans can draw important lessons from one another and their partners – in particular Ukraine, which has turned societal mobilisation into an essential element of its total defence by rallying all sectors of society around shared strategic objectives.

(1) European Commission, 'The European Union in Defence and Space', February 2026 (https://europa.eu/eurobarometer/surveys/detail/3652).

(2) Kovalčíková, N., 'Hybrid warfare: Dismantling the Hypocrisy of Russia's rhetoric', in 'Unpowering Russia: How the EU can counter and undermine the Kremlin', *Chaillot Paper* no. 186, EUISS, May 2025, pp. 56-63 (https://www.iss.europa.eu/publications/chaillot-papers/unpowering-russia-how-eu-can-counter-and-undermine-kremlin); Sikora, S. et al., 'Europe's other battlefields: Foreign hybrid threats in the EU', Institute for Strategic Dialogue, 12 February 2026 (https://www.isdglobal.org/wp-content/uploads/2026/02/Foreign-Hybrid-Threats-in-the-EU.pdf).

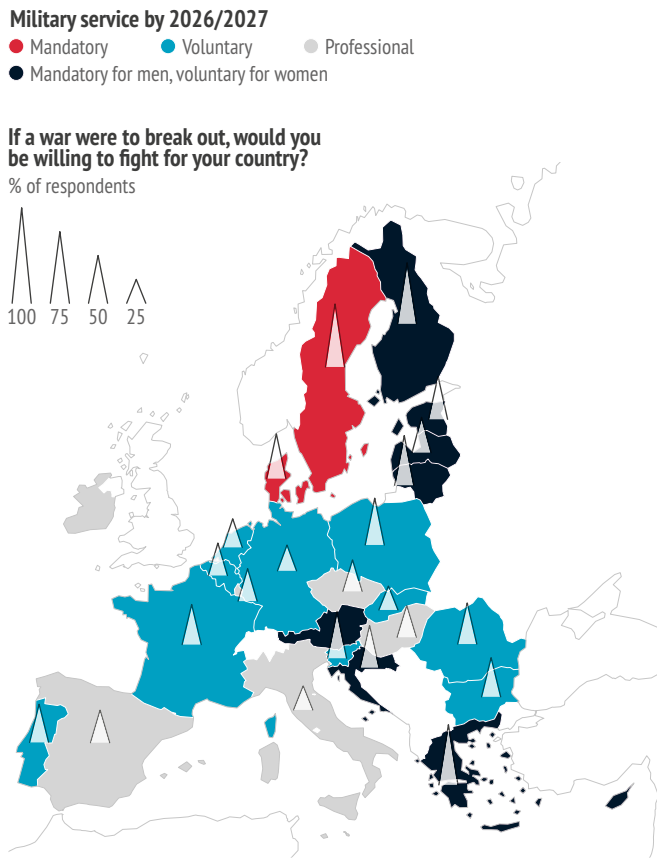
EUROPEANS' UNEVEN READINESS BUT COLLECTIVE RESPONSIBILITY

Although Europe's military rearmament is accelerating, citizens' preparedness and resolve to defend their countries in the event of an attack remains uneven [3]. Yet Russia's war against Ukraine, which is being waged on the EU's doorstep, has evolved into a protracted and expansionist confrontation. Rather than conducted as a short-lived 'special military operation' confined to a limited area, it reflects a deeper and enduring transformation of the Russian state. Its intensity and geographical proximity to EU states may therefore encourage Europeans to invest more seriously in preparedness across the Union. In this context, and amid growing uncertainty over the future role of the US in Europe, the EU's capacity for sustainable self-defence is becoming an increasingly urgent concern, placing renewed emphasis on civil preparedness and total defence. Moreover, the question of conscription and the willingness to mobilise has emerged as critical, with military service now mandatory in ten EU Member States and several others set to revise their national defence postures within the next couple of years. These efforts are however not always in tune with public sentiment. Sustained investment in civil preparedness remains essential, as Russia's hybrid warfare does not respect physical, digital or cognitive boundaries and operates without clear time horizons.

Renewed attention to military service, expanded rearmament programmes and higher defence spending have all gained support in several European countries [4]. But public opinion remains far from uniform, both within and across European societies. In France, for example, 86% of

Europeans' readiness to defend their country

Military service and citizens' willingness to fight



NB: Survey data based on the share of EU-NATO respondents answering 'definitely yes' and 'probably yes' to the question: '[…] if it were to come to [another war], would you be willing to fight for [country]?' (10 Sep- 29 Oct 2025). EU countries with mandatory military service retain systems for exemptions, such as the option to undertake alternative service.

