



Resilience for what? – Preparing for the wrong war?

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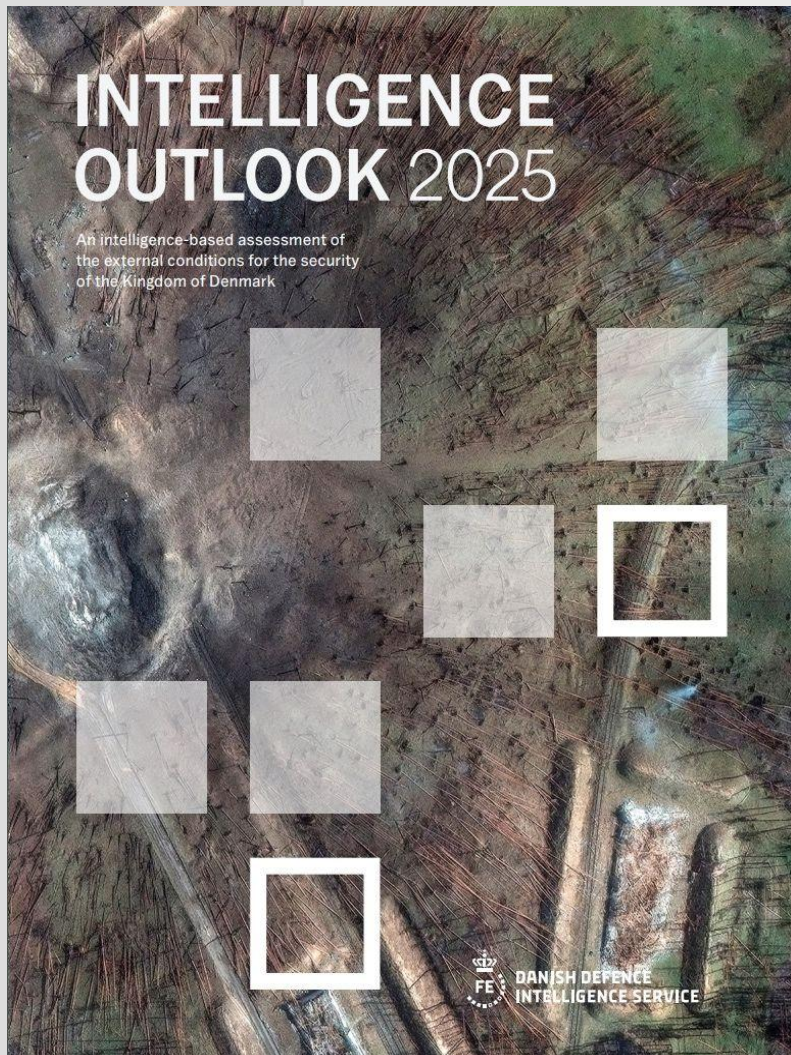
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PwC

3 June 2026



What war should we prepare for?



- **European intelligence services estimate that Russia may have the capacity to attack a European NATO member 2-5 years after the Ukraine War has ended - **provided that the US does not intervene****

→ **That gives Europe 5+ years to build the capacity required for effective deterrence and defence**

→ **And a HUGE incentive to keep supporting Ukraine**



Europe is ill-prepared for war without the US



- The whole point about NATO and the EU was to create a new Western Europe incapable of wielding military power on its own
- NATO's original purpose was to keep the Soviets out, the Americans in and the Germans down
- Europe and the Nordics remain incapable of doing so on a major scale without US support





Military gaps galore

1. Command-and-control
2. Scaled autonomous systems
3. Ground-based deep precision strike & 6 generation air combat systems
4. Air defence
5. Satellite reconnaissance & communications
6. Space launch
7. Persistent airborne ISR
8. Military cloud, software & AI
9. Strategic airlift
10. Electronic warfare - suppression and destruction of enemy air defences

Kiel Institut, May 2026

Analysis

Defending Europe without the US: first estimates of what is needed

Europe could need 300,000 more troops and an annual defence spending hike of at least €250 billion in the short term to deter Russian aggression

