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Collective defence:

The Strategic Defence Review and capability gaps in a changing NATO

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Foreword

The 2025 Strategic Defence Review has three core ideas at the heart of it. First, it recognises a new era of state confrontation and conflict, significantly exacerbated by unfolding in a dynamic combination of global population growth, climate change, nuclear weapon proliferation and all the transformative effects of the Digital Age. This combination of risk and uncertainty is unprecedented in human history.

Second, we entered this new era with all the legacies of over 30 years of the United States (US)-dominated post-Cold War period. Europe's armed forces reflect this comfort in their depleted size, readiness and sustainability, as do our politics, economy and civil society in their resilience. We are habituated to the freedoms and choices of living free from existential peril. The gap between what is necessary to sustain deterrence now and our current position is explicably enormous, and made substantially more challenging by the certainty of diminishing US subsidies to European security.

Third, deterrence based on the credible ability to fight will be shaped by the same Digital Age that changes every other aspect of how we live, work and play. War in the 21st century is about transformation, not simply reconstitution – in fact, this is the most profound change in how to conceive, design, build and operate armed forces for over 150 years. The winners will constantly evolve their 'kill web' architecture to connect any sensor anywhere to any weapon anywhere, and these sensors and weapons will evolve just as quickly in a crewed, uncrewed and increasingly autonomous mix of capability.

Making these changes in the face of the acute Russian challenge to Europe must acknowledge the strategic absurdity of Europe feeling threatened by a Russia with an economy 12 times smaller. Russia has advantage in aggressive mobilisation and a singular autocracy; not in resources, capacity for innovation or industrial power. If deterrence fails, it will be for want of making hard choices, for want of the political and social will, the military and industrial competence, to spend money differently and quickly enough to sustain escalation dominance. It is not about affordability.



This Report describes very clearly where the gaps are in European military capability compared to Russia today. It shows what needs to be done and where military transformation should focus. It recognises deterrence as a ‘whole of society’ undertaking, no longer an outsourcing exercise to small professional forces, and it illuminates the decisive role ahead for private sector innovation and industry.

We know what needs to be done. What is left is to decide to do it at the speed determined by the risks. Relying on the largesse of friends and the forbearance of enemies to continue to spend most of our money on ourselves for the next decade substitutes hope and denial for competent, coherent strategy.

Gen. (rtd.) Sir Richard Barrons KCB CBE

Senior Consulting Fellow, Chatham House

Co-author, Strategic Defence Review 2025



Executive summary

CONTEXT

- The geopolitical situation facing the United Kingdom (UK) and its allies in the Euro-Atlantic is the most severe it has been for decades. The Russian economy is partially mobilised for a large-scale conventional conflict, and the People's Republic of China (PRC) is undergoing an extraordinary military buildup and modernisation programme.
- The next decade will be a period of transition for the security architecture of the Euro-Atlantic. The United States (US) is undergoing a reprioritisation of military posture towards the Indo-Pacific and, for the first time in many decades, free and open countries are faced with the prospect of a multi-front crisis.
- Due to a prolonged period of underinvestment in defence, European members of the North Atlantic Treaty Organisation (NATO) face a number of capability gaps, made more severe by the prospect of US force posture developments. The United Kingdom (UK) has recently appraised its own gaps in the Strategic Defence Review (SDR), published in June 2025.
- Though Britain's investment in defence is set to rise to 3.5% of Gross Domestic Product (GDP) by 2035, it is crucial that maximum impact is achieved from these increases. His Majesty's (HM) Government has also stressed that its defence posture will be 'NATO first' but 'not NATO only', and will therefore prioritise the Euro-Atlantic. Given this context, this Report seeks to explore which of the recommendations made in the SDR will have an outsized impact on collective defence of the Euro-Atlantic.

QUESTIONS THE REPORT ADDRESSES:

- What is the current state of Russian military capabilities and to what extent will Russia be able to regenerate force in the future?



- What will the future American presence in Europe look like with an Indo-Pacific focused military posture?
- What are the current strengths and weaknesses of European NATO military forces, and what are the most concerning capability gaps?
- Given these gaps, which recommendations outlined in the SDR would make the most significant contribution to collective defence in the Euro-Atlantic?

KEY FINDINGS

- The Russian Armed Forces will not be able to reconstitute large armoured and mechanised formations rapidly, and will likely never regenerate significant stockpiles of reserve equipment. However, Russia will be able to reconstitute a large infantry army relatively quickly, backed by a significant number of long-range strike weapons, layered missile defences, modernising naval power and an extensive nuclear arsenal.
- These capabilities give Russia a number of options for posing potential problem sets (either individually or in combination) to NATO in the near future, including attempts to out-escalate, out-produce, out-punish or out-interdict NATO.
- The US has made it clear since at least 2011 that it intends to refocus on the Indo-Pacific. However, while its presence in Europe reached a low point in 2013, it has since increased to bolster deterrence against an increasingly aggressive Russia. But the balance of power in the Indo-Pacific is shifting to the extent that US retrenchment from Europe – though yet to be defined – is very likely.
- The capabilities most likely to be redeployed are those most in demand by US Indo-Pacific Command (INDOPACOM). This means that the American forces most likely to be withdrawn from Europe are naval, air and missile defence assets, while the formations most likely to remain allocated to Europe are ground forces. There will also be an impact on US-led Command and Control (C2) and Intelligence, Surveillance, Targeting and Reconnaissance (ISTAR)



contributions to NATO as a result of a reprioritisation towards the Indo-Pacific, but this is unlikely to be total.

- European NATO's force posture is undergoing its most significant development for several decades, with the addition of Sweden and Finland as members as well as large increases in defence investment across the alliance. In particular, European members of NATO have expanded their land forces considerably, though these still face issues related to integration, readiness and enablers. European naval power, however, is still made up of older vessels, or vessels designed for low-intensity operations rather than peer naval conflict.
- Given these factors, European NATO faces a number of gaps in the following capabilities: Suppression and Destruction of Enemy Air Defences (SEAD/DEAD); Integrated Air and Missile Defence (IAMD); Counter-Uncrewed Aerial Systems (C-UAS); contested logistics; Anti-Submarine Warfare (ASW); nuclear arsenals; and a number of gaps within the defence industrial base (particularly in complex weapons production).
- The SDR provides a comprehensive overview of what is needed to refocus the British Armed Forces to become a 'leading tech-enabled defence power, with an Integrated Force that deters, fights and wins through constant innovation at wartime pace'.¹ Prioritisation was beyond the scope of the SDR, but the National Security Strategy (NSS), published later in June 2025, provided a 'Strategic Framework' from which to determine how the UK would best support a 'NATO first' defence posture.²

RECOMMENDATIONS

To strengthen NATO and address the capability gaps across European NATO, HM Government should:

¹ 'The Strategic Defence Review 2025 – Making Britain Safer: secure at home, strong abroad', Ministry of Defence, 02/06/2025, <https://www.gov.uk/> (checked: 21/10/2025).

² 'National Security Strategy 2025: Security for the British People in a Dangerous World', Cabinet Office, 24/06/2025, <https://www.gov.uk/> (checked: 21/10/2025).



- 1. Drive integration to pursue asymmetric advantage:** Integration is vital to ensuring the military effect is greater than the sum of its parts. Technological, organisational and information superiority has long been a key advantage NATO has enjoyed as a force multiplier against numerically superior enemies. Efforts to achieve integration should be a priority to ensure this asymmetric advantage is maintained.
- 2. Focus the force to reinforce security at home and build strength abroad:** In addition to an Integrated Force, the UK should move towards a Focused Force. This would see priority given to strengthening Britain's air and naval power. Such a posture would defend the UK more efficiently, as the most serious direct military threats to Britain itself are from the sea and the air. It would also deepen the UK's alliances and bolster collective defence more efficiently, as most NATO allies would benefit more from additional air and naval power.
- 3. Define a British national defence model to build resilience:** Though for too many years considerations of homeland defence (and NATO Article Three obligations) have been overlooked, HM Government should not replicate resource-intensive 'total defence' models. Any British national defence model should be centred on cost-effectiveness.
- 4. Reinforce sub-strategic deterrence to deepen alliances:** Were Washington to be distracted and Paris risk-averse, European NATO faces a sub-strategic nuclear gap. HM Government should take the next step in rebuilding the British sub-strategic arsenal through the exploration of a UK-built sub-strategic missile. This would strengthen Britain's strategic indispensability in relation to its allies, with all the added influence which comes with it.
- 5. Expand missile production to enhance the defence industrial base:** The UK has a wide-ranging defence industrial base with expertise across a number of domains, but suffers from limited capacity. Efforts to expand production should focus on a combination of the most in-demand items and UK-specific needs, with a key area being missile production (both strike weapons and interceptors).



1.0

INTRODUCTION



We need to be really confident of our phenomenal overmatch. It is the overmatch that deters Russia. I have never been clearer at any time in my career about the success that NATO is having in deterring Russia.³

Adm. Sir Tony Radakin

Chief of the Defence Staff
(2021-2025), June 2025

The fact is, we need a quantum leap in our collective defence. The fact is, we must have more forces and capabilities to implement our defence plans in full...If we do not invest more, our collective defence is not credible.⁴

Mark Rutte

Secretary General of NATO, June 2025

These two assessments of the North Atlantic Treaty Organisation's (NATO) current capabilities were delivered just days apart. They could not paint more different pictures. Both come from wider speeches which do, for the most part, agree with each other – particularly on the fact that the geopolitical landscape will continue to deteriorate; an assessment shared by the United Kingdom (UK) in both the recently-published Strategic Defence Review (SDR) and National Security Strategy (NSS), which warn of the return of direct threat of military aggression from hostile states.

The SDR provides a 'root and branch' review of Britain's military capabilities, and what the British Armed Forces should be better prepared for in this rapidly worsening geopolitical landscape. Both the SDR and the NSS stress that the UK's military posture will be predicated on a 'NATO first' footing, meaning that 'NATO will be foremost in how the armed forces plan, invest, train and equip themselves', although both documents make the point that such a posture should not be reduced to 'NATO only'. One of Britain's greatest geostrategic gifts is also one of its fundamental problems: unlike most countries, it has strategic options. The tussle between these strategic options has been a constant feature of British geostrategic history for at least the last four centuries.

It is clearly the intent of His Majesty's (HM) Government to focus on bolstering collective defence efforts in the Euro-Atlantic region. Yet,

³ Adm. Sir Tony Radakin, Oral evidence: 'The work of the Chief of the Defence Staff', UK Parliament, 10/06/2025, <https://committees.parliament.uk/> (checked: 21/10/2025).

⁴ Mark Rutte, Speech: 'Keynote speech by NATO Secretary General Mark Rutte at the NATO Summit Defence Industry Forum followed by a moderated discussion', North Atlantic Treaty Organisation, 24/06/2025, <https://www.nato.int/> (checked: 21/10/2025).



even within the Euro-Atlantic, the UK faces an array of options, such as focusing on homeland defence, or a ‘flank strategy’ in the Mediterranean and Wider North, or heavy forward defence on NATO’s ‘eastern front’, to name just three. This picture is further complicated by two factors: the uncertain outcome of Russia’s full-scale invasion of Ukraine, and the unclear future of the United States’ (US) military presence in Europe – long NATO’s ultimate backstop – as Washington shifts its focus to the People’s Republic of China (PRC) in the Indo-Pacific.

1.1 Aim and structure

HM Government accepted all of the SDR’s 62 recommendations, but despite plans for increased outlay on defence, it needs to maximise outputs from its investment. Given the current shape of European NATO military postures and plans for the future, different areas of priority from the SDR’s recommendations will have different impacts on the overall shape of Britain’s contribution to collective defence. This begs a number of questions which drive this study, including:

1. What is the state of Russian military threat?
2. What will the future US presence in Europe look like?
3. What are the current capability gaps facing European NATO countries?
4. Given these gaps, which areas should HM Government prioritise?

