



General Sir Roly Walker's RUSI address:

Reading the signal, reading the reply

This assessment responds to General Sir Roly Walker's address to the RUSI Land Warfare Conference on 17 June 2026. It draws on the public record of Walker's speech, related defence-policy commentary, and contemporaneous Russian official communications.



Bottom Line Up Front

General Sir Roly Walker's 2026 RUSI Land Warfare Conference keynote was a deadline, not a progress report. The British Army has accepted a 2027 readiness test and a 2035 transformation horizon, identified Russia as the conventional adversary, and begun to build against both. It has not yet been given the political settlement, munitions depth, trained mass or mobilisation architecture its own intelligence picture demands.

The race between British and allied adaptation and Russian conventional regeneration will be decided in Whitehall, not the barracks, and Moscow has already publicly committed to reading allied deterrent signalling as offensive intent.

Key findings

- The British Army has built a structured Russian target picture using British and Five Eyes intelligence, with explicit cost-imposition language extending to pre-empting Russian mobilisation at source.
- ASGARD has compressed corps planning cycles from 72 hours to one and increased daily target prosecution by an order of magnitude on a sub-quarterly release cadence; its throughput now exceeds the munitions stockpile available to feed it.
- The “unfair fight” doctrine of pre-emptive overmatch, first set out two years ago, has been reasserted without softening and constitutes settled policy.
- The “national arsenal” framing endorses private capital as central to rearmament and concedes the Defence Investment Plan, when published, will not by itself be sufficient.
- Standing Joint Command is generating contingency plans for a “second army” based on recall of former personnel; UK mobilisation architecture is underdeveloped and trust deficits are widening, with only 35% of Britons willing to take up arms.
- Lavrov's 19 June 2026 article publicly framed European rearmament as preparation for direct conflict with Russia by 2030 and warned of potential nuclear escalation.

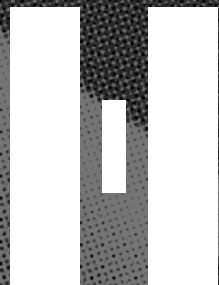
It was one of the most candid public statements of British Army intent in a generation – and the most carefully managed admission of where the gaps remain.

When the Chief of the General Staff stands before forty-two allied army chiefs, the press, industry, parliamentarians and an audience of his own officers, every sentence carries more than its surface meaning.

The constraints are unforgiving: reassure allies without flattering them; motivate the force without alarming the public; manage Treasury expectations without contradicting ministers; and signal to Moscow without provoking it. Read in that register, General Sir Roly Walker's keynote at the RUSI Land Warfare Conference 2026 was not the confident progress report it appeared to be. It was one of the most candid public statements of British Army intent in a generation – and the most carefully managed admission of where the gaps remain.

The thesis he endorsed, proposed by RUSI's Dr Jack Watling, that "land power is the foundation of deterrence", is conventional enough to pass without challenge. What he built on top of it is anything but. Strip away the register, the audience-handling, the celebratory cadences, and what remains is the architecture of an army racing a clock it does not control, against an adversary timeline it cannot publicly name, with resources that have not yet caught up to the mission it has accepted.





Helsing



What the sponsor list told us

It is worth pausing on a detail the speech itself made conspicuous in its opening seconds. Walker's thanks to "the sponsors, Babcock, Helsing, and Stark" was a courtesy. It was also a signal. Five years ago, two of those three names were either not yet founded or had no presence in the UK defence ecosystem. Today they are the gold sponsors of the most prestigious land-warfare address in the British calendar, in place of the system integrators – the Lockheed Martins and BAEs – that have historically occupied those slots.

That substitution is not cosmetic. It tells you which firms the Army now believes will write the next decade of its lethality, and it tells those firms that the door which has historically been awkward for new entrants is now visibly open. Walker said as much later, in the language of capital and welcome. He said it in the running order first.

Why Walker started with the political settlement

It is worth attending to the order in which Walker then built his case. He did not begin with technology, lethality or order of battle. He began with the political end-state. Wars end, he said, “in that enduring political statement”, a settlement “generally written in territorial terms: who holds what ground, under whose sovereignty and, ultimately, protected by whose forces?” Only land forces, he argued, “can seize terrain”, “hold the ground”, and “remain in abundance to guard what was won”.

Recent events reinforce the point. In Ukraine, despite the centrality of drones, long-range strikes, electronic warfare, sanctions and ISR support, the political question remains stubbornly territorial: who controls Crimea, Donetsk, Luhansk, Zaporizhzhia, Kherson and the line of contact. Russia controls roughly 20% of Ukraine, including territory seized before 2022 such as Crimea and parts of Donbas, and recent ceasefire discussions have continued to founder on territorial matters rather than on the abstract balance of military effects.

