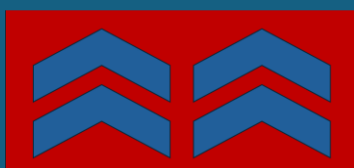


MAPPING DEFENCE, SECURITY AND RESILIENCE TRENDS AND PERCEPTIONS

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2025

One of the biggest defence and security events – Defence 24 Days - took place in Warsaw on the 6th and 7th May 2025.

The size of the event was reflected by the size of the location – with 7 parallel sessions, spaces organised on multiple floors and a remarkable exhibition of entities active in the security and defence sector showcasing their defence products and solutions.

The present report includes the information and opinions given during the event, incorporates the authors’ observations, puts forward an analysis of these and interprets findings in a wider geopolitical context. The last section puts forward a series of comments and recommendations.

Perhaps more than anything the present report is an indication of the regional perspective on the perceptions regarding level of threats, the urgency of needed actions and rank of priorities. It should be thus read as a snapshot of the regional sentiment on the background of the overspilling tensions from the war in Ukraine, the state of national defence capabilities, but also bearing in mind the political mood just before the national presidential elections planned for the 18th of May '25.

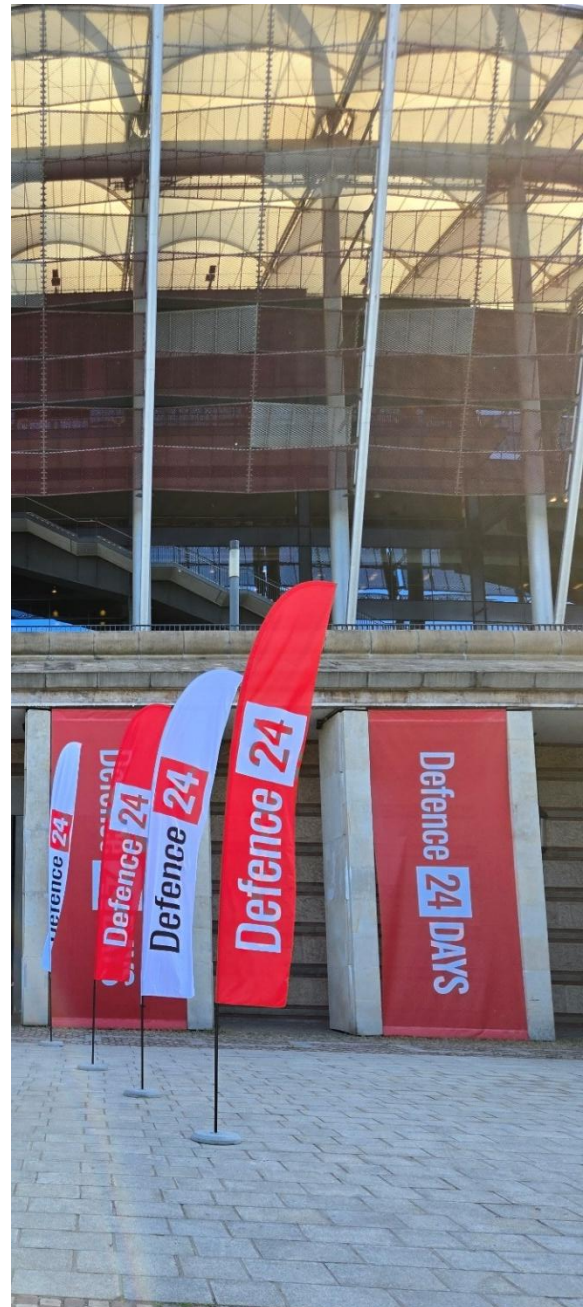


Photo by: the author

Disclaimer. *The information included here is based on the presentations given during the Defence 24 Days event held in Warsaw on the 6th and 7th of May '25 and on the authors' observations. The analysis incorporates the authors views and comments of the presented and observed aspects. The proposed analysis interprets these aspects in light of previous research and by means of a comparative approach.*

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Geopolitical and regional perspectives and challenges

The first notable aspect from a Western perspective is the difference in the tone of messaging in relation to forecasts on the development of conflict and war within the immediate vicinity of Europe and potentially within her territory. The sense of urgency and tone of warnings are different from the ones most often used in the public space by Western public officials and government representatives. A more overt positioning is noted in terms of identifying Russia as the threat, exemplified by characterisations such as “Imperialist Russia”. The second notable aspect is the anticipated time horizon for such escalations on European soil, most likely in the Baltic region, ranging from 5 to as short as 2 to 3 years. The urgency of this timeframe is balanced against the time needed for appropriate armament given the current status of the European defence sector.

