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How to Spend It: European defence for the age of mass precision

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Executive summary

Europe urgently needs to redefine its defence strategy in response to the United States' growing disengagement from its transatlantic allies. The suspension of US military assistance to Ukraine and calls for increased European self-reliance have forced policymakers to rapidly reassess how to sustain collective security. The European Union's ReArm EU plan seeks to mobilize 800 billion in national defence spending to meet these challenges, but investments must be made wisely to prepare for future warfare.

Modern warfare has entered into an era of **mass precision**, where forces can achieve the effects of massed firepower through distributed, AI-enabled, and highly accurate weapons systems. Ukraine's innovative use of drone swarms and precision strikes against Russian forces has demonstrated this shift. China and the US are also leveraging mass precision to reshape the battlefield, making traditional mass-based warfare increasingly obsolete. However, while armoured vehicles, fighter jets, and ships require new protections, they remain essential when integrated into networked, distributed operations.

To prepare for this new strategic reality, Europe must:

1. **Invest in mass precision and distributed operations** – Prioritise drone warfare, deep-strike capabilities, and networked operations. Accelerate investment in the European Long-Range Strike Approach (ELSA) programme to develop long-range cruise missiles.

2. **Build a European command-and-control (C2) system** – Reduce reliance on NATO's US-centric C2 infrastructure.

3. **Strengthen Europe's intelligence capabilities and decision support** – Expand European satellite and cyber capabilities and expand analytical capacities.

4. **Strengthen air and missile defence** – Accelerate the European Sky Shield Initiative (ESSI) and deploy cost-effective countermeasures such as more cost effective laser-based systems.

5. **Build a European military logistics system** – Ensure the ability to sustain forces and ensure rapid troop and equipment mobility within Europe.

6. **Train and exercise European forces at scale** – Conduct large-scale joint exercises to build readiness.

7. **Buy Ukrainian** – Integrate Ukrainian defence firms into EU supply chains.

8. **Buy European** – Reduce dependence on US arms while leveraging UK, Norwegian, Canadian and Turkish defence industries.

9. **Build a European nuclear umbrella** – France and the UK should explore extended deterrence options to protect all European allies in case of further US withdrawal.

10. **Build a European blue-water navy** – Strengthen and expand European naval capabilities to protect vital sea lanes in addition to supporting territorial defence.

Winning the next war, not the last one. Europe can no longer afford slow, bureaucratic and fragmented defence spending—it must accelerate, integrate and innovate in order to defend itself in the event that the United States is unable or unwilling to do so.

We don't just need bigger budgets—we need a better strategy. The future of warfare is mass precision and distributed operations, enabled by AI, and supported by capabilities that enable decision, cyber and information dominance. If Europe invests wisely, it can be a technologically advanced, resilient and autonomous military power while remaining a robust pillar of NATO's collective security.

The hour of Europe is now.

Introduction

"The dominant intellectual strategy people bring to bear on the future is denial."
- Peter Schwartz, Inevitable Surprises

So that's it, we're on our own now. A spiral of events since Donald Trump's inauguration as president of the United States has laid bare the stark choices Europe faces regarding its own defence and security. From US Vice President JD Vance's attack on European democracies at the Munich Security Conference to the ambush of Ukrainian President Volodymyr Zelensky in the Oval Office and suspension of assistance to the embattled country, the message is clear: Europe can no longer rely on America.

Last year, NATO identified a new minimum requirement for an additional 49 brigades in order to be prepared for the territorial defence of Europe. In material terms, this means adding 1,200 tanks, 2,700 infantry fighting vehicles, and over 900 large calibre artillery systems to the alliance's inventory. These requirements also include recruiting, training, and equipping an additional 300,000 troops.[1] Without Washington's guaranteed help, Europe must not only quickly meet these requirements but also provide key enablers, such as intelligence and long-range fires, that had been previously supplied by the US.[2]

As part of its newly announced ReArm EU plan, the EU aims to borrow €150 billion that it will then lend to member states for joint defence projects. The goal of this plan is to also mobilise an additional €650 billion in mostly national spending. Germany, Europe's biggest economy, is preparing to amend its constitution to permit nearly €1 trillion in defence and infrastructure spending in the next decade. Across Europe, governments are raising military budgets. But to meet the dual challenges of supporting Ukraine while re-arming themselves, Europeans must spend their money wisely in a coordinated way to produce key capabilities at scale and at speed. Speed is vital since an increasing number of European leaders and intelligence services are warning of a potential conflict with Russia within three to five years.[3]

As European policymakers deal with the shock of having to rethink their entire approach to defence and security without the guarantee of US support, it is important not only to meet these conventional force targets, but also to spend and plan smartly to be prepared for the next war, not the last one. We can't do so without a better understanding of modern warfare and deterrence.