In light of these questions, this Report will begin with an overview of Russian intent, its current military capabilities and to what extent the Kremlin will be able to regenerate forces in the future following losses suffered after its full-scale invasion of Ukraine. It then examines what the future American presence in Europe may be in the context of Washington focusing more heavily on the Indo-Pacific.

Capability gaps do not exist in a vacuum; therefore, once the Russian and American positions have been outlined, this study will analyse the gaps European NATO allies will face. In doing so, this study offers a number of policy recommendations to help British decision makers ensure that the UK’s plans have the greatest impact on the overall state of collective defence.



Generals have often been reproached with preparing for the last war instead of the next – an easy gibe when their fellow countrymen and their political leaders too frequently have prepared for no war at all.

**FIELD MARSHAL THE RT. HON.
THE VISCOUNT SLIM**

Defeat Into Victory (1956)



2.0

THE RUSSIAN THREAT



In the words of the SDR and the NSS, Russia poses the most ‘pressing’ and ‘immediate’ threat to British interests in the Euro-Atlantic. Though the Russian Federation which emerged from the dissolution of the Soviet Union was a husk of the former superpower, it was buoyed by enormous sums of capital flowing from European countries to pay for Russian hydrocarbons – over €1 trillion (£868.1 billion) from 2010–2019.⁵ The Kremlin used much of this wealth to regenerate its strength, particularly the Russian Armed Forces (although in relative terms, contemporary Russia is still far weaker than its Soviet predecessor).

This was a process long in the making: Russian defence spending hit a low point in 1998 when, in constant 2023 US dollars, it totalled US\$15.8 billion (£11.8 billion), but the budget had doubled by 2004. It would do so again by 2012, and by 2024, the figure had reached US\$150.5 billion (£112.6 billion) – for reference, the British figures for 1998 and 2024 are US\$55.7 billion (£41.7 billion) and US\$77.4 billion (£57.9 billion) respectively.⁶ Alongside this increased defence spending came increased belligerence. For many years, this aggression was overlooked at best or downright ignored at worst by a large number of NATO allies. The reaction to Russia’s illegal annexation of Crimea in 2014 was that NATO allies agreed to a modest 2% of Gross Domestic Product (GDP) target for defence investment by 2024, but many members took years to reach this baseline – and some have still to reach it.

2.1 Russian intent

Assessments of the Kremlin’s intent vary widely. Some officials, analysts and military officers have warned that NATO is in a ‘pre-war’ period, that Russia will not stop at Ukraine, and that a conflict between NATO and Russia is a question of ‘when, not if’.⁷ Yet, there are a number of experts who make very different assessments, arguing that ‘we are not on the cusp of a war with Russia’, that Russian irredentism is limited to Ukraine, and that Russian strategic thought is focused on the defensive.⁸

⁵ See: Alexander Lanoszka, James Rogers and Patrick Triglavcanin, ‘A new energy policy for Europe: The significance of Ukraine’, Council on Geostrategy, 08/06/2022, <https://www.geostrategy.org.uk/> (checked: 21/10/2025).

⁶ SIPRI Military Expenditure Database’, Stockholm International Peace Research Institute, No date, <https://www.sipri.org/> (checked: 21/10/2025).

⁷ John Foreman, ‘Russia will not attack NATO’, *The Spectator*, 09/04/2025, <https://www.spectator.co.uk/> (checked: 21/10/2025).

⁸ Ibid.



While the ultimate intent of an adversary cannot be known, their intentions are often illuminated by their words and their actions. In the Russian case, the demands made in December 2021 encapsulate its intent. The draft US-Russia Treaty and draft NATO-Russia agreement outlining the Kremlin's 2021 demands shows Russia's desire to unravel the security architecture of the European continent.⁹ These demands included that the US refrain from developing military cooperation with states once part of the Soviet Union, as well as that it withdraw its nuclear weapons deployed in Europe. Moscow also demanded that NATO members withdraw their forces from countries which joined the alliance after 27th May 1997. In practice, this would have created a two-tiered NATO; a western half with full protection and an eastern half with limited extended deterrence.

The reason why Vladimir Putin, President of Russia, has not yet sought war with NATO to achieve this goal is because of the relative balance of power; a balance which is evolving, and faces the prospect of serious geopolitical challenges. It is up to European NATO countries to build up the military capabilities necessary to deter Russia from wanting to seize any opportunities to challenge Article Five. As Adm. Sir Tony Radakin, Chief of the Defence Staff (2021-2025), put it: 'The strategy of deterrence by NATO works and is working. But it has to be kept strong and strengthened against a more dangerous Russia'.¹⁰

2.2 Russian capabilities

Although there remain deep flaws and a number of capability gaps within the Russian Armed Forces – as shown by their failure to defeat Ukraine (so far) – they nonetheless possess an impressive array of military instruments which European NATO has to contend with.

2.2.1 THE RUSSIAN GROUND FORCES

Russia's army remains one of the largest in the world, despite taking tremendous losses in the full-scale invasion of Ukraine. The organisation

⁹ 'Treaty between The United States of America and the Russian Federation on security guarantees', Ministry of Foreign Affairs of the Russian Federation, 17/12/2021, <https://mid.ru/> (checked: 21/10/2025) and 'Agreement on measures to ensure the security of the Russian Federation and member states of the North Atlantic Treaty Organisation', Ministry of Foreign Affairs of the Russian Federation, 17/12/2021, <https://mid.ru/> (checked: 21/10/2025).

¹⁰ Adm. Sir Tony Radakin, Speech: 'Chief of the Defence Staff RUSI Lecture 2024', Ministry of Defence, 04/12/2024, <https://www.gov.uk/> (checked: 21/10/2025).



of the Russian Ground Forces is in constant flux due to losses, reconstitution and adaptation. Depending on the sources, and whether units from the Donbas fighting alongside the Russian army are included, Moscow has between 100-130 combat brigades, as well as roughly 30 brigades dedicated to missile defence, 20 missile brigades and almost 40 artillery brigades.¹¹ These missile forces provide a potent offensive and defensive mix, which comprises much of Russia's Anti-Access/Area-Denial (A2/AD) bubbles – the idea behind A2/AD being that the ability to shoot down incoming attacks and launch strikes against enemy platforms which stray within range keeps threats at a safe distance.

Though impressive in terms of mass, the Russian Ground Forces have underperformed in Ukraine. They have shown limited capability to conduct combined arms warfare, and face serious limitations in terms of logistics, morale, and Command and Control (C2).¹² Despite this, they have shown a remarkable ability to absorb losses, as well as to construct and hold defensive positions, and have proven adept at adopting drones for combat. The Russian army is a large, cumbersome tool that would be unable to 'blitzkrieg' its way across Europe, but which could be very difficult to dislodge were it able to establish itself within the borders of a NATO country.

2.2.2 THE RUSSIAN AEROSPACE FORCES

On paper, the Russian Aerospace Forces (VKS) possess an impressive strength of around 1,400 fighter and ground attack aircraft, 120 strategic bombers, almost 100 special mission aircraft – such as Electronic Warfare (EW), or Airborne Early Warning and Control (AEW&C) aircraft – and over 50 Maritime Patrol Aircraft (MPA).¹³ For a number of reasons, however, this apparent strength greatly exaggerates the reality of their abilities. These include the fact that many of these aircraft are older – although many have received upgrades – as well as problems stemming from inadequate training and inflexible doctrine.¹⁴

¹¹ A brigade typically being the smallest unit capable of independent action and comprising around 3,000-5,000 troops, although this varies between countries.

¹² John Foreman, 'Military lessons identified by Russia, priorities for reform, and challenges to implementation', New Eurasian Strategies Centre, 09/07/2025, <https://nestcentre.org/> (checked: 21/10/2025).

¹³ '2025 World Air Forces directory', Flight Global, 27/11/2024, <https://www.flightglobal.com/> (checked: 21/10/2025).

¹⁴ Justin Bronk, 'Russian Combat Air Strengths and Limitations: Lessons from Ukraine', Centre for Naval Analyses, 26/06/2023, <https://www.cna.org/> (checked: 21/10/2025).



The VKS has shown limited ability to conduct effective Suppression or Destruction of Enemy Air Defences (SEAD/DEAD) operations against Ukraine, and has similarly shown limited ability to conduct close air support for the Russian Ground Forces. Despite this, the VKS could still contribute significantly to Russia's A2/AD and strike capabilities where their cruise missiles, glide bombs and long-range air-to-air missiles, such as the R-37, would make life difficult for NATO forces. Until the VKS was sufficiently neutralised, much of NATO's air power would be needed to escort air operations, limiting its ability to conduct other missions.

2.2.3 THE RUSSIAN NAVY

The poor performance of the Black Sea Fleet should not be used to inform a meaningful assessment of the wider Russian Navy. Ukraine has managed to sink several major vessels of the Black Sea Fleet with drones and anti-ship missiles, but many of these successes are specific to the operating conditions and the state of the Black Sea Fleet. The missile power of the surface ships in Russia's other fleets, as well as the large and capable submarine fleet, are a real threat to European NATO, which has underinvested in naval forces.

Following the end of the Cold War, the vast Soviet fleet which Russia inherited spent years without modernisation and without time at sea. But those days of inaction are gone. Over the last 15 years, the Russian Navy has received significant investment, which shows no signs of slowing down. The Kremlin has allocated ₸8.4 trillion (£77.2 billion) for new warship construction over the coming decade, although Russian spending plans often fail to reach their level of ambition.¹⁵

In total, the Russian fleet has 12 nuclear-powered ballistic missile submarines (SSBNs), 25 nuclear-powered attack submarines (SSNs), 21 diesel-electric submarines (SSKs) and 36 escorts (cruisers, destroyers and frigates), as well as a large number of missile-armed corvettes.¹⁶ The largest contingent is Russia's Northern Fleet, with a smaller contingent in the Baltic and a much reduced Black Sea Fleet (courtesy of Ukrainian efforts). Some of Russia's naval forces are based in the Pacific, but elements of this fleet could be redeployed to bolster the Northern Fleet if needed.

¹⁵ 'Meeting on development strategy for the Navy', President of Russia, 11/04/2025, <http://en.kremlin.ru/> (checked: 21/10/2025).

¹⁶ Alex Pape (ed.), *Janes Fighting Ships 2024-2025* (London: Jane's Information Group, 2024).



Of this naval force, a growing proportion are modern designs, built with emphasis on the ability to fight a peer adversary rather than to contribute to low-intensity 'global good' operations (such as anti-piracy), like many NATO warships have done. 50% of Russia's SSBNs, 20% of the SSNs, 62% of the SSKs and 33% of the escorts have been commissioned in the last 15 years. Russia also currently has at least nine SSBNs and SSNs under construction, as well as 15 further escorts.

2.2.4 THE RUSSIAN NUCLEAR ARSENAL

Nuclear weapons play a significant role in Russian military thought, and the country maintains the world's largest and most diverse nuclear arsenal. Russia has over 1,700 deployed warheads across a triad of strategic delivery systems, including 330 Intercontinental Ballistic Missiles (ICBMs), 192 Submarine-Launched Ballistic Missiles (SLBMs) and over 50 nuclear-capable strategic bombers. Russia also maintains an extensive non-strategic nuclear arsenal of 1,000-2,000 warheads.¹⁷

Russia is in the process of modernising its nuclear forces. It is introducing a number of new delivery systems, such as the Sarmat ICBM and the Avangard Hypersonic Glide Vehicle (HGV), as well as launch platforms, such as the Borei class SSBN. In November 2024, the Kremlin published an updated version of its public-facing nuclear doctrine, which broadened the number of scenarios in which the Kremlin states it would consider the use of nuclear weapons.¹⁸

2.3 Russian losses in Ukraine and ability to regenerate

Thanks to Oryx, an open-source intelligence group, losses of Russian equipment which can be visually confirmed in Ukraine include over 4,100 tanks, 8,400 infantry fighting vehicles, almost 2,000 pieces of artillery (towed, self-propelled and rocket), 350 Surface-to-Air Missile (SAM) systems (as well as over 100 radars), 169 aircraft and 167 helicopters, as

¹⁷ Hans M. Kristensen et al., 'Russian nuclear weapons, 2024', Bulletin of the Atomic Scientists, 07/03/2024, <https://thebulletin.org/> (checked: 21/10/2025).

