

THE TURNING TIDE?

A EUROPEAN AGENDA FOR THE WASHINGTON SUMMIT

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TABLE OF CONTENTS

INTRODUCTION	5
THIS IS NOT A DRILL: EUROPE'S DEFENCE IN PERIL	6
FOUR-MINUTE WARNING: THE IMPORTANCE OF THE WASHINGTON SUMMIT	9
CONCLUSION – WASHINGTON AND BEYOND: THE EUROPEAN ROLE	12

Abstract

War has raged in Ukraine for close to two years now, and Russia's illegal war continues to pose a strategic dilemma for NATO and the European Union. Although allies are producing more ammunition and equipment, there is a risk that Europeans do too little, too late. There may only be a slender opening of opportunity for states in the Euro-Atlantic region to address the profound challenges facing Ukraine and Europe. The 2024 NATO Washington Summit is an opportunity to address these fundamental issues. This In-Depth Paper looks towards the Summit. While it will not be able to deal decisively with all of the challenges facing NATO today, we outline some of the areas that the alliance will need to tackle over the coming months and years. In particular, Europeans need to rapidly and substantially contribute to the enablement of deterrence and defence.

Introduction

War has raged in Ukraine for close to two years now, and Russia's illegal war continues to pose a strategic dilemma for NATO and the European Union (EU). Ukraine has valiantly halted a full-scale seizure by Moscow, but today there are questions about the commitment of Western powers. NATO allies are ramping up ammunition production and they have committed to the training of Ukraine's armed forces, plus they have committed to supply sophisticated military capabilities such as F-16 aircraft fighters to Kyiv. Thus far, the unity of NATO and the EU have been the foundation on which this political support has been built. Yet, there are signs that the diplomatic front and domestic support are under pressure. We currently see a United States (US) Congress divided over whether it should continue to fund the supply of military equipment to Ukraine. The forthcoming US presidential election in 2024 is also seen as a moment of a potentially damaging outcome for Ukraine, with elements of the political sphere calling for Washington to reduce or completely cut aid to Kyiv.

Elections across Europe in 2024 also create uncertainty. Countries such as Hungary are already suing for a settlement with Russia. There are also questions about whether Europe's defence-industrial base, left seriously unattended for so many decades by a dramatic contraction of demand, is up to the challenge of supplying Europe and Ukraine with the ammunition and equipment it requires. Yet, there is a potentially bigger challenge for Europe looming on the horizon. A future US president may decide to drastically reduce America's support for Ukraine, while also challenging European allies to look after their own defence in more substantive ways. This is a doomsday scenario for European allies: being called upon to support Ukraine and its own defence, while the US focuses on core national security interests in the Indo-Pacific. While Europeans have long been warned that such a time might come, the possible ramifications for how Europeans continue (or not) to support Ukraine are profound.

There is, then, a real risk that Europeans do too little, too late. There may only be a slender opening of opportunity for states in the Euro-Atlantic region to address the profound challenges facing Ukraine and Europe. There is no burden in European security that cannot be lightened by additional defence investment and political bravery. Yet, even with more money and bravery there is a lack of time. In the short-term, factories across the Euro-Atlantic need to be placed on a war footing and this requires sustained investment and demand from governments. Over the medium- to longer-term, European states need to drastically develop and procure the military capabilities needed to defend Europe. Yet, the order of magnitude is not for the faint-hearted: Germany's €100 billion "Special Fund" has itself so far proved inadequate to completely meet the needs of the German armed forces.

The 2024 NATO Washington Summit is an opportunity to address these fundamental issues¹. At stake is European security and, by extension, the United States' ability to successfully address China. There is a risk, however, that the Washington Summit will be a nostalgic affair. While there is clear merit in celebrating 75 years of the NATO alliance, this should not lead to any political complacency in dealing with the weight of the challenges at hand. How can Europeans seriously take up more of the defence burden in NATO? How to re-ignite and sustain defence manufacturing across the Euro-Atlantic region? How to rapidly meet the ammunition and equipment needs of European armies and of Ukraine? These are just some of the questions facing leaders in Washington in 2024.

