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#EDINA

EUROPEAN DEFENCE IN A NEW AGE

RESHAPE EUROPE

Content

Preface

European security is undergoing a tectonic shift. The Russian war and its shockwaves are leading to a rapid and potentially disruptive change in European defence. This concerns the immediate to long-term European response, support to Ukraine, but also the need to reassess the European defence ecosystem, with a focus on changing defence concepts, capabilities and cooperation. However, this war is only one sign of a larger transformation: the world is entering an era of systemic conflict. Megatrends in geopolitics, economics, technology, the changing nature of conflict, but also climate change and new social movements shape this era.

Europeans must therefore adjust to a more complex geopolitical equation than just the European theatre and purely defence. The most important example is a potential conflict between the US and China. Conduct and effect would go far beyond the military domain. It would have implications for solidarity with the US as well as for the military capability gaps that a rapid increased US engagement in Asia would bring to the European theatre.

European states will have to solve a more difficult equation when it comes to defining their future defence ecosystem: the security and defence policies, capability profiles and the required technological-industrial base, as well as what they need to do collectively, whether within NATO, the EU or multinationally.

It is too early to draw final conclusions on the future shape of European defence. However, the shaping is already taking place. Not only the Russian war plays a role, but also many processes at the national and international levels like the NATO summits and a new round of defence planning cycles will contribute to it. They will take place on the basis of assumptions.

This publication is a contribution to inform this reflection and shaping process. It offers first findings on central developments and key questions from a deeper dive into developments in 15 European countries. Nine topics stand out as key to the future shape of European defence.

1 Geostrategic landscape: assessing political change in Europe

1. The Russian war against Ukraine has exposed not one Europe, but several. Governments are reacting differently in the areas of threat perception, alliance policy, defence budgets or arms deliveries to Ukraine. Changes are taking place at different speeds, to different extents and with different political orientations. This could point to possible divisions despite the current “European unity”. The other risk is that the longer governments are expected to compromise to maintain unity, the more likely such divisions become. Therefore, the war is also a test of the Alliance’s cohesion in the event of a conflict that NATO must fight.

2. Many European states saw the confrontation with Russia coming – even if it was not explicitly a war, many strategic documents from Eastern European countries, but also France and the UK, saw Russia as a potential aggressor. The question arises however, what difference this awareness has made in different parts of Europe in terms of current policies towards defence, Russia and Ukraine. There is also another end to this spectrum: all Europeans see Russia as an existential threat to themselves or to Europe. Most would probably agree that Russia is at least not the only threat to Europe.

3. The policy shifts in most countries are not expressed in a fundamental change in strategic documents. For many governments, the war either meant a reshuffling of their priorities or the more general expectation of a negative aggressive role of Russia became a tangible reality. Many countries made changes as part of the annual policy cycle, e.g. in the form of budget changes. Germany, Sweden and Finland have taken significant decisions outside the cycle that involved massive policy change.

4. There are regional and global perspectives on the impact of the war. The global perspective is often about China’s role as Russia’s partner or as a security actor. The Russian war has opened the eyes of some European governments to the reality of geostrategic competition (Spain, Italy, UK, France, Finland, Germany). China as a strategic rival has gained attention and governments are discussing a more confrontational stance towards China. This is the case for Germany and Spain. Other European states such as the UK, France and Finland have acknowledged the challenge posed by China in previous strategic documents. The outbreak of the war in February 2022 has not given any new impetus with regard to China, as they were already aware of the security implications.

Group 1: From neglect to wake-up call/ Dramatic change to security environment

A group of states that has neglected the threat that Russia poses to European security. This reflected geographic distance. Both **Spain and Italy** have focused on security threats in their southern periphery, focusing more on crisis management than on conventional territorial defence. Both countries have experienced wake-up calls. Spain shifted its threat perception drastically, identifying Russia as the main threat that it had not recognised that clearly before. As a result, both countries have made new commitments regarding defence spending; Italy has pledged to strengthen its support to NATO's eastern flank.