The Persian Gulf offers the counter-example, but not in the sense that Western coercion succeeded and merely stopped short of territorial occupation. If anything, it shows how a weaker regional power can absorb air, missile, maritime, cyber and economic pressure yet still preserve decisive leverage by threatening access, imposing costs and controlling escalation. The US-Israeli campaign could damage, disrupt and punish; it could not reliably hold the Strait, dictate Iran's political choices, or translate military pressure into a durable settlement. Ukraine demonstrates the enduring political weight of land power. Iran demonstrates a related but darker lesson: coercion without control can expose the limits of superior force.

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Walker's observation about the political utility of land dominance was no rhetorical flourish. It deliberately framed the Army's purpose around outcomes rather than inputs: the natural language of a service that knows it must justify itself to a Treasury and a public that have, since the drawdown from Iraq and the end of Op HERRICK, preferred to imagine that wars can be won from the air, the sea, or the cloud. By locating land power in the politics of settlement rather than the mechanics of battle, Walker reasserted the Army's claim on the strategic centre of gravity. He also, less quietly, conceded that the case still needs making.



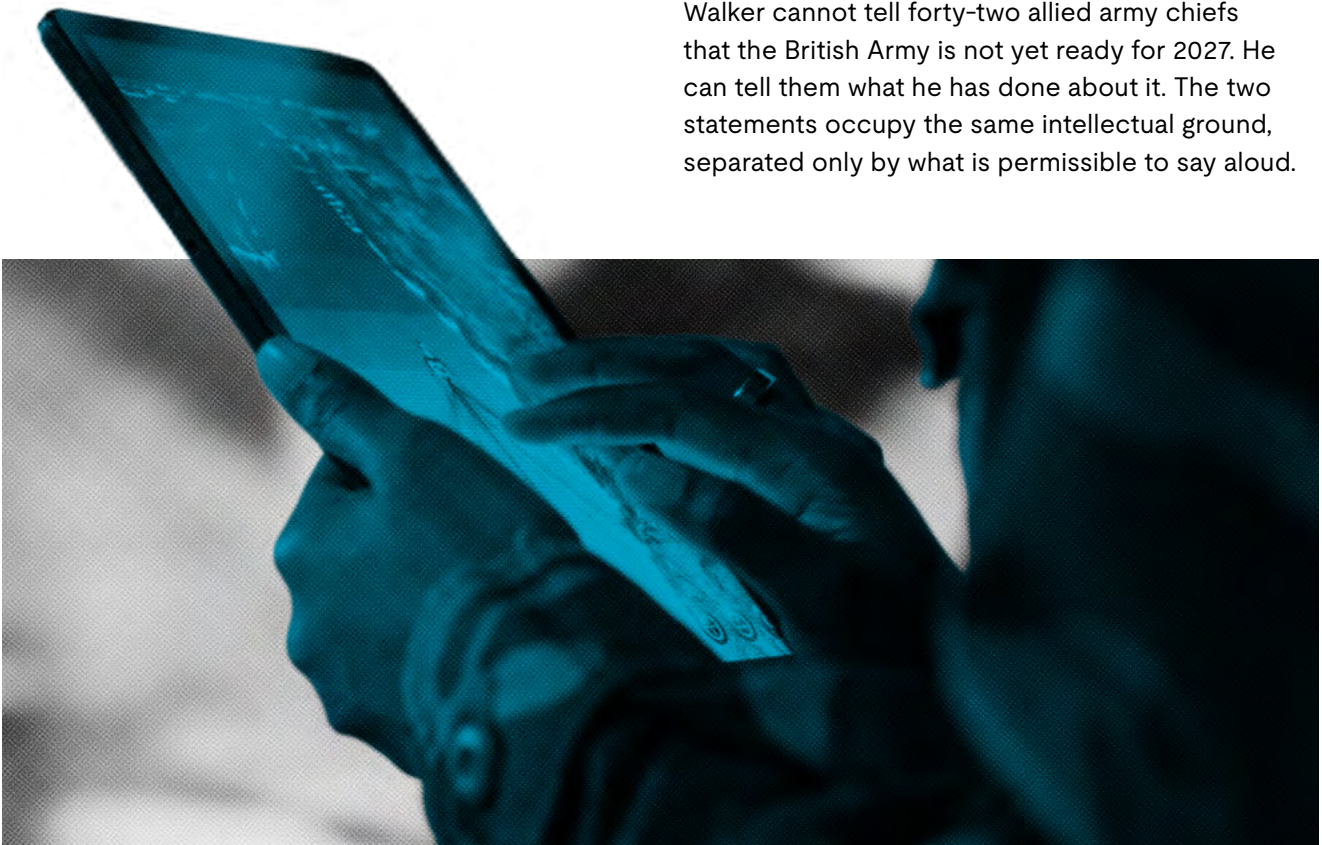
The 2027 question, asked with intent

