

REPORT

EUROPEAN SECURITY AT A CROSSROADS: Diverging Threats, Military Realities, and NATO 2026

ALİ MURAT KURŞUN, MEHMET SALAH DEVRİM

JULY 2026 | NUMBER: 275

EUROPEAN SECURITY AT A CROSSROADS: DIVERGING THREATS, MILITARY REALITIES, AND NATO 2026

ALİ MURAT KURŞUN
MEHMET SALAH DEVRİM

COPYRIGHT © 2026 by SETA

All rights reserved.

No part of this book may be reprinted or reproduced or utilized in any form or by any electronic, mechanical or other means, without permission in writing from the publishers.

The conclusions and recommendations of any SETA Foundation publication are solely those of its author(s), and do not reflect the views of the Institution, its management, or its other scholars.

SETA Publications 275
ISBN: 978-625-5703-54-5

Editorial Team: Ebrar Üzümcü, Sudib Sontoran, Gizem Akbaş
Layout: Said Demirtaş

SETA | FOUNDATION FOR POLITICAL, ECONOMIC AND SOCIAL RESEARCH

Nenehatun Cd. No: 66 GOP Çankaya 06700 Ankara TÜRKİYE

Tel: +90 312.551 21 00 | Fax :+90 312.551 21 90

www.setav.org | info@setav.org | [@setavakfi](https://www.instagram.com/setavakfi)

SETA | İstanbul

Defterdar Mh. Savaklar Cd. Ayvansaray Kavşağı No: 41-43

Eyüp İstanbul TÜRKİYE

Tel: +90 212 395 11 00 | Fax: +90 212 395 11 11

SETA | Washington D.C. Office

1025 Connecticut Avenue, N.W., Suite 1106

Washington, D.C., 20036 USA

Tel: 202-223-9885 | Fax: 202-223-6099

www.setadc.org | info@setadc.org | [@setadc](https://www.instagram.com/setadc)

SETA | Berlin

Kronenstraße 1, 10117 Berlin GERMANY

berlin@setav.org

SETA | Bruxelles

Avenue des Arts 6, 1000 Bruxelles BELGIUM

Tel: +32 2 313 39 41

CONTENTS

ABSTRACT | 7

EXECUTIVE SUMMARY | 9

INTRODUCTION | 13

**CHAPTER ONE: THE EUROPEAN THREAT MATRIX
AND FRAGMENTED SECURITY PERCEPTION | 19**

Conventional Return and the Russian Threat: From Existential Anxiety to
Systemic Management | 21

Asymmetric and Hybrid Challenges: The Common Intersection of the Matrix | 23

The Southern Flank and Neighborhood Instability: Inverted Threat Perception | 24

Network Analysis: Threat Clusters and New Security Complexes | 26

CHAPTER 2: NATIONAL MILITARY STRATEGIES | 29

Breadth and Depth | 30

Total Defence | 32

Maximalist or Enablers | 35

Convergence | 36

CHAPTER 3: SCENARIOS, ARCHITECTURE, AND CAPACITY | 41

A Stronger Europe in a Stronger NATO | 42

European Backbone | 43

The Coalition of the Willing | 45

The Nuclear Ceiling | 46

From Stack to Strategy | 48

CONCLUSION: WHAT ANKARA WILL ACTUALLY TEST | 49

ABSTRACT

As the rules-based order erodes and transatlantic ties strain, European states approach the NATO summit in Ankara of July 2026 burdened by fragmented threat perceptions and severe deficits in industrial scale and military manpower. This report asks a single question: what do European states fear in a fragile global system, how are those fears shaped along geographical fault lines, and how far do national military responses match them once economic weight and industrial capacity are taken into account. Working from a corpus of post-2022 national security and military and defence strategy documents, read wherever possible in their original languages and supplemented by official statements, the report converts declared threats and capability commitments into data and visualizes them. It finds that the apparent continental consensus on Russia dissolves, on closer reading, into three sub-regional security complexes: a Russia-focused East, a societal and transnational South preoccupied with migration and instability, and a broad-spectrum group of larger powers. Translated into force structure, these perceptions are constrained less by fear than by capacity, dividing the continent between

full-spectrum ambition, whole-of-society total defence, and niche specialization. At the level of architecture, procurement patterns and the limits of the Franco-British nuclear pairing point not to full strategic autonomy but to a managed reduction of dependence on the United States. Europe's central task before Ankara is to convert this fragmented threat matrix into a coherent strategic vision.

EXECUTIVE SUMMARY

Europe arrives at the NATO Ankara Summit carrying a defence posture shaped less by strategic clarity than by accumulated national choices made under different threat assumptions, budget constraints, and historical memories. Post-2022 national security and military strategy documents across the continent converge on Russia as a common reference point, yet that surface consensus conceals three distinct security orientations: an eastern bloc for which a Russian conventional attack is an operational planning scenario, a southern flank preoccupied with migration, Sahel instability, and Mediterranean access, and a set of larger western powers pursuing full-spectrum deterrence while managing nuclear credibility questions that Washington once answered for them. Military responses to these divergent perceptions are shaped above all by economic weight and industrial capacity. The result is not a unified European defence architecture but a layered stack: NATO as the legal frame, the EU's SAFE instrument as the intended industrial base, and UK-led minilateral coalitions as the operational stopgap, in which American enablers remain indispensable at every level.

- Threat perception diverges sharply along geographical lines. Three sub-regional security complexes, not one: Eas-

tern and Baltic states (Finland, Estonia, Latvia) treat Russian conventional aggression as an imminent planning scenario. Central-western states (Germany, Netherlands, Belgium) frame the same threat as a manageable systemic challenge. Southern states (Italy, Spain) prioritize Mediterranean instability, irregular migration, and Sahel crises over the eastern flank.

- Economic weight sets the ceiling on what each state can field. Capacity constrains posture more than perception does: Large economies aim for full-spectrum conventional readiness. Exposed medium-sized states mobilize whole-of-society total-defence models with conscription at their core. Smaller states either maximize everything within limited means, as Latvia does, or specialize in high-value niches, as Luxembourg does.
- Professional armies across the continent face recruitment deficits that voluntary service models have so far failed to address. Continent-wide manpower shortages are structural, not cyclical: Germany contacted nearly 300,000 prospective recruits under its new Wehrdienst registration system and enrolled 530. The British Army has fallen from 155,000 troops at the Cold War's end to roughly 75,000 today. Conscription states are scaling supply deliberately; professional-only armies cannot.
- 78% of equipment EU states purchased in the first 16 months after Russia's invasion came from outside the Union, 63% from the United States. Procurement data contradicts autonomy rhetoric: Europe fields over 170 separate weapons systems against roughly 30 in the US, which prevents the industrial scale needed for self-sufficiency. The SAFE fund's largest recipient, Poland, is spending much of it on American and South Korean platforms already under contract.
- France and Britain hold a combined force of roughly 515 warheads against a Russian deployed strategic arsenal of nearly 1,700. The Franco-British nuclear pairing is a hedge, not a replacement: Neither country will surrender the firing decision. German and Polish interest in extended nuclear sharing signals political demand that current capability cannot yet satisfy.

- The architecture being assembled, comprising NATO continuity, EU industrial initiatives, and coalitions of the willing, is real and growing, but it still requires American strategic lift, intelligence, and air defence suppression to function at scale. What is emerging is managed dependence, not strategic autonomy: The realistic near-term aim is a negotiated reduction of dependence while the American backstop holds, not full autonomy.

The Ankara Summit will not resolve these tensions, and the expectation that it might is itself a distraction. What the summit can realistically accomplish is narrower and more consequential: setting the terms on which managed dependence proceeds over the remainder of this decade. That means deciding which European capabilities get resourced first, establishing which American enablers remain indispensable and for how long, and building the bridging mechanisms that can hold three divergent security clusters within a single political frame. States capable of operating across all three clusters, translating eastern urgency for western audiences and southern priorities for northern ones, carry a disproportionate share of the Alliance's diplomatic weight heading into Ankara. Whether the summit produces institutional scaffolding to support that bridging function or settles for convergent communiqué language that papers over persistent divergence, will determine more about Europe's security trajectory than any single spending pledge or capability announcement.

