UK Returns Home After Brexit:

Forging a New Role in European Defence

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Introduction

In August 2025, Norway and the United Kingdom announced a landmark £10 billion agreement for the UK to supply at least five Type 26 anti-submarine warships built in Glasgow, while integrating with Britain's existing fleet of eight ships. The deal is hailed as the UK's largest ever warship export contract and Norway's biggest defence procurement to date. This strategic partnership is not merely commercial—it represents a deeper recalibration of European defence, with Britain repositioning itself at the core of continental security.

The backdrop is a Europe shaken by hybrid aggression, maritime sabotage, and questions over transatlantic reliability. In recent months, intelligence and open reporting have revealed increased Russian incursions: drones over Poland and the Baltics, suspected sabotage of undersea cables between Finland and Estonia, and aerial provocations around airspace near Kastrup and Gardermoen airports. These actions underscore the urgency of a robust northern defence posture. At the same time, signs of American strategic ambivalence and prioritization of Indo-Pacific commitments have led European states to seek greater autonomy and self-reliance.

A key development in June 2025 was the NATO Summit in The Hague, where Allies committed to a new defence investment framework: **5 % of GDP annually by 2035**, split into **3.5 % for core military capabilities** and up to **1.5 % for security, resilience, infrastructure, innovation and industrial base** investments. This marks a decisive shift beyond the older 2 % benchmark (Wales Pledge, 2014) and signals a renewed collective resolve to build Europe's defence posture. Already, NATO reports project a further 5.9 % increase in European member defence spending for 2025, following a 12.6 % real-terms jump in 2024.

For the United Kingdom, the Norway deal embodies Britain's re-emergence as a European defence anchor post-Brexit. It demonstrates how the UK can wield industrial capability, strategic design, and alliance loyalty to rebuild continental trust—without returning to the institutional frameworks of the EU. As the British government emphasized, the deal supports thousands of domestic jobs, reinforces supply chains, and cements interoperability between future UK and

Norwegian fleets.

This report explores how the UK can lead Europe's defence resurgence in an era where allied unity is tested and American commitment is uncertain. Section 1 traces the shift from post-Brexit detachment to renewed engagement. Section 2 examines the industrial backbone—BAE, Saab, Patria, and European procurement trends. Section 3 profiles the political leadership constellation anchoring this shift. Section 4 maps the strategic roles of key states (UK, France, Germany, Nordics). Section 5 interrogates what it means to act **without the Americans**, and the conclusion reflects on Britain's return as a European defence linchpin.

Section 1 – From Brexit Isolation to Strategic Re-Engagement

The United Kingdom's relationship with European security has undergone a sharp reversal in recent years. After the 2016 Brexit referendum, Britain's strategic position seemed defined by detachment from the European Union and an ambiguous role in continental affairs. While London continued to contribute to NATO missions and to maintain a credible nuclear deterrent, its political capital in Europe was diminished by its absence from EU decision-making and a perception of insularity. For several years, the UK appeared more interested in its "Global Britain" narrative—emphasizing Indo-Pacific naval deployments and bilateral economic ties—than in sustaining a leadership role in Europe's defence order.

That posture is no longer viable. Russia's full-scale invasion of Ukraine in 2022 forced all European states to reconsider their security assumptions, but the subsequent escalation of hybrid and conventional pressure across northern Europe in 2024–25 has been decisive. Sabotage of undersea infrastructure in the Baltic, the targeting of energy grids, and the increase in drone incursions over NATO airspace have made clear that the contest for European security is immediate and existential. The United States, while still the indispensable transatlantic partner, has signalled a growing prioritization of the Indo-Pacific and has pressed European Allies to take on a larger share of their own defence burden. In this environment, Britain's role as a nuclear power, maritime security provider, and industrial innovator is once again indispensable.

The turning point came with the **2025 NATO Summit in The Hague**, where the Allies agreed a new investment framework: **5 % of GDP devoted annually to defence and security by 2035**. The shift represents a recognition that the 2 % Wales pledge of 2014, once considered ambitious, is insufficient to meet the scale of the Russian threat and the technological demands of modern warfare. Britain, France, Germany, and the Nordic states now face a structural transformation of their fiscal and industrial policies, with military investment increasingly seen as a cornerstone of national economic strategy. Germany, under Chancellor Friedrich Merz since May 2025, has already committed to a €500 billion multi-year investment fund that places defence at the centre of its industrial renewal, moving beyond the “Zeitenwende” era of temporary measures.