¹⁸ Daryl Kimball, 'Russia Revises Nuclear Use Doctrine', Arms Control Association, 12/2024, <https://www.armscontrol.org/> (checked: 21/10/2025).



well as thousands of vehicles used for logistics and engineering.¹⁹ Further to this, estimates place Russian casualties around the 1,100,000 mark, which includes most of Russia's pre-war trained personnel and a significant number of experienced officers.²⁰ Yet, Russia has shown a remarkable ability to reconstitute its forces, albeit of limited quality.

Through partial mobilisation of its population and economy, transactional support from the PRC, Iran and North Korea – the other so-called 'CRINK' countries – and by utilising the vast, though much depleted, stockpiles of legacy Soviet equipment, the Kremlin has been able to sustain continued attritional warfare.

Intelligence assessments vary as to how long it could take Russia to reconstitute. For example, according to Carsten Breuer, German Chief of Defence, Russia could take five to eight years to regenerate its fighting capability, whereas Eirik Kristoffersen, Norwegian Chief of Defence, suggested it might take only two or three years.²¹

Currently, most of the equipment Russia throws into fighting is refurbished from its stockpiles, and these are beginning to run low. It has shown far less capacity to produce large quantities of new build complex equipment; for example, it is estimated to produce no more than 90 T-90M tanks per year, having ramped up production from around 40 per year before 2022.²² Where Russia has shown an impressive ability to produce equipment, however, is in its missile and attack drone factories. In 2023, Russia fired, on average, 96 cruise missiles, nine ballistic missiles and 269 drones per month at Ukraine. The figures for 2025 up to June are 84 cruise missiles (a small reduction but close to sustainment), 44 ballistic missiles (almost five times as many as 2023) and 3,807 drones (a 14-fold increase compared to 2023) (see: Annex 1).

If the war against Ukraine were to end, the Kremlin would, in relatively quick order, have at its disposal a large infantry-based army, supported by a deep and replaceable long-range fires magazine, shielded by its A2/AD systems and backed by a powerful nuclear arsenal. This is a potent mix, with which Russia could test NATO's Article Five were it willing to run the risks of doing so. The array of conditions under which

¹⁹ Jakub Janovsky et al., 'Attack On Europe: Documenting Russian Equipment Losses During The Russian Invasion Of Ukraine', Oryx, No date, <https://www.oryxspioenkop.com/> (checked: 21/10/2025).

²⁰ Ministry of Defence, Post on X, 12/06/2025, <https://x.com/> (checked: 21/10/2025).

²¹ Michelle Grisé, 'Russia's Speedy Military Rebuild Doesn't Tell the Whole Story', RAND Corporation, 05/07/2024, <https://www.rand.org/> (checked: 21/10/2025).

²² Michael Gjerstad, 'Russian T-90M production: less than meets the eye', International Institute for Strategic Studies, 11/06/2024, <https://www.iiss.org/> (checked: 21/10/2025).



such a test could occur may be limited, but such geopolitical developments are the planning benchmark for NATO countries. The variety of scenarios as to how Russia may go about this are numerous. Therefore, rather than outline a number of these scenarios, it is more useful to explore the problem sets which Russia could pose (see: Box 1).

BOX 1: PROBLEM SETS RUSSIA COULD POSE

- **Out-produce NATO:** By relying on its large capacity and low cost of ammunition and missile production, Russia could seek to stay in the fight long enough that NATO runs out of munitions before it does. Without munitions, NATO's technological superiority on the battlefield would become irrelevant.
- **Out-escalate NATO:** By relying on its nuclear arsenal in particular, Russia could seek to threaten escalation or escalate to capabilities most NATO members do not possess.
- **Out-punish NATO:** By exploiting the concentrated nature of modern globalised economies, by hitting civilian targets, or by targeting irreplaceable military infrastructure, Russia could attempt to inflict punishment on NATO governments such that they back down.
- **Out-interdict NATO:** Through a combination of Russian entrenchment and ability to hit NATO's military infrastructure and logistics hubs in the alliance's most exposed members, the Kremlin could seek to establish a lodgement, and hope it proves too difficult to bring sufficient NATO forces to remove them.



3.0

EUROPEAN NATO FORCE POSTURE



Though the risk of peer conflict in the Euro-Atlantic remains low, and the Americans seek to uphold some form of commitment, it is unclear whether the existing arrangements will be sustainable.²³ For example, irrespective of American desires in Europe, a crisis in the Indo-Pacific involving the PRC would almost certainly force the US to withdraw assets from Europe and redeploy them to deal with the PRC. It is unclear whether Moscow, either through opportunism or under pressure from Beijing, would then seize the initiative to test NATO's resolve. This leaves open the question of what the future presence of American forces in Europe will look like, and how existing European capability gaps will be affected.

3.1 The American presence in Europe

The US has a variety of formations deployed across Europe, and American assets provide the bulk of NATO's large-scale C2 and Intelligence, Surveillance, Target Acquisition and Reconnaissance (ISTAR) capabilities. The American military presence in Europe includes a number of interlocking components. The US Army provides a Corps Headquarters (V Corps), with five combat brigades, as well as a suite of supporting assets such as logistics, engineers, artillery and air defence.²⁴ The US Army also plans to deploy one of five 'Multi-Domain Task Forces' to Europe from 2026. This formation includes a suite of long-range strike weapons, including the Long-Range Hypersonic Weapon (LRHW).²⁵

The US Navy provides six Arleigh Burke class destroyers, an amphibious command ship and two maritime patrol aircraft squadrons. There are also an undisclosed number of American SSNs operating in European waters. In addition to these forces, there are often US Navy units visiting or passing through – a single Carrier Strike Group, for example, would provide several additional squadrons of combat aircraft and at least two or more destroyers.

The US Air Force provides eight fighter squadrons, one intelligence squadron, a tanker wing and a transport wing. Much like the US Navy, the US Air Force often has additional units visiting or passing through

²³ Mark Rutte, Speech: 'Closing press conference by NATO Secretary General Mark Rutte at the 2025 NATO Summit in The Hague', North Atlantic Treaty Organisation, 25/06/2025, <https://www.nato.int/> (checked: 21/10/2025).

²⁴ One infantry, one airborne, one mechanised and two armoured brigades.

²⁵ Andrew Feickert, 'The Army's Multi-Domain Task Force (MDTF)', Congressional Research Service, 02/07/2025, <https://www.congress.gov/> (checked: 21/10/2025).



Europe. Additionally, the US Space Force is responsible for a wide array of spaced-based assets – including navigational, ISTAR and communications satellites – which underpin much of NATO’s fighting capabilities.

On paper, in terms of percentages of the total NATO forces in Europe, US brigades account for only 3%, US fighter aircraft and tanker aircraft account for roughly 12% and 21% respectively, and the Arleigh Burke class destroyers account for 29% of the destroyers available in Europe. In reality, however, these forces provide a far greater contribution. They are well-equipped, properly enabled and held in a high state of readiness, which is not the case for many European forces.

Further to this, and one of the most crucial longstanding assumptions underpinning NATO’s deterrence, is that in the event of a crisis, there would be a massive flow of American reinforcements towards Europe. As such, some analysis, such as the report ‘Defending Europe without the United States: Costs and consequences’ from the International Institute for Strategic Studies, has explored how European NATO countries could look to invest in what is needed to replace all US capabilities committed to the continent completely. This would create unnecessary duplication for budgets which, even with planned rises, will be stretched.²⁶

The US is extremely unlikely to withdraw its entire military presence from Europe. The two most important questions are: What is likely to leave, and what is likely to remain? The answer to both these questions is that the US will take anything it needs to deter or fight the PRC in the Indo-Pacific – primarily air and naval assets and missile defences.

European NATO countries should work on the assumption that the demands of a potential conflict with the PRC would compel the US to allocate its entire airborne and naval capability to the Indo-Pacific, but that US ground forces would be less needed in such a confrontation.

In theory, this would also constrain the American potential to reinforce Europe. Naval and air assets currently allocated to surge into Europe would instead be reprioritised towards the Indo-Pacific, whereas US Army assets allocated to Europe could remain so. However, there are a number of problems which mean that even US Army forces which remain earmarked to reinforce NATO cannot arrive in Europe en masse. This is

²⁶ Ben Barry et al., ‘Defending Europe Without the United States: Costs and Consequences’, International Institute for Strategic Studies, 15/05/2025 <https://www.iiss.org/> (checked: 21/10/2025).



mainly a question of strategic lift – primarily sealift, but also airlift. The US is short of these assets: Indo-Pacific Command (INDOPACOM) believes that it only has 60% of the sealift capacity it needs.²⁷ Therefore, much of the American strategic lift capacity in the Euro-Atlantic could be redeployed to the Indo-Pacific in the event of a serious crisis.

3.2 European NATO posture

European NATO countries have underinvested in defence in the post-Cold War period, with only two countries – the UK and Greece – above the 2% of GDP target at the time it was agreed at the 2014 Wales Summit. Since 2014, and especially since 2022, most European NATO countries have increased investment in defence significantly. These growing investments, alongside the accession of Sweden and Finland to the alliance, have bolstered the force posture of European NATO. Yet, the legacy of decades of underinvestment, alongside geopolitical changes, means that serious gaps remain.

In 2024, European NATO countries spent US\$479.4 billion (£358.4 billion) on defence, of which US\$81.8 billion (£61.1 billion) – roughly 17% – was the UK's defence budget.²⁸ That this figure is over three times the 2024 Russian defence budget (£111.4 billion) may make it seem that European NATO should find it easy to procure and maintain armed forces capable of deterring Russia. But, for a number of reasons, this figure is not indicative of their true combat power. For a start, the costs of production in Russia are far lower than they are in European countries, and at Purchasing Power Parity (PPP) the Russian budget is estimated at £350 billion.²⁹ As a comparator of economic power, PPP is not without its own limitations, but it does provide an alternative perspective when accounting for the defence budgets of less developed countries, such as Russia, where lower input and throughput costs can have a major impact.³⁰

²⁷ 'Open/Closed: To receive testimony on the posture of United States Indo-Pacific Command and United States Forces Korea in review of the Defence Authorisation Request for Fiscal Year 2026 and the Future Years Defence Programme', United States Senate Committee on Armed Services, 10/04/2025, <https://www.armed-services.senate.gov/> (checked: 21/10/2025).

²⁸ SIPRI Military Expenditure Database', Stockholm International Peace Research Institute, No date, <https://www.sipri.org/> (checked: 21/10/2025).

²⁹ Ben Barry et al., 'Defending Europe Without the United States: Costs and Consequences', International Institute for Strategic Studies, 15/05/2025 <https://www.iiss.org/> (checked: 21/10/2025).

³⁰ Michael Bekley, 'The Power of Nations: Measuring What Matters', *International Security*, 43:2 (2018).



The other disadvantage European countries face compared to Russia is that the Kremlin is a single decision maker. European NATO, on the other hand, has the sum of £358.4 billion split between 30 different capitals, each with their own economic and security priorities, although over £200 billion is accounted for by just four countries: Britain, Germany, France and Poland. The result of this is that European NATO defence spending often goes towards duplicative efforts.

