

European Defense Looks Inward

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USPA NEWS - Despite a sharp rise in defence spending, Europe continues to face a shortfall in offensive military capabilities and industrial fragmentation, which limit its deterrent capacity.

The weakening of the transatlantic relationship, the outbreak of war in Iran without Europe even being consulted, and the enduring Russian threat on the eastern flank have left Europe caught in a geopolitical pincer movement. Yet even as pressure grows for Europe to behave like a genuine world power, it still struggles to strengthen itself effectively, particularly in defense.

Europe is confronting a situation it once struggled even to imagine, caught between Washington's increasingly visible disengagement and Russia's war machine. US deterrence is becoming an ever-looser safety net, political rhetoric is growing more confrontational, and mistrust now shapes many multilateral relationships. Former German Chancellor Olaf Scholz's *Zeitenwende* speech in February 2022 appeared to acknowledge this new reality, ushering in a wave of narratives centered on rearmament and strategic renewal. Yet four years on, Europe's defense sector is still confronted with a harsh truth: its strategic ambitions continue to outstrip its industrial and military capabilities.

Bigger budgets, limited mass effect

At the Munich Security Conference in February 2026, current Chancellor Merz once again asserted [1] that "Europe must cast off its excessive dependence on the US." President Macron has also proposed extending France's nuclear umbrella to the whole of Europe. A strategic shift is underway, and there's no denying a significant budgetary effort forms part of this shift.

Defense spending across the European Union is rising sharply. The latest figures [2] from the European Defense Agency show EU-wide defense spending reaching around 2.1% of GDP in 2025. At the same time, the 2025 NATO summit in The Hague saw alliance members agree [3] to an ambitious new framework targeting defense and security spending equal to 5% of GDP by 2035. The European Commission's Readiness 2030 [4] strategy aims to mobilize up to €800 billion by enabling member states to increase their defense budgets under relaxed EU fiscal rules. President of the European Commission, Ursula von der Leyen, described [5] these efforts as a response to a "real and present danger".

Europe has to make up for capability gaps that were allowed to widen over decades of lower spending, especially in areas such as air and missile defense, SEAD, combat engineering, and intelligence and ISR systems, to just name a few. New capability needs driven by Putin's invasion of Ukraine (from drones and counter-drones to electronic warfare and space early warning systems) must now be funded alongside traditional hardware.

The result is that resources are being spread over so many needs that individual capability programs often receive insufficient funding to deliver truly transformational effects. Air defense remains fragmented, long-range fires are scarce, and many armies still lack sufficient troops, logistics and command-and-control cohesion to meet high-intensity conflict demands. The Readiness 2030 Roadmap outlines how Europe is expected to possess the complete set of military capabilities required for credible deterrence, but this is a goal that will depend on major investment and procurement orders.?

Trying to plug the DPS gap

A striking example of the gap between rhetoric and reality is Europe's pursuit of Deep Precision Strike (DPS), long-range offensive firepower capable of reaching deep behind the frontline targeting critical infrastructure, command centers or supply lines.

Efforts are being made to improve this capability gap. At the NATO summit in Washington in 2024, a group of European countries agreed on the European Long-Range Strike Approach (ELSA), whose goal [6] is to select the best industrial proposals in order to meet

needs grouped into clusters. Participant states include Germany, France, Italy, Poland, Sweden and the United Kingdom.

A year and a half later, the effort has yet to produce concrete solutions commensurate with a threat nevertheless presented as imminent (with some officials referring, for example, to the possibility of confrontation with Russia within three years) [7]. Only the United Kingdom and Germany have announced plans to start initial work on a capability with a range exceeding 2,000 km. This poor progress has led some observers to question [8] the future of ELSA, noting the proliferation of national or bilateral initiatives. Whilst Sweden stresses the need to build up its capabilities to counter Russia's growing effort in this area, Germany is pursuing the Joint Fire Support Missile (JFSM) [9], 300-500 km, and is also developing the Taurus 350 in cooperation with Sweden.

