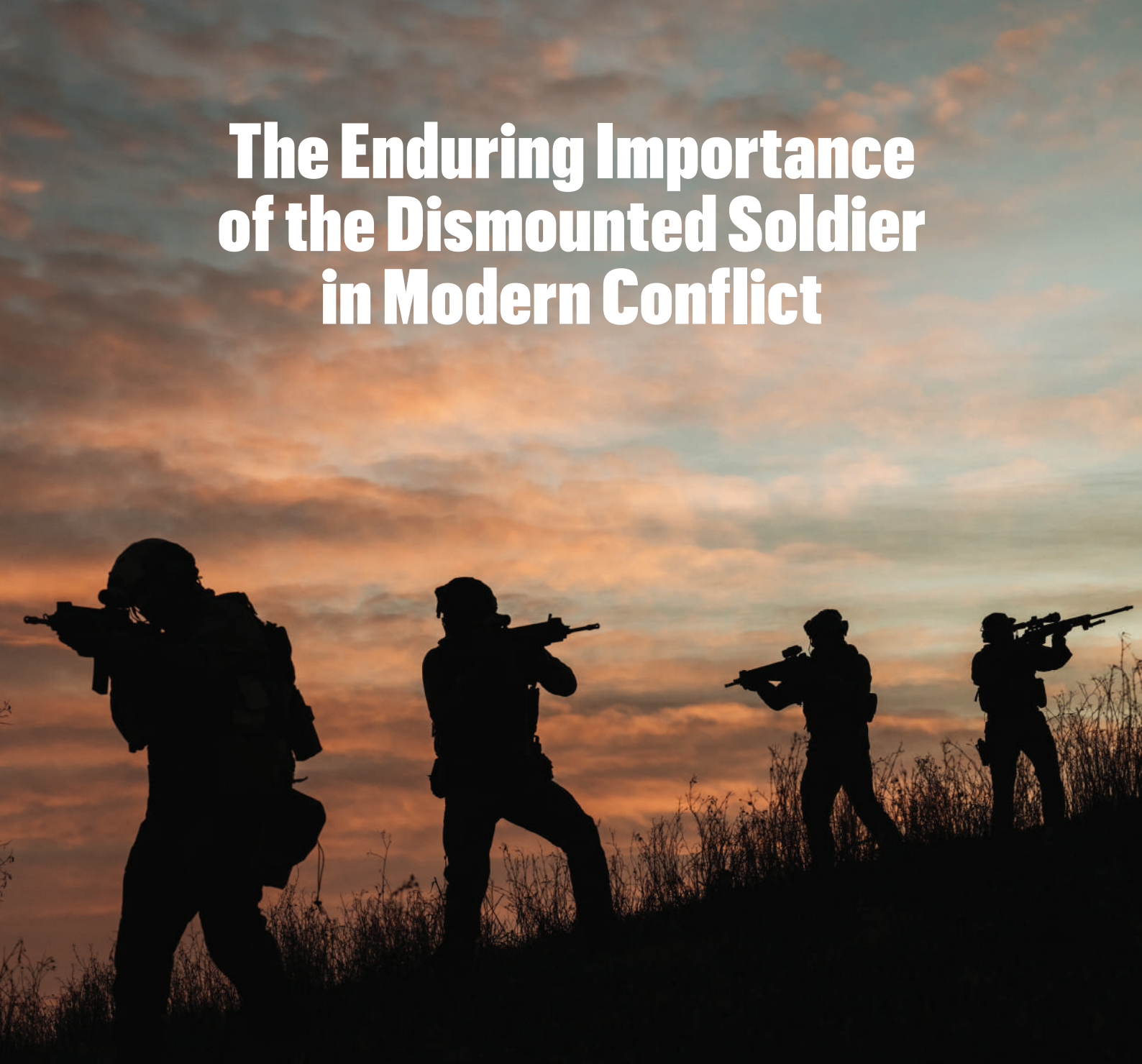
The Enduring Importance of the Dismounted Soldier in Modern Conflict



BERETTA

Foreword

Security has evolved.