¹ Bergmann, M., Monaghan, S. and Droin, M. "Why the Washington Summit Should Focus on Europe", CSIS Report, 20 December 2023. See: <https://www.csis.org/analysis/why-washington-summit-should-focus-europe>.

This In-Depth Paper looks towards the forthcoming NATO Washington Summit. While the Summit will not be able to deal decisively with all of the challenges facing NATO today, this In-Depth Paper outlines some of the areas that the alliance will need to tackle over the coming months and years. In particular, this In-Depth Paper argues that Europeans need to rapidly and substantially contribute to “enablement”, which directly relates to the equipment, logistics and enablers needed to more coherently and credibly defend Europe and deter threats. While other studies have usefully detailed the role Europeans can play in deterrence and defence², the focus here is on what Europeans can – and should – do with regard to defence capabilities, equipment and enablers, as well as the defence-industrial base needed for these ends.

This In-Depth Paper is the result of two conferences held in Brussels (June 2023) and Washington (October 2023) that focused on transatlantic defence. The two events were the result of a project co-organised by the Centre for Security, Diplomacy and Strategy (CSDS) and the Center for Strategic and International Studies (CSIS) entitled “Transatlantic Defence in an Era of Strategic Competition” (the “TIDE” Project). The TIDE project was directly sponsored by the North Atlantic Treaty Organisation’s (NATO) Public Diplomacy Division (PDD). The author would like to thank all of the experts that shared their views during the TIDE project events in Brussels and Washington. The author specifically thanks Alexander Mattelaer and Luis Simón for comments made on an earlier draft of the paper. Needless to say, this In-Depth Paper reflects the authors’ own views and it is not an endorsement of the views of CSDS, CSIS or NATO.

This is Not a Drill: Europe’s Defence in Peril

Ever since Russia’s war on Ukraine in February 2022, Europe has been thrown into a race to produce ammunition and defence equipment, as well as to ensure the vitality of the European defence-industrial base. The war resulted in Europe choosing to support Ukraine by supplying the country with weapons systems and ammunition. Europe’s militaries scoured their inventories for stocks to send Kyiv and EU member states have provided some \$29 billion in military assistance to Ukraine since war broke out³. The politics of delivering certain weapons systems to Ukraine has led to considerable delays in terms of military training and deployment. Europe has moved from delivering helmets and bullets to agreeing to provide Kyiv with F-16 fighter jets, Leopard tanks and sophisticated air defence systems such as at the SAMP/T, IRIS-T SLM and NASAMS systems⁴. The hand-wringing amongst allies, for example, has meant that Ukraine is still waiting for the full deployment of F-16 fighter aircraft.

NATO now finds itself in a challenging predicament. Now that allies have raised the bar on the types of military systems they are willing to hand over to Ukraine, even if more is always required, they need to follow through with sustained deliveries to ensure that Russia cannot achieve superiority in the field. This is easier said than done. Notwithstanding the difficulties of replacing any potentially lost Leopard tanks and F-16 fighter jets in Ukraine, the weight of expectations placed on defence industries across the Euro-Atlantic has grown. The ability

2 See, for example, Simón, L., Fiott, D. and Manea, O., “Two Fronts, One Goal: Euro-Atlantic Security in the Indo-Pacific Age”, *The Marathon Initiative*, August 2023. See: <https://themarathoninitiative.org/wp-content/uploads/2023/08/Two-Fronts-One-Goal-website-publication-v.2.pdf>.

3 European External Action Service, “EU Assistance to Ukraine (in U.S. Dollars)”, 17 November 2023. See: https://www.eeas.europa.eu/delegations/united-states-america/eu-assistance-ukraine-us-dollars_en?s=253.