INTRODUCTION

As the international system witnesses the erosion of the rules-based liberal order, the rise of transactional politics, and an era of normlessness¹ characterized by intensifying hot conflicts, the center of gravity of the global security architecture is undergoing a historic rupture. Situated at the very epicenter of this turbulence, European countries approach the critical NATO 2026 Summit, scheduled to be held in Ankara on July 7-8², burdened by deep internal contradictions, fragmented threat perceptions, and severe capacity deficits, particularly regarding industrial scale and military manpower. The Ankara Summit is regarded not merely as a routine gathering of the Alliance, but as a historic crossroads where transatlantic ties are tested, Europe's reflexes for providing its own security are scrutinized, and the future of NATO is being redesigned.³ During this period, characterized by debates over the NATO 3.0 concept and the intensifying discourse of “a stronger Europe within a stronger

1 Ali Murat Kurşun, “The Dissolution Of The Rules Based Order: The Global Age Of Normlessness and Türkiye's Strategic Role”, SETA Analysis, no: 97, (February 2026), <https://media.setav.org/en/file/2026/02/the-dissolution-of-the-rules-based-order-the-global-age-of-normlessness-and-turkiye-s-strategic-role.pdf>, (Access: 25 June 2026)

2 Utku Şimşek, “NATO leaders to gather in Ankara for alliance summit”, *Anadolu Agency*, 24 June 2026, <https://www.aa.com.tr/en/world/nato-leaders-to-gather-in-ankara-for-alliance-summit/3976937>, (Access: 25 June 2026)

3 “Countdown to the NATO Summit in Ankara: priorities and expectations in 2026”, *European Policy Centre*, 15 June 2026, <https://www.epc.eu/publication/countdown-to-the-nato-summit-in-ankara-priorities-and-expectations-in-2026/>, (Access: 22 June 2026)

NATO,⁴ it has become imperative to analyze Europe's security threat perceptions and its strategies for military capacity building.

Alongside the global security crisis and the divergence in transatlantic relations (such as the U.S. threat regarding Greenland and Europe's failure to provide the expected support for a war with Iran), there are three fundamental geopolitical shocks triggering Europe's crisis within the global security architecture and its search for alternatives. The first and most prominent shock is the return of conventional warfare to continental Europe following Russia's invasion of Ukraine in 2022. This development has shattered Europe's decades-long normative security illusions, once again elevating securitization policies⁵, military capacity building, and the pursuit of collective security to primary state imperatives.

The second major shock is the transformation in the domestic political dynamics of the United States and the structural shift in transatlantic relations. The new approach toward Europe⁶, which has become particularly pronounced with Trump's second term, tends to view the political energy and financial resources Europe expends against the Russian threat as unnecessary in the context of US global priorities (particularly the Asia-Pacific). Washington's transition from an unconditional guarantor of the security umbrella to a stance of transactional reluctance, alongside increasing pressure for burden-sharing, has deepened fears of "abandonment"⁷ in European capitals. These signals of US strategic withdrawal compel Europe to inevitably seek an autonomous security architecture capable of standing on its own within the Alliance, and even to pursue a European security architecture independent of NATO.

The third shock is unfolding along the continent's southern borders. The ongoing collapse of state authority, civil wars, and regime crises in neighbor-

4 "NATO Secretary General previews defence ministers' meeting: Building a stronger Europe in a stronger NATO", NATO, 17 June 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/06/17/nato-secretary-general-previews-defence-ministers-meeting-building-a-stronger-europe-in-a-stronger-nato>, (Access: 20 June 2026)

5 Mitchell A. Orenstein, "Securitisation of EU policy: how Russia's invasion of Ukraine is changing Europe", *Journal of European Public Policy*, vol: 5, issue: 48, 2025, <https://www.tandfonline.com/doi/citedby/10.1080/13501763.2025.2497350?scroll=top&needAccess=true>

6 Nathalie Tocci & Jan Techau, "Can Europe Trust the United States Again?", *Carnegie Endowment*, 7 January 2026, <https://carnegieendowment.org/posts/2026/01/can-europe-ever-trust-the-united-states-again>, (Access: 19 June 2026)

7 Ali Mammadov, "If America Abandons Europe, Will the Continent Fragment or Unify?", *War on the Rocks*, 12 June 2025, (Access: 21 June 2026)

ing regions (North Africa, the Levant, and the Sahel) since the Arab Spring have generated a chronic spiral of instability for Europe. These asymmetric challenges, driven by waves of irregular migration, radicalization, and non-state armed actors, emerge as a much more pressing and urgent security crisis for the continent's southern flank than the Russian threat. Tanks in the east and the transnational impact of instability in the south have condemned Europe to a dual-front strategic squeeze.

In light of all these conjunctural and structural contexts, this report centers on the following fundamental question to analyze the current state of the European security architecture: What exactly do European states fear in the fragile global system, how are these threat perceptions shaped along geographical fault lines, and to what extent do the states' national military responses on the ground align with these perceptions when constrained by their economic weight and industrial capacities? In other words, this report aims to examine the gap between Europe's stated security threats and its actual constructed military capacity.

This report examines Europe's pursuit of new military capacity and collective security architecture through a data-driven methodology. It is built on a corpus of current National Security Strategy and Military and Defence Strategy documents⁸ published by the European states under study, read wherever possible in their original languages and supplemented by official

⁸ To ensure a robust and contemporary analysis, this report utilizes the most current accessible primary policy documents available for each state, organized into two main categories. The first category consists of National Security Documents, encompassing publications from Albania (2024), Austria (2024), Czechia (2023), Denmark (2023), Estonia (2026), Finland (2026), France (2025), Germany (2023), Latvia (2023), the Netherlands (2023), North Macedonia (2024), Norway (2025), Sweden (2024), and the United Kingdom (2025). Poland (2020) and Spain (2021) predate the 2022 turning point that otherwise frames the corpus; both are nonetheless retained because they rank among the most populous states in Europe and represent too significant a share of the continent's population to be left out. The second category is composed of Military and Defence Strategy Documents, specifically drawing on the frameworks of Belgium, Strategic Vision of Defence (2025) and STAR Plan (2022); Czechia, Armed Forces Development Concept 2035 (2023); Finland, Government Defence Report (2024); France, LPM 2024-2030 (2026); Germany, Military Strategy, the Overall Concept of Military Defence (2026); Italy, Chief of Defence Strategic Concept (2022) and the DPP 2025-2027 (2025); Latvia, Defence Concept (2023); Luxembourg, Defence Guidelines 2035 (2023); the Netherlands, Defence White Paper (2024) and the D-SII 2025-2029 (2025); Norway, Long-Term Defence Plan 2025-2036, "The Norwegian Defence Pledge" (2024); Sweden, Defence Commission Report, Ds 2024:6 (2024); and the United Kingdom, Strategic Defence Review (2025). As Italy has not published a standalone national security strategy, its defence documents were coded as the basis for both its national security and military strategy. Furthermore, to contextualize these national strategies within broader collective architectures, the dataset is supplemented by overarching institutional texts, namely the EU Strategic Compass (2022 and 2024) and the NATO Strategic Concept (2022).

statements from heads of state and defence ministers. Marking Russia's invasion of Ukraine, the year 2022 has been identified as a turning point; therefore, documents published subsequent to this date have been compiled and treated as the primary expressions of each state's declared intent, anchoring the report's three movements.

The threat definitions, pursuits regarding the global security architecture, and targeted military capacity commitments within the relevant documents were examined; the statements were converted into data and visualized. The analyses conducted during this process visualize not only which threats the states identify, but also which countries cluster around specific threats (such as purely conventional warfare or the asymmetric threat of migration) to form new sub-regional security complexes within the European security framework. To test the extent to which perception translates into military posture, the discourses in the national documents were also cross-checked against military capacity data, such as defense budget increases, personnel employment policies, and the origin of weapons systems procurement (the US versus the intra-European market).

Aiming to provide a strategic projection for policymakers ahead of the NATO Ankara Summit, this study consists of three main sections ranging from threat perception to collective architecture:

Chapter One (The European Threat Matrix): This section examines how European states perceive threats and at which points these perceptions converge and diverge. It maps out how the mandatory "convergence" observed across all strategy documents regarding Russia and hybrid warfare transforms into a sharp "divergence" when geographical and historical baggage comes into play. It demonstrates how the Russian threat, which is existential in the Eastern and Baltic countries, yet manageable in the West, gives way to the instabilities of the enlarged Mediterranean basin in Southern Europe.