The evolution of modern warfare

Much of the current defence spending debate revolves around whether to go on procuring legacy systems such as tanks and fighter planes, which some say are obsolete, or buy huge quantities of cheap AI-enabled drones and loitering munitions. Both are essential tools, but not the only ones suited to a new era of combat.

We are living in an **era of mass precision** in warfare — the ability to achieve the effects of massed forces or firepower through precise, coordinated, and often distributed means. Mass precision combines the overwhelming force or concentration of combat power at the decisive point leveraging technologies that enhance accuracy, efficiency, and lethality[4] – in other words, striking exponentially larger numbers of targets with precision, often simultaneously.

This evolution of the principle of mass in warfare signifies a fundamental transformation in how wars are conducted. These shifts have been driven by key thinkers, military innovations and technological advances.

The principle of mass has long been a core tenet of warfare, emphasising the concentration of forces at a decisive time and place to overwhelm an adversary. It evolved in several key stages.

During the period from 1803 to 1815, Napoleon Bonaparte institutionalised the idea of mass armies through conscription (levée en masse), making large-scale mobilisation possible. His use of corps-based manoeuvre warfare allowed rapid concentration of forces at critical points. Later, the American Civil War (1861–1865) and Franco-Prussian War (1870–1871) demonstrated how railroads and industrial logistics could enable mass mobilisation and sustain an armed force built on the mass model.

The First World War (1914-1919) saw mass armies engage in attrition warfare, where sheer numbers dictated success. The Second World War (1939-1945) built on this with heavy mechanised forces and combined arms operations, integrating massed forces with manoeuvre (e.g., Blitzkrieg).

During the Cold War, western and Soviet military doctrines emphasised overwhelming numerical superiority and firepower, leading to massed formations of tanks, artillery and airpower. During the same time, nuclear deterrence shifted the emphasis from pure mass to strategic mutual assured destruction (MAD).

The dawn of precision warfare

The period from the 1970s to the 1990s marked a shift away from massed firepower to precision-guided munitions (PGMs) and networked warfare. During this time, military theorists like John Boyd and Andrew Marshall influenced US military strategy toward speed, precision and agility.

Precision-guided weapons were first used in Vietnam but by the time of the 1991 Gulf War they had reduced reliance on massed forces by allowing small numbers of high-tech systems to achieve decisive effects. In Iraq, the US demonstrated how these precision strike capabilities, particularly with use of stealth aircraft and GPS-guided bombs, could enable a swift victory. This marked the dawn of precision warfare, where massed formations became vulnerable to precision-targeted destruction. But precision warfare was extremely expensive, and few countries could afford to adopt it.

The 2001-2020 Global War on Terror saw further development in drone warfare, network-centric operations, and special operations forces (SOF) using precision strikes. AI-assisted targeting and cyber warfare also further reduced the reliance on mass in warfare.

The era of mass precision

Today, warfare has evolved toward mass precision, where military forces can deploy highly accurate fires by networked weapons at scale.

This development has been enabled by AI and drone swarms such as those used by Azerbaijan against Armenia in the 2020 Nagorno-Karabakh conflict, perhaps the first war of mass precision.