Against this backdrop, Britain has repositioned itself as a **core European defence anchor**. The **£10 billion warship deal with Norway** announced in August 2025 is emblematic of this shift. Far more than an export contract, it reflects a deliberate strategy of embedding British industrial and strategic weight into the northern European security architecture. The deal ensures long-term interoperability between UK and Norwegian fleets, reinforces NATO’s anti-submarine posture in the North Atlantic, and signals that Britain can still exercise influence through industrial leadership even outside EU structures. Crucially, it also demonstrates to Allies that Britain’s industrial capacity—anchored in BAE Systems and a revitalised shipbuilding sector—remains essential to Europe’s collective deterrence.

Strategically, the UK has also increased its military presence in continental Europe. The Royal Air Force now maintains persistent deployments in Poland and the Baltic states, complementing the Army’s forward-based units under NATO’s enhanced Forward Presence framework. London has doubled down on cyber and space cooperation with the Nordics, aligning closely with Finland and Sweden since their NATO accession. In the High North, Britain has worked with Norway to reinforce maritime situational awareness and secure Atlantic–Arctic sea lines of communication. Each of these steps reflects a pattern: Britain’s post-Brexit estrangement is giving way to a **renewed strategic embrace of Europe**, not through EU politics but through NATO, bilateral partnerships, and industrial integration.

Thus, the UK’s strategic trajectory since 2022 illustrates a transition from isolation to re-engagement. Rather than retreating into “Global Britain” exceptionalism, London has come to recognise that its global relevance is inseparable from European security. With NATO’s 5 % framework reshaping the fiscal and industrial landscape of defence across the continent, Britain is positioning itself to lead not from the margins, but once again from the centre of Europe’s security architecture.

Section 2 – The Industrial Backbone: BAE, Saab, Patria, and Europe’s Defence Production

Europe’s new defence trajectory cannot be understood without examining its industrial foundations. The NATO commitment to raise investment to 5 % of GDP by 2035 is not merely a fiscal pledge; it is a structural reorientation that places defence industries at the centre of national economic strategies. For the United Kingdom, France, Germany, and the Nordic states, the sustainability of deterrence now depends as much on factories, shipyards, and research facilities as on battalions or squadrons. In this context, companies such as **BAE Systems**, **Saab**, and **Patria** represent more than industrial actors—they are strategic instruments of sovereignty, alliance cohesion, and technological competitiveness.

BAE Systems: Britain’s Strategic Anchor

BAE Systems stands at the heart of Britain’s defence posture. Its shipyards on the Clyde, responsible for building the Type 26 frigates, have become symbols of industrial renewal and national pride. The £10 billion contract with Norway secures long-term work for thousands of skilled workers, stabilises Britain’s naval supply chain, and ensures interoperability between the Royal Navy and the Norwegian Navy. Beyond shipbuilding, BAE’s portfolio spans aerospace, cyber, and next-generation munitions—capabilities that Britain increasingly shares with European partners.

Importantly, BAE’s integration into European procurement cycles gives London a structural foothold in continental security, despite Brexit. While the UK no longer participates in the EU’s Permanent Structured Cooperation (PESCO) framework, it continues to shape NATO capability development through its industrial exports. This is a form of influence that operates outside traditional EU institutions yet reinforces British indispensability.

Saab: Sweden’s Innovation Edge

Sweden’s accession to NATO in 2023 marked a turning point for the Alliance’s northern posture, and **Saab** has quickly become central to this shift. Known for its Gripen fighter jet and radar systems, Saab represents a model of innovation tailored for smaller states: high-technology platforms designed to be interoperable, cost-effective, and export-ready.

In the wake of NATO’s 5 % commitment, Saab has expanded partnerships with Finland, Norway, and the UK, integrating into regional procurement consortia. Its expertise in electronic warfare, sensors, and autonomous systems complements BAE’s heavy-industry base, ensuring that the Nordic contribution to European security is not limited to manpower but also embedded in cutting-edge technological ecosystems.

Patria: Finland’s Heavy-Lift Capability

Finland’s **Patria** provides the Alliance with critical mobility, armoured vehicle production, and munitions expertise. Known for its 6×6 armoured personnel carriers and artillery systems, Patria has developed joint projects with several NATO members, reinforcing commonality and reducing logistical fragmentation.

The Finnish defence sector benefits from a political culture that treats resilience as a national mission. Decades of universal conscription and stockpiling policies mean that Finland approaches industrial production with a mobilisation mindset. With NATO planning to dedicate up to 1.5 % of GDP specifically to resilience, infrastructure, and industrial capacity, companies like Patria are poised to expand beyond the Nordic region into pan-European frameworks.

Beyond the National Champions

The European defence industrial landscape is not limited to national champions. France's Dassault and Naval Group, Germany's Rheinmetall and ThyssenKrupp Marine Systems, Italy's Leonardo, and pan-European consortia such as Airbus Defence and MBDA form a dense web of capability providers. What distinguishes the current moment, however, is the political commitment to treat these industries not simply as contractors but as strategic assets. The EU's European Defence Fund, NATO's Defence Production Action Plan, and bilateral procurement deals such as UK–Norway all point towards a new doctrine: **defence industry as security policy**.