In an ideal world, European NATO countries might totally specialise, but this world does not exist, and it is not unfair for European countries to want to avoid total dependence on others. What is clear, however, is that on the sliding scale between more specialisation and more duplication, European NATO countries should aim for the former and not the latter.

3.2.1 LAND DOMAIN

On paper, European NATO countries will, over the next few years, possess around 140 combat brigades, of which roughly half are what might be called ‘heavy brigades’ (armoured and mechanised formations), with the remainder a mix of light brigades. This represents an additional 25–30 brigades compared to pre-2022 levels.

Additionally, European NATO countries have built experience in training large numbers of troops in their support for Ukraine, and a number of European allies possess a large pool of well-trained reserves (Finland and Poland alone bring together around 1.2 million reservists).³¹ European Union (EU) countries have trained over 78,000 Ukrainians between them, and the UK-led Operation INTERFLEX has trained a further 45,000.³² These factors bode well for European NATO’s ability to reconstitute forces in the event of a protracted conflict, although questions remain over the ability of their defence industrial bases to do the same. This impressive strength, however, is mitigated by a number of factors:

³¹ See: ‘Poland’s military mobilisation plans: How many reservists would be called up in the event of war?’, *Polskie Radio*, 06/03/2025, <https://www.polskieradio.pl/> (checked: 21/10/2025) and ‘Finland plans to raise reservists’ age limit to add 125,000 troops to wartime army’, *Reuters*, 14/05/2025, <https://www.reuters.com/> (checked: 21/10/2025).

³² ‘EU military support for Ukraine’, European Council, No date, <https://www.consilium.europa.eu/> (checked: 21/10/2025) and ‘UK to extend training programme for Ukrainian Armed Forces personnel throughout 2025’, Ministry of Defence, 06/09/2024, <https://www.gov.uk/> (checked: 21/10/2025).



- **Readiness:** Numerous European armies suffer from a lack of readiness; many brigades cannot ‘fight tomorrow’ and would take months to be combat ready. According to the Swedish Defence Research Agency, the average readiness of the countries which lack borders with Russia is as low as 30%–35% of total forces.³³
- **Lack of enablers:** Many land forces across Europe lack enablers, such as maintenance and equipment support units, combat engineers, signals units, logisticians, medical units, reconnaissance capabilities, Chemical Biological, Radiological and Nuclear (CBRN) units, and C2 capabilities.³⁴ Examining the number of Headquarters (HQ) units and their staff officers provides one such example. Assuming the average division is 3–4 brigades strong, European NATO nations would need around 35–46 division-level HQs. There are currently only 29 division-level HQs across European NATO (including NATO multinational division HQs) – over half of European NATO countries have no division-level HQ at all.
- **Strategic mobility:** Limited scale of strategic lift capacity, as well as the vulnerability of concentrated logistics hubs, is also a concern. European NATO would find it difficult to move and sustain large-scale formations across the continent under contested conditions.

3.2.2 AIR DOMAIN

European NATO air forces possess an array of powerful capabilities, and many are in the process of modernising their squadrons. Over the next few years, NATO forces in Europe plan to include around 1,700 fighter/strike aircraft, 13 AEW&C aircraft, almost 100 MPA, 14 EW/Electronic Signals Intelligence (ELINT) aircraft, 70 tanker aircraft and almost 300 transport aircraft.³⁵ Many European NATO air forces are in the process of modernising their fleets of fourth and 4.5th generation aircraft

³³ Björn Ottosson and Krister Pallin (eds.), ‘Western Military Capability in Northern Europe 2023’, Swedish Defence Research Agency, 27/03/2024, <https://www.foi.se/> (checked: 21/10/2025).

³⁴ Matthew Palmer, ‘Don’t Forget the Enablers!’, *Cracking Defence*, 10/03/2025, <https://crackingdefence.substack.com/> (checked: 21/10/2025).

³⁵ ‘2025 World Air Forces directory’, Flight Global, 27/11/2024, <https://www.flightglobal.com/> (checked: 21/10/2025).



to the fifth generation F-35 Lightning II Joint Combat Aircraft, with over 500 currently planned across European NATO allies. These aircraft would give a significant edge in both air-to-air and air-to-ground missions against Russian forces.

Air power is a vital component of NATO's strength, and achieving control of the air is critical to avoiding the static, attritional, trench-like warfare seen in Ukraine. But, much like the land domain, US capabilities and experience in conducting large-scale operations underpin the wielding of NATO's collective air power. A particular concern is the lack of practice and armament for SEAD/DEAD. Regular and realistic training for large-scale combat air operations (including missions beyond SEAD/DEAD) is a gap across European air forces. Until Russia's A2/AD bubbles were sufficiently degraded, much of the potential potency of NATO's airpower would be reduced. Tanker and transport aircraft numbers would be stretched in supporting large-scale air campaigns beyond Europe, but less so in an Article Five situation.

3.2.3 MARITIME DOMAIN

The fact that the Houthi rebels in Yemen were able de facto to close off the Red Sea – one of the continent's key economic arteries – to European shipping should ring alarm bells in European capitals. The post-Cold War assumption that NATO command of the oceans was incontestable by state actors has been shattered by rebels in one of the world's poorest states.

Most European countries had been slow to react to the Russian and Chinese naval buildups which began at least two decades ago, unwilling to fund their naval power sufficiently to maintain this enviable position of maritime supremacy. Many NATO navies are made up of old vessels or ones ill-equipped for peer naval conflict. Low-intensity operations designed to maintain good order at sea, such as anti-piracy, were a central focus for many years. This is an important role, but vessels tailored for this type of operation cannot pivot to 'warfighting'. In comparison, the six American Arleigh Burke class destroyers in Europe bring almost as many Vertical Launch System (VLS) cells – one way of measuring naval firepower – as the French, German and Italian navies combined.

Existing vessels in commission, as well as those under construction in European NATO countries, include: four aircraft carriers, 154 escorts, 17 SSNs, eight SSBNs, 56 SSKs, 40 auxiliaries and 26 amphibious warfare vessels (two of which could be considered light aircraft carriers). However, of these vessels, less than half have been



commissioned in the last 15 years, and even fewer have been built with sensor suites, combat management systems and armaments designed to fight peer adversaries. For example, not a single European navy possesses a Ballistic Missile Defence (BMD)-capable warship – although the Royal Navy’s Type 45 class destroyers are due to receive upgrades both to their software and missiles to give them some degree of BMD capability.³⁶

3.2.4 NUCLEAR ARSENAL

European NATO has two nuclear powers. Both the UK and France possess an arsenal of strategic nuclear weapons delivered via SLBMs. Each country possesses four SSBNs for the purpose of maintaining one on continuous patrol at any given time: the Vanguard class, carrying Trident II missiles, and the Le Triomphant class, carrying M51 missiles. Each Vanguard class SSBN can carry up to 16 Trident missiles with up to 12 warheads each, and each Le Triomphant can carry up to 16 M51 missiles with up to 10 warheads each, meaning European NATO countries can theoretically launch up to 352 warheads (though the operational payload is probably significantly lower).³⁷ While the British and French arsenal is far smaller than the Russian, it is still sufficient to devastate any conceivable adversary.

There are only two sources of sub-strategic nuclear weapons present in Europe. France has around 50 air-launched Air-Sol Moyenne Portée (ASMP) cruise missiles equipped with a sub-strategic warhead, with three dedicated squadrons of Rafale aircraft.³⁸ The other source is American B61 free-fall bombs – the number deployed across Europe is not disclosed, but estimates place it at around 100.³⁹ The storage and potential delivery of these weapons is shared across several European countries, which are part of the NATO Nuclear Sharing Arrangements.

³⁶ ‘Type 45 Ballistic Missile Defence upgrade to support more than 100 UK jobs’, Ministry of Defence, 24/05/2022, <https://www.gov.uk/> (checked: 21/10/2025).

³⁷ In the 2015 Strategic Defence Review, the UK announced that it would reduce the missiles carried by each Vanguard to eight carrying 40 warheads. It also announced plans to maintain operational warhead numbers at 120. It is unclear whether this policy has changed in the last ten years.

³⁸ ‘Arms Control and Proliferation Profile: France’, Arms Control Association, 04/2025, <https://www.armscontrol.org/> (checked: 21/10/2025).

³⁹ Jonathan Masters and Will Merrow, ‘Nuclear Weapons in Europe: Mapping US and Russian Deployments’, Council on Foreign Relations, 30/03/2023, <https://www.cfr.org/> (checked: 21/10/2025).



4.0

CAPABILITY GAPS IN EUROPEAN NATO ALLIES



High-level military postures across domains are only a starting point, although an important one. Capability gaps should be further refined to provide a clearer picture of what exactly NATO countries should focus increasing investment on. NATO does develop capability targets in collaboration with member states, but these are secret. However, by analysing the open-source postures of Russia and European NATO, combined with insights from key publications such as the EU's 'White Paper for European Defence – Readiness 2030' (see: Annex 2), official statements and interviews with officials, the most pressing gaps can be identified. This section of the Report outlines the most pressing gaps and what the risks are to NATO's collective defence if these gaps are left unresolved.

4.1 Existing capability gaps

From a European NATO perspective, there are seven key capability gaps – the gaps below are not an exhaustive list. These include SEAD/DEAD; Integrated Air and Missile Defence (IAMD); Counter-Uncrewed Aerial Systems (C-UAS); contested logistics; Anti-Submarine Warfare (ASW); nuclear arsenals; and those within the defence industrial base.

4.1.1 SUPPRESSION OR DESTRUCTION OF ENEMY AIR DEFENCES (SEAD/DEAD)

The ability to strike targets deep within Russia's missile defences, and the ability to destroy or suppress Russian missile defences to allow NATO air power freer reign, is a key component of NATO's ability to deter and, if necessary, defeat Russia. The ability to conduct SEAD/DEAD missions at the scale required in a peer conflict is likely beyond what European NATO air forces could currently achieve.⁴⁰ There are gaps in terms of training, C2, weapons and, to a lesser extent, platforms.

For example, only four European NATO countries operate Anti-Radiation Missiles – which home in on a radar emission to destroy active air defences, or force air defences to switch off to avoid destruction – in the form of the AGM88 (although a further three have placed orders).⁴¹

⁴⁰ 'White Paper for European Defence – Readiness 2030', European External Action Service, 21/03/2025, <https://www.eeas.europa.eu/> (checked: 21/10/2025).

⁴¹ 'Poland acquires AARGM-ER', *Calibre Defence*, No date, <https://www.calibredefence.co.uk/> (checked: 21/10/2025).



RISKS FROM SEAD/DEAD CAPABILITY GAPS

1. Failure to achieve air superiority would result in static and attritional warfare, which suits Russia more than NATO.
2. An inability to hold targets deep inside Russia at risk would limit NATO's ability to damage key Russian enablers, including logistics nodes, the defence industrial base, and C2 sites.
3. Failure to degrade Russia's missile defences would make it more difficult to seek and destroy Russian launch platforms, placing greater strain on NATO missile defences.

4.1.2 INTEGRATED AIR AND MISSILE DEFENCE (IAMD)

Air and missile defences played a crucial role in deterring an adversary from attacking by raising the cost of an attack and minimising the damage of a potential attack were it to occur. Europe is a large space to defend and, while technically possible, it would be prohibitively expensive to attempt to establish an IAMD system across the entire continent in the same way that Israel, for example, has achieved over its much smaller land area.

Given published orders to date, by the early 2030s, European NATO countries should be able to field around 110 batteries (which can include anything from one to several launch units) of medium-range SAMs and 48 batteries of long-range and/or BMD-capable SAMs, in addition to two Aegis Ashore facilities (one in Poland and one in Romania). A total of 160 missile batteries is potent, but of this number, half are on order and not yet deployed. These batteries comprise a mix of systems, including the National Advanced Surface-to-Air Missile System (NASAMS), Common Anti-Air Modular Missile (CAMM), Spyder, Iris-T, VL-Mica, Sol-Air Moyenne-Portée/Terrestre (SAMP/T), Patriot, Arrow-3, David's Sling, SM-3 and SM-6 missiles. This is further bolstered by the potential contribution of naval launched SAMs, as well as air-to-air missiles (if those assets are drawn away from other missions to help contribute to IAMD).

