



The EU's Defence Readiness 2030 Roadmap: Ambition and constraints

by Luigi Scazzieri, 29 October 2025

The Defence Readiness 2030 Roadmap seeks to accelerate and inject coherence into the EU's defence build-up. Its success depends on sustained funding and political will.

Europeans feel a genuine sense of fear. Russia is probing both Europe's physical defences and its political cohesion with increasingly brazen 'grey zone' incursions and sabotage operations, while continuing its war on Ukraine. Meanwhile, the United States has made clear that Europeans will need to defend themselves with much less support from Washington in the future.

In response, defence budgets are rising sharply in large parts of Europe. According to the latest figures from the European Defence Agency (EDA), EU-wide defence spending will [reach 2.1 per cent in 2025, up from 1.6 per cent in 2023](#). Several European states are already well above that level, with [Poland](#) set to spend 4.48 per cent this year. Moreover, all NATO members – bar Spain – have pledged to increase overall defence and security-related spending to 5 per cent by 2035. However, spending increases will take time to result in concrete capabilities. For now, European armies continue to [face large gaps in many areas](#), from air defence and long-range strike, to intelligence gathering and command and control capabilities, as well as personnel shortages.

The effort to strengthen Europe's defences also hinges on whether Europeans can avoid duplication and weave their efforts into a more coherent whole. National budgets and planning co-exist with a growing number of bilateral and minilateral formats, as well as NATO and EU initiatives – such as the European Defence Fund (EDF) to foster joint research or the €150 billion SAFE instrument to provide member-states with low-interest long-term loans.

While all these initiatives move broadly in the same direction, the challenge is ensuring their alignment to avoid duplication and maximise efficiency. The EU's [Defence Readiness 2030 Roadmap](#), released on October 16th, seeks to do precisely that, and bring greater coherence to Europe's defence ramp-up.

A new approach to the EU's defence ramp-up?

One of the key ideas in the Roadmap is strengthening the link between military priorities and EU defence funding instruments. To that end, the EU Military Staff will produce an annual classified mapping of member-states' aggregate capability shortfalls. This will feed into the EDA's existing defence planning frameworks like the Co-ordinated Annual Review on Defence. Money from existing and future EU funding instruments will be steered towards priorities identified through this process. The overarching idea is to make EU defence funding more targeted and strategic.

The Roadmap also seeks to embrace a more flexible approach by harnessing the [dynamism of small group co-operation](#). To fill identified capability gaps jointly and efficiently, coalitions of member-states will take the lead in individual areas through 'capability coalitions', ideally benefitting from EU support. Co-operation in small groups is quicker and often easier than in larger formats. Embracing it should allow for more joint procurement and therefore enable greater interoperability and economies of scale. Crucially, the Roadmap says that the coalitions should remain open to member-states that want to join later. The EDA will facilitate the formation and operation of individual coalitions, and there should be mechanisms for participating member-states to report on progress to the EU as a whole.

In parallel to coalitions, the Roadmap proposes that EU funding will focus on four broader 'European Readiness Flagships': 1) a drone defence initiative; 2) an Eastern flank watch, focused on strengthening land borders; 3) an air and missile defence shield; and 4) a space shield. These partly overlapping initiatives are still at a conceptual stage, but the idea is that they will be driven by member-states and that the Commission will act as facilitator, ensuring funding and overall coherence. One key difference between the Readiness Flagships and the capability coalitions is that the latter are more diffuse projects, that include dimensions of internal security and the protection of critical infrastructure. They should therefore be able to draw on broader pools of EU funding, such as regional funds.

Finally, the Roadmap tries to track progress: there are milestones to assess progress in all these efforts, with many targets in 2026. There will also be an annual stocktaking process feeding directly into the October European Council, with a Defence Readiness Report.

From ambition to delivery: Key challenges

The Roadmap's aims and methods are sensible: steering EU funding more strategically towards urgent priorities and harnessing the power of small groups by linking them to each other and to the EU level are both good ideas. Yet there are a range of questions that will determine whether the Roadmap can accelerate the effort to strengthen Europe's defences and deliver meaningful change in the way European defence co-operation works.

Overall framework: The first question raised by the Roadmap is about the framework for Europe's defence ramp-up. Plans to strengthen the EU's own defence planning process are bound to raise questions from NATO, from Washington and from many member-states' ministries of defence about duplication of NATO initiatives such as its Integrated Air and Missile Defence or the Defence Planning Process (NDPP). In reality, EU efforts will contribute to strengthening national capabilities in individual areas and strengthen European deterrence more broadly – and there is no reason to presume that capabilities developed in an EU framework will not be anchored in NATO operationally.

