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How do threat perceptions, preparedness levels and risk calculations differ across European states?

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1. Europe has moved a long way since Russia's full-scale invasion of Ukraine began in February 2022. European allies and Canada raised core defence expenditure by almost 20 per cent in real terms in 2025.¹ Yet the apparent convergence in budgets masks a deeper divergence in threat perception and time projection. Governments are preparing against different imminence levels.
2. Four approximate groups can be identified, each characterizing a certain pattern of threat perception and subsequent strategic and military planning. Geography explains much of this; history and political choices account for the rest.
3. For the Baltic states and Poland, a ceasefire in Ukraine could release Russian troops and industrial capacity for use elsewhere.² Their planning starts from the possibility that Moscow may rebuild enough conventional strength to challenge NATO within a few years.
4. Both Finland and Sweden have spent decades organizing national resilience around the assumption that a crisis would reach far beyond the armed forces to impact society at large.
5. France and the United Kingdom (UK) now describe Russia in unmistakably stark terms. Germany has made a comparable shift in its discourse and, more recently, its military posture. Each faces the challenge of aligning military capabilities with their level of threat assessment and risk calculation.
6. Spain gives greater weight to threats from the Sahel and the wider Mediterranean and sticks to a policy of lower-level defence spending.
7. A ceasefire in Ukraine could sharpen the divide between these groups. The most exposed states are likely to see this as the start of a Russian regeneration period. Governments further from Russia may face stronger pressure to redirect money towards domestic priorities or, in some cases, even consider reopening economic channels. Europe could therefore become less aligned just as Moscow gains more room to recover.

¹ NATO (2026), 'Defence Investment Update: Record Spending in Europe and Canada', 7 July 2026. NATO reports that European Allies and Canada increased core defence expenditure by nearly 20 per cent in real terms in 2025.

² Smith, S., Lutsevych, O., Lough, J. and Giles, K. (2026), *How a Russia–Ukraine Ceasefire Could Imperil Ukrainian and European Security: Assessing Risks, Consequences and Options for Mitigation*, Chatham House, 28 May 2026

The eastern flank is already planning for the next phase

8. Poland and the Baltic states have by far the clearest sense of urgency. Poland's *2025 National Security Strategy* states that Russian aggression has increased the risk of direct military aggression against Poland and other NATO members. Warsaw is organizing for a prolonged, high-intensity conflict.³ Its East Shield programme is building fortifications and logistics infrastructure along the borders with Russia and Belarus, as well as strengthening warning and counter-drone capacity.⁴
9. In this region, border defence is often coupled with protection against sabotage. In July 2026, Lithuania deployed military personnel to guard key energy sites after intelligence warnings that Russia was considering a false-flag operation using captured Ukrainian drones. Latvia and Poland tightened security around critical infrastructure at the same time.
10. Spending figures offer a useful measure of the political resolve behind those choices. NATO estimates core defence expenditure in 2026 at 5.33 per cent of GDP in Lithuania, 5.10 per cent in Estonia, 4.92 per cent in Latvia and 4.68 per cent in Poland.⁵ Those governments are committing to levels of expenditure that would be, at this stage at least, politically very difficult to conceive in most of Western Europe.
11. Budget shares still give only a rough measure of readiness. Estonia, for instance, devotes a very high share of a small economy to defence and still depends on larger allies, especially the UK, for rapid reinforcement and on NATO for combat air power and integrated air and missile defence. Germany (as of 2026) spends a smaller share of GDP on defence, yet its much larger economic base gives it greater capacity to accelerate procurement and sustain military production.

Assessing timescales of possible escalation

12. Baltic intelligence assessments offer useful insights into how these countries assess urgency. Lithuania's *2026 National Threat Assessment* argues that the course of the war directly determines Russia's ability to threaten other countries. Continued heavy fighting keeps Russian resources tied down; a ceasefire or frozen conflict would allow Moscow to replenish ammunition and staff new units. It could also return more troops and equipment to permanent bases close to the Baltic states. A settlement followed by sanctions relief would accelerate this process by easing access to finance and technology. Lithuanian intelligence estimates that, over time, Russia could build a force large enough to gain regional superiority in the opening stage of a conflict with the Baltic states.⁶ Danish intelligence confirms that Russia is conducting hybrid warfare against NATO and the West.⁷

³ Chancellery of the Prime Minister of Poland, *Strategia Bezpieczeństwa Narodowego Rzeczypospolitej Polskiej*, 25 July 2025. The strategy identifies a higher risk of direct Russian military aggression against Poland and other NATO states and calls for the capacity to conduct a prolonged, intensive armed conflict.