Ukraine has leveraged mass precision to counter Russia's full-scale invasion of its territory, which began in February 2022. The Ukrainians' innovative advances in drone technology in defensive warfare have placed them at the leading edge globally, enabling them not only to hold off a much larger force but also to conduct deep strikes inside Russia. These technologies have enabled Ukraine to decimate the Russian Navy in the Black Sea, sinking over 26 Russian ships without a navy of its own.[5]

Today, China and the US are both developing autonomous weapons that can coordinate attacks at a mass scale. Scenarios depicting a potential invasion of Taiwan by China indicate that Beijing is pursuing a mass precision approach. In turn, numerous recent decisions by the Pentagon, such as the Replicator Initiative, show that US plans to defend Taiwan also depend on harnessing mass precision.[6]

The development of hypersonic glide vehicles (HGVs) by Russia, China and the US makes even high-speed, mobile targets more vulnerable. As a result, precision is no longer limited to small engagements—it can now be delivered at strategic scale.[7]

Furthermore, AI-enabled decision-making is allowing mass precision at unprecedented speed. This dynamic is not limited to kinetic warfare. Mass precision is also possible in cyber, electronic and information warfare, enabling the targeting and disruption of enemy military and civilian systems, communications and energy networks, and populations.

Precision is no longer limited to small engagements—it can now be delivered at strategic scale.

A major driver of the shift from precision warfare to mass precision is the much lower cost of delivering precision fires. Precision had been the exclusive realm of wealthy countries with vast budgets and sufficient scientific and industrial production resources to manufacture precision-guided missiles and bombs. Today, the extremely low cost of drones, sensors and networking systems is flattening the pyramid, enabling smaller powers to defeat much larger ones, or otherwise deter them from considering military aggression in the first place.

The recent success of the Hay'at Tahrir al-Sham (HTS) rebels against Bashir al-Assad's forces in Syria is a prime example. Their use of cheap drones to attrit and demoralise government forces is one of the main reasons why they were able to advance so swiftly toward Damascus and secure victory.[8]

So, where does mass precision leave legacy systems like tanks, fighter planes and ships? Are they, as some say, obsolete?

The tank is dead, long live the tank!

Tanks have been essential in land warfare since their introduction in 1916 by the British Army at the Battle of Flers-Courcelette in France. They are especially valued for their mobility, firepower and armoured protection. Tanks play a crucial role in combined arms operations, supporting infantry and artillery in both urban and open-field defensive and offensive battles.

During the 1973 Yom Kippur War at the Battle of the Chinese Farm, an Israeli tank brigade suffered devastating losses to a new weapon in Egyptian hands, the Soviet-made AT-3 anti-tank guided missile. These cheap and portable missiles caused the Israeli 14th Armoured Brigade to lose 40 percent of their tanks in a single day – a staggering loss rate – before sufficient infantry forces arrived to support the brigade.[9] As news of this outcome spread, observers and military thinkers around the world began to declare the tank obsolete. Eventually, armies around the world adapted combined arms tactics and countermeasures to keep tanks not only relevant, but vital.

Since the 2022 Russian full-scale invasion of Ukraine, numerous commentators have argued once again that tanks are obsolete. Videos from Ukraine have shown the effectiveness of anti-tank weapons such as the Swedish NLAW and the US Javelin, which have destroyed tanks in great numbers. But to the trained eye, the Russian army's failure to conduct combined arms operations in which infantry, armoured and artillery forces advance as a team is the main reason for these losses. In short, just because the Russians employed tanks and armoured vehicles poorly or didn't protect them well does not mean they are no longer relevant.

Other observers contend that tanks and armoured personnel carriers (APCs) have become too vulnerable, pointing to Ukraine's world-leading drone tactics and technologies, or the effectiveness of drones against tanks in the 2020 Nagorno-Karabakh war or the 2024 campaign against Syrian regime forces by HTS.

Yet as the war in Ukraine has ground on, both sides continue to use tanks and APCs, albeit with better protection from drones and loitering munitions.

Countermeasures range from electromagnetic jamming against enemy drones' navigation and communications systems to improved air defence cover. Since massing large formations has proven to be very costly against mass precision fires, tactics are evolving toward more dispersed and networked approaches to land warfare.

Within NATO countries, counter-unmanned air systems (C-UAS) have been in development for years and some have already been donated to Ukraine to protect its land forces. The fact that Ukraine continues to request tanks and APCs from the West gives a strong indication that heavy metal is still relevant, especially when it comes to recapturing territory.

