EUROPEAN DEFENCE CAPABILITY BY 2030: FEASIBILITY, CONSTRAINTS AND OPTIONS FOR ACCELERATION

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This study examines the evolution of European defence policy between 2022 and 2030 in the context of renewed high intensity conflict in Europe and increasing transatlantic expectations for a more balanced distribution of security responsibilities. It investigates three core dimensions: (1) the operational EU instruments supporting capability development and the defence industrial base, including PESCO, EDF, ASAP, and EDIRPA; (2) recently adopted strategic and legislative frameworks such as the White Paper for European Defence – Readiness 2030, EDIP, and the Defence Readiness Omnibus; and (3) the feasibility of establishing a credible European conventional defence capacity by 2030, alongside the structural constraints that limit progress towards full strategic autonomy.

Findings indicate that the European Union is positioned to deliver by 2030 a coherent package of measures enhancing conventional military resilience, including munitions production, mobility, joint procurement mechanisms, and industrial consolidation. Nonetheless, the analysis shows that the EU will remain dependent on NATO and the United States for nuclear deterrence and certain highend strategic capabilities, notably strategic ISR and advanced air power systems.

Keywords: defence acquisitions; European defence; strategic autonomy; defence industry; PESCO;

INTRODUCTION

Following 2022, the European security architecture encountered structural pressures, resulting in stock shortages, industrial fragmentation, and logistical disruptions becoming practical operational challenges rather than mere subjects for analysis. Concurrently, the United States' strategy for 2026 emphasises that Europe must markedly enhance its conventional defence capabilities and demonstrate the capacity to sustain the initial stages of a major conflict within its regional sphere. This context has prompted the European Union to shift from primarily declarative actions toward the adoption of instruments with financial, legislative, and industrial impact.

STRATEGIC FRAMEWORK: EU-NATO COMPLEMENTARITY AND CREDIBILITY CONDITIONS

From a doctrinal perspective, evaluating the credibility of European defence capacity involves assessing its ability to generate mass and resilience, integrate forces within a command-and-control infrastructure, and maintain industrial capability to sustain operations during prolonged conflict. Achieving strength and resilience necessitates stockpiling, repair, and rotation measures, which have been addressed through initiatives such as *military mobility under PESCO*, designed to facilitate the swift movement of personnel and equipment across EU member states. While Eastern European support requirements and solutions in Central and Western Europe have been identified, impediments remain, notably the absence of adequate infrastructure and harmonised regulations critical for rapid transport and integration into defensive structures. The European Union lacks an inherent assessment mechanism, relying instead on the *Strategic Plans of the North Atlantic Alliance* to inform efforts focused on enhancing *operational resilience*.

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It is important to recognise that the term *resilience* may be misapplied in certain critical scenarios, where alternative strategies could prove more effective. To accurately determine the actual state of defence readiness, a comprehensive, objective audit utilizing real-time data and advanced war-gaming applications is essential – rather than depending on reports provided by individual states. Such a rigorous approach would enable the development of authentic and sustainable defence capabilities, as opposed to perpetuating hypothetical and inadequate ones.

Progress on integrating forces into a cohesive command-and-control architecture is underway through specific PESCO projects aimed at improving interoperability and connectivity. These initiatives seek to align national resources and European Battle Groups (EUBGs) in a manner distinct from, yet complementary to, NATO's existing command structure.

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The Trump Administration's stance regarding the EU has prompted consideration of a more assertive strategy to develop an independent command structure for the EU, separate from NATO. While the US National Defense Strategy (US NDS 2026) supports the enhancement of the EU's conventional defence capabilities, including nuclear deterrence and specialized support in communications and intelligence, greater European participation in NATO's command structure would entail increased appointments of European officers in positions traditionally held by American personnel. Since most commands – aside from the land and sea components – are located within EU territory, creating additional command structures may be unnecessary. Replicating SHAPE and the two Joint Commands in Naples and Brunssum could be strategically unsound, as these entities play a crucial role in coordinating Europe's defence and are not easily duplicated.