⁴ Chancellery of the Prime Minister of Poland, 'National Deterrence and Defence Programme – East Shield', 2024–26. The programme covers fortified infrastructure, warning systems, logistics and counter-drone measures along Poland's borders with Belarus and Russia.

⁵ NATO, *Defence Expenditure of NATO Countries (2014–2026)*, 2026, Table 3, p. 7. Figures for 2026 are NATO estimates of core defence expenditure.

13. Those assessments are not evidence of immediate military intent, only estimates of capability. Estonia's 2026 intelligence report makes that distinction very clear. Tallinn currently sees no Russian intention to attack Estonia or another NATO member in the coming year and expects that to hold into 2027, crediting European preparedness and political resolve for part of that restraint on Russia's end. Its logic is straightforward: the probability stays low because Moscow sees the balance as unfavourable.⁸
14. That logic shapes risk assessment on the eastern flank. Governments in the region are spending now to keep Moscow's calculation unfavourable later. They also care intensely about the credibility and speed of allied reinforcement. A Russian attempt to seize territory quickly would place significant pressure on NATO political decision-making. Polish and Baltic fortifications, reinforced by forward allied forces, reduce the space for Moscow to imagine a short conflict ending before the alliance has fully mobilized.

Finland and Sweden start with society

15. Finland and Sweden add another dimension to preparedness. Both spend heavily on defence, although Finland's estimated 2.65 per cent of GDP in 2026 sits well below Baltic levels. This does not mean both countries are underprepared or that their risk assessment is lower; their strategic advantage lies in whole-of-society models built for massive crisis disruption.
16. Finland's *2025 Security Strategy for Society* assigns responsibility for maintaining vital functions across government and embeds local governments, businesses, non-governmental organizations and citizens in the same framework. The model covers continuity of essential services and security of supply alongside military defence. Finland kept this architecture alive through decades in which many European states allowed comparable Cold War arrangements to fade.⁹
17. Sweden is rebuilding its total-defence system at speed. Its *2025–30 Defence Resolution* added more than SEK170 billion (around £13 billion) for military defence and SEK37.5 billion (around £3 billion) for civil defence. Stockholm is investing in civil protection and municipal rescue capacity and expects public authorities and businesses to keep essential activity running during heightened alert or war.¹⁰ This gives both countries a degree of continuity between peacetime administration and wartime mobilization that remains much thinner elsewhere in Europe, including in the UK.

⁶ State Security Department of Lithuania and Second Investigation Department under the Ministry of National Defence, *National Threat Assessment 2026*, section 'Reduced Western pressure on Moscow would accelerate Russia's preparations for conflict with NATO'.

⁷ Danish Defence Intelligence Service, *Assessment of the Hybrid Threat against Denmark, 2025*, p. 3. The assessment describes Russia as conducting hybrid warfare against NATO and the West and rates the sabotage threat against the Danish Armed Forces as high.

⁸ Estonian Foreign Intelligence Service, *International Security and Estonia 2026*, Foreword. Director General Kaupo Rosin states that Russia has no intention of attacking Estonia or another NATO state in the coming year and attributes this in part to European measures that affect Kremlin calculations.

⁹ Finnish Government, *Security Strategy for Society*, Government Resolution, 16 January 2025.

¹⁰ Government of Sweden, *Defence Resolution 2025–2030*. The resolution provides more than SEK170 billion in additional military funding and SEK37.5 billion for civil defence through 2030.