At the same time, current conflict shows us that the soldier remains the indispensable core of any defence effort. They are the professionals that bind and activate complex military systems.

Today's battlefields are putting yet more strain on these men and women, requiring rapid adaptation to threats that evolve as fast as our ability to shield from them. To defend effectively, Europe must equip effectively.

"As our company celebrates its 500th anniversary, it feels right to reflect on the place of the dismounted soldier in today's operational, industrial, and political landscape. Our heritage includes five centuries of equipping soldiers. As warfare continues to evolve through advancing technologies, the soldier remains a vital and irreplaceable element of modern defense. In this context, innovation and the continuous enhancement of individual equipment are essential to strengthening the capabilities and effectiveness of today's modern soldiers. Despite rapid advances in technology, the modern dismounted soldier remains the cornerstone of defense capability. Strategic investment in soldier equipment, integrated systems, and enhanced interoperability directly drives greater force effectiveness, higher operational readiness, and enduring defense value."

Franco Gussalli-Beretta

Our paper contains key policy recommendations to address the challenges that remain. We stand ready to continue supporting decision makers to learn the lessons of today's conflicts, address market fragmentation, establish key standards and criteria, and facilitate industrial alliances.

We call for:

- Consolidating Operational Requirements across Ministries of Defence for a single, optimised system architecture, enhancing interoperability and reducing fragmentation across defence platforms;
- Harmonising European standards for infantry equipment;
- Including the dismounted soldier in capacity frameworks as a strategic asset fundamental to operational effectiveness.

This Paper is just the beginning. We look forward to working with all stakeholders to ensure this vital aspect of defence remains a key topic on the policy agenda.

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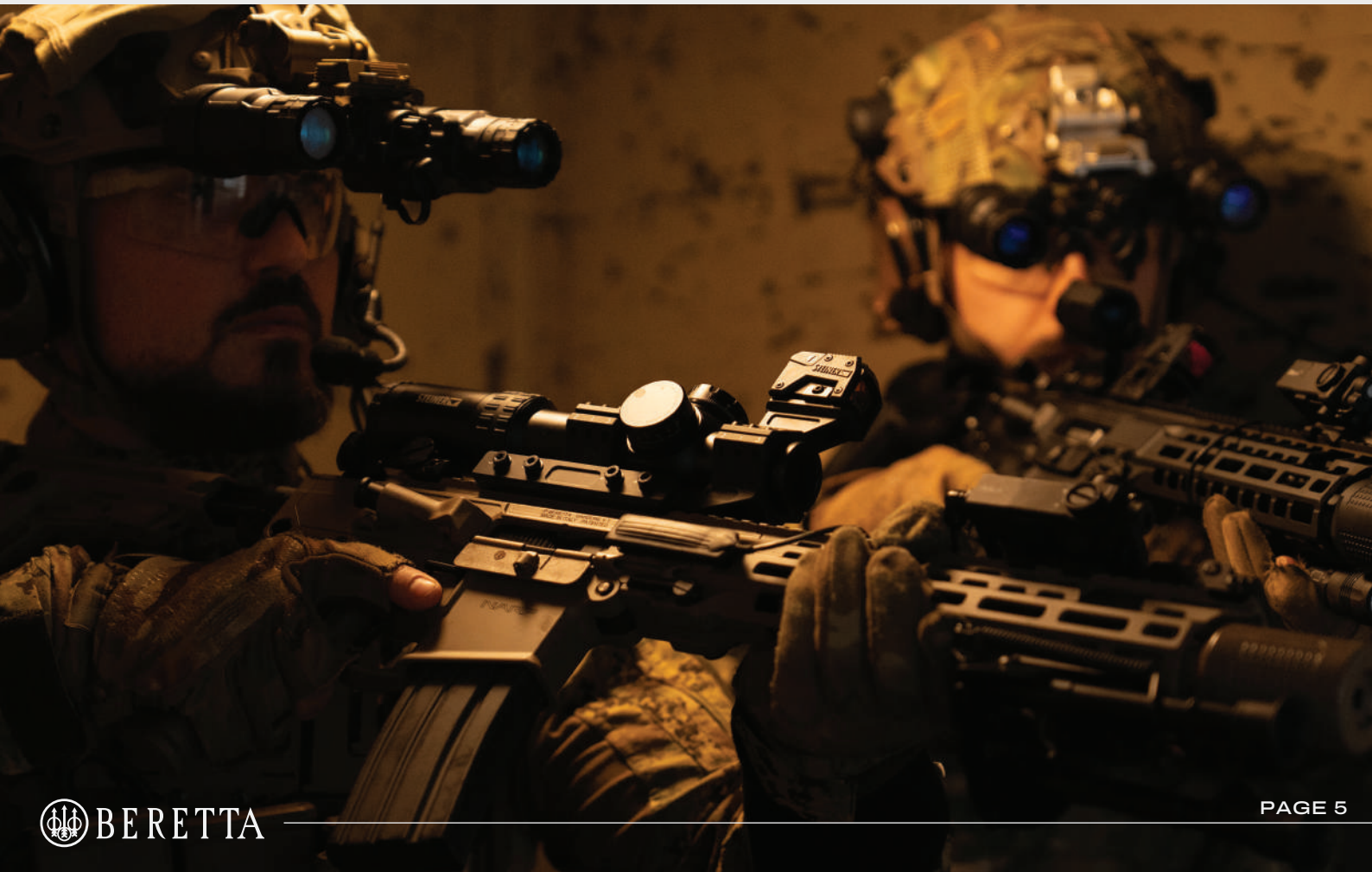
Executive Summary

