

Rearming the West: Can Strategic Reform Restore Deterrence by 2027?

PART TWO – CAPABILITY UNDER PRESSURE

An Assessment of Western Democracies' Capacity to Rebuild Warfighting Credibility by 2027

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From Money to Mass: Can the West Convert Spending into Combat Power by 2027?

The defence budgets are growing. The political rhetoric is hardening. And across the democratic world, procurement reform is gathering momentum. But the uncomfortable question remains: Can the West turn this flurry of intent into real, deployable, sustained warfighting mass—before it's too late?

This is the core of the challenge. Money, alone, does not win wars. It must be translated into force structures, readiness cycles, munitions stockpiles, and industrial resilience. Right now, that translation is dangerously incomplete.

What 'Mass' Means in a Peer Conflict

In counterinsurgency campaigns, high-tech precision and small elite formations could sustain battlefield advantage. Against peer adversaries, the calculus changes. Mass is not just about size—it's about sustainability, survivability, and scalability under contested conditions.

In such a fight:

- Units must be reconstitutable after attrition, not just exquisite but expendable.
- Munitions must be plentiful, modular and rapidly replenished.
- The force must be distributed, with redundancy in command, logistics and data flows.
- Combat power must persist, even under degraded networks, denied airspace, and high attrition.

On all these metrics, Western forces are not yet ready.

Indicators of Inadequacy

Despite rising spend, serious gaps remain:

- Stockpiles of precision munitions and artillery shells are well below conflict-requirement levels.
- Lead times for replacement platforms (e.g. tanks, airframes, missiles) are measured in years.
- Personnel shortfalls in key areas—cyber, EW, engineering—undermine force generation cycles.
- Training days per unit have decreased in several NATO countries, despite larger budgets.

Ukraine has shown that even with modern kit, you run out of capability when you run out of ammunition and people.

The Defence Industrial Base: Still Brittle

One of the largest constraints is not operational—it is industrial. The West's defence-industrial base has atrophied since the Cold War. Production lines have been optimised for efficiency, not surge. Foundries, machine shops and component suppliers rely on globalised just-in-time systems.

- In the US, artillery shell production has only recently been expanded—but is still lagging behind wartime demand.
- In the UK, critical subcomponents—from tank treads to silicon—must still be imported from non-NATO states.
- In Germany, contracts exist—but factories to build the systems often do not.

As one NATO logistics officer observed during a recent war game: "We had the money. We didn't have the metal."

What Needs to Change—Now

To convert intent into combat power by 2027, three things must happen:

1

Mobilisation of Industrial Capacity

Governments must act as conveners, not just customers—co-investing in factories, machine tooling, and raw material access. Defence manufacturing must be recognised as critical national infrastructure, with protected status and sovereign controls.

2

Doctrinal Adaptation

Forces must train and plan for high-loss, high-speed, attritional warfare—not stabilisation or counterinsurgency.

Decentralised command structures and resilient logistics must become baseline assumptions.

3

Integrated Tech and Tactics

Edge AI, battlefield autonomy, and real-time targeting must be built into force design—not bolted on later.

Software-defined platforms must be adopted to enable adaptation within the battlespace.



The Hard Truth About Western Readiness

The hard truth is this: without a step-change in how money is translated into mass, the West may enter 2027 with record defence budgets—but not enough ready force to deter or defeat aggression.

The clock is ticking. The opportunity exists. But only action—not ambition—will close the gap.

A Brittle West? Demography, Debt and Divided Politics

Strategic capability is not built in a vacuum. It depends on the political, demographic and economic foundations of the nations that wield it. And herein lies the often-unspoken vulnerability of the Western alliance: beneath the military reforms and procurement surges lies a fragile societal substrate—one that may not endure the strain of sustained mobilisation or high-end war.

This chapter explores that brittleness—and the implications for readiness, resilience, and strategic continuity.

The Demographic Cliff

Many Western nations are quietly approaching a structural crisis: there simply aren't enough people to replenish or sustain large, high-readiness forces.