Publishing date

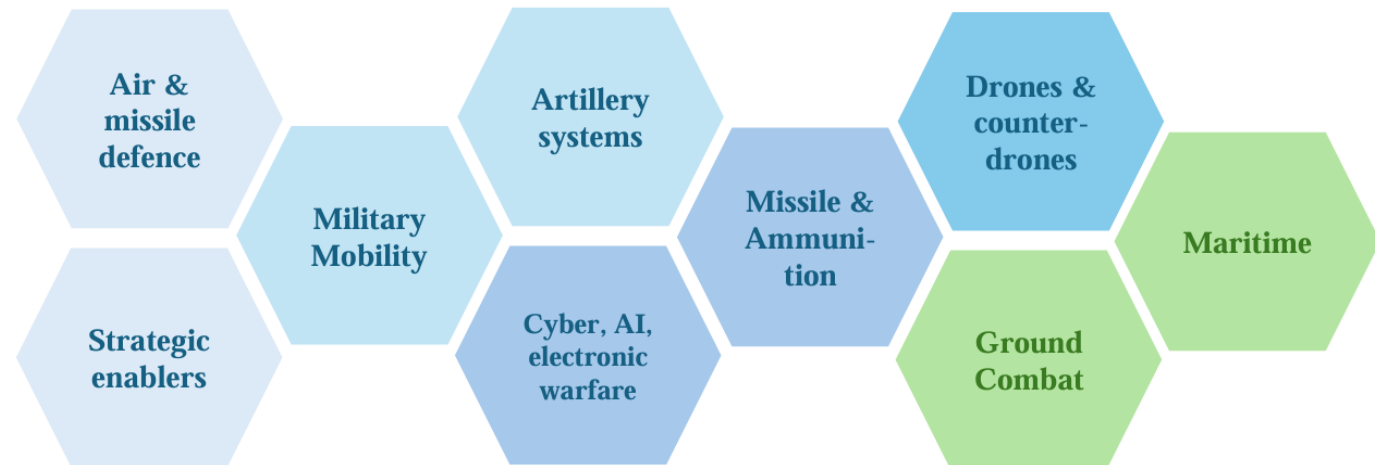
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Civilian/hybrid gaps galore

Civilian/hybrid resilience requires capacity to:

1. PROTECT (Prevent & Prepare - Deny)

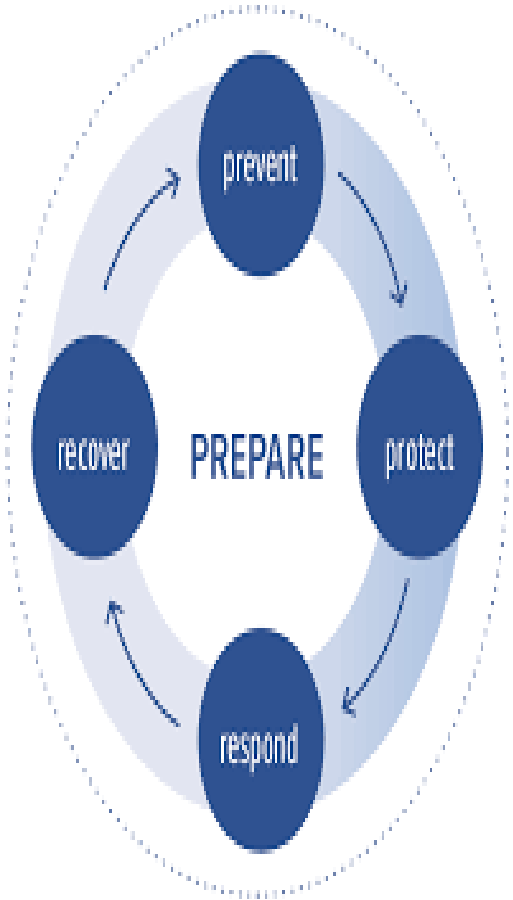
- Harden Civilian Infrastructure
- Empower/educate Citizens
- Ensure Government Continuity