The security environment of the 21st century has evolved faster than most military doctrines and procurement systems were prepared to accommodate. Russia's unprovoked invasion of Ukraine in 2022 has shattered long-standing assumptions about what modern conflict would look like. The dominant expectation among analysts and planners was that future wars would be primarily fought through high-technology, long-range, and unmanned systems — often described as "stand-off" capabilities. Instead, the war in Ukraine has demonstrated the persistence and, in many ways, the resurgence of high-intensity and human-centric conflict.

This new reality of warfare, where conventional and unconventional domains intersect, has re-established the central role of the dismounted soldier.
Despite unprecedented levels of technological sophistication, success on the modern battlefield still depends on the soldier operating on foot, capable of independent manoeuvre, surveillance, and engagement under degraded or denied conditions, meaning technological enablers, such as communications, GPS, data links and sensors are disrupted or even unavailable due to enemy action or environmental factors.

Europe's response to this reality must be strategic and urgent. The continent faces a geopolitical realignment as the United States redirects attention toward the Indo-Pacific, compelling Europe to assume greater responsibility for its own defence.
Simultaneously, the European defence industrial base must overcome chronic fragmentation and adapt to an environment where multi-year development and production cycles are no longer compatible with rapidly evolving threats.

Within this context, the dismounted soldier becomes not only the decisive actor in combat, but also the central figure in the redefinition of Europe's defence posture. Investing in his or her capability: lethality, mobility, survivability, situational awareness, is therefore investing in the credibility of European defence itself.



Introduction: Hybrid Conflict and Strategic Surprise

The Russian invasion of Ukraine in early 2022 sent shockwaves throughout the global strategic community. Military conflict on continental Europe, a scenario widely regarded as consigned to history, has become an enduring, grinding, and transformative reality. For decades, Western militaries had been shaped by operations in asymmetric contexts: technologically advanced forces confronting lightly equipped non-state actors, insurgents, or terrorist organisations. In such environments, the emphasis was placed on precision, stand-off strike capabilities, and information dominance.