This same lesson can be applied to navy vessels and other military platforms. Russia's Moskva helicopter carrier was sunk by Ukrainian anti-ship missiles in April 2022 because it lacked protection from such systems, a lesson most of the world had already learned from the 1982 Falklands War. The same can be said for the numerous vessels of the Black Sea fleet destroyed by Ukrainian maritime surface drones.

Mechanised land forces are still vital in the age of mass precision since they provide the ability to retake lost territory and rapidly respond to incursions and breakthroughs. Drones and aircraft are also critically important to responding to breakthroughs, but they can't retake lost territory. In the end, we need both tanks and drones.

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New era, new requirements

In this new era of mass precision, three broad requirements have emerged: the ability to deliver mass precision; the ability to deliver mobile protected firepower; and the ability to defend against the enemy's mass precision capabilities.

Moreover, these capabilities **must be delivered without breaking the bank**. This is why modern air forces are planning not only for networked drone swarms but for formations consisting of human-piloted aircraft flying alongside AI-driven fighter drones. This approach enables a country to build a more potent air force at a lower cost.

On the air defence side, shooting a $3 million Patriot missile at a $50,000 Iranian Shahed drone, as seen in Ukraine, is clearly not sustainable.

While the ability to deliver mass precision has gotten much cheaper, the ability to protect from it has not. New electromagnetic and directed energy anti-drone systems are entering the market, lowering the cost and increasing the effectiveness of protection from drones. New capabilities such as Hellenic Aerospace Industry's Centaur C-UAS system have already been successfully tested in combat against the Houthis in the Red Sea.[10]

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Nonetheless, an affordable defence against hypersonic missiles, cruise missiles and glide bombs remains elusive. One possible solution is the UK's DragonFire line-of-sight laser weapon system which the UK Ministry of Defence says can shoot down missiles and aircraft for just £10 (€12) per shot, a tiny fraction of what air defence systems cost today. To deliver protection from mass precision, Europe's approach will need to rely on such systems which shift the cost-benefit balance back in favour of the defender.[11]

Another emerging requirement for the age of mass precision is the ability to disperse and network forces and systems to deliver mass precision, mobile protected firepower, and protection from mass precision.

This has led to the concept of **distributed operations** in which combat units, sensors and weapons systems are spread across a wide operational area rather than concentrated in a single location. This approach, which relies on AI-enabled decision-making, enhances their survivability and flexibility, making them harder to detect, target and neutralise. Europe already has the know-how to produce systems designed for this approach. One prime example of a new European system suited for mass precision in distributed operations is the KNDS RCH 155 artillery system.

By dispersing forces while maintaining coordination through networked communication, autonomous systems and real-time data sharing, militaries can sustain combat effectiveness, adapt quickly to evolving threats, and maximise their survivability in modern combat.[12] This requires adequate logistics and communications support to enable distributed operations at scale.

An additional requirement of mass precision warfare is the **rapid adaptation** of forces, equipment and tactics. In this era, rapid means days and weeks, not months or years.

Russian forces are adapting their countermeasures to Ukrainian drone tactics every month, leading Ukrainian forces to shorten their adaptation cycle to just a few weeks, and sometimes days. According to some observers on the ground in Ukraine, drone designers can be working on as many as 40 adaptations in a single month. The numerous small companies supplying the Ukrainian army with drone systems receive and respond to these changing requirements in just a few weeks while the army updates its drone software daily.[13]

These accelerated levels of rapid adaptation can be a challenge for governments and military institutions, which are notoriously slow. This must change fast because the ability to rapidly adapt has emerged as a key element of military deterrence.

Building European defence for the age of mass precision

So, how prepared is Europe for this new age? Can it execute and sustain mass precision warfare at scale to deter possible Russian aggression? Numerous new defence spending initiatives at the EU and member state level are emerging, but how can we be sure this money will be spent in a way that maximises deterrence?

It's clear that Europe's defence spending should be strategically realigned to reflect the shift from traditional mass-based warfare to mass precision and distributed operations. Given the realities of modern and future conflicts—marked by AI-driven targeting, drone swarms, long-range precision fires, and cyber warfare—Europe must spend smarter rather than just spending more. Here's how:

1. Invest in mass precision and distributed operations

Europe's large inventories of tanks, aircraft and traditional naval vessels should be modernised to work in highly networked, precision-enabled environments. If a legacy system cannot be adequately protected and networked with other systems, it won't be effective, and nor will it survive.