However, momentum may now have shifted. In mid-February 2026, participating states signed a new Letter of Intent to sustain the effort. Among the four capabilities selected, the emphasis was placed on one-way effectors, whose low cost should allow production at very large scale to generate mass and saturate enemy air defenses. This represents a meaningful step forward, but it does not address the core requirement: the ability to penetrate even the most heavily defended targets using high-end, survivable missiles. President Emmanuel Macron underscored [10] this point in February, when he called for "deep precision strikes" and unveiled plans to align aspects of France's nuclear doctrine with Germany.

His appeal does not appear to be gaining much traction, despite France having proposed from the outset the MBDA Land Cruise Missile (LCM), which offers a range of 1,400 km. Derived from the combat-proven French MdCN and potentially available as early as 2027–2028, it would provide a sovereign European alternative to the US Tomahawk, on which several European countries continue to rely despite the many limitations associated with this supply, whether in terms of waiting times (resupplying the Pentagon is now a top priority) or restrictions on use. This situation has been aggravated by the depleting of U.S. stocks following Operation Epic Fury.

An overly defensive operational posture

Another revealing sign of Europe's uneasy transition from aspiration to execution is the emphasis on defense. From air defense schemes like the proposed European Air Shield to enhanced border security initiatives, Europe's focus has been defensive in nature. This emphasis is understandable and essential: modern air defense has demonstrated its value, with Ukraine intercepting a large proportion of missiles and drones [11] during sustained Russian strike campaigns, Israel achieving similarly high interception rates against massed aerial threats. Yet defense alone cannot shape an adversary's calculus.

This stands in contrast to Russian doctrine, which has prioritized offensive deep fires and layered precision strike capabilities, and which has repeatedly demonstrated the psychological and physical effect of striking deep into enemy territory (see continued attacks on Ukrainian energy infrastructure [12], for example). European planners now acknowledge that without equivalent capabilities, deterrence lacks credibility.

Indeed, in an April 2026 report [13] for the Swedish Institute for European Policy Studies, analysts warned that while "the EU and its member states face increasing pressure to take greater responsibility for their own security," the Union's "ability to act remains constrained," despite recent defense initiatives and institutional developments. The report highlighted the persistent gap between Europe's strategic ambitions and its fragmented military and political capabilities.

Realpolitik and real capability

Europe's defense debate is no longer shaped solely by the Russian threat; it is influenced by an assertive effort to move Europe away from the United States and look inward. NATO leaders have stressed the need for Europeans to assume a larger share of the burden, and recent summits have framed higher spending targets as a matter of credibility rather than symbolism. Budgets are rising, yet capability does not materialize overnight. Governments remain divided on priorities, so the question is not whether Europe is spending more, but whether it is concentrating its efforts to turn political commitment into credible deterrence.

[1] https://www.theguardian.com/world/2026/feb/13/us-not-powerful-enough-to-go-it-alone-merz-tells-munich-conference?utm_source=chatgpt.com

[2] https://eda.europa.eu/docs/default-source/brochures/2025-eda_defencedata_web.pdf

- [3] <https://www.cer.eu/insights/eu-defence-readiness-2030-roadmap-ambition-and-constraints>
- [4] https://defence-industry-space.ec.europa.eu/eu-defence-industry/white-paper-european-defence-readiness-2030_en
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- [6] <https://www.defensenews.com/global/europe/2025/05/05/europes-long-range-strike-project-nears-choice-of-lead-contractors/>
- [7] <https://www.russiamatters.org/blog/would-russia-attack-nato-and-if-so-when>
- [8] <https://www.eureporter.co/general/2025/12/12/have-you-heard-of-elsa-probably-not-recently/>
- [9] <https://www.armyrecognition.com/archives/archives-land-defense/land-defense-2024/future-europuls-multiple-launch-rocket-system-to-reach-targets-500km-away-with-jfs-m-missile>
- [10] <https://www.youtube.com/watch?v=nyc7aUsCAJg>
- [11] <https://www.bbc.com/news/articles/c1k2lmmjvzxo>
- [12] <https://www.ukrinform.net/rubric-economy/4124889-power-outages-reported-in-four-regions-following-attacks-on-energy-sector-ukrenergo.html>
- [13] <https://sieps.se/en/publications/2026/who-calls-the-shots-institutional-and-political-dynamics-in-european-defence/>

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