However, the war in Ukraine has revealed the persistence of large-scale, state-on-state warfare. Two national armies, both equipped with modern arsenals and industrial support, have been engaged in a protracted conflict over territory, sovereignty, and survival. The anticipated paradigm of high-technology, low-footprint warfare has been replaced by something far more complex, a hybrid conflict that merges old and new forms of fighting.

Hybrid warfare manifests itself in several dimensions. It combines conventional warfare, tanks, artillery, missiles, and armoured manoeuvre, with unconventional attacks such as cyber operations, disinformation campaigns, and physical sabotage of critical infrastructure like undersea cables and energy pipelines. It is also a fusion of high-technology and low-technology solutions: the battlefield is saturated with drones, precision munitions, and digital sensors, yet soldiers once again dig trenches, endure artillery bombardments, and fight over urban ruins.

At the centre of this apparent paradox stands the dismounted soldier, the “boots on the ground”, who must adapt to both high-tech and low-tech realities. The dismounted soldier operates outside the protection of vehicles, often with limited connectivity, and must interpret, decide, and act in environments that are fluid, contested, and lethal. This figure remains the linchpin of military effectiveness, embodying adaptability, initiative, and resilience in the most demanding conditions.

Lessons from Ukraine: The Shape of Hybrid War

Ukraine has become a test ground for 21st-century conflict. The war has demonstrated how rapidly evolving threats can overwhelm even the most sophisticated defence systems. Cheap, commercially available technologies, particularly drones, offer capabilities that were once the preserve of state-level forces. Swarms of repurposed civilian drones have repeatedly penetrated air defence networks, identifying and striking high-value targets with precision.

This dynamic has profound implications for the dismounted soldier.

The modern battlefield is characterised by constant observation, where every movement risks exposure to detection and attack. Soldiers must operate under continuous drone surveillance and endure the psychological strain of being perpetually 'seen'. The demand for camouflage and situational awareness has never been greater, yet the battlefield is increasingly opaque due to electronic warfare, jamming, and information overload.

The Ukrainian experience underscores several key lessons:

- **The human element remains irreplaceable.** While advanced technologies multiply effectiveness, they cannot substitute for the adaptability and trained response of a soldier.
- **Scale and flexibility have re-emerged as critical attributes of survivability.** Small, agile, dismounted squads are more resilient than heavy armoured vehicles (life expectancy of tanks in Ukraine is measured in days).
- **Shorter innovation cycles are needed.** Traditional defence cycle from ideation to procurement, which typically takes upwards of 5 years, cannot match the speed of adaptation observed in Ukraine, where both sides innovate, prototype, industrialize and deploy new systems in a matter of months.

The EU's Defence Technological and Industrial Base (EDTIB) and the policies that guide them, must internalise these lessons. The dismounted soldier must be at the heart of modernisation efforts, supported by modular, interoperable, and rapidly upgradable equipment designed to evolve with the threat.