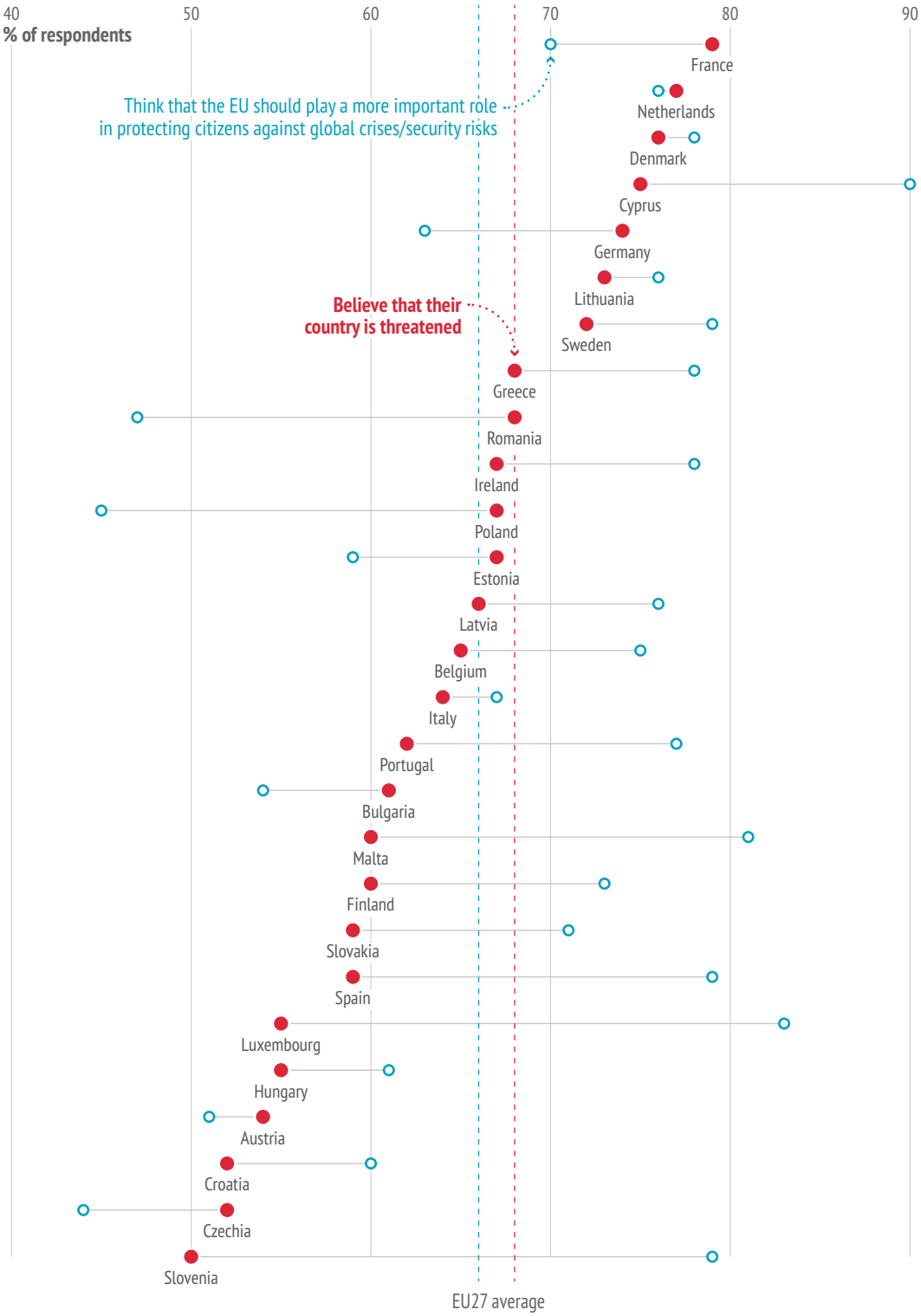
Data: BBC, 2025; Balkan Insight, 2025 & 2026; Center for Geopolitical Studies Riga, 2026; Ekathimerini, 2026; European Newsroom, 2025; Finnish Defence Forces; Lithuanian Armed Forces; Latvia MoD; Slovenia-Gov.Sl; Slovakia National Defence Forces (NOS), 2026

(3) Andžāns, M., 'Would you fight for your country? The most and least willing among NATO allies', Foreign Policy Research Institute, 2026 (https://www.fpri.org/article/2026/03/would-you-fight-for-your-country-the-most-and-least-willing-among-nato-allies/).

(4) Krastev, I. and Leonard M., 'Trump's European revolution', European Council on Foreign Relations (ECFR), 23 June 2025 (https://ecfr.eu/publication/trumps-european-revolution/).

Feeling threatened

Diverse security threat perceptions, but broad support for a stronger EU security role



Data: European Parliament, Autumn 2025 Eurobarometer survey; European Commission, Eurobarometer survey, 2026

the population is in favour of reintroducing military service after its suspension in 1997, but only 53% support compulsory service while one third would prefer a voluntary system [5]. According to a French poll conducted in March 2025, younger respondents under 35 – the group most directly affected – are notably less supportive than older respondents, illustrating generational differences in attitudes toward military service.