Finland has not underestimated the Russian threat per se. It has always identified its eastern neighbour as the most immediate threat to its security. However, Russia's invasion of Ukraine changed the security environment so dramatically that Finland overturned its long-standing policy of non-NATO alignment and applied for NATO membership.

Germany is the most extreme case of a country where the perception of the security environment is fundamentally changing. The Russian war has not only destroyed the European security order but, more fundamentally, almost all German mainstream assumptions about security and peace and about partnership with Russia. In fact, only the Russian war has made the perspective of geostrategy relevant. In many ways, then, this is the first time that Germany has been confronted with the new reality of insecurity in Europe. This was acknowledged by the German Chancellor in his now famous "Zeitenwende" (tidal change) speech in February 2022.

Group 2: Confirmation of previous threat assessment, but reordering of priorities

A second group of states sees the escalation in Ukraine as a confirmation of their threat assessment.

France, the UK and Norway have adjusted their threat assessment following the Russian annexation of the Crimean peninsula in 2014 and have re-prioritized Russia. **Poland, Estonia and Lithuania** have consistently highlighted the Russian threat to their security due to their shared border with Russia and their history as being part of the Soviet sphere of influence.

Group 3: Russia remains no real threat to European security

Both **Hungary and Bulgaria** have officially condemned the Russian invasion of Ukraine. However, both maintain a somewhat balanced position. Hungary still hopes for a return to the status quo ante, a position that can partly be explained by the Hungary's still high energy dependence on Russia. Bulgaria, on the other hand, is in a protracted internal political crisis with changing governments. As a result, the position on the Russian invasion is not coherent. Nevertheless, both countries share the perception that Russia, while to be taken seriously, is not a real threat to their security and the security of Europe in general.

Group 4: Focus on intensifying traditional conflicts

Greece is clearly more concerned about Turkey as a security threat than Russia. At the same time, Greek governments have never ruled out the possibility of large-scale conventional war in Europe. Therefore, Greece feels better prepared for the new age of European defence. **Turkey** takes a balanced approach towards Russia, cooperating where possible but pursuing a strategy of "contained confrontation" where its interests conflict. In general, Turkey seems more concerned about threats on their periphery, including its strategic rivalry with Greece.

5. Domestic audiences are an important reference for shaping defence policy positioning governments against Russia as a threat. However, this is double-edged: in the case of Hungary, the war was used to emphasise the government's ability to use bargaining power and to lower energy prices.

In the case of Spain, the evolution of public discourse apparently allowed the government to reposition itself towards greater support for territorial defence and Atlanticism. In other cases, like Germany and Italy, the public discourse fluctuates between positions such as security with Russia and security against Russia. For France, the UK, but also Turkey or Greece, the role of domestic politics is unclear.

2 Politico-military order(s)

6. The way Europe organises its security may no longer be fit for purpose: There have been regular calls for a division of labour between the EU and NATO in the past. However, this will most likely not cover all relevant needs that become apparent through the current war: For the industrial dimension, there is no effective institutional framework for nations; or frameworks are difficult to enter. NATO or states outside the EU have no direct influence on decision-making and shaping of non-military security by EU institutions, even if it sets conditions for all. Moreover, many European countries, at risk of being a target or lever for Russian non-military aggression, like Moldova, are not part of these organisations, and the new European Political Community (EPC) is not interesting to the traditional security stakeholders either. But it could be the solution to many of the open questions.

7. NATO has gained attention as the main defence alliance relied on by European states. For Easternmost nations, effective implementation of NATO's Madrid strategy is a prerequisite of their security, given their reinforced perception of threat from Russia. Southern states like Italy and Spain, which have traditionally focused on their own periphery and the EU, have not increased their commitment to NATO's defence planning and the protection of its eastern flank. The result of this shift is that European strategic autonomy is losing momentum and importance. Even France, a traditional supporter of the EU defence effort, is now paying more attention to NATO as the backbone of its security.

8. This is not incompatible with a second development: some governments have stressed that Europe needs to take more responsibility for its own security, especially for its eastern member states. This could lead to greater dependence on the EU or at least to a more coherent EU defence concept. However, compatibility with NATO is seen as crucial. Others countries, such as Finland, argue for a stronger EU role in security beyond classical defence. Greece also emphasises the role of the EU, but mainly because Turkey is also a NATO member, which precludes NATO intervention in the event of an armed conflict.