Chapter Two (National Military Strategies): This section analyzes how threat perceptions are translated into military postures on the ground, grouping European states by economic weight and capacity. This report explores how large economies (like Germany, the UK, and France) are focusing on high-intensity conventional warfare and breadth of capabilities. It then contrasts this with medium and smaller states, which are dividing be-

tween those mobilizing whole-of-society “total defence” models (such as the Nordic and Baltic states) and those rebuilding professional forces or acting as specialized enablers. Ultimately, the chapter identifies a continent-wide convergence on the need to address manpower shortages, the receding US role, and the acquisition of critical capabilities like integrated air and missile defense and long-range precision strike.

Chapter Three (Scenarios, Architecture, and Capacity): This chapter tests the scenarios for transforming Europe’s national defense efforts into a collective security architecture, acknowledging the looming shadow of American disengagement. It evaluates two primary, though overlapping, paths: fortifying the NATO status quo with a heavier European burden versus building a distinct “European backbone” through EU industrial initiatives and UK-led minilateral coalitions. By analyzing the industrial reality of procurement patterns and the limitations of the Franco-British nuclear umbrella, this section provides a realistic assessment of the “Autonomy or US dependence?” dilemma, arguing that the current trajectory points toward a managed reduction of dependence rather than full strategic autonomy.

The conclusion of the report synthesizes the logical link within the threat, response, and capacity triangle; it presents final assessments on what the fragmentation in Europe’s security architecture means for the future of NATO and strategic autonomy goals ahead of the historic summit in Ankara.

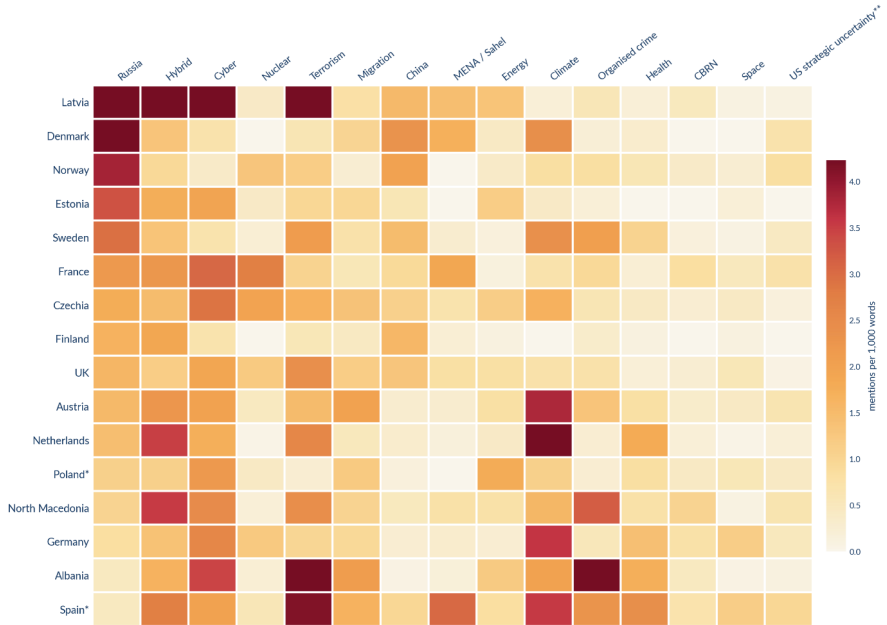
CHAPTER ONE: THE EUROPEAN THREAT MATRIX AND FRAGMENTED SECURITY PERCEPTION

Russia's invasion of Ukraine in 2022 has been the most profound "geopolitical awakening"⁹ for the European security architecture since the end of the Cold War. This shock, which compelled policymakers across the continent to abandon their decades-old normative security paradigms, appears from the outside to have united Europe around a single threat. Indeed, an initial reading of the published national security and military strategy documents gives the impression that a baseline consensus has been achieved across the continent. Almost all states have acknowledged the return of conventional warfare and placed Russia and hybrid warfare methods at the center of their primary threat projections. However, when this state of convergence is evaluated alongside the intensity of the perceptions in the published documents, it rapidly gives way to intra-European geopolitical fault lines.¹⁰

9 Beata Piskorska, "A Paradigm Shift: The Geopolitical Awakening of the European Union and Central and Eastern Europe States as Full-Fledged Security Actors in the Context of Russia's War in Ukraine", *East European Politics and Societies*, vol 40: issue: 1, 2026, <https://journals.sagepub.com/doi/10.1177/08883254251394658>, (Access: 23 June 2026)

10 Mehmet Salah Devrim, "Avrupa'nın Bölünmüş Güvenlik Aklı", *Sabah Perspektif*, 20 June 2026, <https://www.sabah.com.tr/yazarlar/perspektif/mehmet-salah-devrim/2026/06/20/avrupanin-bolunmus-guvenlik-akli-ortak-dusman-farkli-cepheler>, (24 June 2026)

Figure 1: Threat Salience Heatmap (mentions per 1,000 words of body text)



Source: Prepared by the authors based on national security documents data using a multilingual lexicon. Rows sorted by Russia salience. * Poland (2020) and *Spain (2021) documents predate the 2022 invasion of Ukraine but are retained: both states are too important to omit and few post-2022 documents exist for their regions. ** US strategic uncertainty is an inferential, lower-precision category (multi-word proxy terms).

Hybrid and cyber threats are named consistently across nearly all states, the clearest point of convergence, while Russia is named most heavily by frontline and Nordic-Baltic states and far more lightly elsewhere. The remaining categories (Migration, China, Terrorism) vary sharply from country to country.¹¹

While Russia and hybrid threat perception sometimes overlap, the documents frequently treat hybrid threats separated as an independent category. Although Europe appears to have reached a consensus on a common security perception¹² upon experiencing the Russian threat, the interpretation of this

11 Caveat to note: the data counts how often each threat is named, not the intensity of the language used to describe it. A threat discussed at length in measured terms therefore registers as high, while a threat raised only briefly but in existential terms registers as low. I.e. Norway only mentions terrorism related terms 10 times, even though parts of its strategy frame terrorism in sharper language.

12 Mihai Chihaiia, “What Europe thinks about European security and defense”, *European Policy Center*, 24 October 2024, <https://www.epc.eu/publication/What-Europe-thinks-about-European-security-and-defense/>, (Access: 24 June 2026)

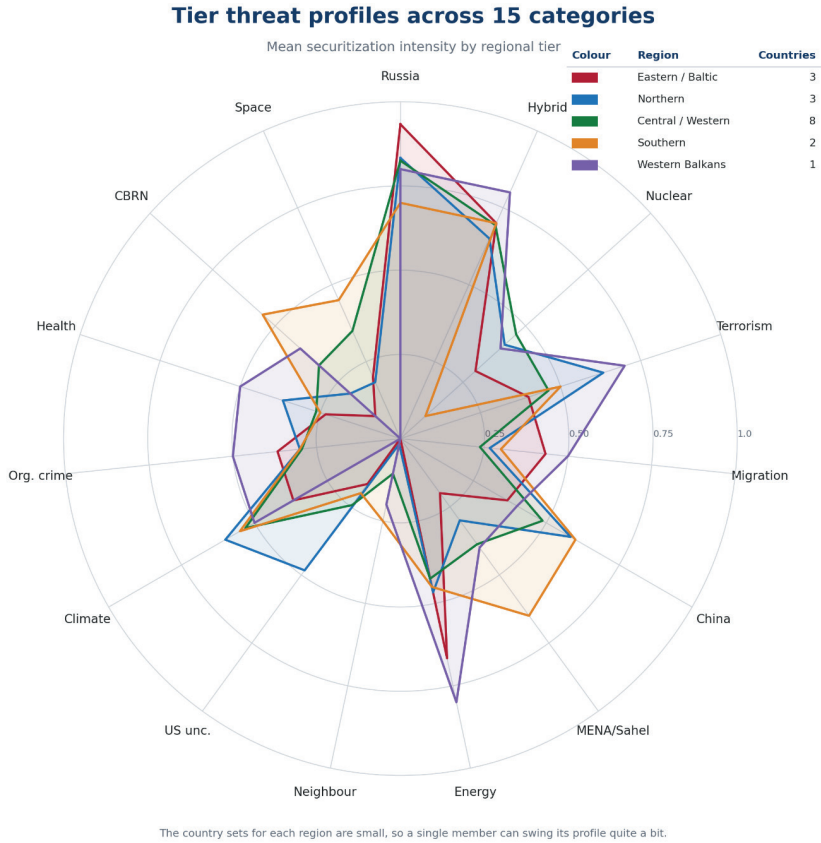
perception in each European capital is reshaped according to geographical location, historical memory, and national capacity. It would be inaccurate to interpret the emerging picture as a homogeneous European security mindset. The most fundamental observation to be made when examining Europe's security perception is as follows: divergent sub-regional security complexes are taking shape across Europe, experiencing threats at varying intensities and occasionally contradicting one another. The existential anxiety triggered by the Russian challenge along the Eastern and Baltic borders gives way to a manageable systemic crisis further inland in Continental Europe, and is replaced by the chronic instabilities of the Mediterranean basin as one moves down to the southern coasts.