These defences will have to cover a vast number of military targets, as well as some of the more sensitive civilian ones. It is worth noting that Ukraine has received a plethora of around 30 batteries (depending on how



many launchers are assumed to be in a battery).⁴² Kyiv has struggled with around one-fifth of European NATO's *future* missile defences to defend all the sites it wishes adequately; European NATO has around eight times the landmass. It is worth noting that, even factoring in current plans, only a limited number of batteries will be BMD-capable, let alone counter-hypersonic. Another vital issue, especially if European countries plan to double their missile defence forces over the next decade, is that of the need to expand missile production to keep up with demand.

RISKS FROM IAMD CAPABILITY GAPS

1. Insufficient missile defences would allow Russia to launch potentially crippling attacks on NATO military infrastructure, or attempt to coerce governments via attacks on civilian targets.
2. As seen in the 2025 Israel-Iran conflict, missile defences are crucial for buying time for offensive forces to achieve air superiority, which then enables them to seek out and destroy enemy launch platforms.
3. Insufficient dedicated missile defences could result in air and naval assets being drawn away from other missions to help contribute to IAMD.

4.1.3 COUNTER-UNCREWED AERIAL SYSTEMS (C-UAS)

C-UAS is an issue which overlaps with IAMD. The Russian Armed Forces, as well as other potential adversaries, have increased the production and use of uncrewed systems from larger long-range strike weapons, such as the Shahed and its derivatives, to small First-Person View (FPV) drones. This presents a number of challenges, both for frontline units and for rear areas facing potentially thousands of Shahed-like weapons. Unlike the ramp up in missile defence orders, NATO countries have been far slower in expanding their C-UAS capabilities.

By all accounts, the Gepard 35 millimetre (mm) self-propelled anti-aircraft gun – a holdover from the Cold War – has performed very well against Russian drones. Yet, almost no European NATO forces

⁴² 'Answering The Call: Heavy Weaponry Supplied To Ukraine', Oryx, No date, <https://www.oryxspioenkop.com/> (checked: 21/10/2025).



operate a similar or modern version. A number of options in the 30–40mm category are either planned or in development, including the Skyranger, the Bofors 40mm and the 40mm Cased Telescope (40CT) cannon, but action has been slow so far. Without gun-based C-UAS (and direct energy weapons currently under development) options, expensive interceptor missiles would have to be employed in destroying mass UAS attacks. European NATO does not have the funding, nor the missile production capacity, to rely entirely on missiles in the C-UAS role. C-UAS will also require a diverse network of integrated sensors, and a battle management system capable of dealing with any UAS threat in the most cost-effective manner.

RISKS FROM C-UAS CAPABILITY GAPS

1. Mass use of UAS would rapidly deplete NATO missile stocks.
2. An inability to intercept UAS would render key civil and military sites at risk.
3. At the tactical level, mass use of UAS along front lines renders concentrations of force (necessary for successful offensive manoeuvre warfare) without C-UAS much more difficult.

4.1.4 CONTESTED LOGISTICS

Related to gaps involving IAMD and C-UAS are the difficulties European NATO would face in conducting mass logistics in a contested environment. Given that NATO does not forward deploy large forces, the ability to reinforce rapidly and resupply contested areas along NATO's long eastern front will be a crucial element of most conceivable Article Five situations. Some of the gaps exist by virtue of globalised economies, where civil infrastructure has concentrated into a smaller number of larger hubs – great for economic efficiency, but detrimental for resilience and redundancy in a conflict.

In addition to these challenges, European NATO possesses limited lift capacity, including airlift, sealift, heavy lift transporters and military-capable trains. To take strategic sealift as one example, most European armed forces lack in-house sealift capacity. Many rely on ad hoc chartering of civil sealift, which, without further action, could prove



unreliable in a time of conflict. The reasons are many, and include a lack of trusted and trained crews (10% of global seafarers are Russian, and many more are from non-European countries), insurance, the right kinds of shipping and the ability to provide military escorts.⁴³

RISKS FROM CONTESTED LOGISTICS CAPABILITY GAPS

1. An inability to reinforce areas of NATO's frontline quickly and at scale weakens the deterrent effect of NATO's wider on-paper strength.
2. Failure to reinforce and sustain frontline forces would weaken any response to an Article Five situation.
3. An inability to provide adequate protection to logistics elements risks losses to personnel and equipment before they have even made it to the fight.

4.1.5 ANTI-SUBMARINE WARFARE (ASW)

European NATO possesses a range of capable ASW systems. But, given the growing threat from Russian submarines, European NATO lacks scale for ASW. In his final testimony to the Senate Armed Services Committee, Gen. Christopher Cavoli, Supreme Allied Commander Europe (SACEUR) (2021-2025), stated that he did not have the quantity of equipment he needed to patrol the North Atlantic for Russian submarines sufficiently – and that Russian submarine activity has grown. Many European NATO nations have focused their efforts elsewhere, and few, except Britain and Norway, have prioritised ASW.

Although the Russian SSN fleet is only a quarter of the size of the Soviet fleet of the 1980s, and its SSK fleet is only a seventh of the size, it is a growing and increasingly modern force which European NATO countries have been slow to react to; the EU's White Paper for European Defence, for example, makes no mention of submarines or ASW.⁴⁴

⁴³ 'NATO Member States' National Merchant Fleet and Seafarers: Implications for maritime security and resilience', Nautilus International, 27/05/2025, <https://www.nautilusint.org/> (checked: 21/10/2025).

⁴⁴ 'White Paper for European Defence – Readiness 2030', European External Action Service, 21/03/2025, <https://www.eeas.europa.eu/> (checked: 21/10/2025).



RISKS FROM ASW CAPABILITY GAPS

1. Russian submarines can launch cruise missiles from within their 'bastion' (the heavily defended A2/AD bubble in the Barents Sea), making it difficult for NATO forces to attack these particular launch platforms and reduce salvo sizes.
2. Russian submarines which 'break out' from their bastion can threaten targets beyond the range of Russian land and air forces and attack from unpredictable angles.
3. Russian submarines could interdict logistics efforts at sea.

4.1.6 NUCLEAR WEAPONS

There are two standing concerns in European NATO's nuclear posture. The first is the French position regarding nuclear policy, and the second is the sub-strategic nuclear balance. France does not 'extend' its nuclear deterrent in the same way the UK and the US do. In theory, France's statements that it would consider nuclear use over 'vital interests', and that Article 42.7 of the Treaty on the EU includes a (technically) more comprehensive security guarantee than NATO's Article Five, should act as a de facto extension of the French nuclear deterrent. However, there is strong evidence that this is not how Russia perceives French nuclear posture.⁴⁵

At the sub-strategic level, European NATO, in the event of a serious crisis, would be compelled to look to Paris, or Washington through NATO's Nuclear Sharing Arrangements, but it may find its capacity for manoeuvre in escalation sorely lacking. There are only two centres of nuclear decision making behind sub-strategic nuclear weapons release, unlike the three centres for strategic nuclear weapons; a gap which Moscow could seek to exploit.

⁴⁵ Zsofia Wolford et al., 'Evolving Russian perceptions of the British and French nuclear deterrents', RAND Corporation, 22/07/2025, <https://www.rand.org/> (checked: 21/10/2025).



RISKS FROM NUCLEAR WEAPONS CAPABILITY GAPS

1. Russia could use nuclear threats to coerce a number of non-nuclear NATO allies to hold back on fulfilling their commitments in an Article Five situation.
2. Without a European NATO nuclear power explicitly committed and able to wield sub-strategic nuclear capabilities, a gap in the escalatory ladder exists, which an emboldened Russia may seek to exploit.
3. Several non-nuclear NATO members – including Poland and Germany – could seek to develop their own nuclear arsenals if they feel coverage from existing nuclear allies is insufficient for the changed geopolitical circumstances.

4.1.7 THE DEFENCE INDUSTRIAL BASE

Technically speaking, the defence industrial base is not a ‘capability’, but its importance is such that it is vital to highlight – and there are those who believe it should be considered a sixth domain of warfare (alongside air, land, sea, space and cyberspace).⁴⁶ There are a number of concerning gaps in terms of capacity, supply chain resilience and technical expertise in the wider European NATO defence industrial base. Despite this, the response to Russia’s full-scale invasion of Ukraine has seen considerable effort to expand the defence industrial base in Europe, and in many cases, the results have been impressive: between 2023 and 2025, it is estimated that European production of 155mm shells more than tripled, from 300,000 to over one million.⁴⁷

Other areas, however, show capacity constraints and lengthy production timescales, which need further efforts to expand and accelerate respectively. Missile production in particular is a key concern, both in terms of strike weapons and interceptors. Table 1 outlines estimates of existing production levels of select missile systems.

⁴⁶ Franklin Kramer, ‘The sixth domain: The role of the private sector in warfare’, Atlantic Council, 04/10/2023, <https://www.atlanticcouncil.org/> (checked: 21/10/2025).

⁴⁷ ‘Europe’s armsmakers have ramped up capacity’, *The Economist*, 20/03/2025, <https://www.economist.com/> (checked: 21/10/2025).



TABLE 1: ESTIMATES OF MISSILE PRODUCTION FOR SELECT COMPLEX WEAPONS

Weapon	Type	Production notes
Patriot PAC-3	SAM (BMD capable)	500 missiles produced in 2024; a 30% increase from 2023. A rate of 650 per year is planned for 2027. ⁴⁸
Patriot PAC-2	SAM	240 missiles per year, with plans to reach 420 per year by 2027. ⁴⁹
Aster 15	Short-range SAM	Around 100 missiles per year.
Aster 30	Medium-range SAM	Around 230 missiles per year (aiming to reduce production time down from 42 months to 18). ⁵⁰
Iris-T	Short-range	Around 450 missiles

⁴⁸ 'Lockheed Martin's PAC-3 MSE Achieves Record Production Year', Lockheed Martin, 24/03/2025, <https://www.lockheedmartin.com/> (checked: 21/10/2025).

⁴⁹ Jen Judson, 'How companies plan to ramp up production of Patriot missiles', *Defence News*, 09/04/2024 <https://www.defensenews.com/> (checked: 21/10/2025).

⁵⁰ Fabian Hoffman, 'Europe's Missile Gap: How Russia Outcompetes Europe in the Conventional Missile Domain', *Missile Matters – with Fabian Hoffmann*, 06/07/2025, <https://missilematters.substack.com/> (checked: 21/10/2025).



	SAM	per year. ⁵¹
Storm Shadow	Cruise missile	50-100 per year. ⁵²
Taurus	Cruise missile	Production in the process of restarting, possibly around 50 per year once underway.
Joint Air-to-Surface Standoff Missile (JASSM) and Long-Range Anti-Ship Missile (LRASM)	Cruise missile and anti-ship missile (common core)	720 missiles per year with scope to expand beyond 1,000 missiles per year. ⁵³
Naval strike missile (NSM) and Joint Strike Missile (JSM)	Cruise missile and anti-ship missile	Over 400 NSM per year. ⁵⁴ At least 100 JSM per year. ⁵⁵
Guided Multiple Launch Rocket System (GMLRS)	Guided rocket	14,000 per year.

⁵¹ 'German arms maker Diehl to ramp up production of IRIS-T air defence system', *Reuters*, 05/09/2023, <https://www.reuters.com/> (checked: 21/10/2025).