4 Di Mizio, G., “Grounded in Reality: Ukraine’s Air Defence and the Implications for Europe”, *IISS Military Balance Blog*, 7 July 2023. See: <https://www.iiss.org/en/online-analysis/military-balance/2023/07/grounded-in-reality-ukraines-air-defence-and-the-implications-for-europe/>.

to produce ammunition for Ukraine has become a central element of the country's ability to halt Russia's advances. Yet, the ability to do so is drastically curtailed by the state of Europe's manufacturing capacity and the lack of standardisation of munitions. As one paper puts it, while 'the Ukrainian army uses around 25,000 – 40,000 pieces of' 155-mm shells each week, the EU is estimated to be able to produce only 230,000 pieces of ammunition each year⁵.

However, beyond ammunition production there is a need to reflect on how Ukraine can be supported to withstand an amplification of Russian military power. Not only has the Kremlin recently announced that it would increase its military budget in 2024 by about 70%⁶, but it is true that Russia is not using the full weight of its military force in Ukraine. Evidence suggests that Russia still has considerable air assets in its inventory, and that it has been rather hesitant to use fixed-wing and rotary aircraft against Ukraine⁷. It appears as though Russia still maintains considerable electronic warfare capabilities and it can draw on stocks of long-range missiles⁸, as well as its nuclear arsenal. Having such capabilities in reserve allows Russia to hedge and play for time, unless, that is, Ukraine is provided with the capabilities to undermine Russia's strategy over the long-term.⁹ Such capabilities not only include the need for air defence systems and long-range missiles, but also an ability to penetrate the extensive minefields and network of trenches put in place by Russia¹⁰.

We must also not neglect the nuclear dimension. Russia continues to be a nuclear risk. Moscow has been using irresponsible nuclear signalling and tactics in conjunction with its illegal war on Ukraine. The Kremlin has decided to use nuclear signalling in a hope to alter and/or limit NATO's courses of action and defence. Nuclear signalling is a deeply troubling aspect of Russia's strategy against Ukraine. In November 2023, the secretary of Russia's Security Council remarked how the Federation's nuclear know-how and its ability to deliver nuclear weapons surpassed all other nations¹¹. Already back in July 2023, a former Russian President directly linked potential nuclear use in case Ukraine's counter-offensive succeeds: 'there simply wouldn't be any other solution', remarked Dmitri Medvedev¹². As analysis has shown, Russian nuclear rhetoric has emerged partly on the back of its conventional force weakness and the Kremlin has sought to use nuclear

5 Maslanka, L., "ASAP: EU Support for Ammunition Production in Member States", *OSW Commentary*, 6 September 2023. See: <https://www.osw.waw.pl/en/publikacje/osw-commentary/2023-09-06/asap-eu-support-ammunition-production-member-states>.

6 Vitkine, B., "Russia plans to increase its military budget by 70% in 2024", *Le Monde*, 26 September 2023. See: https://www.lemonde.fr/en/international/article/2023/09/26/russia-plans-to-increase-its-military-budget-by-70-in-2024_6139811_4.html#:~:text=The%20classified%20government%20spending%2C%20which,dead%20soldiers%2C%20could%20also%20double..

7 Gordon, C., "Russian Air Force 'Has Lot of Capability Left' One Year On From Ukraine Invasion", *Air and Space Forces Magazine*, 15 February 2023. See: <https://www.airandspaceforces.com/russian-air-force-lot-of-capability-left-ukraine-invasion/>.

8 Williams, I., "Russia Isn't Going to Run Out of Missiles", *CSIS Commentary*, 28 June 2023. See: <https://www.csis.org/analysis/russia-isnt-going-run-out-missiles>.

9 Fix, L. and Kimmage, M., "A Containment Strategy for Ukraine: How the West Can Help Kyiv Endure a Long War", *Foreign Affairs*, 28 November 2023. See: <https://www.foreignaffairs.com/united-states/containment-strategy-ukraine>.

10 Jones, S.G., McCabe, R. and Palmer, A., "Seizing the Initiative in Ukraine: Waging War in a Defense Dominant World", *CSIS Brief*, 12 October 2023. See: <https://www.csis.org/analysis/seizing-initiative-ukraine-waging-war-defense-dominant-world>.

11 Mordowanec, N., "Russian Official Issues Nuclear Weapons Warning After Historic Achievement", *Newsweek*, 6 November 2023. See: <https://www.newsweek.com/russian-official-issues-nuclear-weapons-warning-after-historic-achievement-1841145>.