Expressions of this verbalised strong positioning in relation to the identified outside threat include:

- *Only the strong are able to defend themselves.*
- *Those who want to destroy Western civilisation will lose.*
- *We know where the enemy is.*
- *The adversary must know we can defend ourselves.*
- *Don't mess with us because we can return the power.*
- *Values need to be supported by power, [...] by strong economies, by strong alliances.*
- *We don't have time. If sanctions [on Russia] are lifted we maybe have 2 to 3 years to get ready [participant from Lithuania].*
- *Let's not be romantic about the idea of everlasting peace in Europe.*

The messaging also indicates the acknowledgement that defence oriented activities and events as the one here in question most likely are of interest for the Russian government. Invited participants from Lithuania, characterizing their country as being in the region of hard liners, share one of the highest senses of urgency: “We don't have time. If sanctions [on Russia] are lifted, we maybe have 2 to 3 years to get ready”. The challenge of speed is accompanied by the challenges or overregulation, bureaucracy and political disagreement at national and EU levels. The Baltic region was identified as the most probable place for a potential future incursion for Russia, with an anticipated quick attack followed by threat towards the NATO alliance. The Baltic is thus seen as a particularly vulnerable region in relation to the threat coming from Russia.

The current status of defence capabilities and challenges presented in the following need to be seen and analysed in their geopolitical, economic, social and historical contexts. The event itself observed a diverse and wide participation in terms of ranks from national (Poland) and foreign armies with global participation (US, Ukraine, Korea, the Arab nations etc.) indicating a global market for the defence industry as well as global interest for the developments of the

military and geopolitical aspects in the region. The Defence 24 Days initiative itself predates the ReArm Europe programme. The themes of the 2024 edition for example overlap with (still) current trends and challenges, indicating that the reaction speed of a conglomerate is different than that of regional actors, since it needs to accommodate and level different reactions to perceived threats.

Characteristics of the defence industry

No longer have states exclusivity or monopoly over the defence industry, but rather, we are facing the privatisation of the defence industry.



Photo by: the author

Cutting edge solutions are being developed by private entities making them available for governments and national armies in an international market. The presence of private companies with a global representation indicates to this trend, with examples including companies from US, Norway, Israel, South Korea displaying products ranging from drone or anti drone systems, submarines, firearms, AI driven intelligence solutions, medium and large scale land and air systems. In the sense of the open market, the defence industry is no longer a national or regional matter, with goods and solutions being offered by different developers, and global leaders showcasing their niche solutions. Two divergent trends emerge. One is the desirability of having national based solutions, sustained by different arguments: controlling the production and technology in terms of materials, capacity and time, security of data, protection of IP etc. and the overlapping need for stimulating investments in European defence as a means of economic growth: “Without investment in defence, the economy will not grow.” (Participant from Poland). The other is the functioning of a liberal market in terms of construction and production of security and defence materials and solutions.

Being part of a **military alliance** brings advantages but also challenges. Given made agreements, allies can rely on each other for extension of military capabilities, most notable example recently given on numerous occasions in the media being the extension of the nuclear umbrella to allied nations, with the UK and France as examples of having this capacity. Still, states aspire to and pride themselves with having 360° national defence production capabilities, having national “end to end production” (in Poland), leading to the fact that “we don’t have to assemble anything”. In another intervention a similar example was given by a participant from France, stating that “[in France] we have our own intelligence [capabilities]”. Extension of protection does not include full disclosure of capacities. For France, nuclear power serves a defence function - “for protecting her interest”, being the “ultimate warning” with its strategic ambiguity on the matter being maintained as a matter of choice.

The visibility character that **deterrence** needs to have in order for it to function is one of the current challenges that Europe is faced with. On this point, one US former high ranking military, explicitly making the argument that Europe needs to take up the lead role for her own defence, argued for the shift in focus for the US: “our priority is to fight against the axis of dictatorship – China, Russia, Iran and North Korea”. He also anticipated that a crescendo on hostilities [with Russia] is foreseen in the next three years. Capabilities build up also serves a deterrent function and deterrence thus needs to be regained by Europe. Power projection in an influencing element for security awareness perception. Relating a historical event, one participant from Croatia mentions: “One reason why we were attacked is because we didn’t have the deterrence and the capabilities”. In regards to nuclear deterrence, as one participant mentioned, “If Russia understands that it can use nuclear threat to change behaviour in Ukraine, it will continue in UE”.