In Central and Eastern Europe (CEE), 73% of respondents support increasing their country's defence spending, while two-thirds favour increasing national preparedness through voluntary military service, according to the GLOBSEC *Trends 2025* report [6]. At the same time, willingness to defend the country remains relatively low across several European states, including in some CEE countries, according to the latest available survey [7], despite large majorities of Europeans agreeing that the security of their country is under threat. Many Europeans, however, recognise the need to enhance civil preparedness, improve crisis communication and counter hybrid threats [8].

In parallel, large numbers of European citizens look to the EU to protect them against global crises and security risks. The EU therefore faces a triangular challenge: high threat perceptions; an urgent need to enhance preparedness against rising threats; but relatively low public willingness to act if a war were to break out. For European deterrence and defence against Russia's expanding aggression to be credible, states will need to invest more in societal engagement and preparedness. Success will depend on the continuous adaptation of national defence models, better integration of civil defence, and promotion of a broader comprehensive security mindset among European citizens.

ADAPTING THE EU'S NATIONAL DEFENCE MODELS

There are many examples in Europe of what greater societal preparedness would look like, especially in the Nordic countries and the Baltics. Several Member States have also adapted their policies in light of the lessons drawn from Ukraine's resistance against Russia. The EU itself may be seeking to promote this approach. The so-called Niinistö report *Safer Together – Strengthening Europe's Civilian and Military Preparedness and Readiness* [9], followed by the 2025 EU Preparedness Union Strategy [10], already advances a Finnish-inspired comprehensive security model based on whole-of-society preparedness for a broad spectrum of threats and risks. These include disruptions to communications, energy supplies, financial systems, and food and water security, alongside efforts to strengthen

[5] 'Les Français favorables à un service militaire, mais pas forcément obligatoire', Ipsos, 15 March 2025 (https://www.ipsos.com/fr-fr/les-francais-favorables-un-service-militaire-mais-pas-forcement-obligatoire).

[6] GLOBSEC, *GLOBSEC Trends 2025: Ready for a new era*?, 14 May 2025, p.6 (https://www.globsec.org/sites/default/files/2025-05/GLOBSEC%20Trends%202025_1.pdf).

[7] Andžāns, M., 'Would you fight for your country?', op.cit. Results may differ across surveys due to varying methodologies or phrasings of the questions.

[8] *GLOBSEC Trends 2025: Ready for a new era*?, op.cit., pp. 6 and 29.

[9] Niinistö, S., *Safer Together: Strengthening Europe's Civilian and Military Preparedness and Readiness*, European Commission, 30 October 2024 (https://commission.europa.eu/document/5bb2881f-9e29-42f2-8b77-8739b19d047c_en).

[10] European Commission, 'EU Preparedness Union Strategy to prevent and react to emerging threats and crises', 26 March 2025 (https://ec.europa.eu/commission/presscorner/detail/en/ip_25_856).

societal and psychological resilience across Europe.

Sweden's'total defence' doctrine historically integrates four pillars: civil, economic, military and psychological defence. Since 2015, it has evolved into a model combining military and civil defence, including efforts to sustain both Sweden's will to defend itself and society's resilience to external pressure. Since 2022, a new civil defence structure has been organised around 12 sectors, while the new total defence model's main objective is 'deterrence from war and safeguarding freedom' [(11)]. Considering Russia's escalating hybrid warfare, such adaptation has become increasingly necessary. Sweden has also reinforced psychological defence and societal resilience through the Swedish Psychological Defence Agency. Moreover, the agency's mandate is not purely defensive, but also includes proportional offensive responses to attacks, e.g. taking down infrastructure used by threat actors in cooperation with the armed forces, thereby increasing the costs imposed on adversaries. Lastly, Sweden's total defence approach also teaches us that countering hybrid threats must go hand-in-hand with tracking and mitigating domestic vulnerabilities in order to withstand future crises. Today, Sweden's total defence model is underpinned by 18 voluntary defence organisations with over 350 000 members and a nationwide shelter system, which several EU Member States now recognise as necessary after years of underinvestment. A parallel benchmark for bolstering preparedness is Lithuania's comprehensive civilian preparedness system. It clearly defines roles at every level, those of individuals, organisations and the state, supported by a solid legal framework for crisis response. This enables citizens to actively contribute to national defence through a whole-of-society approach, including, but not limited to, mandatory conscription. For example, the Lithuanian Riflemen's Union has brought together citizens to learn practical skills, ranging from navigating psychological operations and anticipating hostile actors' behaviour to training dogs to locate injured people. Composed of around 20 000 members in a country with fewer than 3 million inhabitants, the organisation has been growing steadily. Relatedly, several training initiatives with a focus on civil preparedness have also emerged in other EU states, such as Poland.

Europe has a lot to learn from how Ukraine operationalised the concept of total defence.

