

GESINE WEBER

## *Plus ça change? European security and defence between geopolitical shocks and structural limits*

*Geopolitical awakening, a wake-up call, a watershed moment and historical change – all these terms have been used in recent years to describe the profound shifts in European security and defence cooperation that have occurred since the start of Russia's war against Ukraine. All these terms could also be used to refer to the developments in European security and defence in 2025. Yet, 2025 was different because one of the fundamental principles of the defence of the continent had been challenged in an unprecedented way. With the second election of Donald Trump as US president and Russia's ongoing war against Ukraine, EU member states and their partners on the continent had to respond to the parallel threats of US abandonment and Russian aggression. They have done so through beefing up their security and defence toolkit and legislation, as well as new forms of coordination to convey the European message in Washington DC. Nevertheless, significant structural challenges continue to hamper Europe's capability to live up to its ambitions in security and defence, notably the lack of a coherent European strategy, institutional limits, financial constraints and rising populism in key European states.*

“Europe is in a fight”. With these gloomy words, EU Commission President Ursula von der Leyen opened her annual State of the EU speech in September 2025, which served to assess the EU's action over the past year and outline the political priorities for the year to come.<sup>1</sup> The EU itself may not be at war today in the sense that there is no violent conflict on EU territory; however, it is certainly not at peace. In addition to Russia's full-scale invasion of Ukraine, its hybrid attacks on Europe, ranging from interference techniques to drones in the airspace of EU member states, constitute the primary threat to European security.<sup>2</sup>

1 “State of the Union 2025”. European Commission, 10 September 2025.

2 Baumann, M. and K. Pynnöniemi (2025) “European security in the era of hybrid warfare”. Policy brief. DGAP, 5 November.

Furthermore, China's 'friendship without limits' with Russia has led to a new assessment of Beijing in many European capitals.<sup>3</sup> Especially at Europe's eastern flank and in the north, the relationship with China is primarily seen through the lens of Russia's war against Ukraine, leading to increasing perceptions of China as a security threat to Europe. Lastly, in Europe's historically most important ally, the US, leading figures in the Trump administration – as seen in JD Vance's speech at the Munich Security Conference<sup>4</sup> – have turned openly hostile about the very idea of Europe and the values underpinning the European project. Coercion has become the norm in the transatlantic relationship, with threats of abandonment being a key tool of the Trump administration.

In other words, Europe is not only facing a considerable immediate threat but also a structural risk. As Europe adapts to this new reality, paradigms have shifted, and the EU has adopted a considerable set of new instruments and ways to cooperate. At the same time, it faces the challenges of linking these into a coherent strategy, managing the financial pressures, and navigating an increasingly polarised political landscape in key European states and on the European level.

### **'Europe alone' is a reality**

What made 2025 different from previous years, where security and defence were already top priorities for the EU, is that the security order of the continent now seems questioned in one of its key pillars. Since the end of the Second World War, the security and defence of Europe has been primarily organised through NATO, with US hegemony and US extended deterrence as key organising principles. Both the US and Europe have benefited from the alliance, even in times of European free-riding: security for European states was relatively cheap, and the alliance gave the US a formidable tool of leverage over European states.

2025 might have been the year when even the most transatlanticist governments in Europe had to realise that the calls from French President Emmanuel Macron for more European strategic autonomy – meaning the capability of Europeans to define their objectives based on European interests and pursue them, if necessary, independently – were right.<sup>5</sup> Over the years, many had seen these calls as a potential threat to the transatlantic bond, afraid that a significantly stronger European commitment to the continent's security might either cause irritation in Washington DC and be perceived as a challenge to US primacy, or because it might incentivise the US to withdraw faster as the key guarantor for European security. Due to the lack of consensus on the future organisation of European security and defence, including the division of labour between NATO and the EU as key organisations,

3 Bachulská, A. and I. Karáková (2025) "Great changes unseen: The China-Russia nexus and European security". Policy brief. European Council on Foreign Relations, 16 September.

4 Franke, B. (ed.) (2025) "Munich Security Conference 2025: Speech by JD Vance and selected reactions". Munich Security Conference.

5 Weber, G. (2025) "It's not enough for France to be right about strategic autonomy". *War on the Rocks*, 14 May.

European states could mostly muddle through and hope for the best, which also prevented them from preparing for the worst.

