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Europe's best bet is to increasingly rely on itself for its own security and defence

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Theme

Europe's best bet is to increasingly rely on itself for its own security and defence.

Summary

Europe is arguably going through its most challenging geopolitical inflection point in decades. First, Russia's aggression against Ukraine and now US President Donald Trump's controversial approach to settling the conflict have upended the already fragile European security order that has kept the continent largely at peace for the past 80 years. In this fast-shifting geopolitical context, a disoriented Europe feels vulnerable as perhaps never before.

This paper argues that faced with a White House whose request is no longer that Europe just 'steps up' but also that it steps aside on existential issues such as Ukraine's future, European countries need to increasingly take security and defence into their own hands. While there is nothing to cheer about the decline of NATO, European leaders should work towards immediately reinforcing the European pillar of the Atlantic Alliance but also adopt measures that would protect their security should a post-NATO security order emerge because of the ongoing geopolitical reshuffling.

Although not immediately within reach, the vision of a future European Defence Union should animate and underpin ongoing deliberations among EU countries and their partners. This paper outlines an agenda for Europe in this respect. Meanwhile, all efforts should be put towards supporting Kyiv at this most decisive juncture. How the war ends will determine the security context in which Europe will operate in the years to come.

Analysis

The year 2025 arguably marks Europe's most dangerous geopolitical inflection since 1945. We may indeed be witnessing the final days of the 80 year-old Euro-Atlantic order which had granted the continent the longest period of peace and prosperity. Since 2022, Russia's war of aggression against Ukraine had already forced Europe to abruptly bring to an end a self-complacent holiday from history and face the return of inter-state violence on a scale not seen since World War II. And now, a radical new US that seems at war with everything yesterday's US stood for may be delivering the final blow.

In the couple of months since taking office, the Trump Administration has sent a bundle of shockwaves Europe's way: it has clearly stated that Europe is no longer a strategic priority for Washington; it has displayed a brutally transactional approach to NATO; it has singled out Brussels as an adversary in the fields of trade and regulation, with the US President arguing that the EU was 'formed in order to screw the United States'; it has preferred bilateral channels with selected European leaders while repeatedly interfering in the domestic politics of a number of longstanding allies; and it has engaged in a commercial conflict with Europe despite Brussels' best attempts to avoid unjustified disruptions to the transatlantic economy –the largest and wealthiest market in the world– .

But the US's new course may have its most far-reaching consequences when it comes to the Russia-Ukraine conflict. On this defining –in many ways existential– issue facing Europe, the Trump Administration has attempted an astonishing reversal. No longer seeing Ukraine as the bulwark of freedom, in a chaotic but decisive way, President Trump has backtracked from the approach of the previous Administration, which had made a solemn commitment to support Kyiv, in close cooperation with the US's NATO allies, as long as it would take to deny Russia any meaningful reward for its unprovoked aggression. Instead, the Trump presidency has elevated the goal of bringing the massacre to an end above any other consideration, starting with the basic distinction between victim and aggressor.

While much remains to be determined about the Trump's Administration approach to the Russia-Ukraine war and its possible end, Ukraine and the US's European allies are rightly alarmed by the general inclinations and attitudes of the new US Administration towards Europe and the world. Even if President Trump has shown a proclivity to abruptly reverse stances and policies, some elements of the emerging approach will hardly change since not only the President's loyal entourage but also vast sections of the Republican Party either wholeheartedly support them or do not want to pick a fight with the White House over them.

Taking his first-term attitudes to a new level, President Trump has now unashamedly embraced power politics as the operating principle of the MAGA foreign policy. The US President has repeatedly hinted at annexing or acquiring Panama, Canada and Greenland (a NATO ally and territory of a NATO ally respectively), in a throwback to 19th century-style imperialism. Mercantilism is another key trait, from tariffs levied towards partners and adversaries alike to exploitative economic deals being sought with countries that are in no position to meaningfully resist them, such as Ukraine. As economic or security assistance blackmail has been openly used in the attempt to bring allies and partners into line, 'transactionalism' sounds more and more a euphemistic connotation to describe Trump's alleged business-like approach.

The US President and his entourage seem also uninterested in developing a principled foreign policy that is informed by normative aspirations. For sure, they have no intention to pay tribute to the 'liberal internationalist tradition' that in varying degrees has inspired US foreign policy for decades. The latter is driven by the belief that democracy and human rights are strategic interests of the US, and that it should therefore be the US's strategy to defend and promote a 'liberal international order' (a notion that has become

toxic to US conservatives who associate it with progressivism/liberalism in a domestic context).