Conventional Return and the Russian Threat: From Existential Anxiety to Systemic Management

The center of gravity of the European threat matrix is undoubtedly formed by Moscow's revisionist orientation and power politics. Almost all of the examined national security documents position Russia as both a conjunctural crisis requiring urgent measures and a long-term strategic rival that shakes the continent's current security architecture at a structural level. The Russian administration's instrumentalization of diplomacy and its capacity to use military force directly as a means of pressure to achieve its foreign policy objectives are now being experienced in European capitals beyond any doubt. The conventional interventions, starting particularly with Georgia and escalating to the highest level with the full-scale invasion of Ukraine, are regarded as the most staggering evidence of this situation on the ground. In addition, "gray zone"¹³ maneuvers, such as the gradual establishment of de facto control over Belarus and the violations of sovereignty in Moldova, demonstrate that the threat is not confined to active conflict zones. The underlying deep concern finding its place in European National Security documents is Russia's effort to go beyond mere military gains and reconstruct a historical sphere of influence that would also encompass Central and

13 Liana Fix, "Defending Europe if Russia Steps Out of the Gray Zone", *Council on Foreign Relations*, 24 February 2026, <https://www.cfr.org/articles/defending-europe-if-russia-steps-out-of-the-gray-zone>, (Access: 25 June 2026)

Eastern Europe. Policymakers across the continent interpret this strategy as an attempt to trap Europe once again in a hierarchical regional order where borders are drawn by force, and they construct the main backbone of their collective threat perceptions upon this geopolitical reading.



This chart illustrates how the Eastern/Baltic countries (red line) peak along the Russia axis, while the Southern countries (orange line) shift towards the Migration/Terrorism/MENA axis.

However, the heat map and quantitative proportions generated by coding the strategic orientations in the documents refute the assumption of homogeneity regarding security perception within the continent. The data points to a geopolitical fracture along the East-West axis in how the Russian threat is perceived. Countries that physically share a direct border with Russia or are situated on the geopolitical frontline, such as Finland, Estonia, and Poland, code the current crisis as an existential danger directly aimed at

state survival and national existence. In the national security documents of these states, the scenario of a conventional military invasion is no longer a theoretical or remote possibility.¹⁴ On the contrary, this scenario is evaluated as a concrete threat that sits at the center of national military planning and could materialize at any moment.

On the other hand, as one moves geographically further from the eastern borders, a distinct differentiation in the perceived intensity of the threat becomes apparent. Allies situated in the center and west of Continental Europe, such as Germany and the Netherlands, recognize Russia as the primary element destabilizing Euro-Atlantic security. However, within the strategic vision of these countries, this threat is framed as a manageable systemic challenge that can be counterbalanced by existing deterrence mechanisms and collective defense tools. Consequently, the clear existential anxiety felt in the east of the continent gives way to a crisis management rationality, one that can be contained by institutional capacity, as one move further west.

Indeed, the military intelligence assessments of allies such as Germany and Denmark also offer critical clues regarding the timing of the threat. According to these reports, regardless of how the war in Ukraine concludes, it is anticipated that Russia could directly test Europe's defense readiness and NATO's deterrence shield by 2030 or even earlier.¹⁵ This expectation points not only to the possibility of a military attack, but to a comprehensive strategy of attrition.

Asymmetric and Hybrid Challenges: The Common Intersection of the Matrix

The element that holds Europe's fragmented security perception together and yields the broadest convergence on the maps is hybrid warfare strate-

14 Abigail Miller, "A Matter of When, Not If: Potential Flash Points for Russia's Next Invasion of Eastern Europe", *Georgetown Security Studies Review*, 18 December 2025, <https://gssr.georgetown.edu/the-forum/regions/eurasia/a-matter-of-when-not-if-potential-flash-points-for-russias-next-invasion-of-eastern-europe/>, (Access: 20 June 2026)

15 Steven Blockmans, *More Europe in defence – three pathways*, *Task Force Report*, (CEPS, RUSI, Clingendael, IEP, Brussels: 2026), p. 10, <https://www.clingendael.org/publication/more-europe-defence-three-pathways>

gies. The common consensus across the continent is that hybrid attacks¹⁶ aimed at exploiting the internal vulnerabilities of allies will increasingly continue.

Security documents define disinformation campaigns, political interference in elections, cyber-attacks, and critical infrastructure sabotage (such as the attacks on the Nord Stream pipelines or the severing of data cables) as a crucial front of modern warfare. Particularly in the documents of countries like Sweden, France, and the United Kingdom, hybrid threats are coded as possessing a destructive potential equivalent to conventional warfare. These asymmetric challenges, which infiltrate across borders and employ sub-state elements, compel Europe to develop new defense doctrines that prioritize societal resilience rather than solely conventional weapons.

The Southern Flank and Neighborhood Instability: Inverted Threat Perception

The renewed Cold War wind, shaped around the Russian threat in the security documents of Eastern and Northern Europe, gives way to the chronic and multi-layered problems of the “enlarged Mediterranean”¹⁷ basin as one moves down to the continent’s southern coasts. The security documents of countries such as Italy, Spain, and partially Austria record Moscow as a global instability factor shaking the Euro-Atlantic architecture. However, in the view of these capitals, the true center of gravity of the national crisis dynamic rests on challenges fueled from the southern axis, namely the Middle East, North Africa (MENA), and the Sahel belt.¹⁸

Particularly, the challenges generated by the devastating civil war that erupted in Syria following the Arab Spring and the collapse of central state authority in North Africa, especially in Libya, have transformed the Medi-

16 Will Brown, Jana Kobzová, Nicu Popescu, José Ignacio Torreblanca, “From shield to sword: Europe’s offensive strategy for the hybrid age”, European Council on Foreign Relations, 6 March 2026, <https://ecfr.eu/publication/from-shield-to-sword-europes-offensive-strategy-for-the-hybrid-age/>, (Access: 25 June 2026).

17 Francesca Maremonti, “From the Indo-Pacific to the Enlarged Mediterranean: India’s Economic Rise and Strategic Cooperation with the EU and Italy”, *Istituto Affari Internazionali*, 4 August 2025, <https://www.iai.it/en/publications/c04/indo-pacific-enlarged-mediterranean>, (Access: 18 June 2026)

18 Luigi Scazzieri, “Europe should not forget the challenges to its South”, *Centre for European Reform*, 22 September 2022, <https://www.cer.eu/publications/archive/policy-brief/2022/europe-should-not-forget-challenges-its-south>, (24 June 2026)

terranean basin into a massive security vacuum. The massive and irregular migration waves directed toward European shores from these unstable regions, along with the potential weaponization of demographic movements as an instrument of political pressure by certain actors, are perceived by the southern flank countries as an urgent asymmetric threat. In addition to the migration crisis, the consecutive crises in the Sahel region, the transnational scale of human and arms trafficking networks, and the ability of radical terrorist organizations to carve out new operational spaces within this authority vacuum further aggravate the picture.

This de facto reality on the ground compels Mediterranean states such as Italy and Spain to inevitably shift their focus southward in their security planning. These states designate the enhancement of naval capacities¹⁹, the insurance of navigational safety in the Mediterranean, and the strengthening of border protection mechanisms as a strategic priority. Consequently, the security rationality for Europe's southern flank is shaped by the motivation to neutralize socio-political shocks, driven by demographic pressures, cross-border terrorism, and non-state armed actors, that directly target societal resilience.