This protection also includes integrating electromagnetic hardening and cyber resilience into all weapons systems—every drone, tank, aircraft and warship must be hardened against jamming, cyberattacks and navigational interference. Ideally this means accelerating the provision of electromagnetically protected and quantum-resistant communications and navigation systems to ensure they can function on the modern battlefield.[14]

Any new platforms in development should only be continued if they can deliver mass precision fires, be rapidly adapted, and be protected from mass precision fires. This means building more modularity into new weapons platforms like tanks, ships and aircraft during the design phase. A few good examples of this are Rheinmetall's KF51 Panther tank, Fincantieri's FCx30 modular frigate, and the PESCO Modular and Multirole Patrol Corvette (MMPC) Project.

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Europe must also prioritise drone and loitering munitions development to deter and counter massed forces, especially considering lessons from Nagorno-Karabakh and Ukraine. To get a better idea of how many drones and loitering munitions Europe will need to field, consider that Ukraine produces two million per year, while China has just placed an order for one million loitering munitions alone.[15] [16] By contrast, current European orders for drones and loitering munitions are counted in hundreds.

At the same time, investments must be accelerated to advance Europe's development of precision deep-strike missile capabilities. Based on lessons from Ukraine, France, Germany, Italy and Poland signed an agreement in July 2024 to create the European Long-Range Strike Approach (ELSA), with the aim of developing ground-launched cruise missiles with a range of over 2,000 kilometers as an alternative to the US Tomahawk missile.[17] Sweden, Netherlands and the UK have also joined ELSA since its inception.

The earliest design candidate to emerge is MBDA France's Land Cruise Missile (LCM), an adapted version of its sea-launched Missile de Croisière Naval/Naval Cruise Missile, with a current range of over 1,000 kilometers. By comparison, European air-launched cruise missiles such as the UK's Storm Shadow, Germany's Taurus, and France's Scalp missiles only have ranges of circa 500 kilometers.[18]

2. Build a European command and control system

Even if Europe makes flawless decisions in buying all the right equipment and training its crews, it risks producing a collection of splintered formations unless it's all networked at scale under a European command and control (C2) system.

The current European Command and Control System (ECCS), and more broadly, the EU's C2 architecture, is not yet capable of independently commanding large military formations at the corps level or higher in a conventional war scenario. Currently, the EU would need to rely on NATO's C2 systems to conduct a defence of Europe. However, recent actions by Washington to suspend intelligence and materiel support for Ukraine have raised uncertainty about whether Europe can count on being able to use NATO's C2 system in the future.

The EU is exploring ways to integrate existing national command structures into a unified ECCS-style system. In the meantime, some EU member states have their own national and corps-level C2 systems, such as Germany's Führungsinformationssystem (FüInfoSys) and France's Système d'Information et de Commandement des Forces (SICF). Systems like these could be likely candidates for use in near-term EU-led operations but are not yet part of an integrated EU-wide system.

The EU is exploring ways to integrate existing national command structures into a unified ECCS-style system.

3. Strengthen Europe's intelligence capabilities and decision support

In the absence of dependable US intelligence support, Europe will need to establish a more robust and independent intelligence system spanning space, cyber and traditional ISR (Intelligence, Surveillance and Reconnaissance) domains. In real terms, this means Europe will need an expanded network of satellites for early warning, battlefield surveillance and signals intelligence (SIGINT). France's CSO-3 reconnaissance satellite and the UK's Oberon satellite programmes could form the building blocks of these new enhanced space-based intelligence capabilities. Sweden's new GNA-3 satellite program can also contribute to these efforts. This presupposes the willingness of European space powers to mutualise satellite intelligence, which has long been regarded as among the most closely held of national secrets. Europe will also require more investments in geospatial intelligence (GEOINT) and hyperspectral imaging satellites to supplement existing capabilities within the Copernicus programme.

Strengthening electronic warfare (EW) capabilities, autonomous surveillance drones and underwater ISR systems would help monitor adversarial activities across land, sea and air. Improved human intelligence (HUMINT) networks, cyber intelligence operations and AI-driven predictive analytics and decision-making will be necessary to match the speed of mass precision warfare.