2. DETER (De-legitimize & Impose Costs - Punish)

- Expose Operations – Name and Shame
- Inform the public
- Impose Consequences

3. REBUILD (Respond & Recover)

- Repair systems – Infrastructure and IT
- Support civilian victims
- Evaluate and Adapt





The principal problem is political

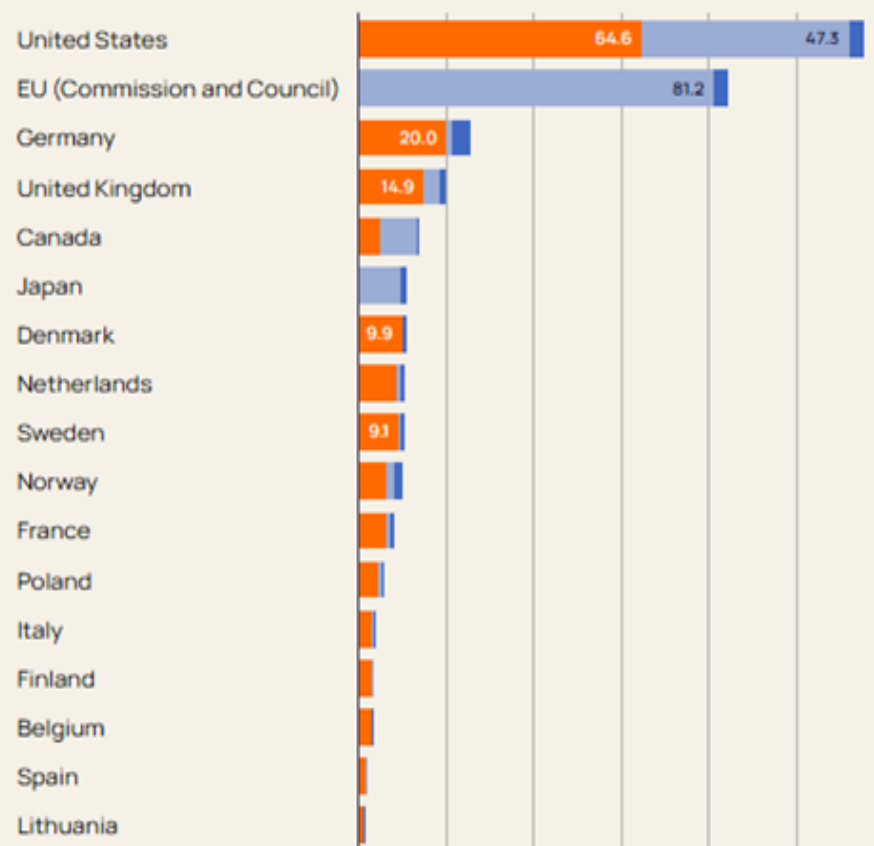
Government support to Ukraine: Type of assistance, € billion

Allocations January 24, 2022 to February 28, 2026. Data on 42 donors; scroll to see more donors