This sub-regional fracture constitutes one of the most significant cracks in Europe's security architecture. For the southern flank, regime crises, state collapses, and civil wars in the Middle East, North Africa (MENA), and the Sahel region are elements that directly threaten national security. The weaponization of irregular migration waves, radical terrorism, and the power vacuums created by non-state armed actors are perceived by these countries as asymmetric challenges requiring more urgent intervention than Russian tanks and missiles. The high values attributed to the Migration, Terrorism, and MENA/Sahel categories in the budget and threat profiles of Spain and Italy demonstrate that the continent's south has practically inverted its threat perception. In an environment where the East is focused on Russia, Southern countries are gravitating toward a different model of capacity building to protect their border security and maritime jurisdictions.

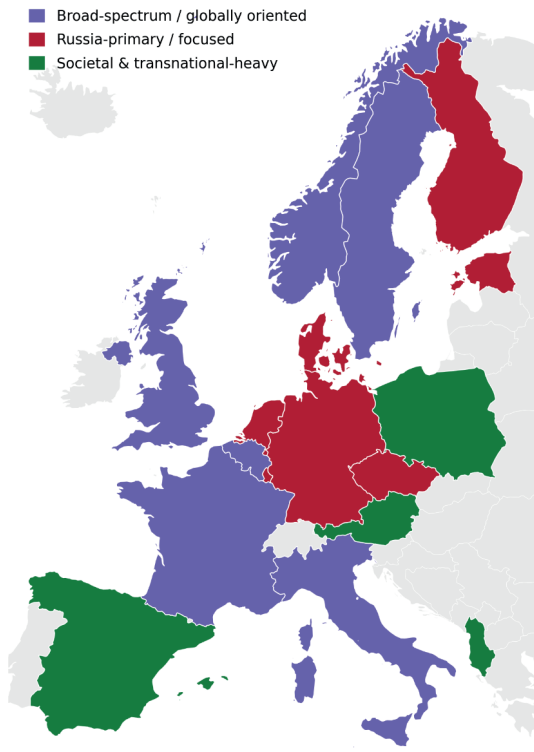
19 Nicolas Mazzucchi, "Naval rearmament, European perspectives", *Fondation Robert Schuman*, 2 May 2023, <https://www.robert-schuman.eu/en/european-issues/0667-naval-reament-european-perspectives>, (23 June 2026)

Network Analysis: Threat Clusters and New Security Complexes

Subjecting the coded statements from national security documents to network analysis places the regional divergence in Europe into a much more complex and paradigm-shifting framework. While classical analyses divide Europe merely into East and West, network analysis proves that states predominantly converge around three fundamental threat profile clusters.

Threat-profile clusters on the map

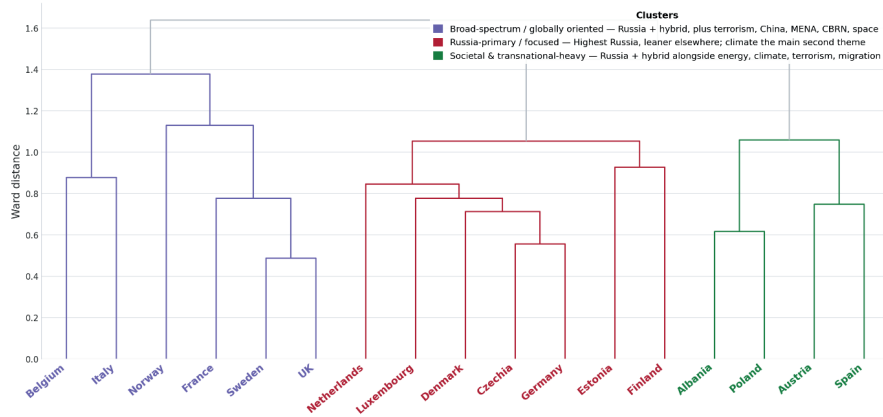
Colour = data-driven cluster, not region



The clusters cut across geography: Estonia and Finland group with Germany and the Netherlands; Poland groups with Spain, Austria and Albania.
Poland's and Spain's national security strategies predate the war in Ukraine; no more recent official documents could be found.

Three threat-profile clusters that cut across geography

Ward hierarchical clustering — vertical distance = how dissimilar two profiles are



Clustering on the 15 threat-category vectors. Leaf colour = cluster

These figures representing how threat perceptions cut across geography (for instance, Spain and Poland converging within the same societal threat cluster).

The first cluster is the “Russia-primary / focused” group. This bloc, predominantly formed on the map by Germany, the Netherlands, Denmark, Czechia, Estonia, and Finland, has built the vast majority of its national security agenda on Russia and conventional deterrence. The second cluster is the “Broad-spectrum / globally oriented” group. Formed by actors with high state capacity or global interests, such as France, the United Kingdom, Italy, and Sweden, this cluster presents a multi-layered threat matrix that includes the rise of China, nuclear deterrence, energy security, and space/cyber domains, in addition to Russia.

The most notable, however, is the third cluster: “Societal & transnational-heavy.” Alongside southern/central European countries like Spain and Austria, the inclusion of Poland in this mixed cluster, due to the mass migration pressure and border security crises it experiences on the Belarussian border, despite perceiving Russia as a top-level threat, demonstrates that geographical determinism does not always apply. This group has securitized transnational issues that directly threaten societal resilience and domestic politics: climate change, terrorism, mass migration, and energy crises.

The network analysis in this report also reveals challenging normative and strategic fault lines within the European security architecture. The differentiation among these clusters creates a potential arena of competition

in discussions regarding resource allocation and strategic priorities within NATO and the EU. While the first cluster dictates that the collective defense budget be transferred to conventional deterrence on the eastern flank, the societal and broad-spectrum clusters press for resources to be redirected toward process-driven crises in the Mediterranean basin, hybrid threats, and transnational networks. This situation inherently complicates the construction of a common European security complex, making the diplomatic capacity of bridge actors, who can facilitate interoperability and transition between clusters, more critical than ever.

Although post-2022 European national security and strategy documents reflect a continent-wide consensus on paper regarding Russia, peeling back the analytical layers reveals a deep strategic fragmentation. The existential fear of the East, the asymmetric migration concerns of the South, and the nuclear, hybrid, and cyber security pursuits of the West stand as structural challenges preventing Europe from unifying under a single, homogeneous security umbrella. This multiplicity in threat perceptions goes beyond mere political rhetoric; it is the fundamental motivation shaping states' budget allocations and military doctrines. As will be examined in the next section of the report, this fragmented structure in threat perception reproduces itself in the national military responses and force structure development of the countries, ultimately transforming into the most concrete obstacle to Europe's pursuit of collective defense.

CHAPTER 2: NATIONAL MILITARY STRATEGIES

As mapped in the previous chapter, European threat perceptions diverge significantly along geographical and historical fault lines. However, when transitioning from strategic intent to actual military posture on the ground, the analytical lens must inevitably shift. The national military responses detailed in this chapter are dictated not solely by what a state fears, but fundamentally by its economic weight and industrial capacity. To accurately understand the intersection between a state's threat perception and its actual defense capabilities, it is essential to categorize European nations by their economic size. This approach reveals how financial and industrial capacity acts as the ultimate constraint on strategic ambition, determining whether a state can pursue full-spectrum deterrence, must rely on whole-of-society mobilization, or is forced into niche specialization.

With the return of high-intensity warfare to Europe following the Russian invasion of Ukraine, and increasing threat of inter-state wars ranging from the Middle East, Asia and Africa, it becomes imperative to not only understand the threat, but also how European countries act upon the uncertainty around the security landscape. The main documents for this are military and defence strategy documents released by a number of European

countries that give an understanding of the future wars Europe plans to fight or deter. Due to the nature of military force planning, transparency is a rare currency and the documents frequently avoid going into specifics. With these limitations in mind, they still provide important insight into European plans. The strategies are grouped here by economic weight since capacity to act, more than threat perception, separates the responses.