9. Neglected, also partly in our country reports, are the countries that are not covered by security institutions. There is a political initiative, the EPC, (European Political Community,) to bring the EU closer to the rest of Europe, especially to countries threatened by de-stabilisation by Russia. However, this EPC or the countries associated with it have not yet played a role in thinking about future politico-military missions and how the EPC could serve European defence.

3 NATO's transformation agenda

10. NATO's role as the main provider of security in Europe has been reinforced. However, NATO as a whole will have to develop a transformation agenda. The real change in geostrategic conditions goes beyond the Russian war itself. The most important example of change is the imminent accession of Sweden and Finland to NATO. This will give NATO greater strategic depth in the North and regionally based capabilities.

11. The second major factor acting as a trigger and yardstick for a successful transformation of NATO is the trust of European NATO members and Ukraine, but also Russia (with a different connotation), in the US role in European defence: even assuming that a future Republican president will be less dour than Trump, the midterm vector of US defence priorities is clear to all: away from Europe.

12. NATO will face a new deterrence debate, including the role and distribution of nuclear capabilities. The currency of relevant commitment will inevitably change. This will have an impact on inputs, i.e. defence spending. Here, an increase of the commitment to more than two percent of GDP is already being discussed. In terms of outputs, i.e. capabilities, it will no longer be sufficient to do something similar to sending a group of special forces to Afghanistan, i.e. to make a token or minimal contribution from a national force pool that may largely be not fit for purpose. The necessary political debate may not be compatible with the collective process that must lead to collective but effective targets for future NATO operations. The other debates in NATO, primarily on the conventional side, will be about procurement priorities and land-based versus multi-domain operations (MDO). This debater could be a false dichotomy: The war in Ukraine has all the criteria of MDO, instead of being a war primarily fought by land armies. The main difference seems to be that while some might have thought of MDO as a bloodless clash in the cyber domain, between unmanned systems etc.; the war in Ukraine has surely purged such illusions from everyone. In NATO, MDO is undoubtedly a warfighting concept that involves death and destruction.

13. The gap between the utility of armed forces and the purpose of defence capabilities could widen. In any case, a new tension will emerge between national defence agendas, including their competing priorities, and collective priorities and actions. What will Europeans continue to do together?

4 Defence spending & burden sharing

14. Many European governments have come to the conclusion that the new age of defence requires them to increase their efforts to modernise and strengthen their military capabilities. Increased defence spending is the result. Some countries have adjusted their budgets significantly, in particular, Poland, Norway, Lithuania and Estonia. Being an outlier, Poland decided in 2022 for a rapid defence expenditure rise to around 4% GDP with the baseline budged at 3% GDP, augmented by a special fund, aimed at financing technical modernization only. Italy and Spain have renewed their commitment to NATO's 2% target. However, their additional funding remains moderate.

One reason is certainly that is takes time to implement changes. Another reason may be that the shape of the security threat from Russia after some kind of settlement in Ukraine is not clear.

15. Here, too, two extremes can be found: Germany on one side and France and the UK on the other: In the Zeitenwende-speech, the German government committed itself to a complete overhaul of the hollowed-out German armed forces. To achieve this, the government has set up a special fund of €100 billion. In addition, the German government has committed to increase the defence budget to 2% of GDP, which will also be achieved with help of the special fund. The UK has not announced any major budget increases in response to the Russian invasion for Ukraine, but established an extra budget for the support of Ukraine. However, these commitments were made before 2022 and are not a direct reaction to the Russian escalation in Ukraine. Nevertheless, the increase was justified by the changed geopolitical situation after the Russian annexation of Crimea in 2014. France has committed to increase its budget since 2017; the latest announcements in January 2023 confirm this trend with an expected doubling of the defence budget between 2017 and 2030.