When it comes to the transatlantic alliance, traditionally seen as the core and engine of the US-led international order, the anti-European sentiments of the US Administration seem to run fairly deep. The long-standing US request for a more balanced transatlantic burden-sharing –a fair argument that President Trump has made more forcefully than any other predecessor– does not seem to exhaust the antagonism towards Europe that has been on display. Nor are unfolding transatlantic frictions exclusively or even primarily the product of a long-in-the-making process of strategic divergence between a US increasingly focused on the contest for primacy with China and a largely self-absorbed Europe that would continue to look across the Atlantic for leadership.

Rather, the US President and his advisors seem to dislike Europe as a whole in cultural, almost personal terms. While individual European leaders may earn the respect of the President, for instance Keir Starmer's UK or Giorgia Meloni's Italy, Trump seems to prefer to mingle with strongmen around the world rather than to patiently cultivate meaningful relationships with the varied cohort of Europe's democratically-elected leaders. Unlike in his first term when the cabinet was a mixed bag of MAGA and establishment Republicans, this time the US President has surrounded himself mainly with loyalists and ultraconservatives, starting with Vice President J.D. Vance, who are eager to interfere in the domestic politics of European allies to support Eurosceptic nationalist parties, including the hard-right Alternative for Germany (AfD).

Indeed, the current transatlantic crisis is also a crisis of liberalism and, in this respect, it not only pits the US against Europe but also liberal democratic forces against illiberal ones across the transatlantic space and beyond. The ideologues around President Trump believe that the MAGA mission requires nothing less than a second American Revolution. They are bent on pushing a radical agenda that advances ultraconservative priorities even if it requires resorting to authoritarian shortcuts domestically and cooperating with anti-liberal leaders on the global stage, Hungary's Viktor Orban being for now the most prominent among the US's Trump-like European counterparts.

Eradicating the 'deep state', rolling back woke ideologies, renegotiating or withdrawing altogether from multilateral agreements and supporting nationalism against globalism are just different sides of the payback currency MAGA advocates are using to fight what they decry as liberal overreach. The separation of powers and the international balance of power therefore risk being the twin victims of MAGA. Indeed, Trump and his entourage press on with their America First agenda with little regard to the rules-based international order. International norms are often seen as an impediment to the pursuit of US interests, international institutions are dismissed as money-devouring organisations that are deprived of popular legitimation, and multilateralism is ill-tolerated as a straitjacket on US power.

International relations are no longer framed as a contest between democracy and authoritarianism (in a break with tradition, Trump's inaugural address passingly mentioned the word 'democracy' just once), not even one between open and closed systems, as had been the case under virtually all other modern presidencies. Rather,

foreign relations are presented as a number of transactions, to assess the value of which trade balance considerations tend to be more important than balance of power considerations. Affinities do matter, but they mainly have to do with personal chemistry between leaders and ideological alignment rather than with similarities in the political system and the sharing of democratic values.

Even the time-old notion of the West is radically re-interpreted as an identity-driven concept whose unlikely champions are 'patriots' fighting for the restoration, in their respective national contexts, of the traditional order, mainly defined in conservative religious and even ethno-centric terms. According to this interpretation, the West is under siege –as US Vice President Vance eloquently argued at the 2025 Munich Security Conference– not so much from rising autocrats around the world, but from uncontrolled migration, spreading multiculturalism, the woke culture, globalism and other alleged byproducts of liberalism.

Against this background, the current US Administration disparages the EU as an example of an elite-driven, supranational project that in key industries such as digital technology has become inimical to US capitalism. While a clear position is yet to emerge, the Trump presidency also no longer seems to value NATO as the world's most successful alliance of democracies, and a security community that is unique in a historical perspective. At best it tolerates it as a legacy arrangement that needs to make business sense to Washington. While the US Administration insists that Europe spend more on defence as a necessary fee to keep the US engaged, the impression is that its European allies are largely seen as a burden in themselves. There is hardly any acknowledgement of the return on the strategic investment the US made by supporting European integration and European security for 80 years.