12 Pennington, J., Stambaugh, A. and Lendon, B., "Medvedev says Russia could use nuclear weapon if Ukraine's fightback succeeds in latest threat", *CNN*, 31 July 2023. See: <https://edition.cnn.com/2023/07/31/europe/medvedev-russia-nuclear-weapons-intl-hnk/index.html>.

signalling to deter direct foreign military intervention in Ukraine, delay or dissuade foreign aid and intimidate the government in Kyiv¹³.

The Russian nuclear threat has also increased since August 2023, when it was announced that Belarus would house Russian nuclear weapons. Not only did this event give rise to additional nuclear signalling by Belarussian leader, Aleksandr Lukashenko, who claimed that his country would not hesitate to deploy nuclear weapons¹⁴, but it also moved Russian tactical nuclear weapons closer to NATO territory. This behaviour should be seen in a wider context where Russia is abandoning all arms and nuclear weapons controls. For example, on 2 November 2023 Russia revoked its ratification of the Comprehensive Nuclear-Test-Ban Treaty (CTBT). In February 2023, President Putin announced that Russia would suspend its participation in the Strategic Arms Reduction Treaty (“New START Treaty”)¹⁵. In June 2023, Putin further eroded strategic stability by withdrawing Russia from the Conventional Armed Forces in Europe (CFE) Treaty. Finally, by late 2021, Russia had already left the Open Skies Treaty. This significant erosion of nuclear arms control is having a devastating effect on strategic reassurance efforts.

Russia’s aim of undermining arms control treaties comes on the back of its desire to modernise its nuclear arsenal and strategic missile and delivery systems, as well as ensuring fewer restrictions are placed on its development of conventional forces. As part of its nuclear signalling, President Putin announced in early October 2023 that Russian forces had successfully tested an experimental nuclear-powered cruise missile (“Burevestnik”). The technology, he claimed, was also the bedrock on which Russia would develop its modernised Intercontinental Ballistic Missile (ICBM) system (“Sarmat”)¹⁶. Russia also claimed in mid-November 2023 that it had loaded a missile on its evolving hypersonic glide vehicle (“Avangard”)¹⁷. These modernisation efforts should not be underestimated. As the Federation of American Scientists estimate, Russia has today a stockpile of close to 4,500 warheads with just over 1,600 of these warheads deployed on ballistic missiles and heavy bombers, and the Kremlin is engaged in a determined strategy of nuclear modernisation¹⁸.

Yet, NATO faces nuclear risks from China and middle powers such as Iran and North Korea too. Even if NATO territory is unlikely to be a nuclear target from these states, the threat landscape facing the alliance is broad and varied. China, in particular, is rapidly modernising and expanding its nuclear forces. As the US Department of Defense made clear in its assessment of China’s military in October 2023, China ‘will continue to rapidly modernize, diversify, and expand its nuclear forces. Compared to the PLA’s [People’s Liberation Army] nuclear modernization efforts

13 Horovitz, L. and Arndt, A.C., “Nuclear Signalling in Russia’s War Against Ukraine”, *CSDS Policy Brief*, 5/2023. See: https://csds.vub.be/wp-content/uploads/2023/09/CSDS-Policy-brief_2305_0.pdf.

14 Taylor, C., “Russia’s closest ally holding Putin’s nuclear weapons warns it won’t hesitate to use them in response to any threat from the West”, *Fortune*, 18 August 2023. See: <https://fortune.com/europe/2023/08/18/russia-ally-belarus-nuclear-weapons-warning-ukraine-war-news-aleksandr-lukashenko-vladimir-putin-europe/>.

15 Williams, H., “Russia Suspends New START and Increases Nuclear Risks”, *CSIS Critical Questions*, 23 February 2023. See: <https://www.csis.org/analysis/russia-suspends-new-start-and-increases-nuclear-risks>.

16 “Putin says Russia tested nuclear-powered missile, warns of revoking ban on atomic tests”, *Associated Press*, 5 October 2023. See: <https://www.pbs.org/newshour/world/putin-says-russia-tested-nuclear-powered-missile-warns-of-revoking-ban-on-atomic-tests>.