Breadth and Depth

For large economies, the most outstanding change here is the *Zeitenwende* speech by then German Chancellor Olaf Scholz and the first military strategy document released by the German Ministry of Defence.²⁰ It gives a clear conventional anchor to German defence, focusing around high-intensity warfare, driven by the increasing rapid reorientation of the United States away from the European theatre to the Asia-Pacific. In this regard, the German military (Bundeswehr), aims to become the strongest conventional armed force in Europe by 2039, with short term goals set for 2029 and medium term goals for 2035.²¹ The primary change is an increase of active military personal to 260.000 and reserves to 200.000,²² the acquisition of long-range precision strike capabilities, and integrated air-and-missile defence of all ranges.²³ It also wants to take greater charge in Europe, showcasing it with the permanent placement of a brigade in Lithuania.²⁴

The UK has a NATO-first approach, aiming to take the lead in European theatre as the US shifts its priorities east- and inward.²⁵ While a number

20 Federal Ministry of Defence (Germany), "The Overall Concept of Military Defence: Military Strategy and Plan for the Armed Forces," Bonn: Federal Ministry of Defence, April 2026, pp. 3-4 (the first Bundeswehr Military Strategy)

21 Ibid. pp. 27-28

22 Oliver Towfigh Nia, "German Reservists' Association Urges Higher Age Limit to Strengthen Defense Capabilities," Anadolu Agency, 21.04.2026, <https://www.aa.com.tr/en/europe/german-reservists-association-urges-higher-age-limit-to-strengthen-defense-capabilities/3913542> (Accessed 25.06.2026).

23 Federal Ministry of Defence (Germany), "The Overall Concept of Military Defence: Military Strategy and Plan for the Armed Forces," Bonn: Federal Ministry of Defence, April 2026, p. 20 (deep precision strike) and p. 30 (air defence of all ranges).

24 Federal Ministry of Defence (Germany), "The Overall Concept of Military Defence: Military Strategy and Plan for the Armed Forces," Bonn: Federal Ministry of Defence, April 2026, sec. 5, p. 19.

25 Ministry of Defence (UK), "Strategic Defence Review 2025: Making Britain Safer, Secure at Home, Strong Abroad," London: Ministry of Defence, 2025, p. 40

of capabilities are named, most specific is the acquisition of 7.000 domestically built long-range weapons, the *New Hybrid Navy* which plans to push out SSN-AUKUS attack submarines every 18 months,²⁶ the GCAP sixth-gen fighter jet, and homeland integrated air and missile defence.²⁷ It also wants to increase domestic munitions production by construction 6 new factories.²⁸

France does not have a specific military strategy similar to Germany and the UK, but it is also too important to skip. President Macron and the 2025 Strategic Review define the current period as a moment of geopolitical rupture and as a turning point respectively,²⁹ demanding that rearmament is only meaningful if its part of greater European ambitions.³⁰ Named capabilities are modernizations across deep-strike, ground-based air defence, drones, as well as space and cyber domains.³¹ France sees preparations for a potential war economy as a core principle, with industrial scale-ups, shortened timelines, and larger ammunition stockpiles.³² With readiness for high-intensity warfare as the benchmark, France wants to sustain full-spectrum capabilities.³³

Italy does not have an English language national security strategy unlike Germany, the UK and France, but a significant military document in the form of the DPP 2025–2027. While significantly shorter-term than similar documents from other countries, only accounting for 3 years of planning, it does give a view of the Italian perspective. It reaches for 360-degree protection but its operational focus is not Russia and Eastern Europe but the

26 George Allison, “New British Nuclear Attack Subs to Start Build by Late 2020s,” UK Defence Journal, 28.05.2026, <https://ukdefencejournal.org.uk/new-british-nuclear-attack-subs-to-start-build-by-late-2020s/> (Accessed 25.06.2026).

27 Ministry of Defence (UK), “Strategic Defence Review 2025: Making Britain Safer, Secure at Home, Strong Abroad,” London: Ministry of Defence, 2025, pp. 9, 23, 62, 116 (up to 7,000 long-range weapons; New Hybrid Navy and submarine production; the sixth-generation Global Combat Air Programme; homeland air and missile defence)

28 Ibid. p. 9

29 Présidence de la République, “Visit to the Île Longue Operational Base,” Élysée, March 2, 2026, <https://www.elysee.fr/en/emmanuel-macron/2026/03/02/visit-to-the-ile-longue-operational-base>; General Secretariat for Defence and National Security (SGDSN), National Strategic Review 2025, (Paris: SGDSN, 2025), 7.

30 Ministère des Armées, Actualisation de la Loi de programmation militaire 2024–2030 (Paris: Ministère des Armées, 2026), Édito de Madame Catherine Vautrin, ministre des Armées et des Anciens combattants

31 Ibid. pp. 9-11

32 Ibid. pp. 12-13

33 Ibid. p. 30

Mediterranean.³⁴ In this sense Italy takes a similar stance to other Mediterranean nations with the luxury to be geographically distant from Europe's primary threat, but still names the downsizing of US forces across Europe as a concern.³⁵ But here again a focus on integrated air and missile defence as well as deep,³⁶ stand-off range precision strike capabilities are a visible priority.³⁷ What stands out are an emphasis on protecting critical seabed and underwater infrastructure,³⁸ and its role as framework nation raising NATO's forward land brigade in Bulgaria,³⁹ despite being on of the most south focused nations in the alliance.

Unlike large economies that try to focus on all threats at the same time, universally maintaining their ambitions to protect Europe with their full force in the face of a receding U.S. role across the continent, medium-sized countries cannot. They split over how they generate the mass they need: some keep or reactive conscription and organize the whole of society for defence, while others rebuild professional forces and edge more slowly toward new forms of military service.

Total Defence

The three Nordic countries, Sweden and Finland, the alliances latest members and potential frontlines marked by their proximity to Russia, and Norway, focus on whole-of-society total-defence models, with conscription as core parts of their defence planning. Their respective conscription models predate the Russian invasion of Ukraine: Finland never abolished it, Norway extended universal service to both sexes in 2015,⁴⁰ and Sweden reactivated a

34 Ministero della Difesa, "Documento Programmatico Pluriennale della Difesa per il triennio 2025-2027," Rome: Ministero della Difesa, 2025, p. 16; Italian Defence General Staff, "The Chief of Defence Strategic Concept," Rome: Stato Maggiore della Difesa, September 2022, pp. 3, 4.

35 Ibid. p. 5

36 Ibid. p. 4, 29.

37 Ibid. p. 27, 56.

38 Ibid. p. 14, 28, 56.

39 Ibid. p. 15

40 Norwegian Ministry of Defence, "Norway introduced gender-neutral (universal) conscription in 2015, the first NATO member to do so (Storting decision of 14 June 2013, in force from 2015)," Regjeringen.no, <https://www.regjeringen.no/en/topics/defence/> (Accessed 25.06.2026).

previously abolished conscription model and including both sexes in 2017.⁴¹ At the same time, all include an anticipated US drawdown from the European theatre in one way or another in their force planning. However, while the general approach of total defence with a whole-of-society aspect are similar, there are significant differences. Sweden priority is to field three operationally ready mechanized and one infantry brigade by 2030, expand their air defence, long range strike capabilities, and begin acquiring a meaningful rocket-artillery capability. Finland commits to modernize its land-defence, acquire 5th gen fighters, air and missile defence systems, Pohjanmaa-class corvettes, coastal troops, as well as a focus on deep fire and long-range strike capabilities.⁴² Norway is the most maritime focused force structure of all available documents. It plans for five new ASW frigates, maritime ASW helicopters, five new submarines, long range maritime surveillance, as well as medium and long-range air defence and long-range precision strike for land forces.⁴³ Additionally Norwegian army aims to field a total of three full brigades.⁴⁴

A second group of medium sized countries generates its mass differently. Rather than a combination of professional forces and conscripts, they field pure professional forces. But pressed by threat of high-intensity warfare, they are now rebuilding toward broader service, either through new models of military service, or active debate.

The Czech Republic is the clearest case of a professional force edging back toward service. It emphasizes a whole-of-government and whole-of-society approach and plans its force structure around a long-lasting,⁴⁵

41 Government Offices of Sweden, “Re-activation of enrolment and the conscription,” Government.se, 02.03.2017, <https://www.government.se/articles/2017/03/re-activation-of-enrolment-and-the-conscription/> (Accessed 25.06.2026).

42 Ministry of Defence (Finland), “Government Defence Report 2024,” Helsinki: Ministry of Defence, 2024, <https://julkaisut.valtioneuvosto.fi/handle/10024/166090>, pp. 40-44, 68-72, 90, 99 (modernisation of land defence; F-35 multi-role fighters; air and missile defence; Pohjanmaa-class corvettes / Squadron 2020; coastal troops; long-range fires) (Accessed 25.06.2026).