Since 2024, the issue of industrial capacity to support ammunition and weapons consumption, as well as to sustain prolonged conflict, has been significantly addressed. This follows recognition of the vulnerabilities arising from the defence industry's limited ability to maintain military operations over medium and long-term periods. The introduction of the European Ammunition Joint Procurement Programme (ASAP and EDIRPA) highlights ongoing initiatives aimed

at increasing production capacity and adapting to contemporary technological requirements. The EU's *Strategic Compass* sets an objective for strengthening security and defence policy by 2030, with the intention to develop a shared strategic culture and enhanced capabilities that reinforce both the EU and its contribution to NATO, rather than replacing the Alliance. It is evident that revisions will be necessary following the release of the US National Security Strategy 2025 and National Defence Strategy 2026, though these documents have not yet been made public.

Simultaneously, the *NATO Strategic Concept 2022* reiterates the Alliance's commitment to collective defence and emphasises the importance of strengthening deterrence and defence postures (NATO, 2022). The integration of frameworks between the European Union – primarily focused on capability development and industry – and NATO – centred on planning, command, and deterrence – enables a practical division of responsibilities. Notably, the European Union's mechanisms are expected to produce measurable outcomes by 2030.

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At the Ankara summit, it was anticipated that the Concept might be delineated further by assigning specific responsibilities to European actors, should the European Union be integrated into the Alliance's planning framework. Despite asserting that Europeans ought to take primary responsibility for the conventional defence of Europe, the current American administration refrains from supporting EU involvement, viewing the European Commission as a destabilizing influence in relations among European states.

The differences between the United States and the European Union stem largely from President Trump's reluctance toward EU institutions, particularly the European Commission, which threatens both the stability and continuity of NATO. This stance limits the Commission's participation in security and defence discussions, even though the Commission oversees the Common Defence and Security Policy. As a result, European NATO and EU members face the challenge of addressing their own defence across various forums and under differing circumstances. The principal vulnerability lies with Eastern European states, which are most susceptible to potential threats from the Russian Federation.

WHAT HAS BEEN DONE SO FAR: EU INSTRUMENTS ALREADY OPERATIONAL

PESCO: Structured Cooperation and Project Portfolio

PESCO serves as a mechanism to aggregate capability projects and facilitate cooperation among participating member states. Recognised as the *"backbone of military cooperation in the EU"*, PESCO was established to operationalise Article 42 (6) of the Treaty of Lisbon, which states, *"Member States whose military capabilities fulfil higher criteria and which have made more binding commitments to one another in this area with a view to the most demanding missions shall establish permanent structured cooperation within the Union framework"* (European Council, 2024). Although the maturity levels vary across initiatives, PESCO has developed a comprehensive portfolio of projects relevant to contemporary warfare, including military mobility, logistics, training, land and sea capabilities, connectivity, and emerging technologies.

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EDF: Financing Technological Development and Reducing Fragmentation

Regulation (EU) 2021/697 established the European Defence Fund (EDF) for the period 2021-2027, allocating a total budget of €8.8 billion to enhance competitiveness and innovation within the EU's defence industrial base. The European Commission emphasises that EDF aims to reduce fragmentation, increase interoperability, and reinforces the EU's role as a significant investor in defence research and development (European Council, 2021, European Commission, 2022).

In 2025, an EDF package exceeding one billion Euros was introduced for strategic technology projects. This fund supports joint research

and development efforts for advanced military technologies, interoperable projects, and fortifies the European defence industrial base.

ASAP and EDIRPA: Addressing Ammunition Shortages and Strengthening Joint Procurement

Regulation (EU) 2023/1525 (ASAP) is designed to rapidly augment industrial capacities for ammunition and missiles by implementing support mechanisms to expand production lines and alleviate supply chain bottlenecks. Additionally, Regulation (EU) 2023/2418 (EDIRPA) establishes an instrument to incentivize joint procurement focused on the urgent and critical needs of Member States (European Commission, 2022).