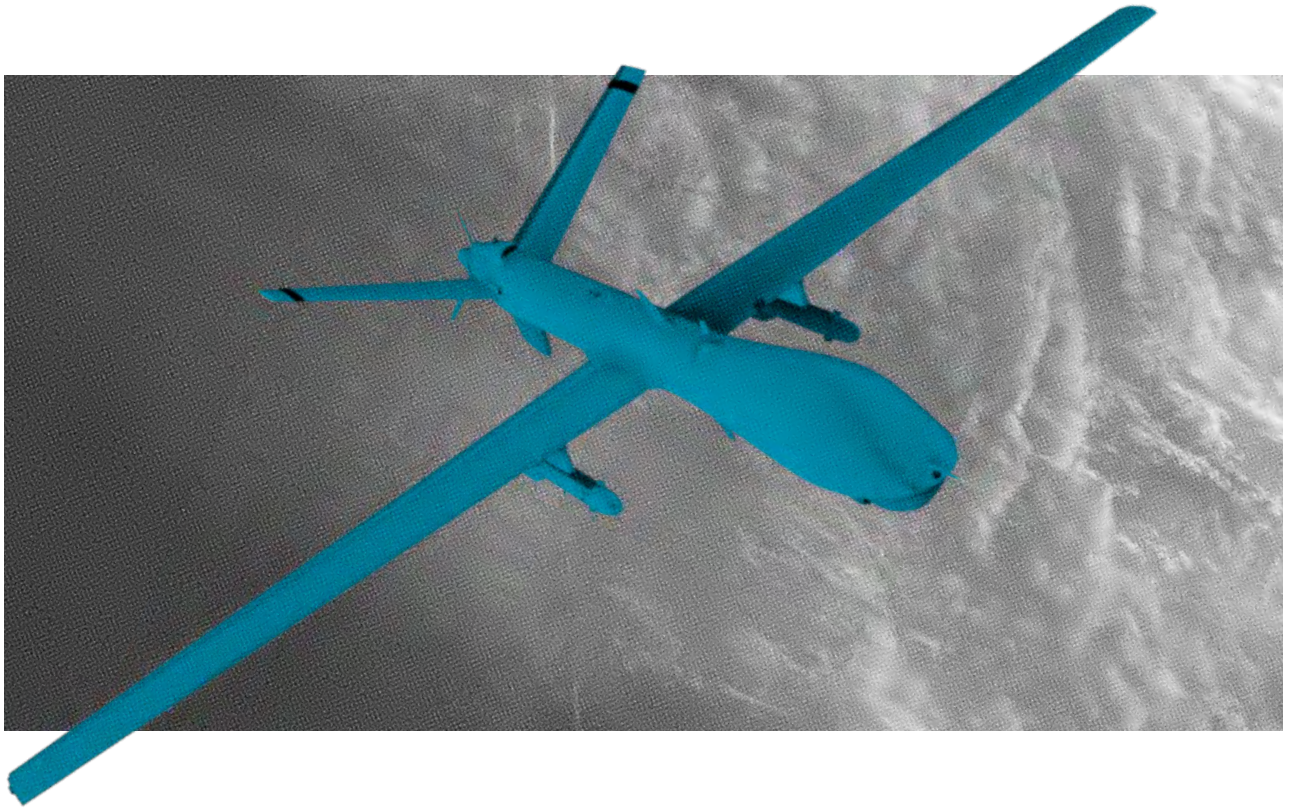
The most revealing passage in the speech was framed as a thought experiment. “If we knew now that our land forces would be involved in large-scale combat operations in, say, 2027, what would we be doing differently now – action this day? And if we can do that, why aren’t we doing it?”

That choice of year is unlikely to have been casual. We assess, with moderate-to-high confidence, that it sits inside the window allied intelligence communities have for some time described as the most acute period of risk for Russian conventional reconstitution following its attrition in Ukraine – a window Walker bookended with the SDR’s 2035 horizon for tenfold fighting power. A premortem is only catalytic if the honest answer is uncomfortable.

The list of corrective actions he then enumerated – restructured headquarters, NATO-aligned tactical groupings, hundreds of millions pushed into emergency drone and electronic warfare delivery, an explicit ambition for COMARRC to do “what a Ukrainian corps can do today” – is, in effect, a readiness gap stated in the imperative mood. Each item describes something the Army has had to do urgently. Each implies, by quiet inversion, what it could not previously do.

Walker cannot tell forty-two allied army chiefs that the British Army is not yet ready for 2027. He can tell them what he has done about it. The two statements occupy the same intellectual ground, separated only by what is permissible to say aloud.