In Estonia, voluntary territorial defence organisations, such as the Estonian Defence League, are also expanding. Estonia has increased investment in warning systems, including civil defence sirens, while the Estonia Rescue Board has identified and marked public shelters to bolster civilian protection. In Latvia, the comprehensive national defence model is implemented through the National Guard and an expanding civil defence education system aimed at deepening citizens' engagement in national defence.

Finland has long pursued a comprehensive approach to media literacy, including strengthening critical thinking, developing AI literacy, countering propaganda and fostering active democratic participation. Such programmes help build individual resilience and reinforce the idea that robust media literacy must be cultivated from an early age as a

(11) Government of Sweden, 'Total Defence' (https://www.government.se/government-policy/total-defence/).

lifelong competency, rather than treated as a purely defensive skill or a reactive institutional response.

These societal defence initiatives undertaken within the EU could serve as inspiration for other countries seeking to better integrate civilian capacities and strengthen civil defence and societal mobilisation as key components of total defence.

LESSONS FROM UKRAINE

Europe has a lot to learn from how Ukraine operationalised the concept of total defence, placing societal readiness and mobilisation at its core. Since Russia's full-scale invasion in February 2022, the Ukrainian government has placed both law enforcement agencies and armed forces under a single unified command to create an adaptive and non-traditional 'total defence system' [(12)]. While the armed forces remain the most trusted state institution in Ukraine [(13)], societal resilience, civil society mobilisation and private-sector innovation have proved to be as decisive as military force. This offers a clear lesson: such capacities must be integrated into defence and deterrence strategies early on, both to protect fundamental freedoms and to frame civil defence and preparedness as a long-term insurance policy. Integrating the evolving role of citizens in security and defence can strengthen preparedness and societal readiness before conflict arises.

Moreover, public sentiment and resolve to defend the country require sustained attention to ensure societies remain ready to respond as the security situation evolves. In Ukraine, initiatives such as 'Reservists' Week' [(14)] can serve as examples of how to strengthen citizens' willingness to stay and fight for their country and sustain soldiers' motivation, thereby helping to avoid a shortage of manpower in the armed forces [(15)].

Secondly, societal mobilisation has included local actors' engagement, volunteer networks and logistical centres, often operating without the state authorities' involvement, for example through the production of camouflage nets or large-scale drone fundraising campaigns. This has required comprehensive and highly agile coordination of a wide range of actors and direct exchange of information between them. This model has allowed Ukraine's businesses and civil society to sustain civilian life under systematic attacks, while bolstering state functionality, supporting the armed forces and compensating for structural weaknesses.

Thirdly, the willingness to contribute to national defence is a precondition for broader societal preparedness and successful community-based initiatives. The 2004 and 2013-14 revolutions in Ukraine

(12) Shelest, H., 'Defend. Resist. Repeat: Ukraine's lessons for European defence', European Council on Foreign Relations (ECFR), November 2022 (https://ecfr.eu/wp-content/uploads/2022/11/Defend.-Resist.-Repeat-Ukraines-lessons-for-European-defence.pdf).

(13) 'Poll: Ukrainians trust the Armed Forces of Ukraine the most, the Verkhovna Rada the least', *Ukrainian National News*, 17 December 2025 (https://unn.ua/en/news/poll-ukrainians-trust-the-armed-forces-of-ukraine-the-most-the-verkhovna-rada-the-least);

(14) Ilko Kucheriv Democratic Initiatives Foundation, 'Freedom, Security, Prosperity: Ukrainian public opinion during the war', 7 April 2025 (https://dif.org.ua/en/article/freedom-security-prosperity-ukrainian-public-opinion-during-the-war).

(15) Haas, M., Ploom, I. and Śliwa, Z., 'Lessons identified from Ukraine: The bid for the Estonian total defence concept', *Journal on Baltic Security*, Vol. 11, No 2, 2025, pp. 58-87 (https://journalonbalticsecurity.com/journal/JOBS/article/133/read).

gradually reinforced the sense of national identity, bottom-up activism, and rapid civic mobilisation, laying the foundations for further societal resilience. Citizens joined Territorial Defence units to build checkpoints and protect cities, while others organised humanitarian aid from abroad. Local community-based efforts [16] and decentralised support networks are often faster than the government in organising evacuations, supplying troops or filling logistical gaps. 'Invincibility points' [17] became hubs of community resilience, sometimes set up in train carriages, where people could keep warm and receive food or psychological assistance. Such sustained initiatives and community-based efforts serve as lifelines and could be replicated across Europe, provided investment in them starts early enough to strengthen collective identity and trust. Resisting Russia's aggression against Ukraine has proved that every citizen matters [18]. To foster societal mobilisation, however, national pride alone is not sufficient. Engaging the whole of society requires identifying diverse and concrete motivations that align individual interests with collective security goals. In the case of Ukraine, this has meant adopting a strong decentralised community approach, linking civilian support to military service, and encouraging citizens to directly assist law enforcement agencies, including fire departments, civil defence units, medical and rescue services, and the police.