National and regional specificities

The monetary aspect of defence has been raised on numerous occasions. In itself this is not a surprise, since the reiterations within NATO, the EU and national structures on raising expenditure for defence indicate that this is not a matter to be solved from one day to the next. An additional factor is that expenditures are calibrated to percentage of GDP, actual defence needs, influenced by size of territory, closeness to a threat, state of the military and the choice, where possible and desired, to opt for gradual increase of own capacities while leaning on the umbrella extended by allies. When looking at expenses for defence thus, one should consider the relation between vicinity to threat actors, levels of threats and attacks towards both the physical and cyber spaces and levels of spending in terms of GDP related to these factors and to size of territory. Given the presented aspects, economical factors are still very much determining choices on procurement and structural developments needed for modernisation and development of civil and military defence capacities and capabilities. Unlike the Netherlands, where current choices on defence initiatives are influenced by conflict of priorities in terms of finite physical resources of land, CO2 and noise pollution quotas and undergo public negotiations or dialogue between the government and the public (Popa, 2025), in the Eastern

vicinity, choices are rather conditioned by budgets. In the same time, one should keep in mind that in general, most defence investments run on debt.

With Moscow reportedly having announced enhancing fighting potential, Poland also reports targeting allocation of 4% of her GDP to defence, with the main objective of deterrence, being among the EU countries with the highest percentages of GDP dedicated to defence. On an additional note, of all EU states, Poland also has the largest diaspora. Meanwhile, it is also faced with a context specific challenge at her borders – that of the weaponisation of illegal migrant streams at the border with Belarus. For defending the border, a third barrier is reportedly being built, in addition to the suspension of asylum rights for up to 60 days.

With delivery waiting times for certain products being currently measured in years, the demand for defence products is higher than the current offer. Investment alone can speed up production only so far. **Procurement** is another challenge faced by armies at national level and under the NATO umbrella. Investments in private and public companies for stimulating defence production is being reported. Joint procurement is one solution for speeding up collective defence capabilities build-up. However, states do report bi-lateral collaborations on the topic of defence capabilities. Croatia for example reported collaborations with the US and Germany and potentially with Poland. Partnerships are being sought and political stability and visibility of a clear strategy are factors when choosing partners for defence activities and defence production and procurement. Reportedly, acquisition of Rafale airplanes has been conducted by Croatia and currently pilots are being trained. From the perspective of Lithuania as well, the need for defence material is higher than the supply. Not only is ramping up of production capacity needed, but reaching higher TRLs and implementing innovative technologies are required. Joint acquisitions in the defence sector are positively evaluated, allowing for faster production, since current waiting times measured in years is not useful in report to current needs: “Our [defence] shopping list needs to be squeezed from 15 years to 5 years”. Investments with a long time frame are not feasible. Expressed estimations also included the fact that it will take a decade for Europe to rearm and that European allies should provide forward facing forces.

The challenges of being part of a federated military alliance also manifest themselves at the practical level, in terms of the need for **standardisation, interoperability and integration**. Standard equipment is needed. Standardisation and compatibility are indicated as current challenges: “Incompatible defence capabilities are not useful for an army that needs to fight”.

Regarding the concrete measures put forward for the modernisation of the army, national military representatives mentioned the need for “**dronatisation of the army**” and the fact that every soldier should know how to pilot a drone. The deployment of drones on the battlefield in Ukraine has led to shortening of the technology development and updating cycles. This is the most often mentioned example of how the face of warfare has permanently changed with the war in Ukraine. Experts present at the Defence 24 Days also conclude that [in a broader sense as well] the current war in Ukraine is no longer the one that was fought in the beginning.

Drones are also seen as a technology that has developed at impressive speed, with an advancement in a 10 year timeframe from garage testing to deployment in operational sites in

warfare. These practical oriented sessions, such as the one on drones and autonomous systems received large interest from military participants. Additionally, the gallery of private companies exhibiting their products and solutions abounded in drone and anti drone systems.

One identified challenge is the production of munition. Additionally, air defence capabilities are considered a vulnerable spot for European defence.

Military mobility is an additional challenge. As one participant put it “It is easier for illegal migrants to move from country to country than to move the military across the EU”. The actual logistic and legislative capabilities in this regard should not be analysed in separation from political will or state willingness to do so.