⁵² Fabian Hoffman, 'How we know what we know about European missile production', *Missile Matters – with Fabian Hoffmann*, 30/03/2025, <https://missilematters.substack.com/> (checked: 21/10/2025).

⁵³ Ryan Finnerty, 'Lockheed secures additional \$4bn to increase production on two critical long-range missiles', *Flight Global*, 01/08/2025, <https://www.flightglobal.com/> (checked: 21/10/2025).

⁵⁴ Xavier Vavasseur, 'DSEI 2023: Kongsberg Increasing NSM Production Capacity', *Naval News*, 19/09/2023, <https://www.navalnews.com/> (checked: 21/10/2025).

⁵⁵ Conversation with an expert at DSEI 2025.



Precision Strike
Missile (PRSM)

Short-range
ballistic missile

Initial aim of 400 per
year.⁵⁶

Estimates are hard to provide for many systems, but it is well known that stocks are low, and that any high-intensity combat operation would run through munitions at an alarming rate. Indeed, during the intervention in Libya in 2011, British and French forces quickly ran low on munitions.⁵⁷

These munitions are also divided across the demands of multiple allies in several theatres. The use of these weapons has also increased in recent years – depleting already fragile stockpiles – as geopolitical tensions have led to the breakout of several conflicts.

Following the inauguration of the second Trump administration, several European NATO allies have emphasised ‘sovereignty’ in future plans for complex weapons system production. The definition (and feasibility) of sovereignty in complex weapons procurement warrants much deeper analysis, but expanding capacity should take priority – empty magazines are a far greater concern.

RISKS FROM DEFENCE INDUSTRIAL BASE CAPABILITY GAPS

1. Russia could seek to absorb initial losses to out-produce European NATO in the long run, if stockpiles, production capacity and production timescales are not adequate.
2. European NATO’s technological superiority becomes irrelevant if it runs out of munitions.
3. Failure to grow industrial capacity to the point where NATO and its allies could collectively meet the demands of a major two-front crisis would increase the likelihood that any one-front crisis spirals into a two-front crisis.

⁵⁶ ‘Building at Scale to Meet Global Defence Demands’, Lockheed Martin, 04/08/2025, <https://www.lockheedmartin.com/> (checked: 21/10/2025).

⁵⁷ Karen DeYoung and Greg Jaffe, ‘NATO runs short on some munitions in Libya’, Atlantic Council, 17/03/2011, <https://www.atlanticcouncil.org/> (checked: 21/10/2025).



4.2 Plugging the gaps

The list of capability gaps which require action to bolster collective defence is evidently long. Yet, the fiscal firepower of European NATO is impressive, and is in the process of being mobilised – although the UK is one of the countries which has been slowest to invest more in defence (having slipped from European NATO's second highest spender in terms of percentage of GDP to its current position as 12th highest). However, even with increasing resources, the risk of duplicative efforts among allies could leave gaps unfilled. HM Government should consider carefully which of these gaps it is best placed to begin closing.



5.0

WHAT BRITAIN CAN DO TO BOLSTER COLLECTIVE DEFENCE



When the Labour government came to power in July 2024, one of its first steps was to launch the process for the SDR. In the words of Sir Keir Starmer, Prime Minister, the SDR outlines that ‘a step-change in the threats we face demands a step-change in British defence to meet them.’⁵⁸ The SDR’s recommendations are designed to deliver a ‘leading tech-enabled defence power, with an Integrated Force that deters, fights, and wins through constant innovation at wartime pace’.⁵⁹ What the SDR did not do, however, was to outline national (defence) priorities.

This is provided by the NSS, which was published shortly after the SDR. The NSS updates the strategic framework of the 2023 Integrated Review Refresh to guide British national security policy over the next five years.⁶⁰ One of the primary purposes of the NSS was to ‘bring together the various strands of work relating to national security that have been underway since the 2024 general election’, including the SDR. The NSS also developed a ‘strategic framework’ with three dimensions, each with their own subsections, to help guide the national strategic effort:

1. Security at home:

- a. Defend national territory;
- b. Make Britain a harder target;
- c. Build resilience to future threats.

2. Strength abroad:

- a. Bolster collective security;
- b. Renew and deepen British alliances;
- c. Develop new relationships in new domains.

3. Increase sovereignty and asymmetric capabilities:

- a. Rebuild the defence industrial base;
- b. Identify, nurture and protect other sovereign capabilities;
- c. Pursue asymmetric advantage.

In other words, the SDR provides the ‘shopping list’ of changes British defence needs to make, while the strategic framework of the NSS

⁵⁸ ‘The Strategic Defence Review 2025 – Making Britain Safer: secure at home, strong abroad’, Ministry of Defence, 02/06/2025, <https://www.gov.uk/> (checked: 21/10/2025).

⁵⁹ Ibid.

⁶⁰ ‘National Security Strategy 2025: Security for the British People in a Dangerous World’, Cabinet Office, 24/06/2025, <https://www.gov.uk/> (checked: 21/10/2025).



provides the ‘toolkit’ to help establish priorities for the implementation of the SDR’s recommendations. However, the NSS takes a wider view than solely defence, meaning that defence will not necessarily be able to resolve all elements of the strategic framework alone. This section of this Report will cross-examine the SDR’s recommendations with the strategic framework of the NSS alongside European NATO capability gaps to determine where Britain could achieve the greatest impact from investment to bolster collective defence.

5.1 Drive integration to pursue asymmetric advantage

One of the SDR’s key thrusts was the drive to move from a ‘joint’ or ‘multi-domain’ mindset to an ‘integrated’ mindset, especially in terms of planning, readiness, deployment and procurement – all underpinned by a common digital foundation. This drive – particularly in terms of procurement – which has long been siloed and disjointed, will (in theory) help deliver efficiencies and ensure that the British Armed Forces are able to deliver effects greater than the sum of their parts. Technological, organisational and information superiority has long been a key advantage NATO has enjoyed as a force multiplier against numerically superior enemies.

In the short term, given the timescale challenges of delivering complex platforms, investment towards integration should be given a high-level priority. Ensuring that the capabilities which the UK currently has, or will soon acquire, are as effective as possible will have an outsized impact. Greater integration will deliver asymmetric advantage by ensuring the British Armed Forces can out-decide their adversaries.

5.2 Focus the force to reinforce security at home and build strength abroad

Britain’s unique geography and location means it has the potential to add real value to NATO in terms of delivering a more focused set of capabilities. The country’s location – central to the Euro-Atlantic theatre – provides the geographic foundations from which to command the North Atlantic (see: Map 1). For this reason, HM Government should prioritise a more focused force, in addition to an integrated one. Such a



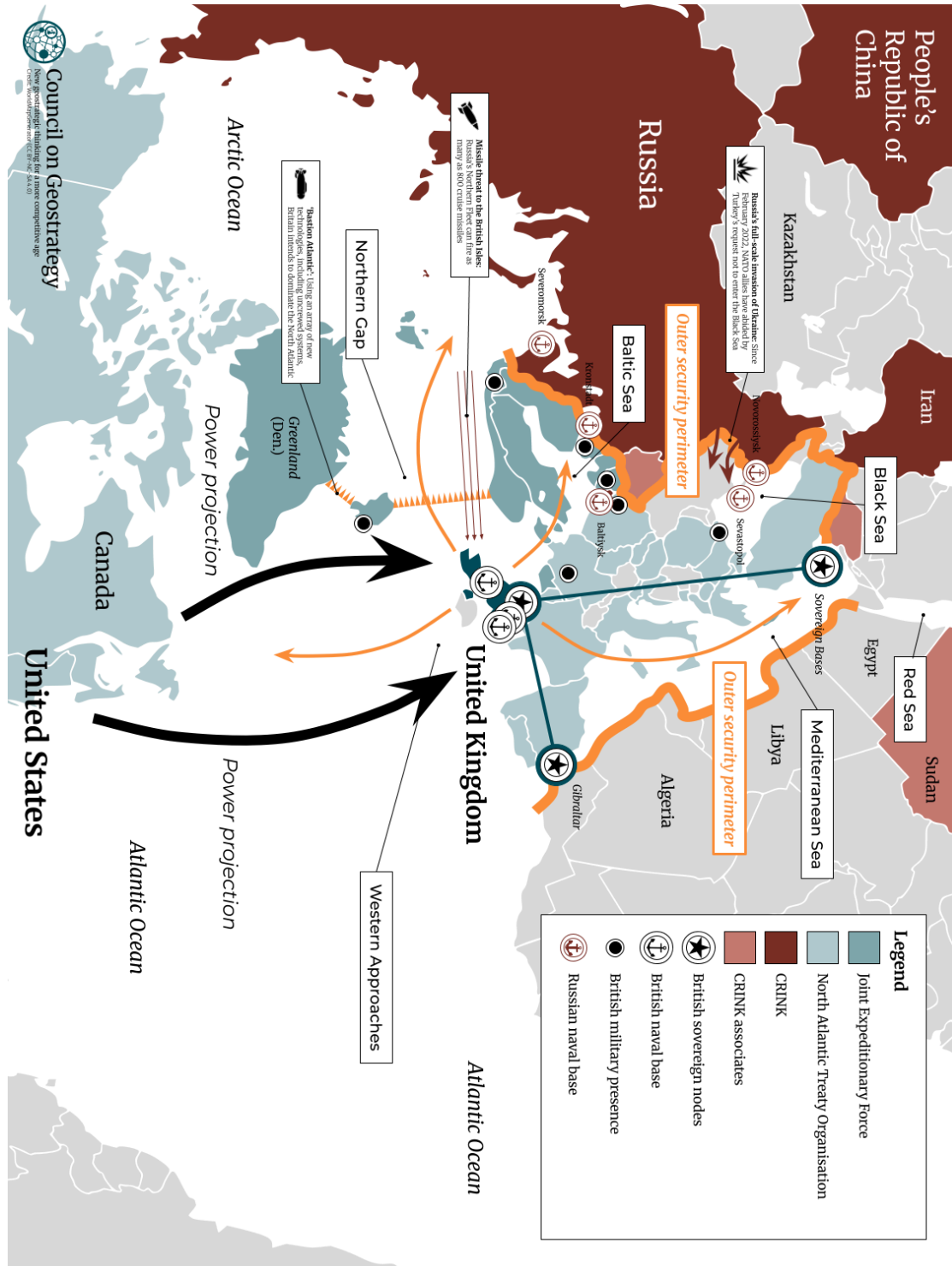
posture would make the UK a harder target, as the most serious direct military threats to Britain itself are from the sea and the air, particularly from Russia's Northern Fleet. It would also simultaneously deepen the UK's alliances and bolster collective defence, as most NATO allies need additional air and naval power rather than greater land power, which many are already regenerating.

Australia's effort – outlined in its National Defence Strategy – to move from 'a balanced force capable of responding to a range of contingencies' to a focused force designed to address the country's most concerning strategic risks could serve as a model.⁶¹ This would require difficult choices in giving greater weight to the air and naval sections of the SDR ahead of other areas. Therefore, beyond efforts to achieve integration – where opportunity cost decisions must be made – the recommendations outlined in the maritime and air sections of the SDR should receive greater priority (Sections 5.2.1, 5.2.2 and 5.2.3 of this Report examine how this might operate in practice).

⁶¹ '2024 National Defence Strategy', Australian Government, 17/04/2024, <https://www.minister.defence.gov.au/> (checked: 21/10/2025).



MAP 1: BRITAIN'S GEOSTRATEGIC POSITION IN COLLECTIVE DEFENCE





5.2.1 TOWARDS A FOCUSED FORCE: LAND REQUIREMENTS

The British Army provides a Corps HQ along with (in theory) one heavy and one medium/light division for the Allied Rapid Reaction Corps (ARRC). However, the simple fact is that the UK's ground forces add less relative value to NATO than its other contributions. Firstly, within the next few years, due to the efforts of terrestrial allies such as Poland and Germany, European NATO's land capacity will have expanded by over four times the size of the entire British Army; secondly, the US V Corps' land contribution is the most likely to remain of all the American military presence in Europe, even in an Indo-Pacific contingency; and thirdly, Russia's army has suffered tremendous losses, which will take time to fix.