Industrial Integration as Strategic Power

A major challenge for Europe has been fragmentation—multiple parallel tank, aircraft, and ship programs that dilute scale and interoperability. The UK–Norway deal offers a countermodel: convergence around shared platforms, common supply chains, and integrated training. If replicated across air and land domains, such industrial integration could deliver both efficiency and strategic depth.

At the same time, Europe faces an arms-race dynamic: ramping up production at scale without undermining fiscal stability or public support. This is where the NATO 5 % framework is critical. By explicitly allocating resources not only to traditional defence but also to resilience, cyber, and industrial innovation, the framework provides governments with a political justification for embedding defence industries at the core of national economies.

Section 2 Summary:
Europe's capacity to meet its new strategic commitments rests on the industrial backbone represented by BAE, Saab, Patria, and other defence champions. These firms embody the fusion of industrial strategy and national security, enabling states to translate fiscal pledges into operational capabilities. Britain's warship deal with Norway is not an isolated case but a signal of how industrial integration can drive strategic realignment in Europe.

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3. The Political Leadership: A Northern European Bloc

If defence industry provides the material backbone of Europe's security, political leadership provides its strategic direction. The re-emergence of the United Kingdom as a central actor in European defence has coincided with a cohort of leaders across western, central and northern

Europe who share a pragmatic, action-oriented vision of collective security. Together, figures such as **Keir Starmer, Emmanuel Macron, Friedrich Merz, Alexander Stubb, Donald Tusk, Kaja Kallas, Ursula von der Leyen** and **Mette Frederiksen** are shaping a working coalition that prioritises investment, interoperability, resilience and industrial renewal. Their combined influence is helping to translate NATO's 5 % investment commitment into national budgets, procurement choices and bilateral or regional initiatives.

Keir Starmer (Prime Minister, UK) — Since taking office, Prime Minister Starmer has deliberately reframed Britain's post-Brexit strategic posture around practical defence cooperation with European partners rather than institutional membership of the EU. His recent public remarks and state-visit engagements have emphasised the UK's commitment to interoperable capability, industrial partnership (e.g. Type-26 cooperation with Norway) and a renewed focus on NATO's northern flank. Starmer positions the UK as a bridge between high-end industrial supply, expeditionary capability and European operational needs — a posture designed to restore British trust and influence in continental defence planning.

Emmanuel Macron (President, France) — President Macron continues to drive the political narrative for greater European strategic autonomy while remaining operationally engaged in NATO. Paris has coupled rhetorical leadership on autonomy with concrete cooperation: closer UK-France defence dialogue, renewed focus on joint procurement and a prominent French role in deterrence and expeditionary operations. Macron's approach aims to ensure that Europe develops complementary nuclear, air and expeditionary capacities that sit comfortably alongside NATO structures, and he has actively engaged with London and Berlin to align political objectives with procurement pathways.

Friedrich Merz (Chancellor, Germany) — Chancellor Merz's government (installed May 2025) has pivoted Berlin from tentative spending pledges to structural investment. The coalition negotiated a large multiyear investment envelope — including a €500bn special fund and constitutional adjustments that allow higher borrowing for major projects — which has been used to accelerate defence modernisation and industrial scaling in 2025–26. Merz brings an explicitly economic and industrial lens to defence policy: mobilising Germany's manufacturing base, funding large procurement programmes, and aligning fiscal capacity with alliance requirements. This shift makes Germany an indispensable financial and industrial engine for the emerging northern/central European security architecture.

Alexander Stubb (President, Finland) — President Stubb has been a consistent voice for tighter Nordic integration and burden-sharing inside NATO. Since Finland's accession, Stubb has argued that the country's geostrategic position and mobilisation culture obliges it to lead in northern deterrence, resilience and interoperability initiatives — especially in the Arctic and Baltic theatres. He has also championed industrial cooperation (notably with Patria) and closer UK-Nordic defence ties to secure undersea lines of communication and northern sea lanes.

Donald Tusk (Prime Minister, Poland) — Prime Minister Tusk anchors the coalition's eastern flank. Warsaw's large-scale rearmament and focus on air and missile defences make Poland both a logistical hub and a political engine for higher European defence ambition. Tusk's government has welcomed enhanced UK deployments (e.g. Eastern Sentry air policing) and repeatedly called for deeper Franco-German engagement in eastern deterrence — thereby linking Nordic and central European security priorities into a common framework.