E3 face a conversion problem

18. France and Germany, the European Union's two largest military powers, are under considerable pressure, as the military weight of the continent hinges on how much credibility those two countries can sustain. Although their threat perceptions have hardened equally considerably, they start from very different baselines and operate within very different strategic mindsets.
19. Germany has made one unusually concrete decision: Panzerbrigade 45, a heavy brigade of around 5,000 personnel, is being permanently stationed in Lithuania and is due to reach full operational readiness by the end of 2027. Germany has never previously stationed a formation of this size permanently abroad.¹¹ NATO estimates German core defence spending at 2.69 per cent of GDP in 2026.¹²
20. This could be the first step indicating a new direction of travel. Berlin now must ensure that higher defence spending effectively translates into forces that are ready to deploy and can sustain a prolonged conflict. Germany sits at the centre of NATO's reinforcement routes towards Poland and the Baltic region; its railways and logistics hubs carry strategic weight far beyond German territory. Berlin's greatest test to come is clear: how quickly higher spending can change what the Bundeswehr can field and sustain. The credibility of German rearmament depends on the answer to that question.
21. France approaches the problem from a different strategic perspective. The *2025 National Strategic Review* calls Russia a threat 'without equivalent' to French and allied interests, identifies an open war in the heart of Europe by 2030 as the principal military danger and asks France and its European partners to prepare for sharply reduced US support.¹³ French policy therefore seeks greater European capacity under less favourable transatlantic conditions. France's nuclear deterrent gives Paris a role in that discussion that no other EU member can assume.
22. Britain's position has important similarities. The *Strategic Defence Review* calls Russia an 'immediate and pressing threat' and warns that a sustained Russian war economy could rebuild land forces more quickly after a ceasefire.¹⁴ Britain also sits close to the Nordic and Baltic states operationally through the Joint Expeditionary Force (JEF) and its NATO commitments. JEF leaders agreed in March 2026 to deepen cooperation across the Baltic Sea, High North and North Atlantic. The UK is preparing the Lion Protector exercise for September 2026, including the protection of critical infrastructure from attack and sabotage.¹⁵ The JEF gives London a practical framework in which northern European threat perceptions are already closer than they are across NATO as a whole.

¹¹ Bundeswehr, 'Bundeswehr in Litauen: In großen Schritten zur deutschen Kampfbrigade', 4 February 2026. The brigade is planned to comprise around 5,000 personnel and reach full operational readiness by the end of 2027.

¹² NATO, *Defence Expenditure of NATO Countries (2014–2026)*, 2026, Table 3, p. 7.

¹³ Secrétariat général de la défense et de la sécurité nationale, *Revue nationale stratégique 2025*, section 1, 'Le contexte stratégique en 2025'.

¹⁴ UK Ministry of Defence, *The Strategic Defence Review 2025*, para. 11.

¹⁵ Joint Expeditionary Force, 'Joint Statement from the leaders of the Joint Expeditionary Force', 26 March 2026; UK Ministry of Defence, 'UK steps up defence of Arctic and High North from rising Russian threats', 11 February 2026.

23. For London, endurance is a harder question. The UK can contribute high-end military capability and intelligence at an early stage of a crisis. A prolonged confrontation would draw heavily on ammunition stocks and industrial surge capacity, exposing weak points in critical infrastructure at home.
24. The SDR has set clear priorities, calling for stronger industrial mobilization, greater resilience of critical infrastructure and more credible preparations for home defence. The armed forces, which remain shaped by the post-Cold War era, must be modernized to create credible national preparations for war and home defence, backed by industrial mobilization.¹⁶ Britain has high-end military assets and possibly the strongest record on support to Ukraine in Europe, but its wider mobilization system has much less depth than Finland's. Russia's use of sabotage and cyber operations already tests that weakness below the threshold of full-fledged war.

Southern Europe has a broader security perspective

25. Spain shows that European convergence has limits. Prime Minister Pedro Sánchez has explicitly accepted Russia as a threat and Spain contributes forces to NATO's eastern flank. However, the Spanish President has argued that security priorities include instability in the Sahel and organized crime linked to the southern flank. In June 2025, he rejected the proposition that Spain should spend 5 per cent of GDP on defence, arguing that roughly 2.1 per cent could deliver the capabilities NATO required from Madrid.¹⁷ NATO's 2026 estimate puts Spanish core defence spending at 2.0 per cent.¹⁸
26. Italy leans towards some form of middle ground. Its *2025 Defence Report* records a sustained contribution to NATO's eastern posture, including deployments in Latvia and Bulgaria. Rome simultaneously treats the Mediterranean as a core area of national security, with forces committed to maritime security and operations linked to North Africa. Echoing Madrid's argument but in a less politically contentious form, Italian officials have repeatedly pressed NATO to retain a 360-degree approach.¹⁹
27. All these choices reflect different exposure to danger. The probability of a Russian ground attack on Spain or Italy is remote, while instability to their south is immediate, tangible and politically much more sensitive, logically attracting attention and budget priorities. In this configuration, a ceasefire would likely give governments under fiscal pressure a stronger case for slowing defence growth, just as the eastern flank would expect them to accelerate it.