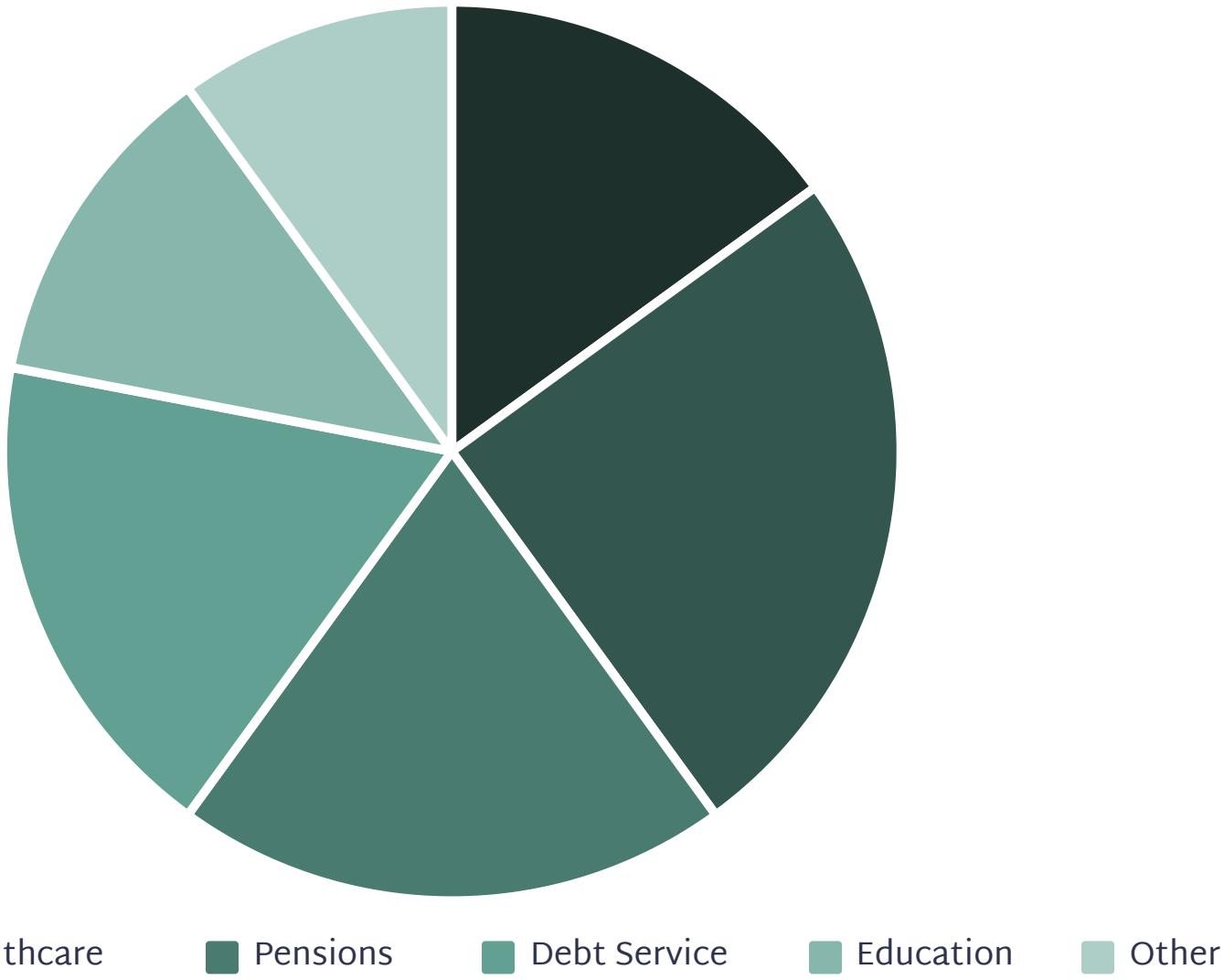
- The UK and Germany face declining birth rates, shrinking labour pools, and increasing healthcare costs—all of which limit both recruitment and economic productivity.
- The US military is struggling to meet recruitment targets, with only a fraction of the eligible population both physically and psychologically suitable for service.
- The average age of defence-industrial workers is rising. In sectors like shipbuilding, avionics and munitions, workforce shortages are now considered a Tier 1 risk.

This isn't just a question of numbers—it's a question of character. Many Western societies have not psychologically prepared for the return of great power war.