Regulation (EU) 2025/2643 establishes the European Defence Industry Programme, providing a comprehensive set of measures to ensure timely product availability, reinforce the industrial base, and promote cooperative initiatives, including support for Ukraine.

WHAT IS PLANNED AND APPROVED: READINESS 2030, EDIP, AND THE SIMPLIFICATION OMNIBUS

White Paper for European Defence – Readiness 2030 and the ReArm Europe Plan

The White Paper for European Defence – Readiness 2030 outlines strategic pathways to enhance defence readiness and mobilize investments in order to achieve defined objectives by 2030. This initiative incorporates a *"surge investment"* approach, with the EEAS estimating that the proposed measures could potentially unlock up to €800 billion in the coming years, thereby expediting the fortification of European defence capabilities. The plan's core strategic priorities include strengthening the European defence industry, facilitating joint procurement, increasing interoperability, and improving pan-European military mobility by 2027. Emphasis is placed on the production of ammunition, air defence systems, drones, and digital infrastructure (European External Action Service, 2025).

EDIP: Transitioning from Emergency Measures to a Permanent Industrial Programme

The introduction of the EDIP signifies a move from temporary instruments (such as ASAP and EDIRPA) toward a stable framework for the availability and supply of defence products. Regulation (EU)

2025/2643 establishes the European Defence Industry Programme, providing a comprehensive set of measures to ensure timely product availability, reinforce the industrial base, and promote cooperative initiatives, including support for Ukraine. Both the European Parliament and the Council have articulated clear objectives: reinforcing industry, advancing joint procurement, and increasing overall production capacity (EU Council, EU Parliament, 2025).

Currently, Romania has yet to develop an adequate policy that would enable the inclusion of its domestic industrial capacities within this European plan. Through legislative action – preferably through law, although an Emergency Ordinance may be suitable under current circumstances – the Romanian government could extend benefits to European or American companies investing in production facilities eligible for integration into this European initiative. Prioritizing the needs of the Romanian Armed Forces would allow for economically and operationally efficient solutions. Potential areas for new government-backed investments include equipment manufacturing and assembly, maintenance, production of complex products, ammunition and essential spare parts, access to sales markets, and integration into major Alliance logistics networks. While projects included in SAFE offer value, they do not sufficiently address the requirements.

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Defence Readiness Omnibus: Facilitating Large-Scale Investment

On 17 June 2025, the Commission introduced a simplification package designed to accelerate defence investments, emphasizing the need for harmonisation and reduction of administrative burdens to enable delivery *"at scale and speed"*. The Communication and accompanying documents detail simplification measures that also apply to dual-use technologies, aiming to expedite project implementation and facilitate faster financing (European Commission, 2025).

Romania must act promptly to capitalise on these critical opportunities. Although rapid debureaucratisation is beneficial, there remains a risk of inefficient or potentially detrimental actions absent a thorough and realistic assessment of existing assets, requirements, and capabilities.

SAFE – Security Action for Europe

The European Commission has allocated investment funds to nineteen participating EU member states for equipment procurement, including air defence systems, artillery, and drones. Allocations are determined based on an initial assessment of urgency and potential requirements. SAFE is structured as a €150 billion financing mechanism, offering relatively low-interest, long-term loans for the acquisition of defence capabilities. The primary goal is to reinforce the European defence industry by promoting joint procurement efforts, which marks a significant step toward establishing Community-wide capacities with standardized equipment. Nations such as Romania, Poland, and France have signed investment agreements for this funding; Romania, specifically, has been allocated €16.7 billion.

SAFE also supports the modernisation of key infrastructure – such as motorways, railways, ports, and airports – to enable rapid deployment of military assets across the Union, thereby reducing transit times and strengthening logistical resilience during crises.