17 “Russia loads missile with nuclear-capable glide vehicle into launch silo”, *Reuters*, 16 November 2023. See: <https://www.reuters.com/world/europe/russia-installs-one-more-hypersonic-nuclear-missile-ifax-2023-11-16/>.

18 Kristensen, H.M., Korda, M. and Reynolds, E., “Russian Nuclear Weapons, 2023”, *Bulletin of the Atomic Scientists*, Vol. 79, No. 3 (2023): pp. 174-199.

a decade ago, current efforts dwarf previous attempts in both scale and complexity¹⁹. This not only includes Beijing's advances on delivery systems and missiles but also its construction of advanced infrastructure such as underground facilities, which vastly improves China's logistical defences and damages counter-projection efforts. China's breath-taking nuclear expansion is prompting considerable debate about the scope of future US nuclear modernisation efforts. As one report to the US Congress from October 2023 notes, there is a need to re-evaluate both the 'size and composition' of US nuclear modernisation²⁰.

Indeed, when the nuclear threats posed by Russia and China are taken together, it is clear that the United States will, for the first time, 'face two nuclear peer adversaries' at the same time²¹. It is for this reason that the US Congressional Budget Office estimated in July 2023 that the US Federal Government would need to invest some \$756 billion in the modernisation of its nuclear forces out to 2032²². There is an immediate need to engage in an intensive process of nuclear modernisation in NATO, and the bulk of these efforts will naturally fall on Washington's shoulders. Any efforts should, however, rest on a political commitment to Article 5 of the Washington Treaty. Messaging that undermines NATO's resolve to protect every inch of alliance territory with nuclear and conventional forces should be avoided. Additionally, there are ongoing steps to modernise US nuclear forces including the life extension programme for the B61-12 gravity bombs, which is in full production²³. The announcement in October 2023 to develop a modern higher yield variant bomb ("B61-13") to be used on next-generation fighter aircraft is another example of the US' planned modernisation efforts.²⁴

Four-Minute Warning: The Importance of the Washington Summit

The Washington Summit provides an opportunity to further underline that Europeans need to take on more of the defence burden in NATO²⁵. There will continue to be a European reliance on the US for nuclear deterrence, even if France and the United Kingdom continue to modernise their nuclear forces, and the alliance deepens its nuclear sharing arrangements in line with the 2023 Vilnius Summit²⁶. Nevertheless, adversaries are calculating that US enablers like Intelligence-Surveillance-Reconnaissance (ISR), long-range fires, air and missile defence, anti-submarine warfare capabilities and tanker and support aircraft would come in short supply in Europe in case the United States becomes involved in a sustained military contingency in the

19 US Department of Defence, "Military and Security Developments involving the People's Republic of China 2023", *Annual Report to Congress*, p. 103. See: <https://media.defense.gov/2023/Oct/19/2003323409/-1/-1/1/2023-MILITARY-AND-SECURITY-DEVELOPMENTS-INVOLVING-THE-PEOPLES-REPUBLIC-OF-CHINA.PDF>.

20 "Strategic Posture: The Final Report of the Congressional Commission on the Strategic Posture of the United States", *Armed Services Committee*, October 2023, p. 90. See: <https://armedservices.house.gov/sites/republicans.armedservices.house.gov/files/Strategic-Posture-Committee-Report-Final.pdf>.

21 *Ibid.*

22 Congressional Budget Office, "Projected Costs of U.S. Nuclear Forces, 2023-2032", July 2023. See: <https://www.cbo.gov/system/files/2023-07/59054-nuclear-forces.pdf>.

23 National Nuclear Security Administration, "B61-12 Life Extension Program", April 2023. See: <https://www.energy.gov/sites/default/files/2023-04/B61-12%20042023.pdf>.

24 US Department of Defence, "Department of Defense Announces Pursuit of B61 Gravity Bomb Variant", Press Release, 27 October 2023. See: <https://www.defense.gov/News/Releases/Release/Article/3571660/department-of-defense-announces-pursuit-of-b61-gravity-bomb-variant/>.