In fact, the Trump Administration has from the beginning displayed a clear interest in rehabilitating the aggressor state that the most recent NATO strategic concept designates as 'the most significant and direct threat' to European and transatlantic security: Russia. In a shocking reversal, Washington and Moscow are not only attempting to move past recent tensions, but to explore a possible rapprochement, well beyond the various 'resets' that have been attempted over the years by various US Administrations. In a series of abrupt moves, uncoordinated with its NATO allies, the Trump Administration has engaged Moscow without preconditions, including through a series of reportedly friendly calls between President Trump and President Putin.

While some believe that all this is ultimately aimed at weakening a Russia-China axis that has only strengthened in recent years against the backdrop of the war, it remains to be seen that the Trump Administration is deliberately pursuing a thought-through so-called 'reverse Kissinger'. The latter would ostensibly require actively engaging the Europeans and also re-purposing and re-tooling NATO as an anti-China alliance, something the new US Administration does not seem to be focused on, at least at present. A more likely explanation is that President Trump and President Putin actually share more than a personal relationship. They seem to subscribe to similar worldviews. Like Putin, Trump looks at spheres of influence as a fact of international life. And like the strongman in the Kremlin, the US President seems to believe that might makes right and that smaller nations ultimately need to yield to the interests of the great powers.

If the US-Russian rapprochement were to continue –a risky bet given the Kremlin's long-standing policy of strategic balancing against the West–, Ukraine would be of course the most direct victim. Even if initial strains between the White House and the Ukrainian leadership have been largely patched up, gone are the days in which Ukraine was presented as a model partner, a country heroically defending its sovereignty and its democratic future, but also holding the line of European security on the West's behalf. As the despicable exchange between President Trump and Ukraine's President Zelenskyy in the Oval Office clearly displayed some weeks ago, Ukraine is now treated not only by Moscow but also by the US Administration as less than a fully sovereign actor. While the Administration has made an effort to hear Ukraine after initially discussing its future with Moscow over Kyiv's head, the Eastern European country's value to Washington, if any, is now mainly measured in terms of its underexploited reserves of natural resources.

As President Trump is fixated on ending the war, cost what it may to Kyiv, Ukraine risks being pushed into accepting a very unfavourable settlement, even more so because it now has to negotiate from a position of weakness rather than strength. For their part, the US's European allies are seen as secondary actors at best, whose role is largely confined to supporting President Trump's deal-making and helping with the implementation of whatever settlement will be agreed upon. The Trump Administration is resisting Ukraine's and Europe's requests for direct security guarantees. Rather, it has insisted that Europe fills the gap in what sounds like a warning that Washington is keen on extracting itself from Europe after the war ends rather than being eager to genuinely empower European allies towards a co-owned transatlantic security equation.

1. An agenda for Europe

Faced with these fast-changing realities, a renegotiation of the transatlantic bargain that has linked the US and Europe together for decades has become inevitable. Pressured from the East but now also from across the Atlantic, EU countries must urgently take bold steps towards taking the security and defence of Europe into their own hands, lest Europe –together with Ukraine– risks ending up on the menu of geopolitical competition.

In this respect, even as Trump is clearly impatient to bring the European war to an end with limited interest for the specific outcome, Europeans must continue to insist on a series of redlines, the withdrawal or redrawing of which would have highly detrimental long-term implications for what is left of the rules-based European security order. In coordination with Ukraine, the EU and similarly aligned NATO members such as the UK should reiterate that a negotiated settlement that involves the formal recognition of illegally annexed territories, that lacks enforceable security guarantees and that curtails Ukraine's sovereign right to seek membership in Euro-Atlantic institutions in due course would be a bad deal.

As diplomatic efforts continue, the much touted 'seat at the table' should not be Europe's only focus. Rather, a 'European coalition of the willing' –a phrase now actively used by the British Prime Minister, Keir Starmer, and other European leaders– should coalesce around a number of determined initiatives allowing Ukraine to negotiate from the strongest possible position even in the current unfavourable circumstances. A non-

exhaustive agenda includes: stepping up military assistance to Kyiv rather than reining in the effort if a ceasefire is agreed to; finally providing Ukraine with weapons systems in which Europe has an edge (it is high time, for instance, for Germany to make Taurus cruise missiles available to the Ukrainian army); setting aside prior hesitations and leveraging the hundreds of billions of dollars in frozen Russian assets to support Ukraine's economy and defence industry at this most decisive juncture; and keeping international sanctions in place, even if Washington may pressure Europe to provide sanction relief as part of the negotiation process, while also adding new ones to the list, as the UK has recently done.