The unfair fight: a doctrine being repeated, not improvised

Two years ago, Walker set out a vision for fifth-generation land forces designed, in his own words, to fight “the most unfair of fights, filled with the best soldiers in the world”. That phrase has not retreated. It has hardened into a consistent doctrinal line, first set out two years ago and reasserted here without dilution. The lexical choice matters. “Unfair” is not the vocabulary of parity, of proportionate response, or of measured escalation. It is the vocabulary of an army that intends, at the point of contact, to present an adversary with an asymmetry the adversary cannot resolve in the time available.

This is the language of pre-emptive overmatch and it should be heard accordingly. It is also, on the available evidence, a settled policy posture rather than rhetorical flourish – an idea Walker first set out two years ago and has reasserted without softening. That matters more than a single keynote line, because policy that survives multiple iterations is policy the Chief of the General Staff intends to be held to. Whether Whitehall, the Treasury and the wider Cabinet have entirely internalised that posture is a separate question, and one the gap between Walker’s mandate and the yet-to-be published Defence Investment Plan would suggest remains live.

A targeted signal to Moscow

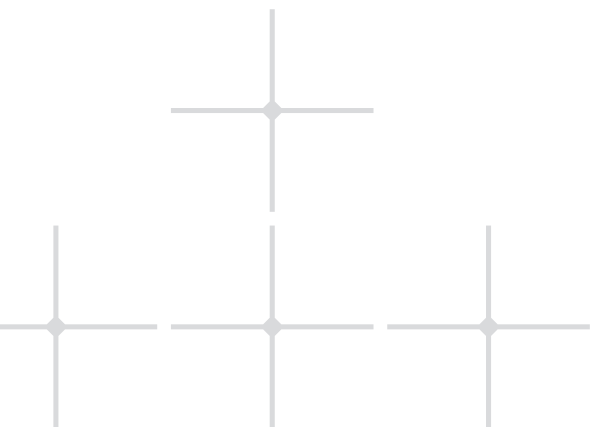
Embedded in the operational section of the speech was one of the more direct messages a serving CGS has addressed to an adversary in recent memory, delivered in the language of methodology rather than threat. Over the past year, Walker said, the Army has “used the full weight of British and Five Eyes intelligence to really get under the skin of this Russian fighting system. Not just in the battlefields of Ukraine, but where SACEUR would probably most likely employ us. We’re beginning to get a much better handle on its strengths, importantly its weaknesses, but critically isolating its vulnerabilities, and it has many.”

Read coldly, that is a declaration that the British Army, with allied intelligence support, has built a structured target picture of the Russian conventional force at the points where it would actually fight – not where it is currently fighting – and has identified specific weaknesses against which it intends to act. The Land Targeting Enterprise, he confirmed, sits behind it; the Ukrainian “problem, payloads, platform” methodology now drives the investment decisions. The Eastern Flank passage extended the signal: should deterrence fail, “the cost we impose on that aggressor must be felt immediately, and preferably before they even get out of their own assembly areas.” That is not the language of reactive defence. It is the language of pre-empting mobilisation at source.

The intent of that passage is worth being honest about. It is calculated communication to Moscow that the conditions under which a Russian conventional move on NATO territory might appear cost-tolerable are narrowing. Whether that calculation lands as deterrent or as confirmation of hostile intent is, on the available open-source record, already being answered – and not in the direction London would prefer.

In an article titled “Ukraine, Europe and Global Security”, which the Russian Foreign Ministry stated had been prepared for Politico Europe but withdrawn by the outlet before publication – a claim the publication has neither confirmed nor denied – and which was subsequently published on the MFA’s English-language journal International Affairs on 19 June 2026, Sergei Lavrov framed European rearmament as preparation for direct conflict with Russia by 2030, warned that a NATO-Russia confrontation “could rapidly escalate into an exchange of nuclear strikes, with catastrophic consequences”, and characterised Ukraine as the intended “strike fist” of a future European force operating independently of the United States and the Alliance.

Read at face value, that is the Russian foreign-policy apparatus telling its domestic and international audiences that the very capabilities Walker is signalling – the targeting picture, the cost-imposition logic, the corps-level commitment to the Eastern Flank – are evidence of an offensive posture against which nuclear escalation is being pre-authorised in public. A serious analyst has to hold both readings in mind: Walker is sending a signal he believes will deter, and the recipient is publicly committed, at foreign-minister level, to reading deterrent signals as confirmation of hostile intent. The space between those two propositions is where miscalculation lives, and the open record now tells us how wide that space currently is.



ASGARD and the inconvenience of throughput

Walker reserved his most striking technical admission for ASGARD, the agentic AI command system already at minimum viable product and now deployed on a corps headquarters. The numbers are arresting and, on the available evidence, real. A corps planning cycle compressed from seventy-two hours to one. Daily target prosecution increased by an order of magnitude. He acknowledged he had underpromised the year before: ASGARD has not merely helped the Army “sense twice as far, decide twice as quick and strike twice as deep”. It has done substantially more. This, he suggested, may be “our century’s tank versus horse moment”.