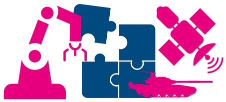
16. But the budget discussion will also take a new turn: On the one hand, there are concerns that European states will have problems maintaining current increases in defence spending due to economic problems or dwindling domestic support. On the other hand, there may be the impression that while more money is available for defence, the tasks are also growing. The defence gap may become much larger than before. Where more money is available, the challenge is to spend it. Therefore, it is not only the budgets but also the actual spending on things that have been ordered that is crucial, suggesting that the efficiency of the defence bureaucracy also needs to be increased.

17. One point stands out, also in the upcoming discussion about NATO spending levels and the taxonomy: Peacetime preparations are rarely considered for areas where non-military efforts are made to improve resilience, such as the protection of critical civilian infrastructure. However, many countries have identified civilian readiness and the protection of critical infrastructures as elements of the next level of ambition. Hence, defence planning needs to open up even more to the resilience of critical civilian infrastructures, as they are also military infrastructure.

18. Given that the current impetus to do more comes primarily from the national levels, the overall increase in the volume available in NATO will be met with a nationally diversified demand for capabilities. It would be short-sighted to assume that more money will simply lead to more cooperation. When less money was available, it did not lead to more cooperation. So more money does not automatically mean more cooperation either.

19. European nations may soon reach a critical juncture: either they can define a large number of missions they want to conduct collectively, or national priorities will meet resistance, and so a new dimension of division of labour may get a stronger push, reviving the discussion about specialisation and reliance on allies. This can be a strategic decision that allows the European capability pool to be shaped (intentionally), or it can happen from the bottom up, forcing European nations to make a series of short-term adjustments (accidental). This option is that threat perceptions, and thus the availability of resources, decline unevenly across Europe.

5 Level of Ambition



20. The need to change existing Levels of Ambition (LoAs) or even the whole approach to what is needed arises from various directions. The mix of tasks between crisis management and deterrence/defence has an impact, as does the type of deterrence approach nations want to employ.

21. Ukraine has taught many countries lessons about timelines and the need for a larger pool of troops. Deterrence for many countries seems to mean increasing the readiness of forces and the number of forces with high readiness. This has implications for the readiness, mass and sustainability of the armed forces.

The challenge goes beyond frontline capabilities: it points to a different technological and industrial base: War production capacities and the endurance of systems in war could receive higher attention. It also has numerous implications for military mobility, logistics, maintenance and manning. In some cases, a shortage either of well-trained personnel or the insufficient quality of the conscription force compromises efforts to raise the level of ambition. In particular, Greece and Bulgaria have reported this problem.

Trend 1: Higher European level of ambition necessary

Most governments in the sample agree that the European level of ambition needs to be raised. To accelerate the shift initiated in 2014, Europe's armed forces need to be able to fight high-intensity, large-scale territorial conflicts against a near-peer competitor. At the moment, European militaries do not seem to be up to this challenge.

This is necessary to effectively deter Russia. There is also a widespread understanding that the US pivots towards the Indo-Pacific region, which will challenge European states to take more responsibility for their security. When addressing the European level of ambition, Eastern European Baltic countries and the UK are focusing more on NATO to provide additional capabilities. Southern and Western European states see the EU and NATO as equally important, with France and Finland seeing the EU as the most important forum for European defence.

Trend 2: Higher national levels of ambition

Some states (Poland, Germany, Estonia, Spain, Italy, Hungary, Norway, Romania) have not only called for higher European levels of ambition, but have also committed themselves to stepping up national efforts. For states like Poland, Estonia, Spain, Italy and Germany, higher readiness and a greater contribution to territorial defence are key objectives. Germany and Poland have set themselves ambitious goals. Germany wants to become the most capable army in Europe. Poland declared its intention to have the most capable land force in Europe.

Trend 3: No higher national level of ambition

Other countries (UK, France, Finland) have not made any significant announcements to change their level of ambition. These countries trust in the current capabilities of their militaries and have adjusted their strategic documents shortly before the outbreak of the war in 2022.

Trend 4: Watching from the sideline

A small but significant number of states (UK, Hungary, Turkey) does not actively participate in the debate on Europe's future military order. Turkey because of its obvious scepticism towards the EU, the UK partly for the same reason and because it has an inward-looking bias since Brexit, and Hungary because it does not perceive Russia as a major military threat.