FEASIBILITY BY 2030: REALISTIC OBJECTIVES VERSUS UNLIKELY OUTCOMES

Realistic: Ammunition, Mobility, Inventory, and Joint Procurement

Areas with robust prospects for delivery by 2030 include those where the EU possesses budgetary and market influence: scaling up ammunition and missile production (ASAP), enhancing joint procurement initiatives (EDIRPA), advancing industrial consolidation (EDIP), and modernising dual-use infrastructure to support military mobility. Existing regulations in these domains provide stability and predictability for industry stakeholders (EU Regulation, 2021, 2023, 2025).

For ASAP, measures adopted in 2023 and 2024 focus on increasing production capacity, co-financing manufacturing facilities and test centres and supporting critical supply chains.

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At the Union level, there has not been a comprehensive Strategic Defence Review nor a periodic evaluation thereof; however, coordination occurs through the *"Coordination Annual Review on Defence (CARD)"*, which annually examines national capability plans

and identifies opportunities for Franco-European collaboration. It is important to note that aggregating individual national defence assets does not equate to a unified common defence capability, and equipment diversity does not accurately reflect overall readiness. Nonetheless, CARD plays a crucial role in identifying capability gaps and informing PESCO projects and other European defence initiatives.

The concentration of efforts and governmental support for projects financed through the SAFE instrument is not the sole focus of the Romanian state. Developing competitive and efficient industrial capacities should remain a government priority, irrespective of political affiliation. Divesting all state-owned enterprises that lack realistic prospects for recovery – by maximising the value of existing assets – should be prioritised over the next six months. The closure of non-viable companies will facilitate the development of new, modern capacities operating under market economy principles, equipped with advanced technological processes that are both energy-efficient and financially sustainable, and capable of competing internationally. Establishing access to foreign markets requires both sound policy measures and high-quality products.

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Partially: Integrated Air Defence and European Command and Control

Continental-level air defence integration is likely to progress regionally (North, East, Black Sea), but achieving a fully integrated pan-European ballistic missile coverage is unlikely by 2030. Similarly, although consolidation of command and control at the EU level may advance in joint exercises and procedures, political factors – including consensus and sovereignty – limit the establishment of a unified European command chain during crises.

A more pragmatic approach could involve increased participation in the Rammstein Air Component Command, creating a dedicated ballistic missile defence system, establishing the European Strategic Airlift and Refueling Group (potentially utilizing Airbus aircraft), and developing a *European Surveillance and Early Warning Group or partn*ering with existing NATO structures (in collaboration with the United Kingdom

and Norway). Further, integrating principal air forces into a Strike Air Force for specific missions using F-35, Rafale, and Eurofighter aircraft, and realising a *European Iron Dome* are feasible initiatives. The latter may be attainable by 2030 if the Strategic Air Defence Device (including Anti-drone capabilities) is implemented promptly, positioning equipment optimally, leveraging existing infrastructure, establishing multinational (potentially European) units, and operationalising each component. Full system operation would require integrated procedures and could benefit from NATO CAOCs' expertise.

Unlikely: Complete Strategic Autonomy and Substitution of Deterrence Shadows

Official documentation and statements from the Commissioner for Defence and Space indicate a pragmatic strategy: Europe must *"spend more, better, and European"*, while maintaining efforts that complement NATO. Achieving full strategic autonomy by 2030 is improbable without significant policy reforms and enhanced deterrence capabilities. Furthermore, NDS 2026 outlines that the United States will prioritise global objectives, beginning with safeguarding its own territory, the Western Hemisphere, and the Asia-Pacific region. Security in Europe will be promoted through the empowerment of allied nations, primarily supporting nuclear deterrence and advanced technological assets; however, this approach does not entail a complete replacement of US forces within NATO in Europe (US Department of War, 2026).

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Adopting a markedly anti-American stance would be detrimental in both the short and medium term, given substantial reliance on the United States that cannot be quickly substituted with equipment produced by French manufacturers. Nevertheless, it is imperative to accelerate the integration of European surveillance systems and missile technologies, as American production is insufficient to satisfy the demands of all current clients. Additionally, the disengagement signalled by the present American administration should prompt European states to pursue active collaboration within the Union.