The system itself, in his own description, is “literally a digital juggernaut that is evolving every 8 to 12 weeks”: an explicit commitment to a sub-quarterly release cadence that would be unremarkable in commercial software and is without close peer in fielded NATO headquarters capability to date. That cadence is the most underappreciated feature of the entire programme. It signals an army that has internalised the lesson Ukraine has been teaching at cost since 2022: in modern warfare, the decisive variable is not the quality of a static capability but the speed at which a capability can be modified in contact. An adversary holding a notional advantage on day one of an eight-week cycle does not hold it on day fifty-six.

It may indeed be a tank-versus-horse moment. But buried inside the boast was an admission of unusual candour: the corps, in his own words, is “limited only by the munitions that are available to fire into the sky”. That single clause is the most important sentence in the speech. It concedes, in passing, that the British Army has built a decision-and-targeting machine whose throughput now exceeds the kinetic stockpile available to feed it. Compressed planning cycles are not deterrent in themselves. They are deterrent only when matched by sustained armament supply depth, industrial production tempo, and an allied munitions ecosystem capable of replenishment under contact. Few of those conditions appear to be met at the scale ASGARD’s targeting cadence implies. Walker cannot dwell on this in public. He acknowledged it once, in the form of a compliment to the technology, and moved on.

The serious observer should not.

“Blood is the hardest currency”: a budget argument in moral dress

Walker's defence of the corps-level contribution to NATO – “if an army is to settle the outcomes, then it needs to generate the effects that matter” – built to one of the more deliberately heavy lines of the address. “Alliances aren't sustained by sentiment, they are shaped by credible contributions. And the blunt truth, that we as soldiers know, is that in an alliance, blood is the hardest and most precious currency that we can contribute.”

This was philosophically correct, militarily uncontroversial, and politically pointed. Walker was pushing back against a familiar British temptation: to treat intelligence sharing, training teams, advisory deployments, specialist capabilities and financial contributions as adequate substitutes for formed land forces. They are useful, often necessary, and politically easier to sustain. But they do not carry the same alliance currency as troops visibly committed at scale, nor do they shape the territorial settlement that follows a war.

He was not addressing the assembled army chiefs when he reached for the most uncompromising language of his speech. He was addressing the Treasury, the Cabinet Office, and any future minister minded to argue that the UK can do NATO on the cheap. He was also, by clear implication, addressing Washington. At a moment when the second Trump administration's terms for sustained Article 5 commitment remain conditional on visible European burden-sharing – most recently codified at the 2025 Hague Summit's 3.5 per cent core defence target – telling forty-two allied army chiefs that “the UK is good for a corps” is a calculated signal from the British Army to Washington and Europe: London understands what burden-sharing actually costs, even if the machinery of government has yet to prove it will pay the bill.

The “NATO First” emphasis – and his pointed remark that “cornerstone” had not previously been “sufficient in terms of focusing our minds” – should be read in the same light. It is a quiet acknowledgement that British Army planning had drifted, through the SDSR 2010 and the long expeditionary commitments that followed, toward out-of-area framing at the expense of NATO warfighting mass. It is also a declaration that the drift is being reversed and that the UK wants the Alliance to see its corps-level commitment as credible. The speech's subtext is that credibility now depends on whether the wider state can sustain what the Army is promising.



The national policy and the political economy of rearmament

Walker's repeated invocation of a "national arsenal" – "a system not just of stockpiles, but of production, of talent, and skills, as well as investment, both public and private" – is not the language of military procurement. It is the language of industrial policy. The borrowing from contemporary American usage is intentional. So is the audience.

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A British Army that wants to triple its fighting power by 2030 cannot do so without sustained capital, an industrial base capable of scaling attritable systems at wartime cadence, and a political consensus that defence spending is also economic policy. Walker made the argument explicitly: a total addressable market of "well over £100bn over ten" years in remote and autonomous systems; a future capital expenditure profile in which "50% of our money is buying the other 80[%]"; an open invitation to private capital to enter a sector "which struggles to find and doesn't feel welcome". The asymmetric advantage, he said, lies in "the capital markets and the talent that our adversaries just cannot match".

This is a serving CGS effectively endorsing a rearmament model in which private capital is not decorative but central. It is also a polite admission that the Defence Investment Plan, when it lands, will not by itself be sufficient – that the speed of transformation Walker has accepted as a personal commitment cannot be financed out of the existing departmental settlement, however the forthcoming plan is calibrated. The "national arsenal" framing pre-empts the inevitable framing of defence-versus-public-services by recasting the question as defence-as-economic-growth. It is a sophisticated political move dressed as industrial vision, and it will need every ounce of that sophistication to survive contact with the next spending review.