In fact, the EU should continue availing itself of the already proactive bridge-building role played by Starmer's UK to maximise its influence in Washington and compensate for the defection of those EU members, like Hungary and Slovakia, which are eager to bandwagon with Washington even if this means weakening European interests. The pressing task to define the possible composition and role of a European peacekeeping force should not distract attention from articulating a credible plan for a future Europe-based common defence scheme. As Friedrich Merz, Germany's next Chancellor and longtime Atlanticist, has openly acknowledged in a historic shift, European leaders have no choice but to come to terms with the fact that Europe's security dependence on the US is no longer viable, nor wise. This means, by implication, that NATO is unfortunately not as well, at least under its current design.

Therefore, the above-mentioned coalition of the willing, comprising capable EU countries plus the UK, need to take concrete steps towards building –at a minimum– a much stronger and actionable 'European pillar' within NATO. This will require not only significantly increasing defence spending –as already agreed– but also pooling assets and resources together in such a way that European capabilities will be truly operable in future conflict settings. The deployment of a European peacekeeping force in Ukraine, if that moment ever comes, could be a crucial step towards creating a permanent European deployable force. But if NATO were to be paralysed over the coming months or years by an unpredictable, dismissive, or even increasingly adversarial US, then Europeans would have no viable alternative than to contemplate the unpalatable but plausible scenario of a post-NATO European security order. In such profoundly mutated strategic context, willing and capable EU member states would have to endeavour to set up what has remained elusive for decades: a European Defence Force.

Currently, the national fragmentation of the European defence industries and the exception clause to the internal market have implied continued capability gaps, duplications, interoperability problems and foreign dependencies (signally on the significantly more advanced US defence industry), as well as sheer inefficient expenditure. As European governments finally step up their investments in defence, all efforts should be now directed towards Europeanising industrial and defence policy. That is why the ReArm plan, timely outlined by the European Commission earlier this month, may mark a decisive step in the right direction if the ca. €800 billion that it aspires to mobilise will ultimately contribute to the emergence of an increasingly integrated European defence force.

Specific agreements on financing will have to be worked out over the coming months, leveraging the waiver from the deficit rule calculation of the Stability and Growth Pact to support investment mainly in joint capabilities through joint procurement. As many have proposed, an Armaments Bank could be set up through EU joint borrowing. Governance aspects of what in time could become a fully-fledged European Defence Union should be kept flexible enough to minimise the impact of internal European vetoes while maximising cooperation with key EU partners such as the UK, but also Turkey –both of which would bring unmatched added value to any future Europe-based defence scheme–.

Conclusions

The establishment of a territorial defence prerogative, and in due course even a European nuclear deterrent, is certainly a huge feat. It has long seemed to be 'mission impossible' given the political leadership and the resources it would require. Not to speak of the transatlantic ties that have been eagerly developed over the decades and that are hard to loosen particularly when it comes to the purchase of US-made military technology or the reliance on US intelligence –areas in which the EU cannot possibly close the gap in the short term–. Yet common defence is also becoming an increasingly existential issue for Europe.

Several intelligence services of European countries assess that it is plausible for Putin's Russia to test the EU before 2030. But members of the Trump Administration have already hinted at reducing or even withdrawing the remaining US forces on the continent. And the US President has repeatedly threatened not to come to the rescue of European allies that do not meet the US's test for worthiness, in financial or perhaps even in loyalty terms. Intelligence sharing, a critical part of the US contribution to European security, may no longer be such a straightforward proposition in the future given that some bilateral relationships may significantly deteriorate as a result of trade disputes or ideological differences with the US Administration. For sure, Europeans cannot afford waiting until the Russians are in Vilnius to find out.

Indeed, this is a turning point for Europe. However harsh the new realities may look, European leaders need to be clear-eyed about the nature and scope of the challenge that lies ahead. Instead of confining their efforts, as they may be tempted to do, to mitigating the most detrimental effects on Europe of the US's new course, the EU and like-minded partners should act strategically, avoiding as much as possible internal divisions while increasingly showing European agency. While cooperating with Washington and within NATO as much as still possible, upcoming European initiatives should be guided by the realisation that Europe's best insurance policy in the new context is to increasingly rely on itself for security and defence.