Europe will also require more investments in geospatial intelligence and hyperspectral imaging satellites to supplement existing capabilities within the Copernicus programme.

In addition, Europe will need to integrate quantum sensing to enhance situational awareness and make European forces more resilient to stealth and electronic warfare.

4. Strengthen air and missile defence

Given Russia's use of long-range strikes and drone swarms in Ukraine, Europe must close its gaps in air and missile defence. This includes not only buying workable current solutions but also accelerating the European Sky Shield Initiative (ESSI), with the ambition to develop in the medium term a European equivalent to Israel's Iron Dome and European substitutes for US Patriot missiles.

To do so, Europe will need to further invest in high-energy lasers and electronic warfare systems to counter drones and hypersonic threats. These include systems such as the UK's Dragonfire laser system and the solutions that emerge from the European Defence Agency's PILUM (Projectiles for Increased Long-range Effects Using Electromagnetic Railgun) programme.

5. Build a European military logistics system

NATO relies heavily on the US for logistics, including within Europe. Without a reliable logistics backbone, European forces risk operational delays, fragmented supply chains and inadequate wartime sustainment.

To sustain its forces in the event NATO is not involved, Europe needs its own theatre-level military logistics system. Europe can enhance its military logistics by integrating and expanding upon NATO's existing logistics framework, which already provides strategic coordination, interoperability and infrastructure. NATO's logistics system, particularly through Allied Command Operations (ACO) and the NATO Support and Procurement Agency (NSPA), offers an established structure for supply chain management, rapid deployment, and sustainment of forces.

In the near term, Europe can build its own military logistics system by leveraging existing EU member state capabilities through enhanced coordination, infrastructure development and strategic investments. Rather than creating a system from scratch, European nations can integrate and expand their current logistics networks, pooling resources to create a more efficient and responsive system.

This approach requires harmonising national logistics planning, standardising equipment and procedures, and improving cross-border military mobility within the EU. Initiatives like the EU Military Mobility project, which aims to facilitate the rapid movement of troops and equipment across Europe by addressing regulatory and infrastructure bottlenecks, can provide a strong foundation for such efforts.

To achieve this, EU member states can strengthen and network regional logistics hubs by upgrading key transport corridors, expanding fuel and ammunition stockpiles, and increasing logistics interoperability between member states. Countries such as Germany, France, Romania and Poland can take leading roles in coordinating logistics efforts, ensuring that transport networks, intra-theatre airlift capabilities and supply chains are robust and resilient.

6. Train and exercise European forces at scale

A credible defence of NATO against a possible Russian invasion would require multiple army corps-sized formations, significant air and naval power, logistics, and supporting enablers.[19] Without the United States, the gaps to be filled are not only in intelligence and other enablers, but also in leadership and staff experience.

Current European military leaders and staff have no experience of leading large manoeuvre formations in combat at the brigade level or higher. The last two European generals (aside from Ukrainians) to lead a division in heavy combat were General Rupert Smith (UK) and General Bernard Janvier (France) in the 1991 Gulf War.

To overcome this gap, European forces will need to train and exercise at scale, learning key lessons in corps-level planning and logistics, deconflicting fires at scale, and air-ground coordination. Exercise and training mentorship from nations with recent large-scale combat experience, notably Ukraine, will also enable Europe to close this gap much faster. Doing so will help to provide a credible European deterrence by ensuring that its forces can rapidly deploy and sustain operations at scale.

7. Buy Ukrainian

Europe can build on the lessons learned by Ukraine and support its war effort by supplying as well as buying Ukrainian weapons. This would lower their unit costs while further integrating them into Europe's supply chains, thereby ensuring a steady supply of critical components. It could take the form of partnerships

between Ukraine's vast array of small to medium-sized enterprise (SME) defence manufacturers and EU SME counterparts, or by forming larger consortiums with Ukrainian companies and their supply chains, as well as other partners within the EU.