25 Bergmann, M., Monaghan, S. and Droin, M. "Why the Washington Summit Should Focus on Europe", *CSIS Report*, 20 December 2023. See: <https://www.csis.org/analysis/why-washington-summit-should-focus-europe>.

26 Mattelaer, A., "Bleak Prospects for Nuclear Disarmament", *Egmont Policy Brief*, No. 30, October 2023. See: https://www.egmontinstitute.be/app/uploads/2023/10/Alexander-Mattelaer_Policy_Brief_320-bis.pdf?type=pdf.

Indo-Pacific. In this sense, the Washington Summit is an opportunity for the US administration to place considerably more pressure on European allies for defence production and the building-up of its defence-industrial base. If defence and deterrence in Europe is to hold in the years ahead, Europeans need to invest in cyberdefence, space, ISR, electronic warfare, long-range strike and air and missile defence capabilities²⁷.

In the short-term, the Washington Summit is an opportunity for the alliance to respond to the poor production levels of ammunition. For example, the EU plan to procure 1 million 155mm ammunition shells by the end of 2023 failed, with only 300,000 shells having been reportedly produced²⁸. One step could be to adapt the NATO Defence Planning Process (NDPP) to take stock of ammunition and equipment needs. At a time of war, marked by the collapse of arms control, European allies should come to understand that the need to place the defence industry on a war footing is not a momentary requirement. The next few decades are more than likely to require steady stocks of ammunition and military equipment. All obstacles to this objective should be removed. Washington should insist that any steps taken to block collective funding for ammunition and support to Ukraine from within the EU will not be tolerated. Without the right political commitments and guarantees, European industry will have little incentive to work through the supply chain and production issues that are hampering the production of ammunition²⁹. While Europe has a potentially capable defence-industrial base for sustained ammunition and equipment production³⁰, companies cannot be expected to invest in additional capacity without long-term demand signals and contracts.

Europe's dilemma in producing enough ammunition and equipment is also indicative of a wider, more serious, problem in defence. Namely, the war in Ukraine has pressed the importance of *mass* and *speed* in warfare. For decades, tales of a Revolution in Military Affairs and the dominance of the crisis management paradigm have given rise to the false comfort that Europeans could invest in "small is beautiful" technologies where mass could be substituted for high-tech, but small-scale solutions. Today's reality, however, is that Europe must be capable to both field and defend against mass and this means also letting go of a "just-in-time" production philosophy – today's high attrition warfare requires industrial scales not seen since the Cold War. This not only means that Europeans have to invest in ammunition and equipment such as drones, but it must also develop counter-drone technologies and ensure that it has enough air, land and naval capabilities. These requirements are already needed today, but they will only become more urgent in case the US drastically alters its approach to European security.

The answers to Europe's defensive vulnerabilities are well-known: more investment, more stocks, more capabilities. The added strain in this regard is that Europe will have to attend to legacy system investments, as well as new military capabilities and emerging and disruptive technologies. All of this is not to say that Europeans are completely averse to the defence

27 Simón, L., Fiott, D. and Manea, O., "Two Fronts, One Goal: Euro-Atlantic Security in the Indo-Pacific Age", *The Marathon Initiative*, August 2023. See: <https://themarathoninitiative.org/wp-content/uploads/2023/08/Two-Fronts-One-Goal-website-publication-v.2.pdf>.

28 Pugno, A. "EU might not meet delivery target of one million shells for Ukraine, Borrell says", *Euractiv*, 13 November 2023. See: <https://www.euractiv.com/section/defence-and-security/news/eu-might-not-meet-delivery-target-of-one-million-shells-for-ukraine-borrell-says/>

29 Giegerich, B. and Lawrenson, T., "The Guns of Europe: Defence-Industrial Challenges in a Time of War", *IJSS Survival Online*, 19 June 2023. See: <https://www.iiss.org/en/online-analysis/survival-online/2023/06/the-guns-of-europe-defence-industrial-challenges-in-a-time-of-war/>.