Five imperatives, two omissions

The five imperatives Walker laid out – NATO war plans first; the ARRC match-fit at corps level; aggressive pivot to the 20:40:40 model, the three rings of modernised lethality with this year's emphasis on the attritable 40 per cent through Project AKSA; the scaling of Task Force RAPSTONE; and the channelling of “hundreds of millions of pounds” annually through the rapid acquisition pipeline – form a coherent and unusually concrete operating model for an army trying to outrun its own procurement and training habits. The numbers behind the rhetoric are not trivial: £300m invested, contracted and delivered in six months on attritable and consumable systems; ten thousand small drones in soldiers' hands; fifty operational-level electronic warfare systems and a brigade's worth of counter-UAS proven in Ukraine and now fielded. Walker is asking to be judged on industrial tempo, and on that measure he has bought himself a hearing.

Three things in that architecture deserve highlighting. First, the announcement that British data standards have been adopted by the US Army and codified into the “Rules of the Game” is presented as triumph; it is also a tacit admission that interoperability has been a constraint, that internal compliance had to be enforced through external validation, and that the absence of such standards was itself a capability gap. Second, the candid observation that “capability development will increasingly happen at the front, not in the rear”, and that the “next challenge” is rethinking the Land Training System so that “what is thought is taught”, is a careful way of conceding that the Army has been fielding technology at a rate its training system has not yet caught up with. Ten thousand small drones are now in soldiers' hands; the collective doctrine to integrate them at scale is being built in parallel with the fielding, not before it. Ukraine has validated learning-while-fielding as a method. It does not change the fact that, at this moment, paper capability runs ahead of trained capability.

Third, and most striking, was the speculative aside about a “third army”. Walker labelled it “just speculation, not a policy position”, which is the only available framing for a serving officer in a politically explosive area. But the Standing Joint Command, he confirmed in the same breath, is “this day” generating contingency plans for a second army for homeland defence and resilience, based principally on the recall of former service personnel. The line “that's a lot of you in the room today, and we know where you are” landed as humour. It is not. It is a quiet acknowledgement that the UK has not seriously planned for national mobilisation since the end of the Cold War; that its legal, administrative, employer, training and communications architecture for recall is underdeveloped; and that the work of rebuilding it is now under way. Yet the harder deficit is social, not bureaucratic. A state can rebuild recall databases, amend legislation and negotiate employer protections faster than it can rebuild trust, obligation and patriotic attachment.



Polling suggests that only 35% of Britons would take up arms for the country, down from 44% in 2022, and one youth survey found that half of young people would not fight for the UK under any circumstances. In that context, the “second army” is not simply a force-generation problem. It is a test of whether Britain still possesses the social contract required for mobilisation.

The omissions are equally telling. There is no substantive discussion of headcount, recruitment or retention. There is no mention of cyber, information warfare, or the cognitive domain. There is no mention of China. The first omission suggests that the entire architecture of “problem, payloads, platform”, of the 20:40:40 ratio, of attritable mass orchestrated by autonomy, is in part a response to a manpower constraint Walker cannot rehearse in public. The second tells us that the integrated force fight described from the lectern is the kinetic and electromagnetic share of a wider competition whose information and cognitive dimensions belong elsewhere in the classified architecture –

not because they are unimportant, but because they cannot be discussed in this forum. The third suggests that references to data standards, trusted supply chains, capital provenance and the architecture of ASGARD may carry a second dimension Walker is not free, or does not choose, to name. A speech about Russia is also, in every line, a speech about the technologies, supply chains and capital flows that connect to a wider competition.

The architecture of the address – the sustained signalling of capability, the named targeting methodology, the explicit cost-imposition language, the reasserted “unfair fight” doctrine, the public alignment with NATO’s most demanding planning assumptions – added up to a message intended for the Kremlin to read in the round. Russia was the only adversary named substantively; every other strategic actor appeared only by inference. The audience in the room was forty-two allied army chiefs. The audience the speech was actually constructed for was a smaller and harder one.

What the bet actually is

Walker has placed the British Army on a single, coherent and high-risk wager. The bet is that the pace of technology adoption, the AKSA model of continuous adaptation, the industrialisation of the RAPSTONE pipeline, and the depth of NATO alignment now being operationalised can close the residual gaps – in munitions depth, trained mass, UGV doctrine, reserve architecture, industrial tempo and training system currency – before Russia can reconstitute sufficient conventional power to act coercively in Europe. That is the British Army’s operating assumption. Moscow would describe the same posture in defensive terms: a response to NATO’s eastward movement, Ukraine’s western alignment, and the claimed insecurity of Russian-speaking communities in Donbas. The analytical point is not to adjudicate motive in this sentence, but to recognise the race Walker is describing: British and allied adaptation against Russian regeneration.