Lastly, digitalisation and national interconnectivity are also central to ensuring total defence. Through the 'Delta platform', which integrates civilian and military data streams to bolster Ukraine's battle-management software ecosystem, digital public services have reduced the administrative burden on a state operating under constant pressure. Ukrainians have used government-supported apps which help geolocate adversaries and transmit data to the armed forces. However, to draw meaningful and effective lessons from these practices, national and European authorities must address identified limitations in advance, including the risk that citizens using smartphones as tools of warfare could be reclassified as combatants.

To learn from Ukraine's defence experience and enhance preparedness, Europeans need to invest in adaptive models of resilience that underpin integrated deterrence [19] and civil defence. This will allow them to adapt tested models of psychological and societal resilience rather than attempt to reinvent approaches to counter hybrid warfare [20].

[16] Sydorchuk, M., 'The Ukrainian model of societal resilience: Why the country did not collapse under full-scale war', *New Eastern Europe*, 12 January 2026 (https://neweasterneurope.eu/2026/01/12/the-ukrainian-model-of-societal-resilience-why-the-country-did-not-collapse-under-full-scale-war/).

[17] Sachalko, B., 'Ukrainians fight cold at "invincibility points" amid ongoing Russian strikes', Radio Free Europe-Radio Liberty, 27 January 2026 (https://www.rferl.org/a/ukrainians-fight-cold-at-invincibility-points-amid-ongoing-russian-strikes/33661463.html).

[18] Haas, M. et al., 'Lessons identified from Ukraine: The bid for the Estonian total defence concept', op.cit.

[19] Bogomolov, O. and Poliakov, L., 'From whole of society resilience to integrated deterrence: How Ukraine defends', National Institute for Strategic Studies, 2 January 2026 (https://niss.gov.ua/en/news/articles/whole-society-resilience-integrated-deterrence-how-ukraine-defends).

[20] Clipa, C., 'Nordic lessons for Romania's information defense: Adapting psychological and societal resilience models for hybrid warfare', *Small Wars Journal*, 3 March 2026 (https://smallwarsjournal.com/2026/03/03/nordic-lessons-for-romanias-information-defense/).

CONCLUSION

Adapting states' capacities for civil defence

Russia's increasingly sophisticated hybrid warfare, directly targeting both military personnel and civilian populations across Europe, calls for greater investment in dedicated civil defence structures in the EU. In particular, enhanced societal engagement, psychological defence and civil defence education can serve as core resilience tools before, during and in the aftermath of crises. Based on the Swedish total defence model, such an approach integrates military and civil defence to address both hostile foreign activities and the domestic vulnerabilities that external actors seek to exploit. Structural funding, digital connectivity and the systematic engagement of citizens and civil society across the crisis spectrum will help further develop and sustain voluntary and community-based efforts which have proved critical for total defence in both war and peacetime.

Scaling national collaborative practices to European frameworks

The majority of citizens across the EU (52%) trust it to strengthen security and defence [21]. Total defence considerations need to be integrated into both national and EU security frameworks to be effective. The challenge now lies in reinforcing both national civil defence and the EU's coordinating role in ways that improve coherence, foster a more holistic approach to preparedness and increase European citizens' willingness to respond to crises at all levels. While collaboration on some aspects of total defence has begun to emerge among the Nordic and Baltic states, it remains limited at the European level. On 4 March 2026, Sweden signed a memorandum of understanding with Denmark, Estonia, Finland, Germany, Iceland, Latvia, Lithuania, Norway and Poland on protecting civilian populations beyond its territory, across the Baltic Sea region and the Nordic countries [22]. This marks a significant collaborative milestone in civil defence, enabling the temporary movement of people across borders in the event of a crisis or, in the worst-case scenario, war. Broader adoption of such civil protection mechanisms and regional cooperation frameworks could benefit Europeans as a whole.

Total defence considerations need to be integrated into both national and EU security frameworks to be effective.

A European approach to total defence and transnational resilience

Several EU countries have gradually increased investment in situational awareness and in fostering a peacetime mindset shift, inspired also by the EU's Preparedness Union strategy. One example is the distribution of 72-hour self-sufficiency

[21] European Commission, 'The European Union in Defence and Space', February 2026 (https://europa.eu/eurobarometer/surveys/detail/3652).

[22] Swedish Ministry of Defence, 'Increased protection for the civilian population in the Baltic Sea and Nordic region', 4 March 2026 (https://www.government.se/press-releases/2026/03/increased-protection-for-the-civilian-population-in-the-baltic-sea-and-nordic-region/).

guidelines for crises or wartime. Total defence considerations need to be integrated into both national and EU security frameworks to be effective.