Buying Ukrainian not only bolsters Kyiv's economy but also gives Europe access to cutting edge technological advances for a fraction of their cost within the EU, enabling the Union to scale up its defences much faster. Working with Ukraine in this way can also help to transform Europe's defence industry into the rapid adaptation model that Kyiv has successfully developed. This can help Europe to build a more rapid procurement cycle – an important goal, given that in modern warfare, a slow defence bureaucracy can cost lives and territory.

Most importantly, this kind of partnership would better enable Ukraine to defend itself, thereby reducing the risk to the rest of Europe.

8. Buy European

Shocking events at the White House in recent weeks have prompted defence planners around Europe to rethink their reliance on US weapons systems. The leaders of France and some other EU member states have long decried Europe's over-reliance on the US for advanced systems such as F-35 fighters and Patriot missiles. The temporary US suspension of arms supplies and intelligence feeds to Ukraine, which has inhibited Kyiv's use of US-supplied weapons, has raised concerns about whether an unfriendly US administration could constrain European allies' use of systems that rely on US software, maintenance, spare parts and data. A much stronger European defence technological and industrial base (EDTIB) is needed – and fast.

A much stronger European defence technological and industrial base is needed – and fast.

Events around Ukraine have also highlighted the importance of the UK as a key player in a whole-of-Europe defence and diplomatic approach that meets the urgency of the moment. The UK is one of Europe's two nuclear powers with a highly capable military and a global strategic culture. It also has cutting edge defence R&D. The UK defence sector should thus be treated as part of the EDTIB, notwithstanding Brexit.

The same applies to Norway, which is a strategically located arms and ammunition producer with energy and investment funds, and to Turkey, which has a vibrant defence industry, large and capable armed forces, and a strategic location vital to the defence of Europe. They should be eligible to participate on a pay-to-play basis in all EU defence programmes. Europe should also find ways to work more closely with Canada's high-tech arms industry.

European nations should streamline defence procurement and prioritise "off-the-shelf" solutions for rapid fielding. Europe can also increase its capacity for mass precision by finding innovative ways to combine existing technologies and systems. The US Rapid Dragon system, which turns transport aircraft into a cruise missile launch platform, is one example.

Europe should remain open to buying US defence goods, provided member states are sure they can't be remotely disabled or denied in a crisis.

9. Build a European nuclear umbrella

In the event the United States is no longer willing to offer its nuclear umbrella to European NATO allies, France and the UK should hold consultations with other leading European powers on possibilities to extend their nuclear deterrents to provide a credible shield for the whole of Europe.

The UK and France would retain sovereign control over their small arsenals, which are mostly submarine-based, and on decisions to use them. However, some form of "nuclear sharing" for European allies might involve either forward deployment of French air-launched cruise missiles or joint air patrols in which non-nuclear European allies provide air cover for French strategic bombers. If European partners request it, France and the UK should be willing to consider an augmentation of their nuclear forces to incorporate tactical as well as strategic weapons to counter existing Russian intermediate-range nuclear forces.

10. Build a European blue-water navy

In the longer term, the US trend of disengagement could lead to fewer US navy patrols in the world's sea lanes, leaving Europe's vital interests less safe.

Since the adoption of the EU's new maritime security strategy in 2023, Europe has been taking on more responsibilities in the Gulf of Guinea and Indo-Pacific region to protect its vital interests at sea. It is unclear whether Europe has the capacity to conduct and sustain more extensive maritime security activities in these distant regions while increasing its capacity to defend European territory. At the same time, France and the UK have been coordinating their carrier deployments, which highlights that the UK remains vital to any plans for European maritime security.[20]

As Europe plans and defines new maritime force requirements for territorial defence, it must also factor in the potential responsibility of patrolling even more vital sea lanes which are critical to its prosperity and economic security.

Winning the next war, not the last one

Europe can no longer afford slow, bureaucratic and fragmented defence spending—it must accelerate, integrate and innovate in order to defend itself in the event that the United States is unable or unwilling to do so.

We don't just need bigger budgets—we need a better strategy. The future of warfare is mass precision and distributed operations, supported by AI and by capabilities that enable decision, cyber and information dominance. If Europe invests wisely, it can be a technologically advanced, resilient and autonomous military power while remaining a robust pillar of NATO's collective security.

The hour of Europe is now.

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