




Fit for war by 2030? European re-armament efforts vis-à-vis Russia

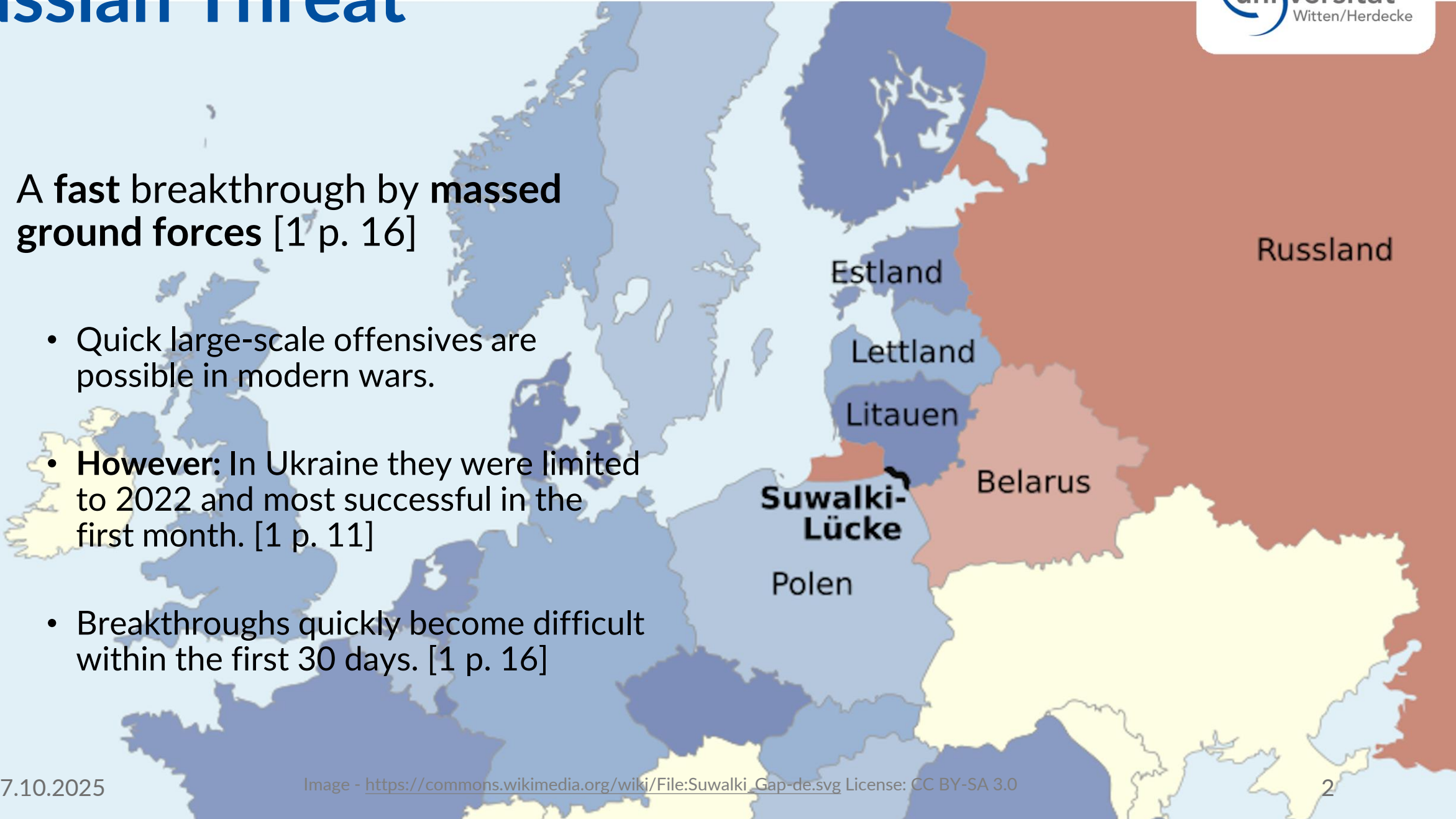


Report by Burilkov Et Al and context
presented by Keno Pecht



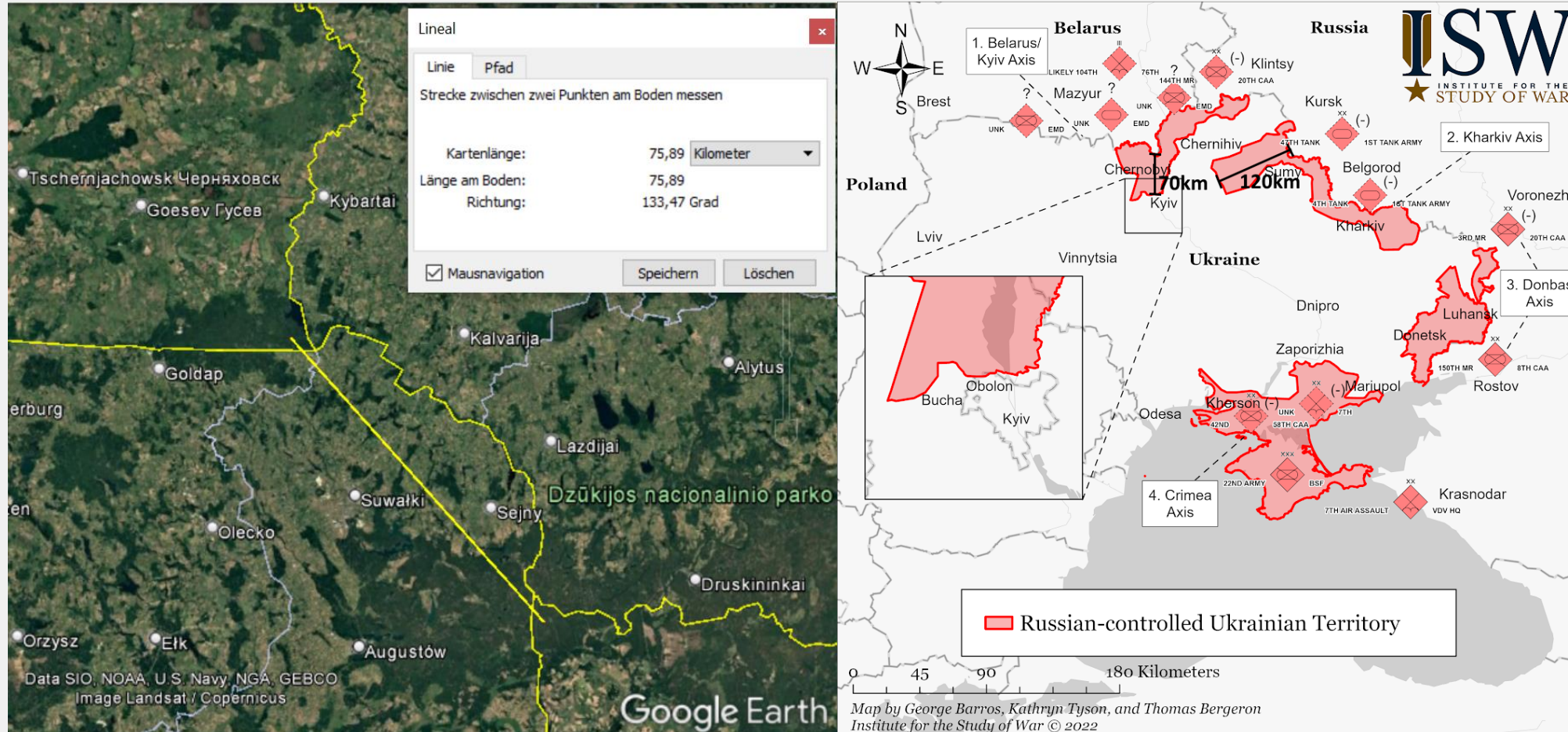
Russian Threat

- A fast breakthrough by **massed ground forces** [1 p. 16]
 - Quick large-scale offensives are possible in modern wars.
 - **However:** In Ukraine they were limited to 2022 and most successful in the first month. [1 p. 11]
 - Breakthroughs quickly become difficult within the first 30 days. [1 p. 16]



Russian Threat

My comparison: Suwalki and Ukraine



Russian Threat

- Other Russian tools of coercion are largely dismissed. [1, p.16]
- Long-range fires (cruise missiles, drones, ballistic missiles, etc.)
 - ... were insufficient to coerce Ukraine so far and are thus unlikely to coerce Europe.
 - ... however, are capable of effectively supporting a ground offensive.
- Nuclear escalation is deterred even by the small European submarine-based deterrent.