The difficult period may start after a ceasefire

¹⁶ UK Ministry of Defence, *The Strategic Defence Review 2025 – Making Britain Safer: secure at home, strong abroad*, 2 June 2025, especially chapters 2 and 6.

¹⁷ Presidency of the Government of Spain, statement by Pedro Sánchez on the agreement with NATO, 22 June 2025, and press conference following the NATO summit, 25 June 2025. Sánchez distinguished Spain's security requirements from those of the eastern flank and argued that approximately 2.1 per cent of GDP would meet Spain's NATO capability requirements.

¹⁸ NATO, *Defence Expenditure of NATO Countries (2014–2026)*, 2026, Table 3, p. 7.

¹⁹ Italian Ministry of Defence, *Report Difesa 2025*, p. 68. The report records Italian commitments on NATO's eastern flank alongside substantial activity on the southern flank and in the Mediterranean.

28. A post-war settlement would give European governments space to interpret future threats through their own geography and domestic politics. Russia would gain an opportunity to move forces away from Ukraine and rebuild reserves.
29. Russia's defence industry has already expanded substantially. Estonia's foreign intelligence service reports that Russian artillery ammunition production has increased more than seventeenfold since 2021. The same service expects economic and social strains inside Russia to deepen, but regards outright economic collapse as highly unlikely.²⁰
30. British and continental planning should avoid assuming that internal weakness will produce external moderation. Domestic instability could either absorb the Kremlin's attention for a time or produce a more erratic system, shaped by powerful security institutions and veterans returning from the front, making the Kremlin less predictable and fuelling its paranoia. European governments should prepare for both outcomes, particularly during a future leadership transition in Moscow – whenever that should happen.
31. The conditions for conflict settlement in Ukraine impact European security. A non-allied and militarily depleted Ukraine would release pressure from Moscow and embolden its ambitions in Eastern Europe. For Poland and the Baltic states, the specific settlement terms matter considerably and form part of their national defence planning.
32. Sanction relief may create another point of divergence after a ceasefire. Lithuanian intelligence explicitly links reduced Western pressure to faster Russian military regeneration. Any eventual relaxation should take account of Russia's access to technologies and financial resources that feed the defence sector.²¹ Governments will have to decide how much leverage to retain over Moscow and whether easing restrictions could accelerate Russian military regeneration; their answers are likely to differ according to threat assessment, energy exposure and domestic politics.
33. For the UK, this uneven landscape points towards a practical policy. Britain should keep Russian force regeneration under continuous review after any ceasefire and tie its own defence planning to observed Russian capability. It should deepen work on civilian preparedness, learning best practices from Finland and Sweden, including exercises that test mobilization beyond the armed forces. Cooperation with Germany should focus on reinforcement routes and logistics across northern Europe. Closer UK–French planning also becomes more important if doubts about US engagement grow further, given France's nuclear force and advanced military capacity.
34. London should also expect some allies to move more slowly. European governments will retain different threat perceptions because they face different risks at home. Britain can work with those differences, building groups of states – mini coalitions of the

²⁰ Estonian Foreign Intelligence Service, *International Security and Estonia 2026*, Summary and chapter 3. The service assesses that Russia's military-industrial complex has increased artillery ammunition production more than seventeenfold since 2021 and expects the risk of economic and social instability to rise in 2026; it considers complete economic collapse highly unlikely.

²¹ State Security Department of Lithuania and Second Investigation Department (2026), *National Threat Assessment 2026*, section "Reduced Western pressure on Moscow would accelerate Russia's preparations for conflict with NATO".

willing – around particular capabilities or regions and connecting them through NATO planning.

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