Complementary measures include having a pool of reservists that can be set on active status if needed, enhancing recruitment and addressing population resilience, the latter measure addressed in programs for population and civil defence.

Perspectives on resilience

As noted previously (Popa, D.M., 2025) resilience needs context adaptation, as different states face different geopolitical, structural and economic challenges and have different profiles in social and historical experiences, influencing the way they react to different threats. For withstanding the current types of threats, states need a strong army, a strong information environment and a strong society. The Scandinavian states are a recognised and respected example of comprehensive resilience programmes not only for the Western neighbours but also for their Eastern ones. Finland and Sweden come up often in this regards. An initiative similar to the Swedish brochure “If crisis or war come” is being implemented in Poland, with the distribution of the printed version of the written material reportedly planned for the fall of 2025. One challenge to be addressed is the accessibility of the text, that needs to respond to the needs of all segments of the population. In this initiative, the Ministry of the Interior, the Ministry of Defence and the Ministry for Civil Society are involved.

One common challenge faced by European states is the construction or rehabilitation of infrastructure for resilience: so called **collective protection structures, shelters** or protective spaces. Development of these shelters is constrained by objective factors such as costs. Initiatives and infrastructure for civil defence manifest context specific development stages. Officials mention that infrastructure is not ready for instant deployment, that a systemic approach is missing in the case of most cities in Poland and that current budgets dedicated to population protection and civil defence do not meet the demands. Protection of urban areas thus includes air raid shelters but also mapping of existing infrastructure in terms of location, capacity and quality standards, since, as reported by one participant “some were built by private developers who cut corners”. Officials also mention the need to update national obsolete alarm systems. In comparison, in the Netherlands, alarm systems are tested on the first Monday of every month, indicating a constant maintenance of the public warning system regardless of actual threat levels.

On the issue of planning for the **defence of critical infrastructure**, lessons drawn from Ukraine have been incorporated in national planning as well as scenarios developed in Ukraine. However, as opinionated by other participants, solutions cannot simply be copied due to different contexts and lessons drawn from countries that are not in military conflict. The relation between critical infrastructure and the population is a factor to be planned for in terms of capacity testing, tension or potential breaking points and redundancies. Protection of critical infrastructure presents particular challenges. Private companies are offering neutralisation solutions for countering drone attacks. In the case of cross-border entities within the critical infrastructure providers, the matter of protection responsibility contains additional challenges, with security being the responsibility of the operator and cross border interconnectivity of critical infrastructures incurring overspilling effects of attacks upon one node.

Another common challenge is the planning for deployment of personnel with military training, either active or retired. In the case of Poland, officials mention an exercise of mapping previous deployment of military personnel and planning for allocation of retired officers to civil defence duties. This initiative seems to suggest that there is a visibility gap in regards to location of service and specific competences and skills that is currently being addressed in view of optimisation of resources planning.

One particular aspect mentioned by Polish officials is the need for **training** at different levels on the topic of **crisis management** and the shortage of specialised staff in the areas of population protection and civil defence, crisis management and psychological support. Training for decision makers in crisis management and protection of civilians is underway, with activities lasting 4 days in small formations, as simulations with large numbers of people is not effective. The compulsory character of the training was set by law and it is reported that according to it all officials need to undergo the training by the summer of this year. An interactive map of counties that had their heads of office trained is also mentioned. The training also needs to be mobile.

Two adversaries are mentioned in relation to response to a crisis: shock and time. The matter of responsibility for allocation of resources in times of crisis and the strategic resources plan are foreseen in the national context, as is the management of critical resources during a military crisis. The ministry of Internal Affairs has the authority to allocate resources. Another allocation of responsibility is the one for determining purchasing of goods needed in crisis, such as power generators and water tanks. Storage of strategic resources is another key aspect to be included in resilience plans.

Resilience plans include resilience stocks at the municipality level for the first three days of a crisis and afterwards the activation of government strategic resources. Additionally, proposed electronic warning systems should also include information on the anticipated duration of the threat. The question as to whether strengthening resilience would be seen as provoking action was also raised.

Legislative initiatives.

Legislation plays an important factor in hindering defence development and preparedness, either through overregulation or due to legislative gaps. Overregulation was mentioned by participants as an impediment for speedy procurement processes and ramping up of defence production capacities. In a similar vein, the lack of legislative frameworks around crisis management and conflict and disaster preparedness is a hindering factor for optimal response to crisis. Developing initiatives for resilience and civil defence requires facilitation through legislative action. This is a challenge faced by different EU and NATO states, since budget allocation and resource prioritization formally require accountability. Poland reports the adoption of a law on population protection and civil defence, an act of parliament that came into force in January of 2025. This piece of legislation was brought into discussion on several occasions, underlining the importance it received in the national context. It can be deduced thus that threat perception also serves as a nudging function for the adoption of legislation.