TWO-SPEED EUROPE: ACCELERATOR OR RISK OF FRAGMENTATION?

In defence, differentiation can serve as an accelerator when functionally defined – a core group of states embracing more ambitious goals (common stocks, joint procurement, interoperability, industrial integration) without being hindered by unanimity requirements. This model, already practiced via enhanced cooperation and voluntary joint procurement, could be formalised to avoid settling for minimum consensus and yield tangible outcomes by 2030.

The continued dependence on the industries of six leading states is evident; however, retaining concentrated industrial capacity while neglecting to modernize and integrate the industries of other European nations may foster dissatisfaction and mistrust. There exist considerable variances in budgetary priorities and approaches to defence policy, and these differences are not easily categorised by group. Thus, there is greater diversity in positions and perspectives, making alignment along two groups more ambitious than a five-tier grouping. Poland's shift from the Eastern European bloc and its acceptance into the Steel and Coal Community among founding states reflects recognition of its evolution as a state considered highly exposed to Russian threats. The development or reconstruction of most industries in these states has been supported by American initiatives, such as the Marshall Plan or more recent offsets, maintaining competitiveness through close ties with American industry.

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Many countries in the second group possess modern and competitive industries comparable to those in the first group (Sweden, Denmark, Belgium, Austria, Hungary, Czech Republic), yet they have historically been viewed as less significant (!) or challenging to include in decision-making circles. This dynamic carries a risk of pronounced negative response from these states.

Modernising or constructing competitive industries in countries like Romania requires commitment from European states with globally prominent companies and strategic clarity. Access to technology necessitates substantial investment, education, and coherent policies. At the community level, tools have been established to support existing industry and facilitate new infrastructure – especially for ammunition,

missiles, and drones. The urgency of these products requires decisive action, which will have lasting impacts. Efficient, modern, low-energy technology lines with high automation and adaptability to evolving market needs are essential for each listed product.

A principal risk arises from the perception of marginalization among states in the *"outer circle"*. To prevent fragmentation, transparent accession criteria for the core (including investment levels, industrial contributions, and operational readiness) should be employed, and projects kept open for gradual participation. NATO compatibility is preserved if the core aligns with Alliance planning, while the EU concentrates on industry, mobility, and procurement, avoiding duplication of NATO command structures.

A *"sovereignist"* inclination to distance the European Union from the United States and respond assertively to MAGA policies carries the risk of escalating tensions into confrontations that could have far-reaching effects not only politically, but also for European security and citizens' well-being. Europe's technological reliance on the US is evident: in today's digital environment – including the UK, Norway, and Switzerland – Europe does not control any operating system, social networks are largely American or Chinese, and the online marketplace is dominated by giants from these countries. Cybersecurity solutions are predominantly sourced from American or Israeli providers, while hardware production relies extensively on Asia (China, Taiwan, South Korea, Japan, Singapore). Communications technology primarily originates from the USA, South Korea, China, or Taiwan, with some autonomy achieved through the Galileo satellite communications and navigation system. In the field of Artificial Intelligence (AI), Europe is still launching programs, remaining dependent on established American systems already dominant in the market. While European stakeholders emphasise AI regulation and ethical considerations, advances in the US and China enable these countries to prevent new entrants. Integrating European facilities into American AI development projects may help maintain a stable Trans-Atlantic relationship.

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Peripheral states may choose to align with broader European initiatives centred around major European consortia, utilize technologies phased out by leading European nations to modernize

their own systems, or engage in strategic partnerships with non-EU states – including the USA, Canada, the United Kingdom, Norway, South Korea, Japan, Israel, Turkey, Taiwan, Australia, or New Zealand – while avoiding China to preserve relations with the US.