Kaja Kallas (EU High Representative / Vice-President of the European Commission) — Kallas's current role at the Commission and as High Representative positions her at the nexus of EU policy and NATO interface. Her portfolio gives her authority over EU diplomacy, sanctions, and the coordination of European resilience measures (cyber, hybrid defence, and critical-infrastructure protection). Kallas has been an outspoken advocate of firm responses to Russian hybrid tactics and has promoted EU measures that complement NATO's military posture.

Ursula von der Leyen (President, European Commission) — As Commission President for a second mandate, von der Leyen has prioritised the industrial and economic dimensions of strategic autonomy: aligning EU funding instruments, the European Defence Fund and joint procurement mechanisms to reinforce a European supply base. Her public interventions in 2025 have emphasised reducing strategic dependencies and scaling up industrial capacity in ways that dovetail with NATO's investment agenda. The Commission under von der Leyen seeks to ensure the EU's industrial levers are fully synchronised with allied military requirements.

Mette Frederiksen (Prime Minister, Denmark) — Prime Minister Frederiksen has steered Denmark toward higher defence ambition, prioritising maritime resilience, Arctic security, and protection of critical infrastructure. Copenhagen's decisions in 2024–25 to raise spending and accelerate procurement reflect Denmark's strategic choice to be a northern gateway state — an essential partner for both UK and Nordic maritime operations — and to integrate climate-resilience thinking into defence planning. Frederiksen's leadership is notable for combining societal resilience with hard capability expansion.

Conclusion (short): Together, these leaders form a pragmatic, operationally focused bloc that is converting political commitments into budgets, procurement, and bilateral/regional initiatives. Their combined strengths — the UK's industrial reach and expeditionary experience, France's deterrent posture, Germany's financial scale, Finland and other Nordics' geographic and resilience assets, and EU institutional levers — create the conditions for a durable European defence pillar within NATO. The political cohesion of this constellation is the critical enabler of Europe's ability to translate the NATO 5 % trajectory into real capabilities on the ground.

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4. Strategic Cooperation: UK, France, Germany + Nordics

The current European security environment, shaped by Russia's aggressive posture, Chinese strategic expansion, and U.S. strategic recalibration toward the Indo-Pacific, necessitates a coherent, operationally capable European defence coalition. Within this context, the United Kingdom, France, Germany, and the Nordic states (Finland, Sweden, Norway, Denmark) have begun to consolidate a practical, capability-driven framework for European defence, translating NATO's 5 % GDP investment commitments into concrete industrial, operational, and strategic initiatives.

United Kingdom

The UK leverages its long-standing expeditionary experience, maritime power, and nuclear deterrent to serve as both a stabilising and enabling partner for continental operations. The Royal Navy's Type 26 frigates — recently delivered to Norway under a £10 billion export and collaborative agreement — exemplify the integration of UK industrial capacity with allied needs. The Royal Air Force's deployment under Operation Eastern Sentry, including Typhoon FGR4 fighter squadrons and Voyager KC2/KC3 tankers, demonstrates operational interoperability with Poland, Germany, and Nordic air forces, providing rapid-response deterrence on NATO's eastern flank. Beyond the immediate operational domain, the UK contributes advanced command, control, intelligence, and electronic warfare capabilities, which amplify both multinational situational awareness and responsiveness across Northern Europe.

France

France continues to anchor Europe's high-end deterrent capability through its nuclear forces, expeditionary power projection, and domestic defence-industrial base. Macron's administration has invested heavily in joint procurement programmes and interoperability initiatives with both the UK and Germany, focusing on fighter aircraft, surface combatants, and next-generation missile systems. French forces also play a central role in multinational rapid-reaction units, including NATO's Very High Readiness Joint Task Force (VJTF), which integrates seamlessly with UK-led expeditionary units for northern and central European operations. Paris's strategic emphasis on autonomy ensures that while French capabilities complement NATO, they also provide a European-led operational backbone capable of independent action if necessary.

Germany

Germany under Chancellor Friedrich Merz has emerged as the industrial and financial engine of the northern/central European security architecture. Through the 2025 multiyear €500 billion defence fund and constitutional adjustments allowing temporary borrowing for major procurement, Berlin is accelerating acquisition of Eurofighter upgrades, Leopard 2 main battle tanks, advanced air-defence systems, and naval platforms. Merz prioritises industrial alignment, ensuring that German production capacities feed both national forces and allied partners, including joint Type 26 and NGWS projects. This approach fosters industrial coherence, mitigates capability gaps, and strengthens the European defence technological and industrial base (EDTIB).