In a world of limited resources, where European allies must be careful not to duplicate capabilities, the UK should approach the future of its land forces with a keen eye for what helps the most; this being the mobility and enablers of the ARRC more so than how big it is. Investment towards key enablers, particularly those which European allies are lacking, would provide a significant return on investment in ensuring that the wider mass of European NATO's land forces can be better wielded and sustained.

HM Government should also ensure that efforts to drive integration include close coordination to integrate with allies, for example including collective training efforts and HQ C2 functions. Such actions would also bolster Britain's strategic indispensability to its European allies. Further examples of this could include:

- **Expand CBRN capacity:** European NATO only possesses four regiment-sized CBRN formations (belonging to the UK, France, Czechia and Poland). Britain could expand CBRN capabilities designed to plug in with allied formations; for example, a joint CBRN regiment could be established along the lines of the joint British-German Amphibious Engineering battalion. Utilising the Joint Expeditionary Force (JEF) could be one route to explore for this, as it would help to bring together various small CBRN units scattered across JEF members.
- **Deepen engineering capacity:** In particular, this includes bridging units and 'Wet Wide Gap Crossing' capabilities. The Baltic countries alone have thousands of bridges, all of which are fixed locations – while not always easy to destroy, they are easy to target.



- **Recapitalise deployable defence medical forces:** The British Army has 16 medical regiments; a capability which many European allies lack at scale. But these regiments have struggled with underfunding. Given the risk that hospitals could be targeted in a peer conflict, the UK's deployable medical capabilities could help provide resilience.

In addition to enablers, the introduction of meaningful C-UAS capabilities should be expedited to bolster the survivability of current mass. As the drone threat grows, the British Army's vehicles and personnel will require improved C-UAS capabilities, including both hardware and software.

5.2.2 TOWARDS A FOCUSED FORCE: SEA REQUIREMENTS

A greater ability to take the fight to Russia's Northern Fleet would reduce the Kremlin's leverage on NATO's northern flank and ease the alliance's contested logistics challenge. This would simultaneously reinforce security at home, by virtue of placing Russia on a more defensive footing. Consequently, HM Government should prioritise the maritime section of the SDR – from Atlantic Bastion and the AUKUS SSN programme to beyond – in the coming years. In addition, a number of further investments could lend increased emphasis towards a more focused force, including:

- **Merge the requirements for the prospective Type 92 ASW sloop and the Offshore Patrol Vessel (OPV) replacement programme:** The three of the first batch of the River class OPVs are due to retire in the coming years (their replacement has an estimated in-service date set for the early 2040s), which will place strain on the recapitalising frigate fleet. Rather than two separate programmes, the UK should combine them and aim to procure a low-cost, low-crewed vessel capable of both home island OPV work and supporting ASW patrols.
- **Regenerate the Royal Fleet Auxiliary (RFA) in the short term:** Britain provides a significant proportion of European NATO's auxiliary ships, vital to keeping ships at sea during operations or for projecting power beyond Europe's shores. However, the RFA has, for a number of reasons such as pay disputes and recruitment



and retention difficulties, for example, struggled to put ships to sea. Most of the resolutions to these problems would be (relatively) low-cost and high-impact.

- **Replace the Type 32 class frigate programme with a second batch of Type 31 class frigates:** Two alternative paths stand out; one where the new batch is adapted for improved ASW capabilities, the other where the new batch is adapted to team with ASW sloops. In either case, this second batch should be built with the full suite of Mark 41 VLS cells from the outset, to help increase the Royal Navy's overall number of VLS.
- **Review arrangements for Ships Taken Up From Trade (STUFT):** Given developments in the global shipping sector, STUFT may no longer be fit for purpose. Creating a framework of trusted shipping partners with strategic contracts and fiscal incentives, drawing inspiration from the Swedish model, could build resilience and certainty in British sealift capacity.⁶²
- **Recapitalise naval support infrastructure:** Much naval support infrastructure is in dire need of investment, and should be a high priority, such as Programme EUSTON, the procurement of floating drydocks at Faslane.⁶³ Ensuring the Royal Navy's SSN and surface combatant fleets are at a good state of readiness in the short term is of great importance.

5.2.3 TOWARDS A FOCUSED FORCE: AIR REQUIREMENTS

The UK should focus on rebuilding mass in combat air and arming itself for the SEAD/DEAD role. Overwhelming and technologically sophisticated air power was long one of NATO's greatest asymmetric advantages over Russia. However, Russian investment in A2/AD capabilities and the American prioritisation of the Indo-Pacific has reduced this supremacy. The Royal Air Force (RAF) is one of the most capable air forces in European NATO, but the size and armament of its combat air capabilities has declined over the last two decades. Britain's air power should be one

⁶² Charlotte Kleberg, 'Sealift: Commercial shipping's potential in military logistics', Council on Geostrategy, 18/11/2024, <https://www.geostrategy.org.uk/> (checked: 21/10/2025).

⁶³ 'Programme EUSTON – floating dry docks for Royal Navy submarines', *Navy Lookout*, 06/01/2025, <https://www.navylookout.com/> (checked: 21/10/2025).



of HM Government's top priorities to ensure Europe's land forces can avoid fighting the type of static war of attrition which Ukraine has been forced to conduct. Actions which could have an outsized impact on bolstering European NATO's collective defence – beyond those already in the pipeline – include the following:

- **Commit to the shape of the F-35 Lightning II Joint Combat Aircraft fleet:** With an initial order of 12 F-35A Lightning II Joint Combat Aircraft, the UK is set to operate a mixed fleet of A and B variants, with one reason being that A variant is up to 25% cheaper than the B variant.⁶⁴ Britain should lean into operating a mixed fleet, and should aim to operate three squadrons of F-35As focused on the sub-strategic nuclear mission, as well as a further three squadrons focused on the SEAD/DEAD mission; a major European NATO gap.⁶⁵ Given HM Government remains committed to a total of 138 F-35s, this would mean a split of roughly 74 F-35Bs – adequate numbers for carrier strike needs – and 64 F-35As.
- **Place an ad hoc order of missiles, as a matter of urgency, to arm the RAF for SEAD/DEAD and provide stand-off strike capability:** This should be initiated while the RAF waits for SPEAR-3 to be fully ready in the early 2030s. Examples of missiles include Mako; the Stand-In Attack Weapon (SIAW); the Advanced Anti-Radiation Guided Missile (AARGM); the JASSM; or Air Long-Range Artillery (Air LORA). If it can be built quickly, and a large enough order placed (e.g., through common procurement with allies if possible), an additional production facility should be established in the UK. As well as this, an interim order of air-launched anti-ship missiles should be explored for the carrier air wing and/or for the P-8 Poseidon – although as the order numbers here are likely to be insufficient to induce UK-based production, this should be a lower priority.
- **Refit the RAF's Voyager tankers with boom refuelling capability:** This would allow the Voyager to refuel the RAF's F-35A, P-8

⁶⁴ 'UK to purchase F-35As and join NATO nuclear mission as Government steps up national security and delivers defence dividend', Ministry of Defence, 24/06/2025, <https://www.gov.uk/> (checked: 21/10/2025).

⁶⁵ Calvin Bailey MP, 'Securing Britain's combat air future', *UK Defence Journal*, 01/08/2025, <https://ukdefencejournal.org.uk/> (checked: 21/10/2025).



Poseidon, E-7 Wedgetail, RC-135 Rivet Joint and C-17 transport aircraft. This would also have a further two positive impacts; allowing RAF Voyagers to support a wider range of allied aircraft and easing the strain of sustaining continuous presence on Britain's small fleets of P-8s and E-7s.

5.3 Define a British national defence model to build resilience

For too many years, considerations of homeland defence, and the UK's Article Three obligations, have been overlooked (see: Box 2), and effort is required to rectify this. As Britain is an island power, HM Government should not spend large amounts of time and money replicating continental 'total defence' models.⁶⁶ Though this would, in theory, build security at home, the cost-effectiveness of such an approach is ill suited to British needs.

Were a major conflict to break out, chaos at home – which would undoubtedly be a goal for any adversary – would significantly hinder the UK's ability to wield its power in support of collective defence. However, it should not be a high priority, as over-focusing on home defence is too reactive a mindset and encourages adversaries to focus their efforts on posing offensive problem sets to British strategists. Where a 'total defence' model is needed by certain countries, such as Finland or Estonia, Britain would better serve collective defence by balancing the need for resilience – in line with its Article Three obligations to NATO – with wielding its power to pose problems which push the Kremlin onto the back foot (i.e., efforts which would help deliver asymmetric advantage).

Any efforts put towards a 'total defence' model should aim to be low-cost and high-impact. For example, the recent decision to expand funding for cadet forces in the UK is an excellent case of this, as opposed to far more costly efforts to impose national service – even conscription – which have previously been proposed.⁶⁷

⁶⁶ Jenny Medlicott, 'UK should consider conscription and introduce national service to deter Russian threat, NATO ally says', *LBC*, 17/03/2024, <https://www.lbc.co.uk/> (checked: 21/10/2025).

⁶⁷ 'UK needs wake-up call and must consider Swedish-style conscription, ex-MI6 chief says', *BFBS Forces News*, 05/04/2024, <https://www.forcesnews.com/> (checked: 21/10/2025).



BOX 2: BRITAIN'S ARTICLE THREE OBLIGATIONS TO NATO

Further to the UK's Article Five commitments, its Article Three commitments are a crucial part of collective defence efforts, and should be given the attention they deserve. Given the slow decline of Britain's defence industrial base and similarly reduced focus on homeland defence, the UK is at risk of overlooking its Article Three commitments:

In order more effectively to achieve the objectives of this Treaty, the Parties, separately and jointly, by means of continuous and effective self-help and mutual aid, will maintain and develop their individual and collective capacity to resist armed attack.⁶⁸

In other words, British forces storming to the rescue in an Article Five situation could be rendered powerless if the UK were to come under armed attack and it proves unable to defend itself adequately. The destruction of military production sites, defence intelligence hubs, naval dockyards, airbases or even civil infrastructure (such as power generation and undersea cables) which support the military could result in strategic inertia.

5.4 Reinforce sub-strategic nuclear deterrence to deepen alliances

Britain's nuclear capabilities are its most important contribution to collective defence. This fact is already recognised as being of utmost priority in the SDR. However, there are questions as to whether the UK's current nuclear posture is sufficient in the changing strategic environment. Were the US to be distracted with an Indo-Pacific contingency, and France unwilling to risk retaliation, European NATO faces a sub-strategic nuclear gap which Russia could exploit.

Britain's decision to join NATO's Nuclear Sharing Arrangements – placing British Trident missiles behind the American B61s deployed to Europe – is a good first step, but HM Government should go further. This

⁶⁸ 'Resilience, civil preparedness and Article 3', North Atlantic Treaty Organisation, 13/11/2024, <https://www.nato.int/> (checked: 21/10/2025).



would make the UK a harder target, as it would have more options for escalation manoeuvre. Reinforcing Britain's nuclear arsenal in this manner would also deepen the UK's alliances with European partners, as many – such as Poland – have made no secret that they may consider their own nuclear programmes if their nuclear armed NATO allies appear indecisive or incapable of delivering on their commitments.⁶⁹ A more comprehensive nuclear arsenal would give Britain greater strategic indispensability. Accordingly, HM Government should:

- **Explore the feasibility of developing a UK-built air-launched dual-use cruise missile, which could also deliver a nuclear payload:** Efforts would be required to keep costs down, and HM Government should aim for minimal viable capability. While the 2013 Trident Alternatives Review estimated that a new warhead tailored for delivery via cruise missile would cost in the region of £8-10 billion, and take around 20 years to develop, this can only be the *extreme* upper estimate for both.⁷⁰ The Ministry of Defence should explore how the costs and timeframes of this estimate can be reduced – for example, whether low-yield Holbrook warheads could be fitted to existing missile systems (as was done with old Polaris warheads to create the WE.177C during the Cold War) – or alternatively seek to develop a new dual-use missile with allies which could be capable of delivering low-yield Holbrook warheads.