43 Norwegian Ministry of Defence, “The Norwegian Defence Pledge: Long-Term Defence Plan 2025-2036,” Oslo: Norwegian Ministry of Defence, 2024, <https://www.regjeringen.no/contentassets/0faae3f9efcf4c2fa0f43e2a15bfbcd/en-gb/pdfs/the-norwegian-defence-pledge.pdf>, pp. 2, 8-10

44 Norwegian Ministry of Defence, “The Norwegian Defence Pledge: Long-Term Defence Plan 2025-2036,” Oslo: Norwegian Ministry of Defence, 2024, <https://www.regjeringen.no/contentassets/0faae3f9efcf4c2fa0f43e2a15bfbcd/en-gb/pdfs/the-norwegian-defence-pledge.pdf>, p. 10 (Accessed 26.06.2026).

45 Ministry of Defence of the Czech Republic, “Defence Strategy of the Czech Republic 2023,” Prague: Ministry of Defence, 2023, pp. 10-11

high-intensity defensive war against a technologically advanced enemy.⁴⁶ Yet it remains a fully professional army. But its military leadership has begun to argue that “some form of military service” will eventually be necessary, even as the political level still rules it out.⁴⁷ While NATO is the fundament of Czech defence,⁴⁸ it is also one of the oldest documents in the set, preceding the hastened US shifts in late 2024. Its core contribution to NATO is described as a mechanized brigade and utilizing its territory as an allied reception and transit hub.⁴⁹ Ground-based air defence systems, unmanned systems, long-range precision munitions, and new generation multirole supersonic aircraft are the Czech Republics planned acquisitions.⁵⁰

Belgium is rebuilding from the lowest base in this group. Its 2025 Strategic Vision describes turning “a small military force focused on expeditionary interventions” into a solid armed force focused on deterrence and high-intensity conflicts.⁵¹ This gets additionally framed as an effort to reducing strategic dependence on the United States whilst also building a European pillar within NATO.⁵² To generate mass, it introduces a voluntary military service model and a territorial reserve alongside its professional core.⁵³ Unlike most other military strategies and force structure planning documents, the Belgian document is highly detailed with regards to acquisition, spanning 46 pages, making it difficult to adequately summarize capability developments. But some notable acquisition plans include layered air defence, additional F-35s, a motorized brigade,⁵⁴ with personnel growing by roughly a third by 2034.⁵⁵

46 Ibid. p. 12

47 <https://www.czdefence.com/article/the-return-of-mandatory-military-service-in-the-czech-republic-is-not-imminent-but-it-will-come-into-effect-in-germany-from-the-new-year-while-poland-is-training-volunteers>

48 Ministry of Defence of the Czech Republic, “Defence Strategy of the Czech Republic 2023,” Prague: Ministry of Defence, 2023, pp. 7-10

49 Ibid. p. 16, 8.

50 Ibid pp. 15-18

51 Belgian Ministry of Defence, “Strategic Vision of Defence 2025,” Ministry of Defence, 2025, p. 4

52 Ibid. pp. 3-4

53 Ibid. p. 36

54 Ibid pp. C-27-28, C-23-27, C-15-19

55 Ibid p. A-1

The Netherlands frames its perspective around the claim that Europe is “not at war but no longer at peace”, perceiving no existential threat.⁵⁶ But simultaneously, its 2024 White Paper rebuilds combat power including fielding a tank battalion for the first time since 2011, additional anti-submarine frigates, NH90 helicopters, and additional F-35s.⁵⁷ And it too edges toward a new military service model, pairing a voluntary service year inspired directly by the Scandinavian model with an exploratory mandatory survey of young people.⁵⁸ What further distinguishes the Netherlands from the others is its emphasis rather than its force structure. It defines its role as a high-end industrial and technological contributor,⁵⁹ placing European autonomy into industrial rather than political terms.⁶⁰ Significant portions of the Dutch strategy documents are dedicated to quantum technology and smart materials, space technology, sensors, and intelligent system.⁶¹

Maximalist or Enablers

At the lower of the list sit Latvia and Luxembourg, both smaller states. They cannot field broad capabilities, and the two resolve that constraint in opposite directions, set by exposure. Latvia, on the frontlines of the eastern flank, mobilizes everything, whereas Luxembourg, sheltered and tiny, specializes in niches that plug into allied frameworks.

Latvia is the maximalist case. Its 2023 Defence Concept builds defence on a comprehensive national defence model that makes security a collective responsibility of the entire society.⁶² Latvia reintroduced conscription in 2023

56 Ministry of Defence (Netherlands), “Defence Strategy for Industry and Innovation (D-SII) 2025-2029,” The Hague: Ministry of Defence, 2025, p. 4

57 Ministry of Defence (Netherlands), “Defence White Paper 2024: Strong, Smart, Together,” The Hague: Ministry of Defence, 2024, p. 36

58 Ibid. p. 44

59 Ministry of Defence (Netherlands), “Defence Strategy for Industry and Innovation (D-SII) 2025-2029,” The Hague: Ministry of Defence, 2025, p. 4; and Ministry of Defence (Netherlands), “Defence White Paper 2024: Strong, Smart, Together,” The Hague: Ministry of Defence, 2024, p. 6.

60 Ministry of Defence (Netherlands), “Defence Strategy for Industry and Innovation (D-SII) 2025-2029,” The Hague: Ministry of Defence, 2025, p. 4

61 Ministry of Defence (Netherlands), “Defence White Paper 2024: Strong, Smart, Together,” The Hague: Ministry of Defence, 2024, p. 6; and Ministry of Defence (Netherlands), “Defence Strategy for Industry and Innovation (D-SII) 2025-2029,” The Hague: Ministry of Defence, 2025, p. 6

62 Ministry of Defence of the Republic of Latvia, “The State Defence Concept,” Riga: Ministry of Defence, 2023, p. 6.

through its State Defence Service bill, explicitly growing the force and generate trained reserves.⁶³ Its capability priorities are those of front-line states buying time and denying ground: air and coastal defence, long-range missile artillery, and unmanned systems.⁶⁴ All layered over a force of professional units, the National Guard, the State Defence Service, and reserves with spendings being the third highest in NATO by GDP.⁶⁵ Because Latvia cannot field necessary mass alone, it binds allies as tightly as it mobilizes its own society. The Multinational Division North on Latvian soil, prepositioned reserves, a standing demand for a permanent combat capable allied brigade.⁶⁶

Luxembourg on the opposing pole is the enabler. Too small to field mass, it makes no attempt at a full-spectrum force, channeling efforts into a handful of high value niches that slot into allied structures, including ISR, deployable specialized medical teams, maritime air surveillance, space and cyber.⁶⁷ Its contributions are defined explicitly through bilateral and multinational frameworks rather than national self-sufficiency.⁶⁸ Whereas Latvia maximizes, Luxembourg specializes.

Convergence

Two analytical lessons run through the full set of documents and read together they explain not just how these statements respond, but why they divide as they do. The first is the nexus of capacity and intensity. Economic weight and resources set the ceiling on what a state can field, whereas proximity to the perceived threat, above all the geographic proximity to Russia,

63 Ministry of Defence of the Republic of Latvia, “The State Defence Concept,” Riga: Ministry of Defence, 2023, p. 12, 17; see also Saeima of the Republic of Latvia, “Valsts aizsardzības dienesta likums (State Defence Service Law),” adopted 5 April 2023, <https://likumi.lv/ta/id/341210-valsts-aizsardzibas-dienesta-likums> (Accessed 25.06.2026).

64 Ministry of Defence of the Republic of Latvia, “The State Defence Concept,” Riga: Ministry of Defence, 2023, p. 12,

65 NATO, “Defence Expenditure of NATO Countries (2014–2025),” NATO Public Diplomacy Division, 2025, <https://www.nato.int/content/dam/nato/webready/documents/finance/def-exp-2025-en.pdf> (Accessed 25.06.2026)

66 Ministry of Defence of the Republic of Latvia, “The State Defence Concept,” Riga: Ministry of Defence, 2023, p. 13-14

67 Directorate of Defence (Luxembourg), “Luxembourg Defence Guidelines 2035,” Luxembourg: Ministry of Foreign and European Affairs, 2023, pp. 9, 33-34, 49, 57

68 Ibid. Pp. 30, 40

sets how hard it pushes toward that ceiling. The two axes together place every state in this chapter: Latvia, low in capacity but high in intensity, maximizes what little it has and mobilizes its whole society. Luxembourg, low in both, does neither and becomes an enabler. Germany, high in capacity but only moderately exposed, builds breadth without total mobilization and convenient pace. The relationship is a strong tendency rather than law. The Czech Republic sits centrally yet stays professional without shifting to a conscription model to address mass and recruitment issues. Italy is distant yet large, but as a first cut it organizes its own surroundings. It is also the one point where the threat geography of chapter 1 and the capability analysis of this chapter combine: intensity and capacity combined lead to posture.