The European approach to fostering civil defence is also providing partners with blueprints for strengthening public situational awareness and contributes to broaden transnational societal resilience against hybrid operations. For example, the Taiwanese authorities have issued their own civil defence and preparedness guidelines, drawing inspiration from approaches adopted in several European democracies, to help citizens respond effectively during crisis events[(23)].

Ukraine's wartime mobilisation, together with the evolving total defence models, concrete preparedness measures and emerging initiatives of the Nordic and Baltic states, demonstrates both the strategic value of and growing need for whole-of-society preparedness. Scaling up these national experiences and embedding them within European frameworks will be essential to strengthening deterrence and building a credible and resilient security architecture for Europe and beyond.

(23) 'Taiwan publishes updated civil defense guide for emergency preparedness', Mehza, 12 September 2025 (https://mezha.net/eng/bukvy/taiwan-publishes-updated-civil-defense-guide-for-emergency-preparedness/).

CONCLUSION

FROM AMBITION TO ACTION

Resources, readiness and resolve

by
STEVEN EVERTS AND LUIGI SCAZZIERI

Europe is facing years of maximum danger: it needs to be able to deter an aggressive and revanchist Russia at a time when the Trump administration is signalling a significantly reduced US role and commitment in Europe. To face this dual pressure, Europeans are ramping up their defence spending – with an estimated increase of 21% in 2025 alone. But it takes a while for more money to translate into more combat power and usable capabilities. Meanwhile, Europe must absorb the lessons of the transformation in warfare revealed by Russia's war of aggression against Ukraine and the conflict in the Middle East. In short, Europeans need not only to do more, but also to do things differently, if they are to deter Russia effectively when time is short and institutional inertia remains strong.

The core argument of this *Chaillot Paper* is that building credible European deterrence against Russia, and doing so with much less US involvement, is within reach. Europeans often underestimate their own resources and collective strength: Europe is affluent, densely populated and technologically advanced. Yes, there are real divisions but during the Greenland crisis, among others, Europeans demonstrated that they can close ranks when fundamental, collective interests are at stake.

The chapters in this volume argue that the effort of building up European defence rests on three interlocking foundations: resources, readiness and resolve. Resources provide the material basis of deterrence: capabilities, industrial capacity, technology, raw materials, infrastructure and energy. Readiness is the ability to turn those resources into usable power: by preparing, exercising, planning and being able to work together effectively, in a context of reduced US involvement. Resolve is the capacity to convince Russia that Europe has the will to resist coercion, sustain collective defence over time and is ready pay the price of defending freedom.

On resources, Europe needs sustained investment. Europeans will need to invest not only in conventional capabilities and in closing well-known military gaps, but also in the broader technological and material foundations of deterrence. That includes defence innovation and the development of a stronger European defence-tech ecosystem. Europeans will also need to secure the inputs on which their rearmament depends, above all critical raw materials, for which Europe

is almost wholly dependent on China. The same logic applies to energy. Making Europe's energy infrastructure more resilient is a key component of a stronger deterrence posture and requires diversification of supplies combined with investment in grid redundancy and stronger measures to protect critical infrastructure.

On readiness, the key challenge is for Europeans to build a deterrence backbone that can function with much less American support. The goal here is to deter Russia, not to replicate the US's global defence posture, with its extensive network of bases and a system of alliances spanning four continents. But Europeans will need to replace the military mass and high-end capabilities provided by the US, particularly in areas such as command and control (C2) and intelligence, surveillance and reconnaissance (ISR). Europeans will also need to ensure that their forces can operate together seamlessly as a coherent military whole. Through joint training and exercises and by working with Ukraine, they can develop their own doctrine tailored to their own defence needs and budgetary realities while incorporating the lessons of the fighting in Ukraine. Moreover, readiness is not only military: Europeans must strengthen societal preparedness and resilience, and ensure that their critical infrastructure can function under pressure.

The key challenge is for Europeans to build a deterrence backbone that can function with much less American support.

Resolve, meanwhile, is about persuading Russia that Europeans are willing to defend each other even at substantial cost. In military terms, Europeans can signal resolve through a more credible conventional and nuclear posture and through regular exercises. But Europe's ability to deter Russia also depends on the survivability of its critical infrastructure and preparedness of its citizens. Systematically exercising responses to hybrid attacks is a key element of deterrence. Resolve also requires preparing to manage escalation: Russia can try to coerce or attack Europe in many ways and Europeans need to be able to communicate deterrence by punishment clearly and credibly.

This is an ambitious agenda, and the obstacles to its full implementation are considerable. Three stand out. The first is whether Europeans are willing and able to sustain the effort over time. Much hinges on maintaining political support for higher defence spending. That support is uneven across Europe.

The second obstacle is ensuring that increased spending delivers the greatest possible military effect. Europeans risk spending on gold-plated systems that are slow to develop and produce, rather than on a more effective mix of high-end capabilities and cheap modular and rapidly upgradable kit. They also risk spending in an uncoordinated manner, reproducing the fragmentation that has long weakened European defence and missing the opportunity to generate scale and efficiency.