Russian Threat

A few disparate points on Russian production

- Military production is high compared to European levels. [1 p. 69-70]
- It increased since 2022 and has now begun to plateau. [1, p. 17-19]
- A significant share of production is needed just to replace losses. [1, p. 17-19]
 - E.g.: Monthly tank production exceeds 100.
 - after subtracting sustainment in most month less than 30 are left.



Russian Threat

A few disparate points on Russian production

- A large share of Russian military production is reliant on stockpiled soviet equipment. [1, p. 21]
- 85% of tanks and AFVs are build from hulls that are pulled from storage. [2, p. 9]
- Reliance is lower in other categories. [1, p. 21]
- The report projects that depletion of these stocks will “constrain [Russia] from 2026 onwards” [1, p. 21]



Manpower constraint

- Manpower is also noted as major constraint. [1, p. 21]
 - Apparently, Russia plans to grow its military to 1.5 million active personal by 2030 – the report is not quite clear on this.
 - After the end of the war in Ukraine, patriotic motivation for joining the military will be lower.
 - The other source of motivation, monetary compensation, will be limited by financial constraints.



Russian Threat

A few disparate points on air forces and air defence

- The Russian air force (VKS) is rather small [1, p.23]
 - Estimated < 800 fast jet combat aircraft in 2018 [3, p.13]
 - It has grown and improved since. [1, p.23]
- The integrated (ground based) air defence network compensates this weakness. [1, pa.23]
- This does not imply European air superiority. [1, p.77]



A few disparate points on air forces and air defence

- The VKS' most modern type, the su-57, is only available in low umbers.
- The current estimated inventory is projected to grow form ca. 40 to ca. 100 aircraft by 2030. [1, p.23]
- The report projects 400 Euro-NATO F-35 by 2030. [1, p.23]
- The Su-57 is not even a direct competitor to western “stealth” aircraft like the F-22 or F-35. [3, p.31-32]



A few disparate points on air forces and air defence

- The Russian integrated air defence system (IADS) is large and capable. [4, p.15-20]
 - With ranges in the low hundreds of kilometres these missiles can negate European advantages in the air domain over much of eastern Europe.
 - With the help of mostly American operated systems “pulses” of access into the IADS are possible.
 - A SEAD/DEAD campaign against this system would take weeks.
- This delaying effect is necessary to enable a Russian offensive. [4, p.19-20]



Requirements for European Forces

- The report assumes at least the possibility of attritional warfare. [1, p.77]
- New capabilities appear to replace established capabilities. E.g.: drones causing > 50% of casualties in Ukraine.
- Established systems remain important [1, p.77]
 - Tanks
 - Infantry fighting vehicles
 - artillery
- New capabilities should augment rather than replace these systems.



Requirements for European Forces

Two scenarios

- Minimum scenario [1 p. 77-80]
 - + 25 brigades
 - + ca. 140.000 soldiers.
 - Russian ground forces would not be matched but the gap would shrink.
- Maximum scenario [1 p. 77-80]
 - + 50 brigades
 - + 250,000 soldiers.
 - Russian ground forces would be nearly matched.
 - May be required as a result of a scaled down US commitment to Europe.
 - “[...] nearly match Russian ground forces, and provide, **in conjunction with Ukrainian forces**, a very serious deterrent to Russian aggression.”