That is why Walker moved quickly from threat logic to proof points: if the Army is asking allies, ministers and industry to believe in the race, it has to show that acceleration has already begun. The credibility signals are real and material: a reserve army brigade deployed to Germany for the first time since 1985; a Forward Land Forces brigade into Estonia in under forty-eight hours by road, rail, sea and air; the Land Special Operations Forces, raised only after the last SDR, now validated to lead NATO’s High Readiness Special Operations Component Command; and the ambition to have remote and autonomous systems forward on the Eastern Flank “ready to strike and act within 30 minutes” in the year ahead. The window in which the bet must pay off begins, on his own framing, in 2027. The outer edge, the SDR’s tenfold horizon, sits at 2035. Between those two dates lies the period in which European deterrence will either hold or be tested.

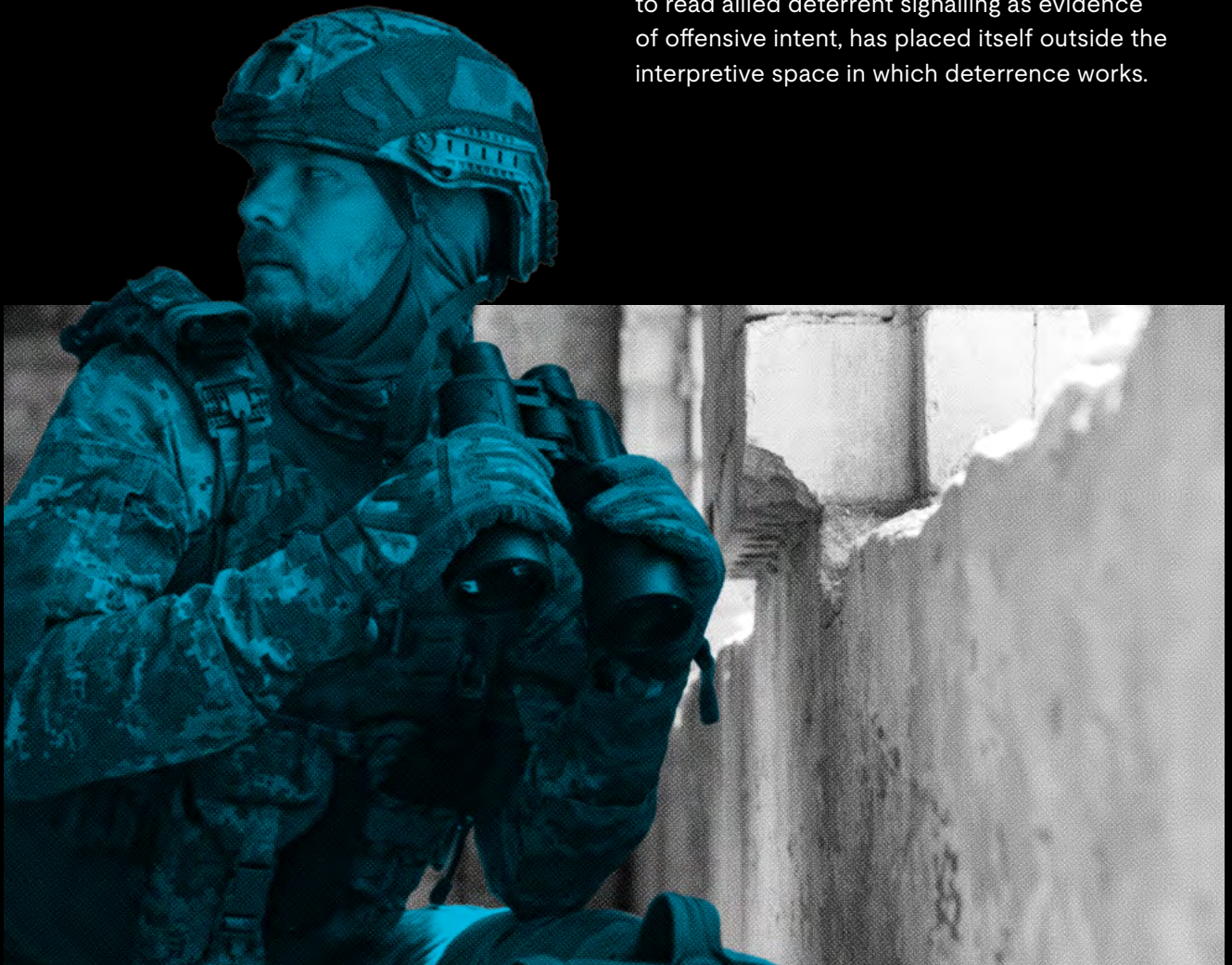
It is worth being precise about what those proof points evidence and what they do not. They evidence a financial year of genuine progress under the previous defence planning settlement – the framework that preceded the new SDR’s full implementation cycle and against which most of the capabilities Walker is reporting were funded and contracted.

