

Notes on defence trends. The Hague. April-June'25

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➤ **April**

Taking the pulse of society on defence related matters

Defence seems to dominate the media across the country and Europe. Dedicated large events taking place in The Netherlands, Belgium, Poland for different audiences, from career militaries to the general public.

Inside the country, defence transforms landscape and perceptions, it morphs, starts to become visual, audible, olfactive and percussive, sometimes at people's discontent.

There is an abundance of defence related events.

People must be convinced.

They must be told a good story.

At one such event for the general public, a soft voice on a stage is relating the history of NATO's coming into being. The voice mentions returning from a 6 months stay in the US [The story must receive some weight from the get go].



“Nato – strong enough in uncertain times?” event. April '25. Source: The Author.

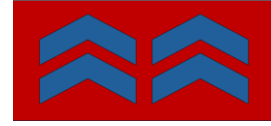


The atmosphere is relaxed, jovial. Jokes are being told on stage. People react in the room. It is the spring break. The tone of the discussion is different than the one of the NATO Secretary General on the topic of NATO's readiness at the moment. Third and young generation present in the now dark, now dimly lit space of the event. Not many representatives of the middle age population. At the entrance of the building where the event is held, an anti-war protest. The sense of cohesive community at the event and at the protest is present, despite the seemingly opposite positions.

A minister [also on tour] is laying the facts bare on defence preparedness. [Government officials are directly engaging different segments of the public in planned awareness and engagement campaigns across the country].



“Nato – strong enough in uncertain times?” event, April '25. Source: The Author.



An admiral addressing the civilian audience from the stage: “when war comes, the military are the first to fall. Then defending the country comes to you, the people”. One wonders what he must feel like doing this. His usual interventions in public national and international events and in the media are firm, imposing. Here he speaks kinder, softer, and not quite as comfortable. Adapting military behaviour to civilian life and interaction is hard. People expect you to have a light hart, ever when talking about war and war preparation.

Across the country there is a lot of political movement. Parties disagreeing about priorities, public debt, international involvement, Israel and Gaza. The young are involved in action of protest related to the Israeli – Palestine conflict. The International Court of Justice is handling the accusations against Israel. Half of the city is on lock down due to the NATO summit in 2 months.

The international stage is dominated by the possible forced peace on Ukraine and the geopolitical repercussions of the Trump administration. Trade tariffs determining reactive searchers for alternatives. Patch work. Too many fronts. Political discourse in written and verbal form oscillates between strong stances and stimulation of support for strong stances and soft voices pleading for adaptation and verbalising strategies needed for “small”. Countries, economies. Very different from what comes from the outside. Especially from the USA. Values are questioned and trade alternatives conditioned by them.

One should ask: When the stakes change, how much should one reconsider their position? How immutable are our values or should they be? Too much diversity weakens cohesion. The end result is much weaker that the opposing outside forces. And if one opposes no strong force to the pressure coming from the outside, it cannot keep ground, let alone gain more. This is not the time for soft speaking or consuming energy on internal alignments.

As other experts have also pointed, Russian, China and North Korea benefit from NATO’s and the EUs’ struggles with value and internal strategic alignment issues.

➤ **June**

Threat perception and response capacity

The NATO Secretary General, in a speech held in June at Chatham House in London, mentioned that “We are all on the Eastern front now“. This position can be linked with the advice of other military specialists reiterating that deterrence and enhanced forward presence are needed in order to discourage Russia. This also reflects the principles of defending one’s own country from far away from one’s own territory and bringing the war to the enemy. This means collective action in strengthening the presence and visibility of NATO on the Eastern flank, despite anticipated retaliatory action from Russia that would perceive such enhanced



presence as increased aggressive posturing against her interests and territory. On the other hand, the hybrid nature of war also means that wars are no longer expeditionary but they become a fight at home. In the current grey zone war, the population has become the main target of the enemy.

Across NATO and the EU, opinions diverge though on the perceived closeness of the threat. Closeness to the front line influences reactions and consensus on best approaches and needed capabilities. Threat perception is reportedly low in countries such as Belgium, which in turn has an impact on the readiness of accepting allocation of 5% of GDP to defence. Threat perceptions differ across NATO and the EU, with so called “first line countries” having a higher sense of urgency and better ongoing preparedness initiatives (e.g. Estonia, Poland). Given proximity and history with the origin of the threat, Europeans also react more emotional to the conflict in comparison to US partners.

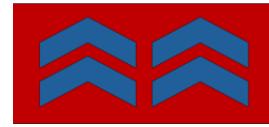
Defence production capacity upscaling is a main concern. According to NATO Secretary General, Russia produces in 3 months what NATO produces in one year. This point that was picked up, propagated and discussed by many commentators and analysts. Also according to the Secretary General, NATO needs a 400% increase in missile air defence and a doubling of enabling capabilities, with the objective of becoming more lethal. This means strengthening defence and deterrence posture. One backlash effect of a potential cease fire in Ukraine is that Russia will be able to increase stockpiles.