5.5 Expand missile production to enhance the defence industrial base

Many sites across the UK produce vital military equipment, including: Merthyr Tydfil and Telford, where the British Army's Ajax and Boxer vehicles are being built; shipyards in Govan, Rosyth, Barrow-in-Furness and Belfast, which are busy building the Type 26 class frigate, the Type 31 class frigate, nuclear submarines and Fleet Solid Support Ships; aircraft production facilities in Warton; and a number of missile and munitions

⁶⁹ Daryna Vialko, 'Poland's President hopes for deployment of nuclear weapons on its territory', *RBC Ukraine*, 17/09/2025, <https://newsukraine.rbc.ua/> (checked: 21/10/2025).

⁷⁰ This estimate seems excessive given the time and money required to build Britain's original nuclear weapons, and all its supporting infrastructure, from scratch in the aftermath of the Second World War. It is probable that the higher cost and longer timeframe estimates were those published. See: 'Trident Alternatives Review', Cabinet Office, 16/07/2013, <https://www.gov.uk/> (checked: 21/10/2025).



plants across the country producing hundreds of missiles and thousands of shells. Beyond the large production sites, the UK also produces vast quantities of crucial subsystems and components for allied equipment, such as the F-35 Lightning II Joint Combat Aircraft, and is also home to facilities crucial to the development, testing and integration of weapons, such as those in Stevenage, Ampthill and Hastings.

HM Government should prioritise expanding or building new production lines for missile defences and precision strike systems to address gaps facing both the UK's industrial base and European NATO stockpile gaps. In particular, this focus should be on systems in high demand with allies, which would benefit from common procurements to boost order numbers. While low-cost strike weapons should continue to be explored and experimented with, these are weapons for which production can be expanded more easily and rapidly when needed, such as 155mm shells. While for more complex weapons, European NATO will have to 'fight with what it has got', it should aim to boost those stockpiles now. Accordingly, HM Government should:

- **Emphasise the expansion of missile production capacity over the development of new systems:** The wider Euro-Atlantic defence industrial base must be able to compete on a two-front basis. Many of the missiles needed to deter Russia would also be in high demand were a conflict between the US and the PRC to break out. In recent years, Britain has announced plans to develop several types of long-range precision strike missiles. Meanwhile, Russian missile production outpaces that of European NATO. HM Government should place greater emphasis on expanding production capacity within the UK for in-demand missiles.⁷¹ This will require a more strategic approach to government-to-government discussions related to co-production. As shown in Table 2, some of these efforts are duplicative of allied capabilities which are already well advanced and production ready, for example, Project NIGHTFALL and the PRSM, or the hypersonic effort and US-Australia collaborative efforts.

⁷¹ 'Australia signs long-range precision strike missile agreement with the United States', Australian Government: Defence, 06/06/2025, <https://www.minister.defence.gov.au/> (checked: 21/10/2025).



TABLE 2: STRIKE WEAPONS UNDER DEVELOPMENT

Programme	Details	Delivery date
Brakestop	To deliver a 'one-way effector' with a range of 500km and a unit cost of £400,000.	2026
European Long Range Strike Approach (ELSA)	Long-range (1,000-2,000km) ground-launched cruise missile.	By 2035
Project NIGHTFALL	Ground-launched tactical ballistic missile with 500km range and a cost of £500,000 (excluding warhead).	2027
Hypersonic Technologies and Capability Development Framework (HTCDF)	To develop the UK's hypersonic expertise with the aim of eventually delivering a hypersonic weapon.	Demonstrator by 2030

In addition to these programmes, Britain has the following missiles expected to enter service: Spear-3 in the early 2030s, and RJ-10 and TP-15 (two variants of the Future Offensive Surface Weapon [FOSW]) in 2028 and 2030 respectively. There will also be a number of efforts not yet in the public domain.



6.0

CONCLUSION



NATO has been the world's most successful military alliance, having kept its members safe from peer conflict for seven decades and counting. But this success came from action and investment adequate to the threat facing the alliance. With Russian aggression on the rise, the US focusing on the growing military capabilities of the PRC, and after two decades of underinvestment by European allies, collective defence in European NATO will come under increasing strain. This Report has sought to outline the extent of these gaps, how shifting geopolitics will impact them, and what this means for HM Government as it rebuilds the British Armed Forces for an era in which direct state-based threats have returned.

6.1 Key findings

Though the Russian military has performed poorly in Ukraine and has suffered heavy losses, the Kremlin nonetheless possesses an array of capabilities with which it could pose problems to NATO should its risk calculations change. Russia's modernising navy, dense A2/AD bubbles, growing ability to produce strike weapons at an impressive scale, stubbornness in defence which its ground forces have demonstrated and, above all, its nuclear arsenal, ensure that the Kremlin will remain a serious threat for the foreseeable future.

At the same time, uncertainty over the future American military presence in Europe – long the ultimate backstop for deterrence – is yet to be clarified. Given the capabilities required to deter, or in extremis fight, the PRC, it is most feasible that US air and naval forces will be withdrawn from Europe, but that American land forces would be more likely to remain committed to European defence.

These factors, alongside the shape of current and near-future European military postures, give rise to a number of capability gaps. The most concerning gaps include SEAD/DEAD, IAMD, C-UAS, contested logistics, ASW, the nuclear balance and defence industrial base capacity. It is noteworthy that, given the expansion of European armies – as well as the fact Sweden and Finland have now joined NATO – the balance of power between Russia and European NATO on land is perhaps the most in NATO's favour it has been for some years.

Conversely, the balance of power in the air and at sea, long domains where NATO could assume supremacy in the post-Cold War era, are the worst they have been for some years. The key development moving



forward will be for European NATO countries to change their mindsets; to think how they can create postures which are more specialised than they currently are (although total specialisation is, of course, impractical).

The SDR provided a thorough overview of the actions which HM Government should take to reshape its defence capabilities back towards a peer threat focus. It was not until the publication of the NSS, with its strategic framework, that the means for assessing and deciding priorities from the SDR's 62 recommendations were provided. Through applying this strategic framework to the alliance-wide capability gaps and the SDR's recommendations, it is clear that Britain – should it want to maximise the impact its defence investment has on collective defence – should move towards a force which is both integrated *and* focused.

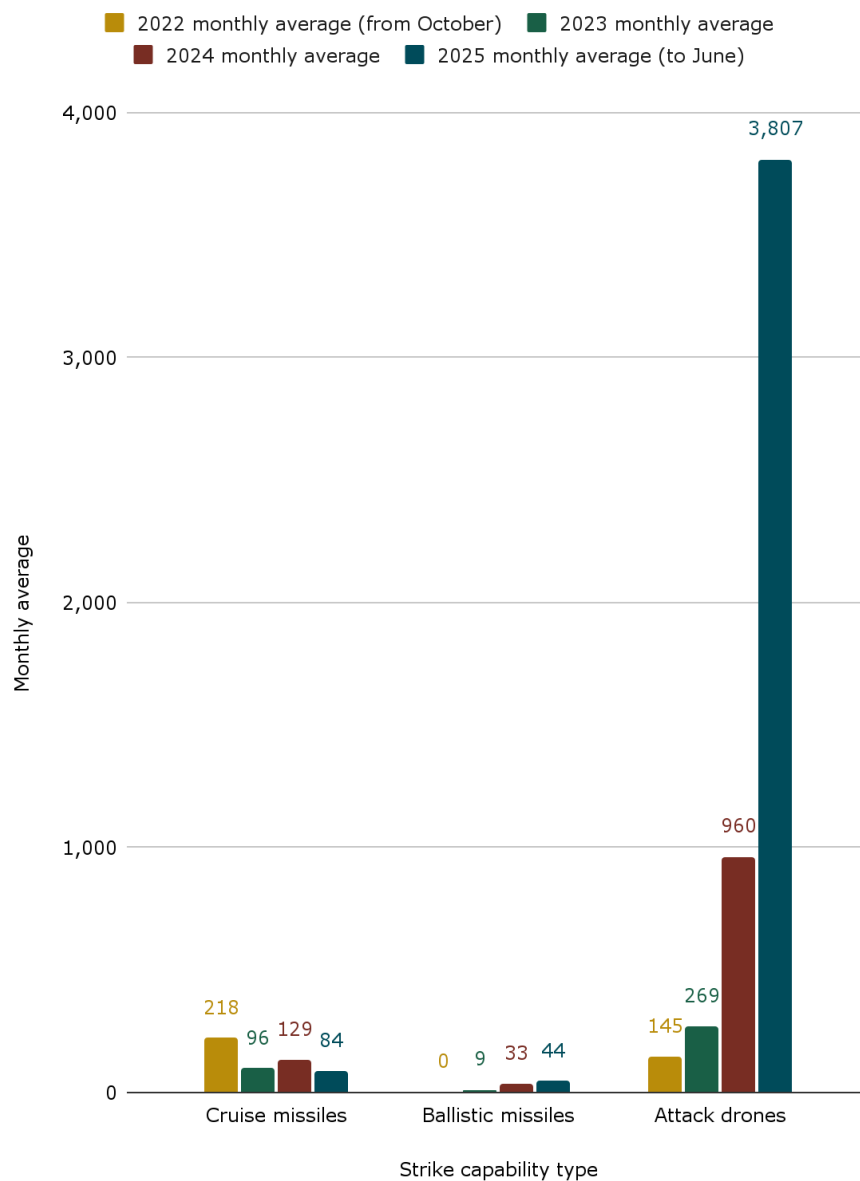
6.2 Final reflections

After too many years of foot dragging, investment in defence across European NATO is now on the rise. This is to be applauded, particularly the efforts of those allies who are leading the charge, such as Poland and the Baltic countries. However, a number of capability gaps remain. HM Government has made clear its intent to prioritise the security situation in the Euro-Atlantic – the most acute for Britain – which is the worst it has been for some years, and which only looks set to deteriorate. It is of paramount importance that deterrence in the Euro-Atlantic continues to hold. Maximising the impact of the new defence spending across NATO will be of growing importance to ensure it endures.



Annexes

Annex 1: Monthly average for each strike capability used in Russia's strike campaign against Ukraine, October 2022-June 2025⁷²



⁷² Petro Ivaniuk, 'Massive Missile Attacks on Ukraine', Kaggle, 12/10/2025, <https://www.kaggle.com/> (checked: 21/10/2025).



Annex 2: EU assessment of capability gaps

The White Paper for European Defence outlines the steps the EU believes it needs to take to support Ukraine, address critical capability shortfalls and bolster its defence industrial base.⁷³ It sets out seven priority areas:

1. Air and missile defences;
2. Artillery systems (including long-range fires);
3. Ammunition and missile stockpiles;
4. Drones and C-UAS systems;
5. Military mobility;
6. Artificial Intelligence (AI), quantum, cyber and EW technology; and
7. Strategic enablers.

This provides a useful – albeit incomplete – picture of the problems facing stretched budgets across European NATO. The main issue, understandably, is that the report focuses on EU countries. This leaves out the needs of European countries which are in NATO but not the EU – most notably the UK and Norway – which means the report has a distinct lack of emphasis on the threat posed by Russia's Northern Fleet.

⁷³ 'White Paper for European Defence – Readiness 2030', European External Action Service, 21/03/2025, <https://www.eeas.europa.eu/> (checked: 21/10/2025).



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