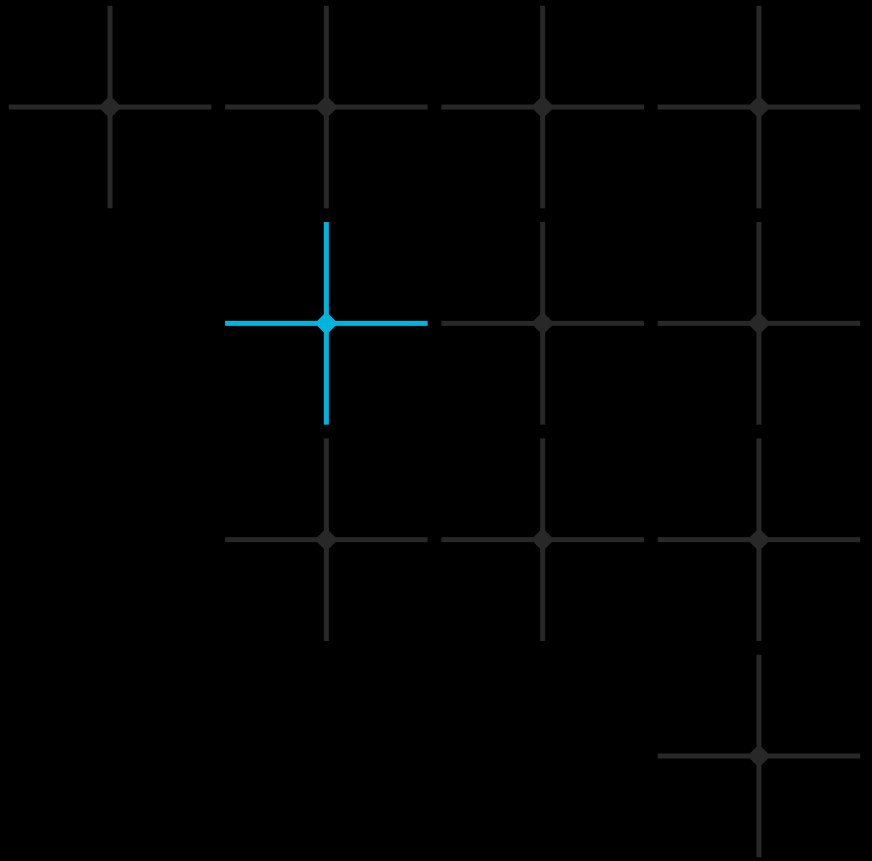
They do not yet evidence that the new SDR’s more ambitious commitments will land at the funding levels its targets require. The architecture Walker described is being built faster than its critics credit. The political settlement around it has yet to catch up. That gap is the strategic risk the speech was managing in plain sight.

What Walker described, in the language available to him, is an army that has stopped pretending the choice between readiness and transformation is real. “They are one and the same thing, and we’ve done both this year.” It is also an army that has not yet been given the political settlement to match the military assessment its own intelligence picture demands. The gap between what the intelligence-informed timeline requires and what the political economy currently provides is the strategic risk Walker is managing in real time. He is doing so with skill, with candour calibrated to the constraints of his office, and with a clarity of operational design unusual in a peacetime chief.

The uncomfortable conclusion is straightforward. The British Army is moving faster than its critics credit and slower than its mission requires. It has identified the adversary problem, the alliance posture, the operating model, and the industrial logic around which British land power is now being organised. It has not yet been resourced, manned, stocked, or politically underwritten at the level its own analysis of the threat implies it should be. Whether the bet pays off will be decided less in the barracks than in the Treasury, less in the trial sites than in the cabinet room, and less on the Eastern Flank than in the political decisions taken in London and the interpretive choices taken in Moscow – neither of which the British Army controls.

The judgement should change only when the state starts doing three visible things. It needs to fund Walker's 2030 ambition, not hide behind the more comfortable 2035 horizon. It needs a serious munitions plan, backed by Treasury money and industrial capacity rather than warm words. And it needs to turn the "second army" from a contingency file into a real mobilisation system: legally ready, administratively ready, and intelligible to the people who may one day be called. Without at least two of those, Walker's gap widens rather than narrows. That is why his repeated use of "must" mattered. He was not describing a preference, or even a plan. He was describing a deadline. The danger is that the Army now understands that deadline more clearly than the political system does, and that Moscow, having publicly chosen to read allied deterrent signalling as evidence of offensive intent, has placed itself outside the interpretive space in which deterrence works.





Ben Addley

Head of Research, Strategic Advisory
ba@heliganadvisory.com

Adam Irwin

Managing Partner, Strategic Advisory
ai@heliganadvisory.com

Heligan Group	St Philip's House
24 Upper Brook Street	4 St Philip's Place
London	Birmingham
W1K 7QB	B3 2PP

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