As to the NDPP specifically, it has [inherent limitations](#) in the sense that it is based on the assumption that the US will continue to contribute extensively to European deterrence, a risky proposition given that Washington is consistently telegraphing its desire to reduce its commitments in Europe. In theory the NDPP could be adapted to account for a lower US contribution, but that is a difficult sell both politically, because that would openly question America's stated contribution; and technically, because it is a complex exercise that would probably require re-opening national plans.

However, a planning process such as that envisaged in the Roadmap would not be a panacea. Aside from the lack of institutionalisation and buy-in from member-states, in itself it does not account for the contribution of non-EU European allies, especially Norway and the UK. Capability gaps will look much bigger without their contribution, and planning will be skewed. To be effective, an EU process should have mechanisms to account for the capabilities that non-EU allies bring to the table.

Planning: The second question is the degree to which member-states will be willing to engage with the more robust planning and monitoring process proposed by the Roadmap, providing the EU Military Staff and EDA with all the necessary (sensitive) data on capability gaps and production capacity. This is not just a question of political will: strengthening the EU's planning and co-ordination capacity would mean allocating more human resources at the national level. It would also mean substantially strengthening the EU Military Staff and EDA in budgetary terms. In other words, building a stronger capability planning process at EU level will be resource-intensive.

The EU directing its own funds more strategically is important in its own right. A separate question concerns the appeal of the EU's proposed frameworks, like the capability coalitions and the Readiness Flagships, to member-states. The way in which both frameworks will work is not yet fully clear and the European Council did not refer to the Flagships in its October [Conclusions](#). Moreover, for many capability gaps, such as air defences, there are different views among member-states on what approach to follow and what equipment to buy. Reconciling their interests in a single EU-endorsed project backed by EU funding may not be easy. And, if working within an EU framework comes with little additional funding but significant added administrative costs, member-states may prove reluctant to use EU instruments.

Funding: A third question concerns money. The availability of funding from the EU level is a significant driver of defence co-operation. At the same time, EU funding is playing a major role in keeping Ukraine supplied with the means to defend itself, and the EU is increasingly emphasising the deepening of defence industrial co-operation with Ukraine. The Roadmap does not in itself announce new funding sources, but the EU has already unlocked substantial financial resources for defence since March this year. The first step was relaxing the rules on national deficits to allow member-states to increase public spending or run higher deficits without breaching EU fiscal rules. The second step was the establishment of the €150 billion SAFE loan instrument, which has now been fully subscribed to by member-states. While Ukraine cannot directly take out SAFE loans, member-states can procure with Ukraine and for Ukraine, including from Ukrainian industry. In parallel, the European Investment Bank (EIB) has stepped up lending to defence activities, and it is now possible for member-states to direct cohesion funds to supporting defence.

In addition to these steps, the recent [agreement between](#) the Council and the Parliament on the European Defence Industry Programme (EDIP) should ensure that the EU can continue to foster joint procurement and support industry with grants from its budget. EDIP will also have a small envelope

dedicated to supporting Ukraine. However, EDIP is only worth €1.5 billion until the next EU budget cycle starts in 2028. The availability of additional funding in the near term depends above all on whether member-states are willing to move forward on the proposal to use Russia's frozen assets to issue a loan to Kyiv.

In the medium term, the EU's role in defence hinges largely on the level of defence funding in the next EU budget. The Commission has proposed a very substantial €131 billion for defence and space over the seven years of the next Multi-Annual Financial Framework. A budget in the tens of billions for defence would play a significant role in steering national planning. But details about how this funding will be distributed remain unclear, and the proposal could well be whittled down during negotiations.

Industry: Finally, on the industrial side of the picture, the Roadmap stresses the need to strengthen the EU's defence industry. To that end, the Commission will try to do more to connect innovative defence tech firms with defence end-users, deepen its dialogue with industry, and present an action plan to mitigate dependencies on critical raw materials. The Roadmap echoes recent proposals for moving towards a single market for defence by revising EU defence directives on procurement and transfers. In practice, member-states' appetite to open up national contracts to EU-wide competition or loosen controls over the intra-EU movement of defence equipment is unclear. It is possible that they will agree to such steps for specific areas, for example emerging capabilities such as small drones.

Conclusion

The Defence Readiness 2030 Roadmap has a clear aim: by 2030, Europe should have the full spectrum of capabilities to deter aggression. Achieving this will demand substantial resources and a higher degree of co-ordination between Europeans. The EU can help align incentives and instruments, but ultimately only European governments can deliver the capabilities that underpin credible deterrence.

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