The conflict in Ukraine underscores the importance of securing resources, particularly energy, establishing backup systems, and optimizing domestic resource utilisation. Failure to harness and process local assets – such as minerals, energy sources, and agricultural products– results in dependencies that contribute to emigration of skilled workers and immigration of less-skilled personnel.

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Significant demographic shifts will have lasting impacts, producing social and cultural transformations. Exceeding critical thresholds required for integration leads to the formation of communities with diverse religious and cultural backgrounds, which may structurally alter populations across Europe.

ROLE OF THE EUROPEAN COMMISSIONER FOR DEFENCE AND SPACE

The portfolio held by the Commissioner for Defence and Space, Andrius Kubilius, serves a coordinating function between Member States, the Commission, and the High Representative, with an emphasis on spending efficiency and prioritization of European products. The commissioner's mission letter highlights preparedness for *"the most extreme military contingencies"* and the Commission's official website emphasises the goal to spend *"more, better and European"* (European Commission, 2025).

The newly appointed commissioner established several key objectives, including securing the economic conditions necessary for the EU's armament through financial instruments; enhancing industrial capacity; and achieving a credible defence capability.

To address the first objective, the commissioner succeeded in securing financial mechanisms and obtaining consensus among member states to prioritize funding for arms production. An integrated plan for the European defence industry was formulated, encompassing capabilities across all member states. The framework for industrial cooperation and allocation of financial resources is now in place;

it is the responsibility of individual member states to manage these resources effectively, devise solutions to build and modernise their industries, leverage existing assets, and address shortfalls in national defence capacity.

The development of common defence capability centres on projects agreed under PESCO, complemented by national assets and the European Union Battle Groups (EUBG), which may be integrated as needed. Notably, the European Union has not conducted a Strategic Defence Review, having avoided the issue for years to prevent discord with the United States, which maintained that the EU did not require independent defence capabilities due to NATO's security guarantees. The accession of Finland and Sweden to NATO, following the Russian invasion of Ukraine, took place at their request, reflecting concerns about threats from the Russian Federation and the perceived absence of sufficient protection from the EU.

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The European Commissioner for Defence has suggested an urgent evaluation of those member states most vulnerable to potential aggression from Russia; however, this recommendation appears not to have been pursued further. From an analytical perspective, appointing an Eastern European official to this role presents certain challenges, particularly regarding limited experience in strategic defence at a broader scale. In contrast, the Union may benefit from leveraging the global perspectives and expertise of member states with extensive international engagement. A comparative review of the effectiveness of European foreign policy during the tenure of Lady Catherine Ashton as High Representative, relative to her successors, could offer valuable insights, all while acknowledging the contributions of Mrs. Federica Mogherini through a pragmatic lens. During this critical period for the future of the Union, it is noteworthy that both the High Representative and the European Commissioner for Defence are accomplished individuals, albeit representing nations with limited global influence.

The cautious approach to the primary subject – the establishment of Community or European Armed Forces – may be viewed as a prudent decision, given the divergent perspectives among certain states concerning the conflict in Ukraine. Neither the General Staff of the European Union nor its Director currently possesses the capacity

to assume responsibility for Europe's conventional defence from SHAPE and SACEUR. The likelihood of this scenario materialising may increase should there be indications of a potential American withdrawal.

Exposed states should adopt a proactive stance, contributing viable solutions, realistic initiatives, and impactful measures to enhance their security. The continued US presence in Poland – affirmed by President Trump during the Polish president's visit – and increased German and British involvement in the Baltic States have reduced pressure on those countries to accelerate efforts in developing a European army. Romania and Bulgaria remain vulnerable to Russian aggression originating from the Black Sea, with Romania facing heightened risk due to the potential of direct contact with a hostile Ukraine, should Russia gain full control of the latter. The partial withdrawal of American forces from these states has conveyed a concerning signal, which has only been partly mitigated by France's commitment to sustaining its nation-frame state role and expanding the Romanian battle group to brigade level.