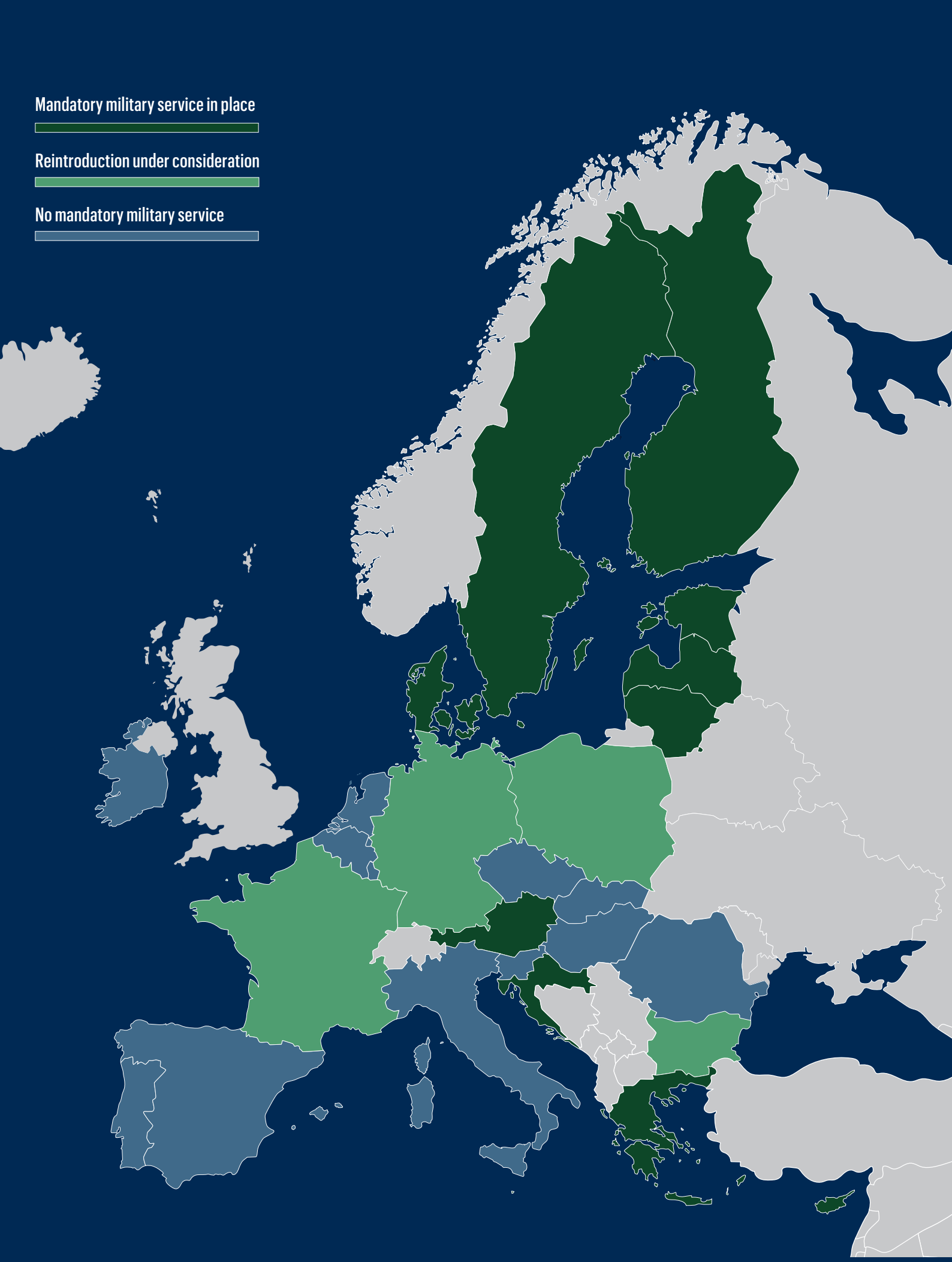
Europe's Geopolitical Shift

The war in Ukraine is unfolding against a broader geopolitical transformation.
The United States, long the cornerstone of European security through NATO, is recalibrating its strategic priorities toward the Indo-Pacific region. This pivot is driven by growing tensions around the Taiwan Strait and the need to deter competitors in the Pacific theatre. As a result, Washington is encouraging European allies to assume greater responsibility for their own defence and to invest more consistently in the European industrial base (EDTIB).

This shift presents both a challenge and an opportunity. On one hand, Europe can no longer assume that the approximately 80,000 US troops stationed on the continent will remain indefinitely. On the other, it compels European nations to accelerate efforts toward strategic autonomy.

Reducing dependency on American suppliers, securing critical defence technologies, and fostering a self-sufficient industrial base are no longer optional goals. They are necessities for credible deterrence.