Trend 5: More focus on territorial defence, but not less crisis management

Territorial defence is back. This is a clear consequence of the Russian invasion. However, this does not lead in a decrease in crisis management commitments. Countries like Spain and Italy, which have focused on their peripheries, will maintain their level of commitment while increasing their territorial defence efforts.

6 Capabilities

22. There seems to be a need for a new mix of mass, delivery time, cutting edge, complexity and sustainability in war. The Russian invasion of Ukraine accelerates thinking and discussion, but at the same time opens the door for biases such as situational overestimations. New assumptions and observations are (re-)emerging on the scene, while old wisdom is being challenged: High-intensity warfare might be less high-tech: Will we continue to transform into muti-domain operations with greater technological edge, information superiority and agility? Large-scale and long duration wars are under-represented or ignored in planning. Equipment fragmentation goes from being a theoretical problem to a practical one with challenges for logistics and maintenance, repair and overhaul (MRO). Land and air forces may receive more attention in the short term. But nations with classic naval missions will hold on to them. The challenge of resources will lead to a faster division of labour.

Decisions on technological pathways can be made more quickly, for example on unmanned systems, how to deal with gaps and how to deal with legacy systems.

23. Several contributions highlighted the strike a new balance between complex, state-of-the-art capabilities (which can only be produced in smaller quantities) and the availability of less complex weapon systems on a large scale. This will have significant implications for procurement and industry.

24. The supply of mass-produced goods is both difficult and important. Similarly, the ability to fight a long war needs to be supported by industry. Introducing the ability to fight an industry-supported war would re-balance the equation between innovation and production in favour of manufacturing.

25. Fragmentation has been identified as one of the main challenges to a higher European level of ambition. European defence efforts remain incoherent, in particular with regard to procurement. Defence industrial cooperation is not yet delivering the benefits in terms of cost savings and interoperability that it should.

Purchases of off-the-shelf products due to the need to rapidly upgrade capabilities have led to a loss of momentum in joint European procurement and development.

Trend 1: No major adjustments – UK, Norway, France, Spain

For some states, higher European levels of ambition have not yet translated into concrete adjustments of national defence structure or equipment procurement. These are mainly the states that have not adjusted their national level of ambition.

Trend 2: Modernisation and faster procurement

A few countries (Poland, Lithuania, Estonia, Germany, Bulgaria, Finland) have announced changes in the personnel structure. Hungary and Estonia will increase their troops significantly, too. Most other countries are focusing on procurement. Either, as in the case of Germany, Italy and Estonia, by procuring a range of new capabilities, including sixth-generation fighter aircraft.

Or they are accelerating existing procurement programmes, as is the case for Finland. Common focal points of the procurement programmes are air defence systems, modern combat aircraft and long-range artillery systems (especially in the Baltics). Poland is a prime case of a heavy investment directed into developing a land forces branch.

Trend 3: Focus on the land domain

Although the picture is not always clear, there seems to be a tendency for the land domain to receive more attention in the allocation of new funds. This makes sense, as territorial defence depends on credible land forces. However, it puts a question mark behind multi-domain operations and concepts.

7 Defence technological and industrial base

26. Against the backdrop of the Russian war and the support for Ukraine, European defence industry appears ill-prepared to support a large-scale war in terms of both arms and ammunition production. This is mainly due to the fact that production capacities have been significantly reduced over the last decades as a result of the financial crisis and threat assessments that focused on crisis management rather than territorial defence. To accommodate this trend, many defence companies have shifted production to high-value, complex weapon systems manufactured in small numbers. However, large-scale war requires more mass, which the EDTIB is currently unable to deliver.

27. Reduced funding has meant that even in larger industries like Germany's, some production capacity has been lost. Only the UK and France have been able to maintain almost the full range of capabilities due to their relatively high level of funding in the past. Additionally, many industries suffer from a lack of professional staff and complex and slow procurement processes.