As one US general bluntly noted: "We may not have the stomach for what's coming."

Public Finances: High Debt, Higher Promises

Defence spending is rising—but so is the cost of everything else. Ageing populations, ballooning healthcare demands, and climate mitigation costs are squeezing national budgets.



■ Defence ■ Healthcare ■ Pensions ■ Debt Service ■ Education ■ Other

- Debt-to-GDP ratios across Europe and the US are at post-war highs.
- Interest payments now compete with defence in several budgets.
- Defence commitments are politically fragile, especially when juxtaposed against domestic priorities like pensions, housing, or cost-of-living crises.

The West's adversaries, by contrast, often operate under centralised control, with fewer fiscal constraints and far lower political costs for economic disruption. In short: they can mobilise at speed. We must debate it.

Polarisation and Political Fragility

Perhaps the most corrosive weakness is internal division.

- In the US, partisan gridlock and isolationist factions increasingly question the value of overseas commitments.
- In Europe, far-right and populist parties are rising—with defence policy often becoming a casualty of their agendas.
- In the UK, despite growing awareness of threat, there is still no unified long-term strategy for mobilisation or national resilience.

All of this undermines the continuity needed for effective force generation. Defence capability cannot be rebooted every election cycle. It requires 10–15 years of uninterrupted focus, investment and reform. Right now, the West's strategic horizon is often shorter than a government's term in office.

The Risk of Strategic Hesitation

When these factors—demography, debt, division—are combined, they pose a stark risk: that Western societies will hesitate when decisiveness is needed most.



Hesitate to reintroduce conscription or national service

Political leaders may delay difficult decisions about military service requirements until it's too late to build necessary force strength.



Hesitate to nationalise or subsidise critical industrial production

Economic orthodoxy may prevent timely intervention in defense industrial capacity until shortages become critical.



Hesitate to take pre-emptive measures in defence of allies or national interests

Democratic processes and divided public opinion may slow response times to emerging threats.

Such hesitation, in the face of adversaries who act without restraint, could prove fatal.

Former Australian defence chief Angus Houston put it succinctly: "We're one major shock away from being tested in ways we haven't imagined."



Western Democracies: Strong But Vulnerable

Western democracies remain strong, but not invulnerable. The adversaries preparing for war are not only watching our tanks and budgets. They are watching our cohesion, our will, and our ability to sustain resolve under pressure.

And on that front, the margin for error is growing dangerously thin.

Forging the Edge: Technology, Adaptation and the Role of AI in Future Conflict

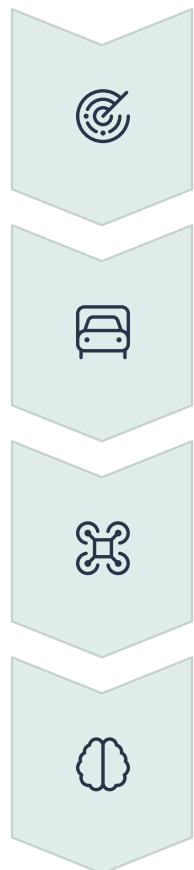
In the race to restore strategic overmatch by 2027, technology is often cast as the great equaliser. But technology alone does not guarantee advantage. It must be wielded with precision, integrated into doctrine, and adapted under fire. As the West scrambles to rearm and retool, it must also ask: can we integrate emerging technologies—especially AI—fast enough, and smart enough, to matter in the next fight?

This chapter explores the promise and peril of defence AI, and how technological edge is shaped not just by innovation, but by adoption, scale, and tactical integration.



The AI Inflection Point

Artificial Intelligence is now a decisive enabler in modern warfare. Its applications range from back-office optimisation to frontline decision dominance:



ISR fusion and target recognition

Dramatically reducing sensor-to-shooter timelines

Predictive logistics

Improving resilience and reducing friction in contested environments

Combat autonomy

Allowing small unmanned systems to swarm, probe, and strike with minimal human input

Battlefield decision support

Offering commanders real-time recommendations based on ambient data

Ukraine has been the laboratory. AI-enhanced targeting, dynamic drone routing, and machine vision-enabled strike confirmation have already entered the field. But these are early steps. The next war will see AI as a combatant, not just a tool.