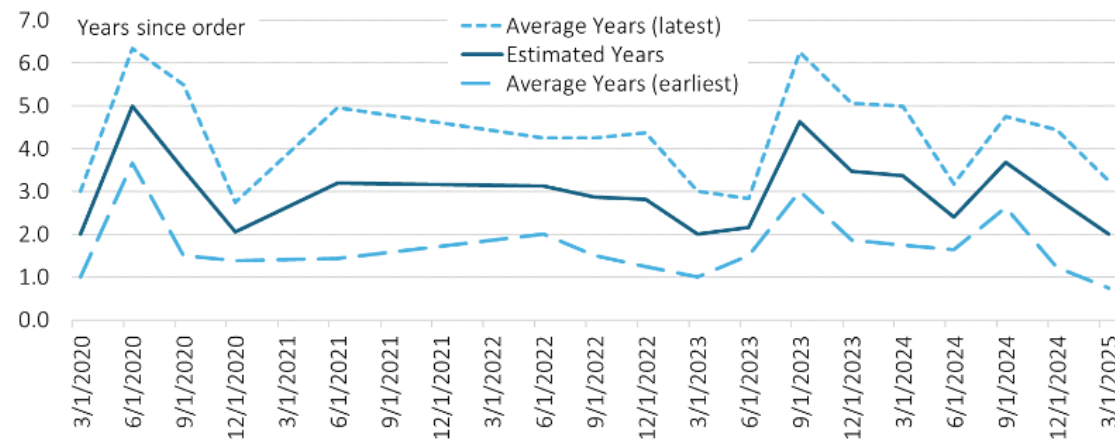


European Procurement

Delays

- Procurement of equipment needs to happen within 2 years [1 p. 64-65]
- Delivery times for equipment ordered so far is ca. 3 years
- $2030 - 3 = 2027$

Figure 6.1.1: Germany quarterly estimate of the number of years needed to deliver the ordered equipment where available, January 2020 – April 2025.



Note: Out of the 291 ordered items recorded for the years 2020-2025, 122 have both an earliest and latest expected delivery date. In cases where the order is not an item to be delivered per se (e.g. a maintenance contract), the "delivery date" refers to the expected date where the contractor's obligation to provide a service to the Bundeswehr ends. This

European Procurement

Production increases so far

- Production has substantially increased in some categories: [1 p. 69-70]
 - Production of artillery systems and shells is already close to Russian levels.
 - By 2027 European production of artillery shells will be 1.9mio annually – a 15-fold increase.
 - MBT production has increased less and is still far below Russian levels.
 - Production of fighter aircraft shows no apparent increase.



Training requirements and service time

- Personal is identified as a constraint which is more significant than production. [1, p.80-81]
- Extensive training required: 12 month at least; more for specialised roles. [1, p.80-81]
- Therefore, conscripts will be most useful for rear duties. [1, p.80-81]
- Military service as a full-time career must be made more attractive. [1, p.80-81]



Some Observations

Ukraine and USA

- The report generally considers **European forces**, rather than NATO as a whole. Apparently because of questions about American commitment.
- Several Key capabilities are held by the US.
- At various points the report Ukraine is included when European defence is considered.
 - It makes up a significant part of the available capability.
 - Therefore, European defence is closely linked to the future of Ukraine.



- [1] A. Burilkov, K. Bushnell, J. Mejino-López, T. Morgan, and G. Wolff, 'Fit for war by 2030? European rearmament efforts vis-à-vis Russia', Kiel Institute for the World Economy. Accessed: Oct. 15, 2025. [Online]. Available: <https://www.bruegel.org/report/fit-war-2030-european-rearmament-vis-vis-russia-lagging-numbers-and-technologies>
- [2] J. Watling and G. Somerville, 'A Methodology for Degrading the Arms of the Russian Federation', June 2024. Accessed: Jan. 19, 2025. [Online]. Available: <https://static.rusi.org/methodology-degrading-arms-russia-rusi-op-june-2024.pdf>
- [3] J. Bronk, 'Russian and Chinese Combat Air Trends Current Capabilities and Future Threat Outlook', Royal United Services Institute, Oct. 2020. Accessed: Oct. 20, 2025. [Online]. Available: <https://www.rusi.org/explore-our-research/publications/whitehall-reports/russian-and-chinese-combat-air-trends-current-capabilities-and-future-threat-outlook>



- [4] J. Bronk, „Modern Russian and Chinese Integrated Air Defence Systems The Nature of the Threat, Growth Trajectory and Western Options“, Royal United Services Institute, Okt. 2025. Zugriffen: 20. Oktober 2025. [Online]. Available: <https://www.rusi.org/explore-our-research/publications/occasional-papers/modern-russian-and-chinese-integrated-air-defence-systems-nature-threat-growth-trajectory-and>