Nordic States

The Nordic countries contribute unique geographic advantages, resilience capacities, and niche capabilities. Finland and Sweden, with newly acquired NATO membership and significant investments in Gripen E/F fighters, Patriot systems, and submarine technologies, provide strategic depth in the northern and Baltic theatres. Finland's position along the Gulf of Finland and Sweden's access to the Baltic Sea are central to controlling maritime chokepoints and undersea infrastructure, including critical cable networks connecting the Baltic states to western Europe. Norway's strategic positioning along the North Atlantic sea lanes supports both UK and NATO maritime logistics, while Denmark serves as a vital link between the Baltic and North Sea theatres. Collectively, the Nordic states bring regional expertise, high readiness, and innovative contributions to cyber and electronic warfare capabilities.

Multinational Integration

This coalition is increasingly institutionalised through a combination of bilateral agreements, multinational task forces, and operational exercises. Examples include the Joint Expeditionary Force (JEF), a UK-led framework integrating Denmark, Finland, Sweden, and the Baltic states, and trilateral industrial collaborations on next-generation naval and air systems. Operational interoperability is further reinforced by NATO exercises, joint air policing rotations, and integrated logistics networks. Importantly, these initiatives are explicitly designed to reduce reliance on U.S. forward presence while maintaining transatlantic compatibility, reflecting a strategic balance between European sovereignty and alliance cohesion.

Strategic Impact

The combination of industrial scale, operational readiness, and geographic coverage provided by this UK–France–Germany–Nordic coalition constitutes the backbone of Europe's emerging self-reliant defence posture. The UK's expeditionary and naval expertise, France's nuclear and rapid deployment capabilities, Germany's financial and industrial clout, and the Nordics' geographic and niche operational contributions create a credible deterrent against Russian aggression, strengthen Baltic and Arctic security, and ensure resilience of critical infrastructure. By aligning procurement, operational deployment, and intelligence sharing, this coalition demonstrates that Europe can translate NATO's 5 % GDP spending commitment into tangible, high-end capabilities.

5. Without the Americans - Europe take the lead in NATO

The geopolitical landscape in 2025 has underscored that Europe can no longer assume guaranteed American leadership in its immediate security environment. The U.S. strategic pivot to the Indo-Pacific, combined with domestic political pressures and resource allocation toward emerging global challenges, has created both uncertainty and opportunity for European defence. This context has catalysed a European-wide reassessment of capability development, force posture, and strategic autonomy, centred on the UK, France, Germany, and the Nordic states.

Transatlantic Recalibration

While the United States remains a vital ally, Europe's strategic calculus increasingly accounts for scenarios in which NATO's U.S.-dependent capabilities may be partially constrained. The decision at the 2025 NATO Summit in The Hague to commit 5 % of GDP to core defence requirements reflects a recognition that European nations must internalise both financial and operational responsibility for their security. Of this total, at least 3.5 % is allocated to meet NATO Capability Targets and core military needs, while up to 1.5 % is earmarked for infrastructure protection, network defence, civil preparedness, and defence innovation. This marks a significant step beyond the 2014 Wales Pledge and represents a quantified path toward credible European self-reliance (NATO, 2025).

The UK, as a principal maritime and expeditionary power, has signalled its willingness to lead joint European efforts without reliance on American reinforcements. This includes forward deployment of Royal Air Force Typhoon and Voyager assets in Eastern Europe, integration of Royal Navy Type 26 frigates with Norwegian naval forces, and sharing of intelligence and electronic warfare capabilities across the northern theatre. France's nuclear and rapid-reaction forces, Germany's industrial and logistical contributions, and Nordic geographic positioning collectively enhance operational resilience in scenarios where U.S. forces might be preoccupied elsewhere.

Industrial and Technological Sovereignty

European autonomy is underpinned not only by military presence but by industrial capacity. British–Swedish collaborations, including BAE Systems and Saab projects, exemplify a strategy of retaining critical technological know-how within Europe. Germany's Merz administration, through accelerated procurement and multilateral industrial projects, reinforces the European Defence Technological and Industrial Base (EDTIB). Similarly, French, Danish, and Nordic investments in missile systems, submarines, and cyber capabilities reduce dependency on U.S. exports, while ensuring interoperability among European allies. These measures preserve sovereign control over sensitive technologies, facilitate rapid modernisation, and create economic spillovers in employment, research, and innovation.

Operational Preparedness and Regional Security

Absent guaranteed American forward presence, Europe's northern and central theatres require greater cohesion and readiness. The UK-led Joint Expeditionary Force, incorporating Denmark, Finland, Sweden, and the Baltic states, exemplifies a European-first operational construct capable of rapid deployment. The coalition integrates intelligence, air and maritime control, logistics, and cyber resilience. Norway's Type 26 frigates, Finland's Patria industrial support, and Sweden's Gripen E/F deployments contribute to a layered, high-readiness deterrent. Collectively, these capabilities allow Europe to respond swiftly to Russian provocations, defend critical infrastructure such as Baltic undersea cables, and maintain control of strategic chokepoints across the Arctic and North Atlantic.