At the same time, several European states are revisiting force generation models. National discussions on reintroducing conscription or expanding professional forces reflect an understanding that modern defence requires both mass and readiness. These initiatives, however, will only succeed if paired with investment in soldier capability, ensuring that every soldier, conscripted or professional, is equipped, trained, and supported to operate effectively in hybrid warfare environments.


Mandatory military service in place
Reintroduction under consideration
No mandatory military service

The Return of the Dismounted Soldier

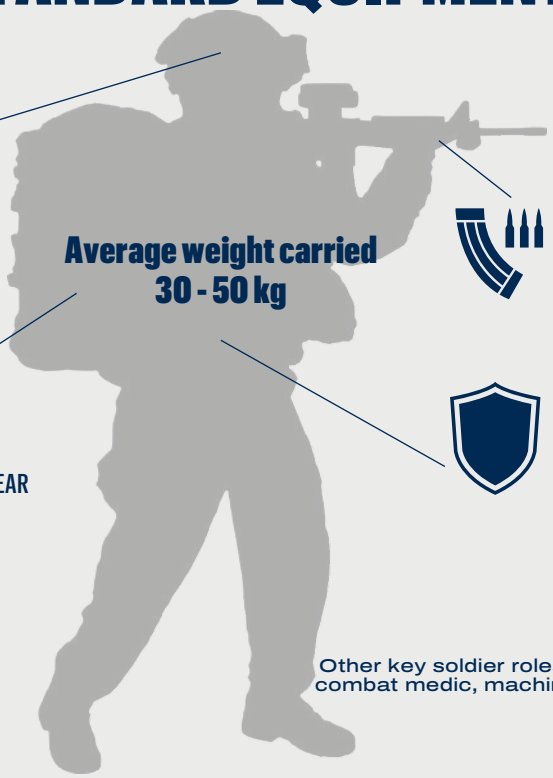
After decades of focusing on precision strikes, airpower, and network-centric warfare, European militaries are rediscovering a fundamental truth: wars are ultimately fought and won by people on the ground.

The dismounted soldier, often overlooked in the era of high-tech modernisation, has returned to the centre of strategic attention.

In modern hybrid conflict, the dismounted soldier performs roles that no sensor or algorithm can replicate. Operating across complex terrain, from urban environments to forests and mountains, the soldier provides a true picture of the situation on the ground, validating or correcting digital intelligence. He or she can secure territory, interact with local populations, and adapt tactics to evolving conditions. Crucially, the dismounted soldier makes the final decision in the chain of engagement, applying judgment, ethics, and proportionality in combat. Even when disconnected from central command due to jamming, cyber disruption, or information warfare, the soldier retains the ability to make rapid, autonomous decisions on the ground, ensuring mission continuity and tactical responsiveness.

The war in Ukraine illustrates that cost-effective, scalable weaponry can offset the strategic advantages of sophisticated, high-cost military assets. Swarms of inexpensive drones, electronic warfare, and decentralised tactics have levelled the playing field between major powers and smaller forces. For the dismounted soldier, this means an even greater reliance on situational awareness tools, communications, and protection systems that can withstand electronic interference.
Many European nations have taken note. Latvia, Lithuania, Sweden, Croatia and others have reinstated compulsory military service, while countries such as Germany and Italy are debating similar steps. The objective is not merely to increase numbers but to restore societal and operational resilience. A renewed focus on the infantryman is, therefore, both a strategic and cultural adjustment, a recognition that deterrence and defence depend on soldiers who can fight, survive, and adapt in unpredictable environments.

A SOLDIER'S LOAD: THE STANDARD EQUIPMENT



COMMUNICATIONS AND NAVIGATION

- RADIO
- MAPS, COMPASS, GPS
- NIGHT VISION

FIELD ESSENTIALS

- MEALS, WATER
- WATERPROOF & COLD WEATHER GEAR
- SLEEPING BAG, PONCHO
- BACKPACK

WEAPONS AND AMMUNITION

- RIFLE, PISTOL
- AMMUNITION
- GRENADES AND OTHER PYROTECHNICS

DURABILITY

- COMBAT BOOTS AND CLOTHING
- BODY ARMOUR AND HELMET
- FIRST AID KIT

Other key soldier roles carry significantly heavier loads e.g. combat medic, machine gunner, sniper, radio operator, etc.