28. The Russian war has not led to made major adjustments at the DTIB levels, whether through additional or modified procurements or other reasons for scaling up activities. Countries with large industries like the UK have not increased their defence budgets, countries with smaller NTIBs like the Baltic States do not have the technological edge or production capacity to benefit from increased national funding levels. However, some industries do experience a moment of revival.

29. The case of France remains somehow ambivalent. On the one hand, the French president announced a "war economy", on the other hand, the French industry remained reluctant to increase their production capacity, as no new procurement programmes were announced that would have made industry confident that higher production capacity would pay off. However, the French government was the only one in the sample to announce a reform of its procurement procedures. This could lead to faster and less complicated procurement in the future.

30. Turkish and Hungarian industries have been growing for a few years due to increased defence spending and modernisation programmes. However, these efforts were not a consequence of the war in Ukraine, but were initiated before.

Trend 1: US-dependency in Central and Eastern Europe

Most states in Central and Easter Europe are heavily dependent on the US for their defence equipment. This makes them less open to intra-European defence cooperation. Another factor is the relatively small size of their NDTIB, which makes off-the-shelf purchases and offsets more attractive, as participation of national defence companies in European framework programmes is hardly possible. Also, the additional bureaucracy required to set up European programmes often outweighs the potential gains of economies of scale.

Delays, typical for multinational programs, are also seen as a potential handicap, all the more important given the acute character of some capability gaps. There are exceptions to this trend, a notable one is Romania, which participates in several PESCO and EDF initiatives.

Trend 2: No clear picture of cooperation potential

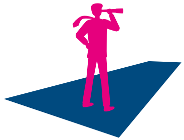
Although Western European states are more engaged in European defence cooperation and strongly support further development of PESCO and EDF projects, no clear areas of potential cooperation could be identified from the sample. On the contrary, the Russian invasion has led some key stakeholders in EU cooperation to rely on off-the-shelf systems mainly from the US. The German decision to buy F-35s is a case in point. The French government in particular is disappointed by such tendencies. It does not look as if the war in Ukraine has given new impetus to European cooperation.

31. Deliberate industrial policy will further divide or unite Europeans in terms of European defence production, procurement and operations. The future of European DTIBs will be driven by the Western European states with large industries and those Europeans who can invest significantly in future defence procurement and innovation. Off-the-shelf national procurements and acquisitions from extra-EU partners weaken European projects and EU institutional pillars for a more unified European DTIB.

At the same time, strengthening the European DTIB can currently only be achieved through significant national programmes and in many cases it is non-EU partners, who could only provide the capabilities needed and in the required time. Whether these provide an anchor for a more unified European base and thus military and budgetary efficiency is a second question. For the time being, the focus is on strengthening national DTIB.

So far, there is no significant push for European DTIBs. While Europe hosts some multinational defence companies like Airbus, MBDA, Thales or Leonardo, they are driven by national procurements rather than European ones. The current call for filling gaps and increase stocks in the context of the war in Ukraine does not provide sufficient political direction and scale to keep the DTIBs alive.

8 The Future



32. The core issues of European defence resemble an open system. This leads to co-dependencies and unintended consequences of debates and decisions for one element on many other elements of the system. The future of Ukraine, Russia and US engagement are as defining and interacting variables as the future defence path of more than 40 European nations. A more European(-ised) defence requires a new consensus on the strategic outlook, the level of ambition, but also on the purpose and role of the military and the corresponding capabilities.

33. The Russian war against Ukraine has created the need, but also the opportunity, to generate a new consensus in the overlapping circles of NATO and the EU, but also with the European countries that do not yet belong to these institutions. The EPC could be a political opportunity to take a new look and start on discussing European security.

34. Europe may be more divided than we thought in its response to the future of collective action. Differences in nuances can lead to greater rifts today when the war is over or difficult compromises have to be made. Looking back to the state of unity after the fiscal crisis and the Corona crisis can be instructive in anticipating governance „after“ war. Current politics is influenced by risks and constraints rather than opportunities and cohesion.