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WHAT CHARACTERISTICS SHOULD AN EFFECTIVE EUROPEAN COMBAT CAPABILITY POSSESS BEYOND THEORETICAL PLANS AND EXERCISES?

At present, Europe's military structure comprises *national forces* that demonstrate heterogeneous and incompletely assessed operational and response capabilities. While these forces exist in sufficient numbers, they lack concrete operational effectiveness.

❖ **Land Forces**

- A robust framework should comprise 2-3 permanent multinational army corps, designed for rapid deployment with the capacity to execute missions within ten days.
- The positioning of heavy, mechanised, and armoured brigades in Eastern Europe is fundamental for effective deterrence against identified threats such as the Russian Federation and its allies.

Adequate reserves are crucial, including substantial artillery ammunition (notably 155 mm and GMLRS), spare parts, fuel sufficient

for over ninety days, blood supplies, food reserves, and resilient communications infrastructure. Lessons from ongoing conflicts indicate that sustainable resistance demands sufficient personnel, operational depth, and robust reserves.

❖ **Air Power** must achieve regional air superiority, advancing beyond routine air policing tasks.

- Core capabilities should encompass suppression and destruction of enemy air defences (SEAD/DEAD), comprehensive surveillance and reconnaissance (inclusive of Air ISR – AWACS, drones for intelligence, and systems for drone detection and neutralisation).
- A unified, interoperable European Air Command would enhance strategic coordination, replacing the current model of 27 separate national centres.
- Fighter jets – such as F-16, F-35, Rafale, Eurofighter, and Gripen – should be organised into operational groups according to performance and mission requirements. NATO planning could be enhanced through dedicated European strike air groups operating in complementarity with US support.

To comply with international agreements such as Montreux, riparian states may collaborate to assemble European naval groups under both national and EU flags.

❖ **Air and Missile Defence**

- Europe remains critically exposed in this domain; achieving full stratification is necessary to prevent concentrations of forces from becoming vulnerable targets.
- This requires continental sensor integration and an anti-ballistic missile system incorporating platforms like Patriot, Arrow, and SAMP/T NG, alongside MRAD, SHORAD, and V-SHORAD solutions.

Assuming expanded roles within C.C. Air Rammstein command, strengthening CAOC, and developing dual-use CAOC functions would support greater autonomy in European air and missile defence.

❖ **European Naval Forces**

Naval development should prioritise security needs in the Baltic and Black Seas, with growth towards the Mediterranean and North Sea.

To comply with international agreements such as Montreux, riparian states may collaborate to assemble European naval groups under both national and EU flags.

Enhanced communications, surveillance, and weapons systems on existing vessels, or joint procurement initiatives, can address current deficiencies.

❖ **Industrial Autonomy and Logistics (Key Element in NDS 2026)**

NDS 2026 highlights that industrial capability outweighs doctrinal considerations in modern conflict; Europe requires a proactive defence industry with multi-year contractual guarantees, standardised equipment, and fewer variants in major systems.

Presently, Europe fields 17 tank models compared to the United States' single variant; grouping capabilities and forming tactical subgroups by equipment type – such as *"Abrams", "Leopard"* and *"Leclerc"* groups – would provide mission-specific operational flexibility.

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❖ **Strategic Logistics**

Logistics must sustain frontline operations and contribute to societal resilience.

Heavy military transport via air and rail must be rapidly deployable, enabled by a comprehensive network of highways and railways for swift movement and supply.

Secure logistics centres in Eastern regions (Poland, Romania, Baltics) for pre-positioning and distribution are urgently needed. At-risk states should develop advanced repair and intervention capacities, as well as engineering expertise for defensive land structures.

❖ **Command, Control, and Decision-Making**

Streamlining command protocols is essential to overcome Europe's traditional weaknesses. Utilising existing NATO commands under a clear authority transfer protocol could yield efficiencies.

Transfer of command to NATO solely upon Alliance involvement ensures alignment with Europe's defence mandates while respecting potential reservations among non-EU participants.