30 Béraud-Sudreau, L. and Scarazzato, L., "Beyond Fragmentation? Mapping the European Defence Industry in an Era of Strategic Flux", *CSDS In-Depth Paper*, 7/2023. See: <https://csds.vub.be/publication/beyond-fragmentation-mapping-the-european-defence-industry-in-an-era-of-strategic-flux/>.

investments required. We have witnessed a rise in military expenditure, an increase in European contributions to NATO forces and the acquisition of military capabilities. European allies have also stepped up to the plate in providing military training to Ukraine, as well as weapons and equipment. What is missing, however, is a sense of urgency and direction. The reality is that any initiative to develop Europe's military capabilities and defence-industrial base are hampered by national interests based on industrial motives (i.e. technology transfers and *juste retour*). Even when Europeans have been able to agree on a common course of action, as they did via the EU on ammunition, the approach has been too timid and the scale rather lacklustre.

Again, the solution is clear and widely known. For example, while the EU-27 invested €240 billion in defence in 2022 this still only corresponds to 1.5% of the EU-27's overall GDP. While the EU-27 as a whole are not bound by NATO's defence investment pledge of "2% of GDP", the EU would have needed to invest an additional €75 billion to meet the 2% guideline³¹. Yet, in Vilnius the 2% average became more of a baseline than a ceiling. In this sense, any ambitious European response to investments would have to sit in the range of €300-400 billion per year. With this additional investment, the other challenge would be to prioritise spending. The NDPP is already focused on collective defence planning and priorities but EU capability priority processes need far more refinement, especially if the Union is to play a role in helping to enable defence. In their recent revision of the Capability Development Plan, EU member states identified 22 capability priorities³²: these areas relate to long-standing capability gaps but they still include crisis management priorities that are not automatically linked to deterrence or defence.

Instead, Europe's capability priorities need to be better tied to strategic realities. The biggest challenge facing Europe today is how to support Ukraine and defend against Russia, regardless of how the United States, for whatever reason, augments its military presence in Europe in the future. To ensure that European states would be able to make a credible contribution to defence, they would have to prioritise the production of artillery ammunition and missiles. As one recent study puts it, 'the credible capacity to roll back Russian conventional forces in Europe relies on achieving air superiority', but Europeans are overly dependent on the US for SEAD/DEAD capabilities³³. In addition to developing Europe's air forces, there is a need to significantly upgrade Europe's production capacities for missiles, ammunition and spare parts. As Russia develops its own defence-industrial base, there is no option for Europe but to invest in ammunition and equipment stockpiles as a way 'to convince Russia it could not achieve a quick and easy landgrab in Europe if the US and China were to come to blows'³⁴.

Any loss or reduction of US Ballistic Missile Defence (BMD) capabilities³⁵ would pose real difficulties for Europe³⁶. It is partially for this reason that Germany has sought to lead on the European Sky Shield Initiative (ESSI), which seeks to strengthen NATO's Integrated Air and Missile Defence (IMAD) system. Yet, the ESSI can only be a partial response to air and missile defence in Europe and it is not without its trade-offs – not least in terms of Europe's own missile defence-

31 European Defence Agency, "Defence Data 2022: Key Findings and Analysis". See: https://eda.europa.eu/docs/default-source/brochures/2022-eda_defencedata_web.pdf.

32 European Defence Agency, "EU Defence Ministers agree to prioritise 22 military capabilities to bolster European armed forces", 14 November 2023. See: <https://eda.europa.eu/news-and-events/news/2023/11/14/eu-defence-ministers-agree-to-prioritise-22-military-capabilities-to-bolster-european-armed-forces>.

33 Bronk, J. "Europe Must Urgently Prepare to Deter Russia Without Large-Scale US Support", *RUSI Commentary*, 7 December 2023. See: <https://rusi.org/explore-our-research/publications/commentary/europe-must-urgently-prepare-deter-russia-without-large-scale-us-support>.

34 Ibid.

35 O'Rourke, R., "Navy Aegis Ballistic Missile Defense (BMD) Program: Background and Issues for Congress", *Congressional Research Service*, 28 August 2023. See: <https://sgp.fas.org/crs/weapons/RL33745.pdf>.