Transferring lessons. A blessing in disguise

States develop resilience plans as anticipatory action for different envisioned threats. These are put to the test once either threat or disaster manifest themselves. The [2024] flood in Poland was mentioned on several occasions as the trigger for legislative changes allowing for swifter response during crisis and better allocation of responsibilities during crisis. Critical water supplies in the region are now better planned for, as they proved to be a systemic weakness made visible during the natural disaster. As water supplies and a water purification plant were affected during the crisis, water tanks were brought in. The timeframe in which the emergency water supply had to be kept in place until situation redress was also influenced by the time needed for testing contamination levels and receiving results. This factor needs to be incorporated in future calculations of necessary stocks for responses to crisis. The flood tested the collaboration between military and civilian defence. One practical example of concrete initiatives taken based on lessons learned post-event was changing of the size of the power generators after the flood. The lessons learned from a natural disaster improved preparedness and protection of vital services for the future, with lessons learned not being limited to the same type of disaster.

Willingness to defend and cognitive warfare

The topic of cognitive warfare and fighting disinformation is high in Western countries given their observed manifestations, with numerous initiatives addressing the need to educate the population in the means of recognizing and countering disinformation. (See for example the reports and projects of DisinfoLab). In comparison, in the case of the East neighbourhood, cognitive warfare and disinformation in themselves seem to receive less attention from government bodies. This could be connected to preliminary conclusions published elsewhere (Popa, 2025) that the communist experience has had a formative effect on collective memory and as such the population in countries of the former Eastern block is less permeable to foreign

influence, since exposure builds immunity. Still, raising public awareness regarding upcoming threats needs to be addressed by public authorities, as reinforcing and deterrent exercise. Participants from Poland reported initiatives on introduction of courses in schools for media literacy enabling recognising of disinformation. Government officials also have to carefully balance their messaging in relation to the need for preparedness for war, both for not giving away potential sources and methods and also for not causing panic reactions within the population, something that would only be in the benefit of the adversary.

In facing current threats, officials from Croatia mention drawing on the lessons learned from fighting against Yugoslavia 30 years back. Contrary to this perspective, reflecting on the civilian preparedness for war, it was noted by one participant that “war has been erased from the consciousness of citizens”. The image is thus nuanced, not only across Europe but also among blocks of states sharing common history. As showed in the previous report on resilience (Popa, 2025) surveys among the European young generation indicate a concerning low willingness to participate in active conflict. However, mature comprehensive resilience programmes such as the ones found in Sweden and Finland incorporate actions directed at preparedness for war, including physical and skills training. This does not negate the marking, internalised experience of communist rule and conflicts with the former USSR. Analytic reports made by the CIA on the potential for invasion of the USSR in different East European states indicate how differences in anticipated population reaction and resistance led to different decisions on the USSR's part regarding invasion, given anticipated costs of holding the territory, with Poland being an identified example in this regard.

In regards to perspectives of population psychological resilience, different points of view were presented. It was mentioned that the population becomes affected by constant warnings and that behaviours start to change as reaction to perceived threats. The Finish example of a comprehensive security model was mentioned, in which the population is well aware, due to repeated and time sustained government messaging on where to obtain vital and correct information from and where to go in case of crisis. On the other hand, a participant from Finland reported on pejorative characterisation that individuals in the US focusing on preparations for disaster receive – that of “prepers” subsequently suggesting the need to move away from stigmatisation to normalisation of the behaviour, in order to have disaster as a probable future in mind and prepare accordingly for it.

One other point is the one that despite military considerations in regard to the rationale behind a European effort of strengthening the Eastern flank, “security is patriotic in nature”.

Cyber and tech

It was reported that Poland has observed a substantial increase in attacks of its cyberspace from one year to the other. In terms of cyber defence, it has been noted that with due effort “we can make it through this difficult period”. This last remark points to different aspects. In terms of cyber resilience, the capabilities build-up phase, when existing defence capabilities are strained

either by volume or complexity of attacks, is the most challenging one. If one relates the statement as a reflection to the wider context of the conflict, it indicates a view of the conflict as a time limited event. It was also noted that cyber and hyber attacks are more similar to terrorism than warfare.