35. Discussing end-of-war scenarios and their implications for European defence, while necessary, may itself have collateral effects and put governments in paradoxical situations. Moreover, the urgency to allocate more resources also means preserving the unity of Europe, i.e. avoiding a potentially divisive discussion in which individual objectives may be far apart, making a collective action hard to define and achieve.

36. At the same time, Russia will not be the only threat to Europe, so diversification of the risk and threat landscape should be expected and accepted as part of the reality and complexity of European security. The problem of collective action and individual actors trying to pursue objectives on the margins is by no means new, but a constant factor in collective politics.

37. Future deterrence considerations will need to incorporate several aspects: At the strategic level, the challenge will be how to deal with strategic surprise and nuclear blackmail. The latter seems to have been partially achieved in the German case. But questions of capabilities and capacities will also have to be reassessed: The ability to fight a long war not only has implications for the DTIB that sustain such a war, but reserves and readiness also play a role in this complex equation. A long war could itself become a deterrent: An aggressor should not believe that there is a quick victory.

38. Alliances and partners: Smaller countries like Estonia and Latvia are particularly vulnerable to the policy choices of their partners. Frictions can arise when partners do not share their approaches, e.g. on the need to shift towards a posture of deterrence by denial. Nonetheless, interoperability is of great benefit here, too.

39. Dealing with Russia: The future of the Russian threat to European security depends on three variables:

1. The immediate outcome of the war in terms of Russian posture. The Russian armed forces will remain largely in place after the war. While the army will be severely depleted and the air force weakened to some extent, the naval and strategic forces will be intact.

2. Moreover, what lessons the Russian leadership will draw from the conflict at the political, strategic and military levels and how it organises learning will be critical.

3. The political and military priorities of the US and its commitment to NATO will also determine the level of threat that Russia poses for Europe.

40. How to deter Russia may become more and more of a guessing game in the near future, as Russian perceptions of security and threats will become less and less comprehensible. Europe, with the help of partners in the region, will have to try indirect approaches and tackle the root causes of the war. The immediate task for Europe is to relearn Russia and the post-Soviet space as a political and social sphere. So far, a fundamental objective may be to deny Russia quick wins that it can negotiate. What has also not been exploited are the pressure points offered by the Russian international presence and its weakening through war.

9 Ukraine: Lessons learned and future support

41. The question of Ukraine's near and distant future in the European strategic landscape is the most central issue – it affects the immediate need for support, the impact on the course of the war and thus the likely end state and end date of the war, as well as the state of Russian posture and strategic options at that time. However, this immediate state of affairs after whatever end to the war does not define the character of Ukrainian and Russian attitudes in the more distant futures, i.e. the 2030s. Both sides will also in the future aim for outstanding military capabilities. This will take place in reference to the respective other side and will be supported by partners, i.e. Ukraine will most likely receive timely extended and qualitatively high capabilities from the West, even if a hot war is over, to ensure minimum deterrence vis-à-vis Russia . Thus, Ukraine and Western Russia may remain for a long time a focal point of geostrategic conflict in Europe and a demarcation of political spheres.

42. From this point of view, the question of the quality of military assistance to Ukraine gains strategic relevance but also urgency. Whether Ukraine wins or survives will make a difference for the next chapter of the confrontation, but also for relations with the country. Ukraine will be an important deterrent for Russia, which will also shift some of the burden from others.

43. So far, the Allies cannot agree on what they want to sacrifice for Ukraine. Part of the problem may be that they are either not yet clear about the long-term strategic importance or have concluded that Ukraine is not essential or as important to their security as other issues.

44. Ukraine has provided a number of technical and tactical cues and warnings to many countries regarding the timetable for action and the need for a larger pool of troops. However, it could be misleading to apply the operational and strategic lessons of the war in Ukraine to deterrence or the war between NATO and Russia.

List of Abbreviations

DTIB	Defence Technology Industrial Base
EDF	European Defence Fund
EDTIB	European Defence Technology Industrial Base
EPC	European Political Community
LoA	Level of Ambition
MDO	multi-domain operations
MRO	maintenance, repair and overhaul
NTIB	National Technology Industrial Base
PESCO	Permanent Structured Cooperation

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