European Defence Industrial Fragmentation

Despite political consensus on the need for a stronger defence, Europe's industrial base remains fragmented. There is a proliferation of overlapping programmes, divergent national requirements, and slow decision-making cycles.

Nowhere is this more evident than in infantry modernisation.

Each European nation maintains its own approach to equipping soldiers, using different rifles, optics, communication systems, protective gear, and training methods. This diversity complicates interoperability during coalition operations and inflates costs through duplication. The absence of common European standards for soldier systems limits economies of scale and slows innovation.

Overcoming this fragmentation requires a new industrial mindset, one that emphasises modularity, standardisation, and collaboration. Common European requirements for dismounted soldier equipment would not only improve interoperability but also enhance resilience by enabling shared supply chains and maintenance capabilities.

EU SERVICE ASSAULT RIFLES

27 Countries - 16 Different models

7 models of **EU ORIGIN** supplying 13 Countries

5 2 2 1 1 1 1

3 models of **NON-EU ORIGIN** supplying 4 Countries

2 1 1 1

6 models THAT **REQUIRE MODERNISATION** supplying 10 Countries

3 2 2 1 1 1

EU SERVICE PISTOLS

27 Countries - 12 Different models

6 models of **EU ORIGIN** supplying 16 Countries

9 3 1 1 1 1

3 models of **NON-EU ORIGIN** supplying 5 Countries

3 1 1

6 models THAT **REQUIRE MODERNISATION** supplying 10 Countries

3 2 1

European Projects and Instruments

European cooperation mechanisms such as the European Defence Fund (EDF), Permanent Structured Cooperation (PESCO), and the European Defence Industry Reinforcement through common Procurement Act (EDIRPA), and more recently EDIP (European Defence Industry Programme) and SAFE (Security Action for Europe), represent important progress toward collective defence investment. However, current funding streams remain heavily weighted toward big ticket' projects, meaning large, high-visibility platforms, naval vessels, aircraft, and strategic systems, while soldier-centred capabilities often receive limited attention.

The imbalance is striking, given that the dismounted soldier remains the most frequent and versatile actor in defence operations.

A more balanced portfolio would allocate greater resources to programs that enhance soldier mobility, lethality, survivability, situational awareness and integration. This includes investments in lightweight protection, next-generation optics, small arms and ammunition, secure communications, and counter-drone measures at the squad level.

Several EU member states, most notably Italy and Latvia, have taken leadership roles in promoting smaller-scale, high-impact projects focused on innovation and human performance. Such initiatives could be seen as models for future European calls under the EDF, emphasising rapid prototyping, field experimentation, and agile acquisition tailored to the pace of modern conflict.

Urgency and Timeframe

Europe faces a narrow window of opportunity to rebuild credible land forces capable of operating in hybrid conflict environments. The 2028–2030 timeframe represents a critical inflection point by which Europe must restore both capacity (sufficient troop numbers and conventional weaponry stockpile) and capability (technological sophistication and readiness).

The challenge is that traditional defence procurement cycles, often spanning a decade, are incompatible with the speed of contemporary innovation. Europe's defence industry must adopt faster, iterative design and production models, inspired by civilian technology sectors. This means embracing spiral development, where prototypes are field-tested, refined, and deployed in short cycles rather than awaiting a single 'final' product.

The EDTIB must also increase production capacity to meet future surge demands. Several companies, including Beretta Defense Technologies and others within the European base, have already invested in expanding manufacturing facilities, R&D centres, and workforce development programs. These efforts illustrate how industry can act proactively to ensure readiness without waiting for crisis-driven mobilisation.