As former Google CEO Eric Schmidt warned: "The nation that masters AI will win not just the battlefield, but the battlespace."

Integration, Not Invention, Wins Wars

The West's challenge is not a lack of innovation. It is a lack of integration.

- Thousands of dual-use AI companies exist across NATO nations.
- Billions are being poured into AI accelerators, R&D centres, and defence tech hubs.
- Yet very few systems make it from demo to deployment, from lab to lance.

This is the so-called "valley of death"—where promising tech fails to cross the cultural, contractual and doctrinal chasm into the hands of operators.

To overcome it, militaries must:

Embrace modular, open-systems architectures
That allow rapid tech insertion

Build human-in-the-loop AI frameworks
That enhance, not replace, command judgement

Field minimum viable capability fast
Then iterate in theatre—not in committee

Ambient Intelligence and the Tactical Edge

Beyond general AI lies a more specific battlefield concept: ambient intelligence—systems that live at the edge, embedded within units, platforms and environments, able to process and act on data without requiring cloud access or centralised decision-making.

This is essential in denied, degraded, and disrupted conditions.

Ambient AI:

- Enables real-time adaptation under fire.
- Reduces operator burden through context-aware automation.
- Maintains mission continuity even under comms blackout or EW attack.

It is not science fiction. It is the new form of digital survivability.

Ethical, Legal, and Strategic Risks of AI in Warfare

AI at war is not without peril. Western democracies must balance speed with safeguards:

- Rules of engagement must evolve, ensuring accountability even in human-machine teams.
- Adversarial AI attacks—spoofing, manipulation, and cognitive warfare—will become standard.
- Public confidence may erode if AI-enabled decisions lead to civilian harm or mission failure.

Yet these risks must be managed—not used as excuses for inertia. The cost of delay is greater than the cost of adaptation.

The side that wins the next war will not necessarily have the best algorithms—it will have the fastest feedback loops. The West still has the edge in innovation. But only if it can bridge the valley of death, embed AI at the tactical edge, and move from invention to adaptation at warfighting speed.

Rearming the West: Urgency, Unity, and Unyielding Will

As we stand in April 2025, two stark realities confront the Western alliance.

First: the world has entered a pre-war period.

Second: the window to deter—and if necessary, prevail—by 2027 is rapidly closing.

Across the United States, the United Kingdom, and Europe, the recognition of risk has finally ignited action. Procurement reforms, strategic investment initiatives, industrial mobilisation and technological acceleration are all underway. The Hegseth Memo, the DSR Bank, the *Zeitenwende*, the European Defence Fund—they are not mere headlines. They are the scaffolding for a new, more serious security posture.

But scaffolding is not a fortress. Intent must now be forged into capability. Money into mass. Innovation into operational advantage.

And critically, all of this must be done faster than our adversaries anticipate.

Summary of Strategic Imperatives

- Speed Up Procurement: CSO models must be embraced wholesale, across the alliance. Bureaucracy must become the exception, not the rule.
- Mobilise Industry at Scale: Defence manufacturing must be retooled for surge capacity, with government acting as strategic sponsor, not just customer.
- Close the Valley of Death: AI and emerging technologies must be fielded into operational units now—not studied endlessly in think-tanks.
- Harden National Resilience: Logistics, cyber infrastructure, and critical industries must be battle-proofed against disruption and coercion.
- Strengthen Political Resolve: Societies must be prepared—psychologically and materially—for the demands of high-intensity conflict.
- Deepen Allied Integration: No European state can stand alone. Neither can Europe without the United States. Unity must become habit, not aspiration.

As Winston Churchill once said: "To each, there comes in their lifetime a special moment when they are figuratively tapped on the shoulder and offered the chance to do something special. What a tragedy if that moment finds them unprepared."

This is the West's moment.

If we succeed, 2027 will mark not the outbreak of catastrophe, but the quiet validation of strength through readiness. If we fail, history will not care about how much we spent, or how sincere our reforms sounded. It will record only that we hesitated, divided, and arrived too late.

The time to act is now.

We call on policymakers, industry leaders, defence innovators and allied commanders:

Align. Accelerate. Arm the future.