Photo by: the author

Concluding remarks and recommendations

International participation in the event from current and former high ranking officials in either EU, NATO or national structures, scientists and opinion leaders, stands to show several aspects. First, European security is a shared concern. Secondly, strengthening the Eastern flank is of European interest, acting as deterrent both in military and political commitment terms. Thirdly, it stands to show that lessons can be transferred and cross-country or sector knowledge be build upon, as unique combinations of context factors and threats have lead to novel solutions that can be easier learned from then learned by doing or experiencing them. Fourth, it also indicates that both within EU and NATO structures taken individually, but also in their intersectionality, questions on individual, shared, overlapping or not covered responsibilities in the face of current threats are being debated. Rapprochement between the two conglomerate structures remains a matter of political debate.

Europe can draw on the lessons provided by the Second World War and change her mentality and speed of action to wartime conditions. The speed with which states and national armies can reach their assumed defence targets is influenced by perceived levels of threat and the timeline or imminence of manifestation. Unfortunately at this point, in matters of speed of

rearmament, the matter is no longer only one of what “We want” but also very much one of what “We can”. Defence production at its current state does not meet the demands. Programs such as ReArm Europe provide political backing, stimulating public support for investments in defence, but building the actual capabilities will require time and concentrated focus. Discussions on potential withdrawal of the US from NATO or of shifting focus to other geographical areas of interest have a double edge effect. They make the negotiation processes longer and reaching of consensus on long term commitments more difficult due to the uncertainty factor. On the other side, this envisioned defence capability void makes increasing own defence capabilities and committing the needed budget to it a matter of urgency. Manifest declarations from former US high ranking military personnel on the US’s shift of priorities to the Asia region and “finger pointing” at low investments rates of European states in their own defence capabilities indicate not only the current necessity to make these investments in the situation of having “a knife to one’s throat” but it should also serve as nudging function for reflecting on how prior strategies have lead to being put in this position.

Leaning on traditional allies for defence is at the base of the NATO treaty. It must also be said that taking on the role of defender of the *free world* and its values also stimulates ones’ own economy through the need for developing defence capabilities not only for oneself but for ones’ committed allies and assumed points of interest and projecting these capacities there where needed. Why then has Europe not done the same in a long term strategy for having defence and economic autonomy is a question too complex to approach here and one that has been analysed at length in the recent period.

As one US high ranking former military mentioned “China and Russia are not looking to deter but to attack”. Additionally, given Russia’s revisionist character, it is not foreseeable that it would accept arms control. These big geopolitical players are revisionist ones. The *status quo* mentality is thus not at Europe’s advantage because it keeps her in a speed and that is no longer suited to the global challenges. Looking from “quick fixes” in terms of alternative trade partners for strategic or basic goods also proves lack of long term unified vision and does not serve the purpose of reinforcing the European position on a global scale. Public declarations from the president of the European Commission regarding the development of the war in Ukraine included the need for transforming Ukraine into an “indigestible porcupine”. Why does Europe not set for herself the same objective? Instead of having a reactive mode to externally determined crisis (enhanced in fact by internal structural weaknesses caused by years of policy choices) becoming such a steel porcupine includes not only having own defence capabilities and power projection for deterrence, but also developing self-sufficiency for the long term if needed, in matters of energy and food security, technology development and consumption etc.

Investments in defence are very much influenced if not determined by political decision. The political process is a lengthy and often a painstaking one, with political parties also having different agendas and views on priorities and best approaches and solutions. Europe prides herself on her political and electoral processes and legislative system. These are values built, consolidated and tested in times of peace. As participants in the Defence 24 Days event noted, currently, lengthy political discussions weaken public support, overregulation delays vital

investments and decisions needed for defence and weakens the power projection capacity so much needed for deterring external adversaries. Legislations are being changed and new pieces of legislation are being introduced in order to respond to challenges and threats coming from the outside environment. This is needed but not sufficient and not a purpose in itself. History has shown how the saying *Nood breekt wet* [Necessity knows no law] has been used as justification of extreme action or as basis for changing laws in response to political regime change. One should not forget though that the ultimate purpose is not to have political decision making and government action defensible by the law, the purpose is to defend the state and its citizens.

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Diana Popa has over 17 years of experience in research and academia and has authored numerous reports and scientific articles. Recent research and analysis focus on resilience as part of defence programmes, emerging disruptive technologies, in particular Artificial Intelligence in high risk areas, including defence.

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