The third challenge is overcoming Europe's political fragmentation. Member States' threat perceptions, strategic cultures, fiscal room for manoeuvre and political priorities differ. This makes it challenging for Europe to act collectively, and to communicate credible deterrence towards Russia. These realities cannot be wished away: the task is to build up Europe's defences while navigating them.

These obstacles are real but not insurmountable. Europeans can overcome them if they combine political determination with a pragmatic approach to building European defence.

First, Europeans need to sustain the effort. This means staying the course well beyond a possible ceasefire in the war against Ukraine, as the threat from Russia will remain. National budgets are the bedrock of Europe's defence build-up, but many are under strain. Europeans will therefore need to mobilise additional resources for defence by embedding it horizontally across EU funding instruments and by considering innovative financing mechanisms such as a possible SAFE 2, or other forms of joint borrowing. The case for higher spending will also be easier to justify if defence is seen as an economic investment. A stronger defence effort must support defence-tech and dual-use ecosystems in Europe, foster the emergence of competitive companies, create skilled jobs and reduce critical dependencies. The practice of past decades, in which Europeans relied on foreign suppliers for many high-end capabilities, is becoming increasingly untenable from both an operational and political point of view. External suppliers will prioritise their own needs in a crisis, and European publics will increasingly expect Europeans – including Ukraine, the UK and other partners – to be able to produce the bulk of what they need at home. This does not mean cutting out foreign suppliers, but the balance needs to shift towards much greater European control over critical capabilities.

Ukraine should be treated as part of Europe's wider defence ecosystem.

Second, Europeans need to make their spending more efficient. The fighting in Ukraine and in the Gulf has highlighted the importance of cheap and reasonably accurate unmanned systems, rapid software adaptation and the ability to integrate information quickly. Europeans need to become more comfortable with 'good enough', modular and upgradable capabilities across all domains. This does not mean abandoning high-end capabilities but recognising that affordable mass has strategic value in its own right. Europeans will need to embrace faster procurement cycles, spiral development, modular contracts and accept more risk when developing new capabilities. This can also help aggregate demand and thus create more predictable incentives for industry to invest, avoiding the familiar cycle of mutual blame in which governments point to limited industrial ramp-up while industry laments the lack of long-term orders.

Ukraine should be central to any plan for European defence, in terms of capability development, doctrine and wider societal resilience. Europeans need to ensure that their own defences are suited to the realities of contemporary high-intensity war. Ukraine is at the cutting edge of defence innovation, from drones and missiles to battlefield software, C2 systems and a culture of rapid battlefield adaptation. But cooperation with Ukraine should go beyond the defence industrial domain: Ukraine should be treated as part of Europe's wider defence ecosystem and its experience should feed directly into European procurement, training, exercises, military education and force development.

Third, Europeans need to overcome collective action challenges and institutional silos. The reality is that Europe's defence build-up cannot depend on one institutional framework. National armies and budgets will remain the basic building blocks of defence. NATO, in a Europeanised form, will remain the central framework for organise European deterrence. The EU has a key role to play in reducing fragmentation, supporting the expansion of defence production, strengthening supply chains, and embedding defence and resilience systematically across different policy areas. In many of these areas, the EU's potential is underused. The Union can play a larger role in adding momentum and coherence

Europe's deterrence agenda

Resources, readiness and resolve

RESOLVE

Convince Russia that Europeans are willing to resist coercion, defend each other and sustain the costs of deterrence.

- Make **solidarity visible** through exercises, deployments and planning
- Strengthen conventional and nuclear **deterrence signalling**
- Give greater substance to **Article 42.7** alongside NATO's Article 5
- Systematically exercise responses to **hybrid attacks**
- Proceed pragmatically, leveraging NATO, the EU, national efforts and **smaller groupings** to show that Europe can act despite fragmentation

READINESS

Turn resources into usable power: industrial capacity, digital systems, energy networks and societies must be able to function in crisis or war.

- Build a **European deterrence backbone** adjusted to a lighter US footprint
- Advance **multinational force integration**
- Quickly **fill capability gaps**, especially critical enablers
- Build **resilient command and control** arrangements
- Embrace **innovation** and make procurement faster
- Absorb **Ukraine's battlefield experience** from doctrine to procurement
- Harden **critical infrastructure** so European societies can function under attack
- Strengthen **societal preparedness** and **civil resilience**

RESOURCES

Strengthen the material basis of deterrence: military capabilities, industrial capacity, technology, critical raw materials, secure energy supplies.

- Sustain **higher defence spending** to strengthen military capabilities and resilience
- Mobilise **national, EU and private financing**
- Strengthen Europe's **defence-industrial and defence-tech base**
- Secure **critical raw materials** and **energy** and reduce dependence on external suppliers

Photo credits: NATO, EDA

to Europe's defence ramp-up, if it uses its instruments more strategically. EU funding should be focused on a smaller number of areas where it can make a real difference, and eligibility criteria should create stronger incentives for Member States to work together.