36 See and Loss, R. and Mehrer, A., "Striking Absence: Europe's Missile Gap and How to Close It", *ECFR Commentary*, 21 November 2023. See: <https://ecfr.eu/article/striking-absence-europes-missile-gap-and-how-to-close-it/>.

industrial capacity³⁷. True, the missile mix proposed under the ESSI (Arrow 3, Patriot and IRIS-T SLM) targets both medium and long-range targets, but Europe has an opportunity to develop BMD-ready naval frigates and destroyers in order to substantially increase its short-range missile defence capabilities. This has become more imperative since Russia's war on Ukraine, especially with vulnerable geographical areas such as the Black Sea, Mediterranean Sea, Baltic Sea and High North/Arctic. What is more, the ESSI initiative largely focuses on interceptor systems, but Europe needs urgently to invest in the Command and Control infrastructure supporting these systems including radars and sensors.

Europe also needs to invest in long-range missile strike capabilities. In particular, long-range precision strike systems are required for offensive and defensive manoeuvres in Europe, but, 'as a result of structural underfunding and different procurement priorities, European states have long ignored the shift towards stand-off range and precision strike in modern war. This has resulted in European missile arsenals not fit for purpose for high-intensity warfare'³⁸. This is particularly worrying given that Europe has the defence-industrial capacity to produce long-range strike weapons: think of the Taurus or SCALP missiles. Yet, European allies are being forced into the difficult position of deciding between maintaining their own long-range strike inventories and what they deliver to Ukraine. One of the key acts that should be pushed at the Washington Summit is an insistence on production of missiles in Europe. The production skills are in place but the manufacturing capacity needs ramping up rapidly – European governments need to provide industry with the demand and support required to bolster European missile production over the longer-term.

Conclusion - Washington and Beyond: The European Role

This In-Depth Paper has offered ideas for further reflection in advance of the Washington Summit in 2024. Overall, it outlines two general sets of observations. First, the European allies need to collectively invest at least €300-400 billion in defence per year. These states have the financial means of doing so, even in the current economic climate. Should Russia succeed in its war against Ukraine, the costs for defence in Europe will be even higher. In addition to increased investment, Europe needs to unlock the full potential of its defence-industrial base. It must spare no effort to remove any bureaucratic hindrances in the way of putting the industrial base on a genuine "war footing", and governments need to provide industry with contracts and long-term demand. Investment in ammunition, missiles and equipment is a priority. While the capabilities Europe needs are ever more clear, the urgency to acquire them differs across the alliance. The Summit could be an occasion for the US to politically support European efforts to ramp up its defence-industrial base.

Second, the Washington Summit will have to provide strong political signals for the continued modernisation and integration of NATO forces. There is a need to continue to integrate nuclear and conventional force strength in the alliance across the air, sea, cyber and space domains. NATO will continue to primarily rely on US nuclear forces for its deterrence, and this appears to be one dimension of the US' commitment to European security that has not been questioned in

³⁷ Barrie, D. and Giegerich, B., "European Missile Defence – Right Questions, Unclear Answers?", *IJSS Military Balance Blog*, 10 February 2023. See: <https://www.ijss.org/en/online-analysis/military-balance/2023/02/european-missile-defence-right-questions-unclear-answers/>.

³⁸ Hoffmann, F. "Europe's Missile Conundrum", *War on the Rocks*, 25 July 2023. See: <https://warontherocks.com/2023/07/europes-missile-conundrum/>.

American domestic politics. Aside from any turbulence that may emerge in transatlantic politics in the coming months, the chief way to contribute to deterrence in Europe is for the British and French to modernise and potentially expand their nuclear forces. As this In-Depth Paper has explained, however, larger European investments in conventional forces and military equipment such as ammunition, missiles and enablers will be a major contribution to the credibility of NATO's deterrence and defence. As the alliance looks towards the next 75 years, it is time for Europeans to take on more of the defence burden and ensure that the defence-industrial base is fit for an era of competition and war.



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