KIEL Institut

Select the type of aid ▾

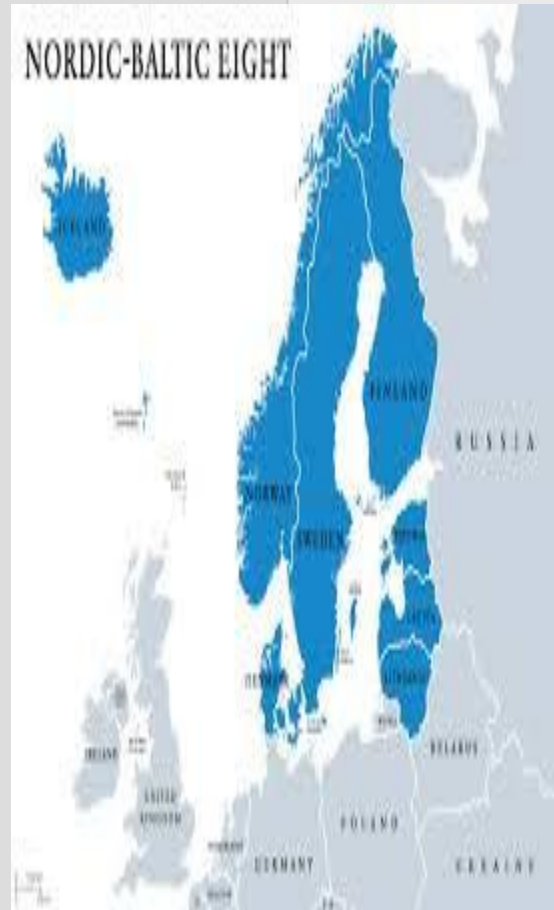
■ Military ■ Financial ■ Humanitarian



- **North-South divide – Russia vs Migration/instability threat**
- **Germany, UK and the Nordics provide lion's share of Ukraine support; Nordics and Balts lead when measured in % of GDP**
- **No common European threat perception**
- **Uneven defence spending**
- **No agreement on when and how to use force (common strategic culture)**



European deterrence and defence hinge on coalitions of the willing (COWs)



- **The 2026 Greenland crisis was handled by 7 countries willing to deploy troops + EU threats of sanctions**
- **European nuclear deterrence without the US is an Anglo-French affair**
- **Conventional deterrence of Russia in Northern Europe must be addressed by the Nordic/Baltic Sea nations + UK**
- **Southern instability and migration must be addressed by Club Med**
- **Coalitions inside NATO and EU are not a threat, but a necessity**

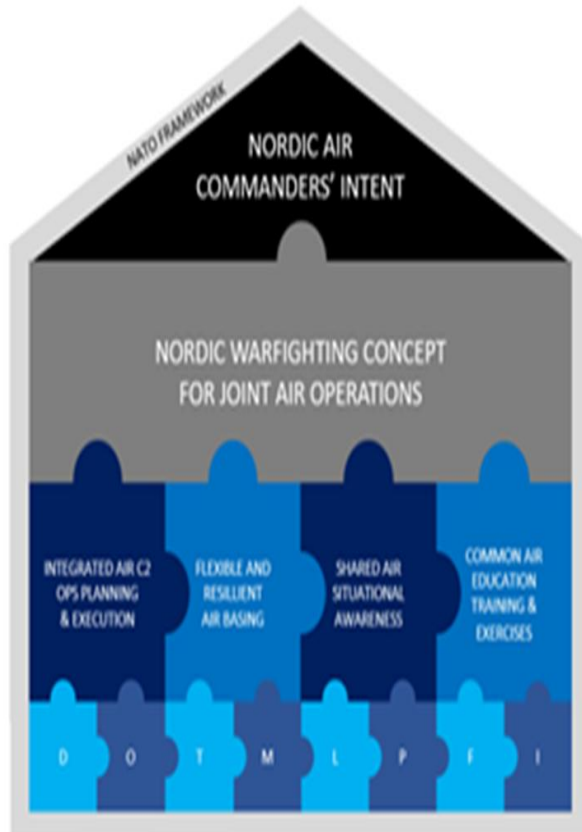


COWs are key to collective action problems



UNCLASSIFIED

NORDIC AIR COMMANDERS' INTENT



- **Small groups of countries sharing threat perceptions can mobilize the will to act collectively**
- **The Nordics need to cooperate to survive in a world where US support can no longer be taken for granted in the event of a Russian attack**
- **It is for this reason that Nordic military cooperation has taken off and become a priority in all four Nordic countries since Finland and Sweden joined NATO**



Europeans/Nordics must be able to use NATO's infrastructure without US by 2030



Europe

Report: US to cut strategic bombers and warships available to NATO in a crisis

By Markus Wacket, Linda Pasquini, Reuters

May 26, 2026, 04:32 PM

- **The Northern NATO countries may be capable of executing NATO defence plan North West with little or no US support by 2030**
- **It will require large investments in command and control and communications, but it is doable**
→ **The combined pressures from Trump and Putin make it likely that these investments will be made**



Questions?



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