Procedures governing the timing, composition, and scale of military response should be standardised to enable unified action during crises. Avoidance of unanimous parliamentary approval across 27 nations is critical to prevent delays and mitigate risks.

❖ The Nuclear Dimension

Although often avoided in discussions, nuclear deterrence remains a necessary consideration as indicated within NDS 2026.

Current capabilities in France and the United Kingdom are insufficient for comprehensive deterrence against major threats, necessitating continued reliance on US nuclear assurance and advanced technologies in cyber defence, space, communications, and satellite operations.

Establishing a European Cyber Defence Command and enhancing anti-satellite capabilities represent realistic steps toward autonomous defence.

Safeguarding critical infrastructure at the EU level – including energy, transport, communications (submarine cables), financial systems, strategic communication, and counter-disinformation efforts – requires integrated national contributions and a cohesive strategy.

WHAT A EUROPEAN DEFENCE CAPABILITY WOULD MEAN FOR ROMANIA

From Romania's standpoint, the development of European defence capabilities would establish credible security guarantees. The deterrence of military threats originating from the Russian Federation and its potential allies cannot rely solely on national defence mechanisms. Given Romania's geographical proximity to the Black Sea – a region closely associated with potential threats – coordination of European defence activities could be managed at a Fleet (Division) command level, as previously announced by Romania. Additionally, this command structure (HUB) could facilitate multimodal transportation coordination.

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Romania should consider initiating the establishment of at least two major European military bases to enable the pre-positioning of equipment and personnel training within operational environments. Logistics and transfer centres situated along the front lines would ensure preparedness and rapid response. Romania's defensive infrastructure ought to be integrated with Bulgaria's, as outlined in Strategic Defence Plans, to secure Europe's southern flank and address

its unique requirements. As Romania is vulnerable and potentially a primary target in any conflict scenario, a permanent European rapid reaction capability within the country is essential to support readiness and effective deterrence.

Should Europe advance its independent defence capacity, Romania would transition from being considered peripheral to occupying a pivotal frontline position.

CONCLUSIONS

By 2030, the European Union can achieve robust conventional defence capabilities, encompassing industrial assets and mechanisms that foster resilience, rapid force generation, and sustainment. Key deliverables include ammunition production, joint procurement, industrial consolidation, and enhanced military mobility, all supported by established legal frameworks and budgetary provisions. Nonetheless, attaining full strategic autonomy remains improbable; nuclear deterrence and certain strategic assets are expected to continue under NATO and the transatlantic alliance. Embracing a two-speed Europe may expedite progress by 2030, provided it alleviates decision-making bottlenecks and bolsters standardisation through coordinated procurement (European External Action Service, 2025).

The formation of a comprehensive community defence capability – integrated with the North Atlantic Alliance – should be pursued via revision of Allied Planning after the EU defines its requirements, ensuring sufficient capacity to deter the Russian Federation.

The formation of a comprehensive community defence capability – integrated with the North Atlantic Alliance – should be pursued via revision of Allied Planning after the EU defines its requirements, ensuring sufficient capacity to deter the Russian Federation. European defence planning can leverage NATO's Strategic Defence Plans if appropriate steps are taken and mutual trust is maintained.

The United States will remain committed to providing nuclear defence and advanced military technology, areas where European states currently lack sufficient manufacturing capacity. European nations are responsible for maintaining operational readiness and ensuring sustainability through the provision of ammunition, spare parts, and logistical support. Enhanced cooperation at the Community level can facilitate shared costs and collective security across Europe.

Romania must conduct a thorough defence capability audit prioritising operational effectiveness, ideally with guidance from experienced partners. Addressing gaps and integrating support structures should be paramount, with requests grounded in strengthened bilateral agreements, treaties, and joint economic initiatives. Political parties in Romania should prioritise supporting Moldova's integration into the EU and developing a unified defence capability, recognising these objectives as essential to national security.

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