In many areas, however, an EU-wide approach will be challenging; while an EU-only approach would be suboptimal. Smaller flexible groupings of states allow willing countries to move faster and more deeply across different dimensions, from force integration and operational planning to capability development, military mobility and the protection of critical infrastructure. Arguably the most dynamic developments in of European defence are taking place at the bilateral or (sub-)regional level in frameworks such as Belgian-Dutch naval integration, the Joint Expeditionary Force, Nordic defence co-operation, and the growing number of bilateral and minilateral defence clusters focusing on procurement, integration or operational coordination. Such groupings can also provide the most feasible framework to work with key European partners, above all Ukraine, which has built a battle-hardened army that is in many respects the strongest on the continent. The UK, despite facing serious fiscal constraints, must play a central role given its critical assets: a large and advanced defence industrial base, a strong strategic culture and a nuclear deterrent that plays a central role in NATO planning. But the effort of strengthening European deterrence should also involve other countries with a direct stake in European security, including Norway and, where interests converge, Türkiye. Partners such as Canada, Japan and South Korea can also contribute in specific areas, including defence production and strengthening the resilience of supply chains.

Finally, Europeans need to demonstrate resolve. Europeans should not only affirm solidarity, but also put it into practice. This requires more frequent and demanding exercises, including for grey-zone and hybrid scenarios, and increasing deployments and rotational contributions in vulnerable regions. Giving greater substance to the EU's Article 42(7) would complement NATO's Article 5, by clarifying how Europeans would assist each other in situations that fall short of a conventional armed attack, and what role they foresee for the EU's institutions.

The more Europeans strengthen their ability to deter and defend against Russian aggression while relying less on the US, the better placed they will be to resist other threats. A stronger European defence posture would in turn rebalance transatlantic relations by reducing the extent to which Europe's security depends on American political choices. Above all, by taking ownership of their own defence, Europeans will be less vulnerable to external pressure and better able to uphold their interests in a harsher strategic environment.

Implementing all the ideas set out in this *Chaillot Paper* to build European deterrence will be demanding. But the task is achievable - and the costs of inaction are both real and growing over time.

ABBREVIATIONS

AI
Artificial Intelligence

BCT
Brigade combat team

C2
Command and control

CEE
Central and Eastern Europe

CTI
Cyber threat intelligence

DTIB
Defence Technological and Industrial Base

EATC
European Air Transport Command

ECCC
European Cybersecurity Competence Centre

EDA
European Defence Agency

EDF
European Defence Fund

EDIP
European Defence Industry Programme

EDIRPA
European Defence Industry Reinforcement through common Procurement Act

EDIS
European Defence Industrial Strategy

EDTIB
European Defence Technological and Industrial Base

eFP
enhanced Forward Presence

EIB
European Investment Bank

EIF
European Investment Fund

ELSA
European Long-Range Strike Approach

ENTSO-E
European Network of Transmission System Operators for Electricity

EU
European Union

EUCOM
European Command

EUDIS
EU Defence Innovation Scheme

FIMI
Foreign Information Manipulation and Interference

GDP
Gross domestic product

HQ
Headquarters

ICTs
Information and communication technologies (ICTs)

IoT
Internet of Things

ISR
Intelligence, Surveillance and Reconnaissance

JFC
Joint Force Command

LNG
LIquefied natural gas

MDTF
Multi-Domain Task Force

MoD
Ministry of Defence

MPCC
Military Planning and Conduct Capability

NATO
North Atlantic Treaty Organization

NDS
National Defense Strategy

R&D
Research and Development

SACEUR
Supreme Allied Commander Europe

SAFE
Security Action for Europe

SMEs
Small and medium-sized enterprises

TEU
Treaty on European Union

TSO
Transmission system operator

UAV
Unmanned aerial vehicle

UK
United Kingdom

US
United States

USD
United States Dollars

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Europe is facing years of maximum danger. Russia's war of aggression against Ukraine is grinding on, and its hybrid pressure against Europe is intensifying just as uncertainty grows over future US engagement in Europe. Europeans must take greater ownership of their own defence.

This *Chaillot Paper* examines how Europeans can strengthen deterrence against Russia in the context of a reduced US role. It argues that success rests on three foundations: resources, readiness and resolve. The contributors to the volume explore the political, military, industrial, technological, energy and societal dimensions of building up Europe's defences. They identify the steps needed to reinforce deterrence and enhance Europe's ability to withstand coercion and aggression in a harsher strategic environment.

The key message of this *Chaillot Paper* is that Europe has the means to defend itself. The challenge is to move faster and more pragmatically, work together more effectively and sustain the political will needed to bolster European security.

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