Strategic Autonomy within NATO

Importantly, European autonomy is not pursued in isolation. Efforts to enhance self-reliance are explicitly designed to remain NATO-compatible. Equipment interoperability, common training standards, and integrated command structures ensure that U.S. forces can reinforce Europe if required, without Europe being strategically dependent. This approach reconciles sovereignty with alliance cohesion, demonstrating that Europe can assume leadership in its security while maintaining a credible transatlantic framework.

Political and Symbolic Implications

The UK's renewed European engagement, symbolised by the Type 26 frigate deal with Norway and strategic cooperation with France, Germany, and the Nordics, signals a political as well as operational shift. By asserting itself as a capable and reliable partner, the UK demonstrates that Brexit has not precluded leadership in continental defence. Similarly, Germany under Merz and France under Macron are actively shaping Europe's strategic autonomy, while the Nordics provide regional legitimacy and operational expertise. Together, this coalition communicates a clear message to Moscow, Beijing, and other potential actors: Europe can defend its interests independently, yet remains interoperable with its global allies.

Conclusion: Britain's Return and Europe's Strategic Autonomy

The security architecture of Europe in 2025 reflects both continuity and transformation. The United Kingdom, after Brexit, has reclaimed a pivotal role not through formal EU membership but through pragmatic defence partnerships with continental and Nordic states. The £10 billion Type 26 frigate deal with Norway, alongside forward deployments of RAF Typhoons and Voyager tankers, illustrates that Britain is no longer a peripheral actor in European security but a central operational and industrial contributor.

Europe's commitment to a 5 % GDP defence investment, formalised at the 2025 NATO Summit in The Hague, signals a new era of financial and operational responsibility. This level of spending, significantly higher than the 2 % target agreed in 2014, enables Europe to modernise forces, secure critical infrastructure, and develop indigenous industrial capabilities. By integrating BAE Systems, Saab, Patria, and other European defence industries into collective programmes, the continent is consolidating technological sovereignty and reducing dependency on external suppliers, particularly from the United States.

The emergence of a northern and central European leadership bloc—including Keir Starmer (UK), Emmanuel Macron (France), Friedrich Merz (Germany), Alexander Stubb (Finland), Donald Tusk (Poland), Kaja Kallas (Estonia), Ursula von der Leyen (EU Commission), and Mette Frederiksen (Denmark)—illustrates a shared strategic vision. These leaders are harmonising operational capability, industrial output, and political will to create a credible European shield. Nordic states provide geographic advantages and frontline expertise, while larger economies anchor industrial and financial power. The UK contributes maritime and expeditionary capabilities, France adds nuclear and rapid reaction assets, and Germany supplies industrial strength and logistical capacity. Collectively, this coalition embodies the principle of "Europe first, America complementary": Europe can defend itself autonomously while remaining interoperable within NATO.

Strategically, the absence of guaranteed U.S. forward presence in the European theatre has accelerated European operational cohesion. The Joint Expeditionary Force, European defence industrial programmes, and integrated command structures ensure that Europe is not merely reactive but proactive, capable of deterring and, if necessary, defeating threats from Russia or other state and non-state actors. By doing so, Europe secures both its sovereignty and its credibility on the global stage.

For the United Kingdom, this reintegration into continental security frameworks represents a successful recalibration of post-Brexit policy. Britain leverages its industrial base, naval expertise, and intelligence capabilities to lead, rather than merely follow, regional defence initiatives. The "Alliance of the Willing," composed of northern and central European powers, demonstrates that security cooperation can be flexible, pragmatic, and effective without requiring full institutional integration.

In conclusion, the combination of high defence spending, industrial consolidation, and a coalition of pragmatic leadership has repositioned Europe—and the United Kingdom within it—as a credible, autonomous, and capable security actor. The Type 26 deal with Norway, alongside broader industrial and operational integration, is emblematic of a wider trend: Europe is assuming responsibility for its own defence. In this context, Britain's return to European defence leadership is not only symbolic but operationally significant, setting the stage for a continent that can stand independently, yet collaboratively, in the evolving security environment of the 21st century.

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Appendix 1: Case Study – BAE Systems: A Truly Successful British–Swedish Company

BAE Systems represents a striking example of transnational defence industrial collaboration within Europe, combining British strategic leadership with Swedish technological expertise. While the company does not publish exact figures isolating revenue contributions from its Swedish operations, available indicators highlight the importance of BAE Systems Hägglunds and BAE Systems Bofors in the overall corporate portfolio, particularly in combat vehicles and advanced munitions (Asia Pacific Defence Reporter, 2025; DefenceHere, 2025).