After the inauguration of US President Trump, Europe witnessed what came close to a worst-case scenario: open threats from the US to abandon Europe; coercion against allies through linking trade and security; and a stance towards Russia's war against Ukraine that could clearly undermine European priorities. This evolution has led to a paradigm shift in European thinking about security and defence. 'Europe alone', and consequently 'Europe responsible', is not just a hypothesis anymore; it has become the reality of the continent. Despite the US commitment to NATO at the summit in The Hague in summer 2025<sup>6</sup> and ongoing private reassurances, the cracks in trust that Washington DC will ultimately come to Europe's defence if needed, not least because this was historically seen as being in the US's interest, are likely to stay. Given the volatility of President Trump himself on key strategic questions, as well as coercion and hostility as integral parts of the Trump administration's alliance playbook, Europeans realise that relying solely on Washington DC is insufficient to defend against the threat from Russia. While the idea of 'defending Europe with less America'<sup>7</sup> was still more hypothetical ahead of the elections, it has today become a widely recognised reality, forcing Europe to profoundly rethink its defence from operational questions to deterrence and a long-term strategy.

## Panic mode as a catalyst for European defence

Europe's 'home alone' moment has served as a catalyst for European action in terms of political coordination, the development of new instruments and the breaking of intellectual taboos.

A noteworthy development in European security and defence was the creation of the so-called Coalition of the Willing<sup>8</sup> and the shift towards cooperation beyond NATO and the EU as institutions. When it appeared that the US would abandon Ukraine and forge a deal with Putin, which Europeans feared would have much broader implications for the European security order, European states adjusted their approach. Firstly, a noteworthy Franco-British effort led to the creation of the Coalition of the Willing, an informal gathering of heads of state and government representing over 30 European states and committed to further support to Ukraine. In parallel, they significantly enhanced bilateral diplomatic efforts through a series of visits to the White House, with close coordination to ensure they conveyed the same message to the Trump administration. The level of European cohesion at that time was perhaps unprecedented. More importantly, even the French and British public signalling of willingness to potentially deploy troops to Ukraine as part of a

6 "The Hague Summit Declaration". NATO, 25 June 2025.

7 Grand, C. (2024) "Defending Europe with less America". Policy brief. European Council on Foreign Relations, 3 July.

8 Ebert, N. and C. Major (eds) (2025) "Coalition of the Willing". The German Marshall Fund of the United States, 15 May.

security guarantee<sup>9</sup> – albeit with strong emphasis on the limited mandate of those troops – demonstrated that Europe was ready to take responsibility for the continent's security. A potential ceasefire or peace deal has yet to materialise;<sup>10</sup> the coalition has not produced any palpable results and mostly remains a political tool to signal European credibility towards Washington DC, Kyiv and Moscow. Yet, its creation outside the existing institution, the Franco-British lead and the more flexible structure of European security cooperation indicate that thinking about the formats and practices of European defence cooperation is evolving. European security initiatives might still need an external shock, but they can also be launched without the US as a constructive catalyst.

The European panic mode has also translated into the creation of concrete instruments to respond to the parallel threats of Russian aggression and US abandonment. As the lack of conventional capabilities<sup>11</sup> is perhaps the most pressing challenge in the short term, the EU has adopted a set of measures throughout the year. The “White Paper for Defence – Readiness 2030” outlines clear steps and benchmarks for the European rearmament effort.<sup>12</sup> Furthermore, the European Commission takes a much more active role in defence industrial policy and financing European capabilities. This is most evident in the adoption of the Security Action for Europe (SAFE) instrument, which involves €150 billion in loans for EU member states for joint procurement.<sup>13</sup> However, Europe's problem remains ambition and scale. The SAFE instrument remains relatively limited in light of the approximately €580 billion increase to bring defence spending of EU member states to an average of 3.5%.<sup>14</sup> And whilst projects like the drone wall<sup>15</sup> or the EU Defence Industry Transformation Roadmap, which aims to bridge deep tech and the defence industry,<sup>16</sup> are important steps of a comprehensive strategy, they cannot even out Europe's significant conventional capability gaps.<sup>17</sup>

Most importantly, panic mode has shattered intellectual taboos on European defence. For decades, Europe felt safe under the US nuclear umbrella and barely questioned the US's extended nuclear deterrence. While France and the UK obviously included a nuclear dimension in their deterrence and defence doctrines, a European strategic dialogue, as suggested by French President Macron back in 2020,<sup>18</sup> never materialised. Without the ambition of replacing the US's nuclear umbrella – a sheer impossible endeavour – Europe

9 Francis, S. (2025) “Europe ‘ready to deploy’ troops to Ukraine if ceasefire secured, says Healey”. BBC News, 20 October.

10 At the time of writing, discussions on a new peace plan were still ongoing.

11 Besch, S. (2025) “How must Europe reorganize its conventional defense?” Brookings, 17 June.

12 “White paper for European defence – Readiness 2030”. European Commission, 2025.