The imperative is clear: Europe cannot afford to modernise slowly.

A sense of urgency, comparable to that demonstrated during past periods of geopolitical tension, is necessary to ensure that, by 2028-2030, European forces are prepared not only to deter aggression but to prevail in a hybrid conflict.

Policy Recommendations

To translate these insights into action, European policymakers should consider several key priorities:

- Rebalance funding priorities to explicitly include the dismounted soldier in capability frameworks. Soldier systems must be treated not as ancillary equipment but as strategic assets fundamental to operational effectiveness.
- Establish European interoperability standards for infantry equipment to ensure common benchmarks in lethality, mobility, and survivability, covering small arms, protective clothing, load-bearing gear, and tactical accessories.
- Harmonize design and performance criteria across member states to enable joint operations, streamline logistics, and enhance industrial efficiency in the development and procurement of infantry systems.
- Reform procurement processes to achieve rapid results. Flexible, outcome-based contracts and collaborative development models would reduce bureaucracy and accelerate innovation.
- Consolidate Operational Requirements across Ministries of Defence to enable delivery of a single, optimized system architecture for all participating nations, enhancing interoperability and reducing fragmentation across defence platforms.
- Provide long-term visibility on system volumes and deployment timelines to support industrial planning, enabling scalable production, cost efficiency, and strategic readiness.
- Support industrial alliances that enhance European sovereignty and resilience. Encouraging cross-border partnerships can help consolidate expertise and create economies of scale, while maintaining diversity and competition.
- Institutionalise lessons from Ukraine. NATO and EU doctrines should be updated to reflect the realities of hybrid conflict, ensuring that the dismounted soldier's needs lethality, mobility, survivability and situational awareness, are prioritised in future planning and funding cycles.

Conclusion

Hybrid warfare has reaffirmed a timeless truth: despite technological leaps, wars are ultimately fought by people. The dismounted soldier remains the cornerstone of European defence, the irreplaceable link between strategy and execution, between political intent and ground reality.

In the evolving landscape of hybrid conflict, success depends on balancing innovation with resilience, and technology with human capability. The European defence community must therefore anchor its modernisation agenda around the soldier, not as a relic of past wars, but as the living embodiment of adaptability, initiative, and courage.

Europe's defence stands at a decisive juncture. Budgets are rising and mobilisation is under way, but unless these efforts are coordinated, the continent risks building stockpiles without operators or armies without equipment. The dismounted soldier bridges that gap. By placing the soldier back at the centre of policy, by investing in the systems that protect and empower them, and by ensuring that European companies equip Europe's own forces, the European Union can turn ambition into credible deterrence. When Europe puts the soldier first, and when European industry delivers for that soldier, security becomes not a promise, but a reality.

About Beretta and BDT

Beretta (Fabbrica d'Armi Pietro Beretta SpA) is the oldest firearms manufacturer in the world. With roots in Northern Italy going back to 1526, the company remains under the leadership of the Beretta family, making it one of the world's oldest family-owned and family-run businesses.

Beretta is also a founding member of BDT (Beretta Defense Technologies), an alliance of Beretta Holding Group companies that supply leading armed forces and law enforcement agencies worldwide with firearms, ammunition, optics, electro-optics, clothing and accessories.
This unique portfolio makes BDT a single reference point for many individual soldier requirements. With over € 390 million revenue generated in Europe in 2024, BDT is a European Defence Industry leader that includes national champions like Beretta (Italy); Sako (Finland); RWS (Germany);Norma (Sweden) and SwissP (Switzerland). Beretta and BDT entities are committed to furthering research and development around the dismounted soldier, through active involvement in European projects such as through the EDF and the EDA.

BERETTA DEFENSE TECHNOLOGIES

BERETTA sako RWS SWISS P

Benelli STEINER CENTANEX MFS norma