Swedish Operations and Strategic Importance

BAE's Swedish subsidiaries primarily focus on armoured combat vehicles and munitions, with the CV90 family and BvS10 Arctic vehicles representing flagship platforms. Hägglunds and Bofors have consistently secured major contracts in 2023–2025, including a $2.5 billion order for CV90s, jointly serving Denmark and Sweden, and a €760 million order for BvS10 vehicles, in which Sweden plays a leading role. Additionally, recurring munitions orders from Bofors contribute hundreds of millions of SEK annually, reinforcing Sweden's strategic role in supporting Nordic defence capabilities (Investors BAE Systems, 2025).

Financial Contribution

Globally, BAE Systems reported group sales of approximately £28.3 billion (€28.91 billion) in 2024 (DefenceHere, 2025). The Platform & Services segment, encompassing Hägglunds and Bofors, is a multi-billion-pound division, with Sweden consistently identified as one of the three largest operating geographies alongside the UK and US. Industry analyses estimate that Swedish operations contribute roughly 10–15% of BAE's global sales, with higher figures possible in years of significant contract deliveries or increased Northern European procurement activity (Annual

Report BAE Systems, 2025; Asia Pacific Defence Reporter, 2025). This suggests a ballpark figure of €3–4 billion in annual revenue attributable to Swedish entities for 2024–2025.

Industrial and Strategic Implications

The BAE Swedish operations illustrate several key trends in European defence:

1. **Transnational Industrial Integration:** Sweden's advanced technology and combat vehicle production are fully integrated into a British-led industrial network, supporting both national and allied capabilities.
2. **Regional Defence Alignment:** Major contracts serve not only Sweden but also Nordic partners such as Denmark, reinforcing interoperability and shared defence objectives.
3. **Strategic Autonomy:** By developing and supplying European platforms domestically, Sweden and the UK collectively reduce reliance on non-European defence imports, enhancing European capability sovereignty.
4. **Economic Impact:** The Swedish operations underpin thousands of jobs, generate substantial tax revenue, and support local supply chains, demonstrating the economic as well as strategic importance of cross-border industrial collaboration.

Summary

While Sweden accounts for a minority of BAE Systems' global revenue, its operations are crucial to the company's strategic and industrial footprint. Hägglunds and Bofors deliver high-value platforms and munitions, contribute to European defence autonomy, and reinforce Nordic cooperation. The Swedish business, likely representing 10–15% of total BAE sales (€3–4 billion annually), exemplifies the mutual benefits of a British–Swedish defence industrial partnership in an era of heightened European security investment.

Appendix 2: Case Study – SAAB: Becoming a Leading European Defence Industry

SAAB AB represents one of Europe's most advanced and strategically significant defence companies, exemplifying Sweden's growing role in European security and industrial sovereignty. The company is renowned for its integrated platforms spanning aerospace, radar systems, and naval technology, with a particular emphasis on fighter aircraft, surveillance solutions, and next-generation defence technologies.

Core Capabilities and Strategic Importance

SAAB's product portfolio includes the Gripen E/F fighter aircraft, advanced radar systems, electronic warfare technologies, and submarine and naval systems. Gripen E/F has been adopted not only by Sweden but increasingly by other European and global partners, reflecting the aircraft's cost-efficiency, operational flexibility, and compatibility with NATO standards (SAAB Annual Report, 2024; Jane's Defence Weekly, 2025). SAAB has also been actively involved in multinational defence programs, including joint projects with the UK and Finland, such as radar integration and Arctic-capable naval platforms, reinforcing European interoperability and defence capability (European Defence Review, 2025).

Financial Performance

In 2024, SAAB reported group net sales of approximately SEK 52.7 billion (€4.9 billion), reflecting both domestic and international demand (SAAB Annual Report, 2024). Exports account for roughly 45–50% of revenues, indicating the company's significant reliance on European and global partnerships. Gripen deliveries and associated maintenance and support contracts have been a major driver of revenue growth over the last three years, complemented by naval systems and electronic warfare platforms. Analysts estimate that SAAB's contribution to the European defence industrial base is comparable in strategic value to its financial size, as the company provides critical sovereign capabilities in air, land, and maritime domains (Defense Industry Monitor, 2025).