Other sources in the military also mention that the current regime in Russia has the intention, interests and capacity to continue the fight. Russian soldiers with PTSD that are imprisoned are reportedly rather sent back to the front line than be allowed in civilian life.

Experts also mention correlation of combat capacity, correlation of war potential and of moral and mental resilience of the population.

Because on the hybrid war, the population becomes a target, it needs to be actively involved in conflict preparedness actions. Opinions on population readiness and resilience vary from ones such as “be active or at least not get in the way of the military” to programs for strengthening population involvement and resilience. In the Netherlands, government proposals on forms for planned population engagement include the expansion of the reservist pool through different initiatives and stimulants and making the “service year” more attractive. Initiatives for enlarging the reservist pool include former military pilots now working in civilian aviation receiving the status of reservist in order to facilitate quick reinsertion and deployment if needed, business owners wanting to become reservists in order to be able to protect their own company and so called “cyber reservists”.

Estimations on military personnel requirements in the Netherlands mention 100.000 soldiers in a normal situation and 200.000 if things become tense. The need to enlarge the defence capabilities in terms of troops capacity is accompanied by additional challenges, such as shortcomings in housing facilities. This aspect is similar with the situation in the UK. Additional challenges are connected to the mobility of troupes across the European space. The need for a military Schengen space is reiterated by different military experts as currently movement of military equipment across the EU is extremely difficult. For this national legislation must be adapted.



Legislation

Additional challenges stream from the legislative sector, with outdated laws of war leaving room for interpretation, especially in the case of the grey zone type of war that characterizes the current landscape. This leaves the militaries having to interpret according to their own approach rules from 100 years ago. Internal regulations that go against efficiency also need updating.

The interpretation over article 5 is also debated among alliance partners in terms of the limits of what constitutes an attack, thus influencing the need for reaction. Additionally, in international humanitarian law, states are central, whereas in the grey zone, other type of actors are present, diluting even further the limits of current day legislation. Experts also address the contamination effects of changes to international order and the interconnectivity of current wars.

The NATO – EU relation

The EU - NATO interaction, not always the most comfortable of partnerships, is still in flux regarding existing structures and division of responsibilities in terms of defence. If in the past the Commission avoided assuming a role in the defence sector, the situation is now different. Still, required capacities differ between the two structures. For example, NATO has the technical systems needed to exchange classified information, while the EU does not.

What clearly differentiates the two structures in terms of power balance is the presence of the USA in NATO that changes the dynamic of negotiations. Limited resources shared between different organisational units lead to conflict of priorities. Diplomatic and military interests often clash in terms of preferred outcomes and speed of reaching them. Defence diplomacy is increasing in importance, with states sending delegates to centralised structures in order to push own interests and influence central policy decisions.

Military experts now talk about burden shifting instead of burden sharing, in a so called “Less America, More Europe” approach. In the same time, sovereignty in the cyber and intelligence areas makes it so that nations decide how much they want to share. Policy experts mention the need for new EU/NATO structures in order to address gaps and overlaps. However, given already existing tensions and permutations in power relations within NATO, any such new structures would most likely require a long time to reach the desired efficiency level.

In the wider institutional ecosystem, working together with the defence sector is no longer as controversial as in the past. Universities now want to contribute to the research done for defence purposes and engage internally and externally in dialogue for mending old taboos.



Technology opportunities and challenges

Technology is also present across the board in plans for enhancing defence capabilities, with drones being a main topic. Unusing drones has a multiplying effect, with the cost ratio between deployed and targeted systems being often raised. Experts mention that in Ukraine a first world war is fought in the trenches and a third world war is fought in the technology field. AI is embedded on devices that are deployed in trenches. Operations such as Spiderweb are already case studies for national armies and military alliances alike. Learning from the lessons in Ukraine, national armies are embedding drone units within their own structures.

The three week technology development cycle that initially was considered fast in Ukraine is now seen as slow. Reportedly, technology is doubling capacity every 2 years. Rapid procurement and rapid iteration are common requirements for national DoDs. Departments of defence now face the dilemma of standardisation needed for scaling versus the need for innovation. Reaching consensus across Europe is thus not an easy task, as it involves standardisation and interoperability of systems. Securing supply chains is characterised by some as protectionism. In the defence area, protectionism is manifest, seen that defence is a strategic asset and also due to the difference between offer and demand in terms of production capacities.

The division of the 5% dedicated to defence spending between 3.5% on core military requirements and 1.5 on infrastructure and industry capacity indicates to the need for a holistic approach to defence readiness, but it is also a way of facilitating absorption, since capacity cannot be increased just through financial stimulants. This is despite the EU's perception that economic spending equals security, since it does not directly or speedily translate as such. The current situation is characterised by waiting times often measured in years for large platform systems and limited producers that can deliver at certain standards.



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About the author.

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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