



LONG-TERM CAPABILITY ASSESSMENT

The present brochure reflects the outcome of the 2023 long-term strand revision, referred to as "Strand B". It identifies key future strategic environment factors, future capability areas' requirements and technology fields that MS need to focus on to support the development of defence and security capabilities in the timeframe of 20+ years ahead.

CAPABILITY DEVELOPMENT PLAN UPDATE

Since 2008, the European Defence Agency (EDA) has been producing a **Capability Development Plan (CDP)** to address **security and defence challenges**. It looks at future security scenarios and makes recommendations about the capabilities European militaries will need to react to a variety of potential developments while maintaining initiative and freedom of action.

Since 2008, the European Defence Agency has been regularly updating its Capability Development Plans (CDP) in close cooperation with its Member States and with the EU Military Committee (EUMC) and the EU Military Staff (EUMS).

The purpose of the periodic CDP revision is to provide a full and up to date capability picture that supports decision-making at EU and national levels regarding **defence capability development**, addressing the current security challenges from the strategic environment.

The CDP is developed using four different strands of inputs, all validated by Member States. All strands contribute to identifying the EU Capability Development Priorities.



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SCOPE AND METHODOLOGY

EDA initiated an evaluation process with **a group of experts** including capability planners, technology experts and foresight analysts from Member States, EDA, EU Military Staff, EU Military Committee and NATO. **An analysis of the future operational context** was conducted, considering worldwide geopolitical and socio-economic macro trends. Likewise, possible **long-term operational scenarios** were developed and finally, **two tabletop exercises (TTX) were conducted** to extract preliminary defence capability requirements.

The long-term capability assessment constitutes a summary of the evaluation of the results presenting a concise **overview of its principal findings**. The identified key results, indicate the points that EDA Member States need to focus on to support the development of defence and security capabilities in the timeframe of 20+ years ahead:



GLOBAL FUTURE
STRATEGIC FACTORS



LONG-TERM
CAPABILITY TRENDS



TECHNOLOGY IMPACT ON
FUTURE MILITARY CAPABILITIES

GLOBAL FUTURE STRATEGIC FACTORS

An analysis of the main factors that will shape the strategic context in 2040 and beyond was conducted, identifying the following trends regarding strategic factors, where **persistent digitalization will significantly affect the character of war**.



LONG-TERM CAPABILITY TRENDS

Identification of these **capability trends** have been **driven by** the **analysis among experts** and the **need of keeping future military advantage**.



TECHNOLOGY IMPACT ON FUTURE MILITARY CAPABILITIES

The study presents the **Emerging Disruptive Technologies that will shape future battlefield**, introducing them from the **capability development perspective**, to describe possible **military applications** and next **challenges** to be considered as part of the future battlespace.

By 2040 and beyond, it is expected that the world will be largely digitized and technology dependent. In consequence, the future conflict environment will be characterised by a widespread use of digital technology and a competition for the cognitive superiority, as well as by a conflict over the perception of reality.

From a **military perspective**, specific technologies, such as **artificial intelligence, internet of things, robotics, biotechnologies, advanced materials or quantum technologies**, are strong candidates to shape and orient both, threat and military capabilities under this general new strategic context. Defensive and offensive operations in **cyberspace** are considered critical for the high information exchange.