Regional and European Role

SAAB's strategic positioning highlights several key trends in European defence:

1. **European Sovereignty and Industrial Independence:** By producing high-end platforms domestically, SAAB reduces European reliance on non-European defence imports, particularly from the United States, while enhancing regional technological self-sufficiency.
2. **Integration with NATO and Nordic Partners:** SAAB products are designed to integrate seamlessly with NATO systems, facilitating joint operations. Finland, Sweden, Denmark, and increasingly other European countries rely on SAAB capabilities for air defence, naval security, and intelligence, surveillance, and reconnaissance (ISR) functions.
3. **Innovation and Advanced Technologies:** SAAB invests heavily in research and development, representing over 20% of its net sales in recent years (SAAB Annual Report, 2024). This investment ensures continuous capability improvement in radar, electronic warfare, AI-driven command systems, and next-generation fighter and naval platforms.
4. **Economic and Industrial Impact:** SAAB provides thousands of high-skilled jobs across Sweden, drives local supply chains, and stimulates European technological competitiveness, reinforcing the symbiosis between industrial

capacity and strategic capability.

Summary

SAAB exemplifies Sweden's emergence as a pivotal European defence industrial actor. Its Gripen aircraft, advanced radar and naval systems, and integrated R&D ecosystem not only strengthen Sweden's national defence but also bolster European and NATO capabilities. The company's dual role in financial contribution and strategic technological influence illustrates the benefits of investing in indigenous European defence industries. SAAB's performance underscores how European countries can achieve both industrial independence and operational interoperability within an integrated security framework.

Appendix 3: Case Study – Patria: The Meaning of SISU

Patria Oyj is Finland's premier defence company, emblematic of the Finnish concept of **"SISU"** — a national ethos representing determination, resilience, and perseverance. Patria's operations encompass land systems, military vehicles, maintenance services, and integrated support solutions, providing both Finland and European partners with high-quality, operationally resilient capabilities.

Core Capabilities and Products

Patria is best known for its **armoured combat vehicles**, including the **AMV XP (Armoured Modular Vehicle)**, and the **NEMO mortar system**, as well as supporting infrastructure for vehicle maintenance and training. Patria's solutions are designed to operate in extreme conditions, including Arctic and sub-Arctic environments, reflecting Finland's strategic focus on Northern Europe's unique security landscape (Patria Annual Report, 2024; Jane's Defence Industry, 2025).

Key capabilities include:

1. **Armoured Vehicles:** Patria's AMV XP is widely exported across Europe, including deliveries to Estonia and Latvia, and is optimized for mobility, survivability, and interoperability with NATO standards.
2. **Support & Maintenance Services:** Patria provides lifecycle support, upgrading, and modernisation for vehicles and systems, ensuring long-term operational effectiveness.
3. **Integration & Training:** Patria trains armed forces personnel in vehicle operation, maintenance, and battlefield integration, emphasizing operational readiness in harsh Nordic climates.

The Concept of SISU in Industrial and Operational Practice

The Finnish idea of **SISU** — representing courage, grit, and resilience in the face of adversity — is central to Patria's corporate ethos. This philosophy is reflected in both design and operational use: vehicles are engineered for extreme reliability, maintainability, and performance under duress, while the company's workforce demonstrates high technical skill and adaptability. SISU informs Patria's culture of continuous innovation, operational pragmatism, and long-term strategic thinking, contributing directly to Finland's national defence and NATO cooperation (Laaksonen, 2023).

Financial and Strategic Significance

In 2024, Patria reported net sales of approximately €1.2 billion, with exports comprising roughly 40% of its revenue (Patria Annual Report, 2024). Contracts with domestic and Nordic partners — particularly Finland, Estonia, and Denmark — ensure both revenue stability and strategic alignment. Notable contracts include:

- €450 million for AMV XP deliveries and upgrades to Finland's Defence Forces (2023–2025).
- €150 million for regional Nordic and Baltic vehicle procurement and modernisation programs.
- Lifecycle support and training contracts exceeding €100 million annually across Northern Europe.

Patria's role in Nordic defence is further amplified by its close cooperation with other European partners, including BAE Systems and SAAB, on joint vehicle and systems projects. This collaborative approach enhances industrial interoperability and strengthens Europe's independent defence capacity.

Regional and NATO Integration

Patria's vehicles and support systems are fully NATO-compatible, allowing for seamless integration in multinational exercises and operational deployments. Finland's accession to NATO has further increased the relevance of Patria's solutions for broader European security objectives, particularly in the Baltic and Arctic regions. Patria's industrial output not only contributes to national capability but also reinforces Europe's strategic autonomy and operational readiness without reliance on non-European suppliers.

Summary

Patria exemplifies the Finnish model of industrial and operational resilience. Through high-performance armoured vehicles, support services, and a corporate culture rooted in **SISU**, Patria ensures both national and regional security. Its contributions demonstrate the vital role of indigenous defence industries in maintaining European strategic autonomy, enhancing interoperability, and delivering durable, high-quality military capabilities adapted to Northern Europe's challenging operational environment.