13 “Proposal for a Council Regulation establishing the Security Action for Europe (SAFE) through the reinforcement of the European defence industry Instrument”. COM(2025)122 final. European Commission, 19 March 2025.

14 On defence spending, see: Tian, N., L. Scarazzato and J. Guiberteau Ricard (2025) “NATO's new spending target: Challenges and risks associated with a political signal”. SIRPI, 27 June.

15 See Clapp, S. (2025) “Eastern flank watch and European drone wall”. European Parliamentary Research Service, 23 October.

16 “EU defence industry transformation roadmap”. European Commission, November 2025.

17 On conventional gaps, see Besch, S. (2025) “How must Europe reorganize its conventional defense?”

18 “Speech of the President of the Republic on the Defense and Deterrence Strategy”. Elysée, 7 February 2020.

is now more intensely discussing what a genuinely European nuclear deterrent could look like.<sup>19</sup> The fact that Franco-British cooperation on nuclear matters is now supposed to be enhanced demonstrates the more active engagement of European powers with this domain of security and defence.

## The 2026 challenge: Managing the lack of strategy, financial constraints and political polarisation

The new instruments, methods of cooperation and approaches to deterrence in Europe are remarkable, but they also present obvious limits and challenges that European policymakers will have to navigate in 2026.

The first challenge is the absence of a strategy. The new toolkit adopted by the EU, measures taken by member states and commitments for future defence spending are certainly a good starting point. Still, the lack of a joint strategy significantly limits Europe's efforts to play a credible role as a security actor. Metaphorically speaking, fancy tools alone will not help you when you do not know what to build with them. The key challenge for European governments and the EU alike today is that most European action is in reality a reaction, and there is no shared vision they aim to work towards. In other words, Europe is now slowly acquiring the means to defend itself, but beyond the shared objective of deterring the threat posed by Russia, it has never formulated clear objectives for European action. The requirement for unanimity on all decisions related to the EU's Common Security and Defence Policy, combined with divergent views among EU member states, leads to a lowest-common-denominator approach rather than ambitious long-term thinking. This shortcoming considerably hampers Europe's ability to craft instruments fit for future challenges.

The second and perhaps most obvious challenge – not least because debates about numbers in defence spending have dominated the news over the last years – is Europe's financial capability to fund its rearmament effort. With a struggling German economy, concerningly high French public debt and deficit, the UK's post-Brexit stagnation and limited fiscal space, and Italy's fragile growth outlook and heavy debt burden, Europe's major powers face significant macroeconomic pressure. As continuous borrowing for defence at the financial markets is unlikely to be a sustainable option, European governments will face tough trade-offs<sup>20</sup> if the commitment to 3.5% defence spending is more than lip service. While the EU budget can support these efforts, it will not be enough by far: the current plans for the next Multiannual Financial Framework include €130 billion for defence<sup>21</sup> – that is less than 15% of the total EU defence spending if all member states achieved 3.5%.<sup>22</sup>

19 Ryan, J. (2025) "Should Europe develop its own nuclear deterrent?" LSE, 11 September.

20 On trade-offs, see: D'Aprile, F., M. Koehler, P. Maranzano et al. (2025) "Europe's military programmes: Strategies, costs and trade-offs". LEM Papers Series 2025/25. DOI: 10.57838/sssa/r1fr-jd35

21 "Europe's budget: Defence". European Commission, July 2025.

22 Tian, N., L. Scarazzato and J. Guiberteau Ricard (2025) "NATO's new spending target: Challenges and risks associated with a political signal".

The macroeconomic challenge is directly linked to the third challenge: rising populism and polarisation within European states and across Europe. Given that public support for higher defence spending is high across Europe (numbers), far-right forces might not make claims against higher defence spending, as such, a central part of their campaigns. Yet, it is almost safe to say that there would be little willingness to pursue efforts to strengthen defence in a more integrated European way.<sup>23</sup> Over the medium term, the political landscape in France, the UK and Germany could look very different, with considerably less outlook to the European level. Across Europe, this increased polarisation could therefore manifest in less institutionalised cooperation and catalyse trends for cooperation in smaller, informal groups – which may be suitable for short-term responses but lack the bureaucratic structure and coordination tools for ambitious initiatives in European defence.

Europe is in a race against time in its endeavour to strengthen its defence. It will be critical for European policymakers to seize 2026 to solidify bureaucratic structures, strengthen the instruments within existing institutions and bring bold initiatives along the way if Europe does not want to lose this race.

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23 Cliffe, J., T. Coratella, C. Lons et al. (2025) "Rise to the challengers: Europe's populist parties and its foreign policy culture". Policy brief. European Council on Foreign Relations, 12 June.