The second lesson is what the documents share, and the clearest shared feature are manpower, the receding role of the United States in European defence, the necessity for integrated air and missile defence systems and long-range precision strike capabilities.

Two decades of relative peace led many European states to abolish conscription and shift to smaller professional forces, a loss of standing manpower compounded by socio-economic trends visible across the continent. The strain surfaces in almost every document but not uniformly. And this difference is instructive. The professional armies describe a recruitment crisis they cannot yet solve. The United Kingdom records its regular force falling from 311,000 at the end of the Cold War to 136,000 today, with any increase contingent on funding.⁶⁹ The conscription states describe something different. Not an inability to recruit, but a supply they are deliberately scaling, as when Sweden raises its annual conscription intake from 10,000 toward 14,000.⁷⁰ Italy is the outlier, presenting no recruitment crisis at all because its constraint is a legislated drawdown and an aging force rather than an unfilled expansion.⁷¹

69 Ministry of Defence (UK), “Strategic Defence Review 2025: Making Britain Safer, Secure at Home, Strong Abroad,” London: Ministry of Defence, 2025, p. 33, 18

70 Swedish Defence Commission / Ministry of Defence, “Strengthened Defence Capability: Sweden as an Ally (English summary), Ds 2024:6,” Stockholm: Ministry of Defence, 2024, p. 5

71 Ministero della Difesa, “Documento Programmatico Pluriennale della Difesa per il triennio 2025-2027,” Rome: Ministero della Difesa, 2025, p. 102; and Tom Kington, “Italian Leaders Scramble to Reverse Military Headcount Shrinkage,” Defense News, April 5, 2024, <https://www.defensenews.com/global/europe/2024/04/05/italian-leaders-scramble-to-reverse-military-headcount-shrinkage/>; Andrea Carli, “Crosetto: ‘The Army Cannot Afford 49-Year-Old NCOs’; The Challenge to Lower the Average Military Age Begins,” *Il Sole 24 Ore*, 25.06.2026, <https://en.ilsole24ore.com/art/crosetto-the-army-cannot-afford-49-year-old-non-commissioned-officers-challenge-to-lower-the-average-military-age-AFLDeqqD> (Accessed 25.06.2026).

Germany is the most revealing case. Despite planning the largest expansion of any state in the set, toward 260,000 active-duty and 200,000 reserve personnel, its recruitment issues so significant, a separate personnel growth plan for the German armed forces is being referenced on how to deal with recruitment issues.⁷² As part of the growth Germany introduced the new voluntary military service. In the six months following the introduction of the new military service and 298,000 letters and survey sent to potential male recruits, only 530 people were ultimately recruited.⁷³ Similar voluntary military service models adopted by the Netherlands and Belgium will likely face the same issues.

Beyond manpower, the document converges on the receding role of the United States. The perception of the American drawdown appears independent of the second Trump administrations moves: documents from 2023 and 2024 already register the shift toward the Indo-Pacific, anticipating a reduced role of the United States in European defence, and calling for increased Europeanization of European security and defence. But the second Trump administration certainly has hastened the process and raised the level of alarm. The drawdown is examined more closely in Chapter 3 but it is already among the strongest drivers of European rearmament.

The capability converges themselves divide by origin. Some are top-down. Integrated air and missile defence is mandated by NATO's 2022 Strategic Concept, committing allies to strengthen IAMD. Munitions and industrial scale-up are the same as IAMD, and intensifying. The European Unions emphasis rises from its 2022 Strategic Compass to the 2024 progress report, tracking the ammunition and joint-procurement initiatives. Others are bottom-up. Long-range precision strike and the turn to unmanned systems, named by almost every document, are mandated by neither NATO nor the EU. Their convergence reflects the lessons of Ukraine, the missile exchanges involving Iran, and the shadows of a potential conflict in Asia. Conscription is the purest bottom-up case of all: Not mentioned at all by

72 „Neuer Wehrdienst: Freiwilliger Einsatz für Deutschlands Sicherheit“, Bundeswehr, 19.12.2025, <https://www.bundeswehr.de/de/menschen-karrieren/neuer-wehrdienst> (Accessed 25.06.2026)

73 Mario Kubina, “Neuer Wehrdienst: Das ist die Halbjahresbilanz”, BR24, 25.06.2026, <https://www.br.de/nachrichten/deutschland-welt/neuer-wehrdienst-das-ist-die-halbjahresbilanz,VNZEN7f> (Accessed, 25.06.2026)

any alliance document and left entirely to national choice, many formally professional only armies are returning to conscription.

Ultimately, the structural limits of individual state capacity, most visibly manifested in continent-wide manpower constraints and the sheer financial burden of acquiring these convergent capabilities, force a stark realization. National rearmament alone is insufficient to address either the fragmented threat matrix or the impending American drawdown. This inescapable reality pushes Europe beyond national military strategies and compels it to seek collective, overarching security architectures, setting the stage for the institutional dilemmas and scenarios explored in the following chapter.

CHAPTER 3: SCENARIOS, ARCHITECTURE, AND CAPACITY

Chapter 2 read Europe's national responses one by one. This chapter asks what they add up to, and it begins from a premise that the documents themselves now state openly. The forces those strategies describe do not defend the continent alone, and they are written in the shadow of an American ally that is turning toward Asia and toward its own hemisphere. France's 2025 review speaks of "a combination of the Russian threat and American disengagement," Germany's military strategy notes that Washington "is increasingly shifting its strategic focus towards its Western hemisphere and the Indo-Pacific," and the British review opens on "the United States' change in security priorities, as its focus turns to the Indo-Pacific."⁷⁴ President Emmanuel Macron drew the conclusion most starkly, warning that "our Europe today is mortal. It can die."⁷⁵ From that shared anxiety run two answers. The first keeps NATO as the frame and simply shifts

⁷⁴ Secretariat-General for National Defence and Security (SGDSN), National Strategic Review 2025 (Paris: SGDSN, 2025), p. 17; Federal Ministry of Defence (Germany), Military Strategy (Berlin: BMVg, 2026), p. 20; Ministry of Defence (UK), Strategic Defence Review 2025: Making Britain Safer – Secure at Home, Strong Abroad (London: Ministry of Defence, 2025), pp. 13-14, 26.

⁷⁵ Emmanuel Macron, "Europe Speech" (Second Sorbonne Speech), Élysée, 25 April 2024, <https://www.elysee.fr/en/emmanuel-macron/2024/04/24/europe-speech> (Accessed 25.06.2026).

more of the load onto Europe. The second has Europe build its own backbone, through the European Union and through coalitions of the willing. Neither is posed against the Atlantic Alliance. Every document frames the goal as a stronger European pillar inside NATO, and the real difference between them is one of degree and instrument rather than of allegiance.⁷⁶ What separates the two, in the end, is not language but capacity. The pages that follow weigh each answer against the documents that produced it and against the harder evidence of what Europe can actually build and buy.

A Stronger Europe in a Stronger NATO

The first path is continuity. It keeps the Alliance as the foundation and answers American pressure with money and posture. The documents make NATO the bedrock of national defence almost without exception. Czechia calls full membership the guarantee of “*a functional system of deterrence, preparation and provision of collective defence*,” Italy names the Alliance “*il pilastro fondamentale della sicurezza nazionale ed euro-atlantica*,” (the fundamental pillar of national and Euro-Atlantic security) and Latvia calls NATO collective defence “*the most potent instrument of deterrence*” while deeming the reinforced presence of allied forces vital to its security.⁷⁷ The United Kingdom condenses the instinct into a doctrine, making “NATO First” the defining principle of its review while adding that this “does not mean NATO only.”⁷⁸ The Alliance has built the scaffolding for a Europeanised continuity. At The Hague in June 2025 allies agreed to spend five percent of GDP by 2035, three and a half points on core defence and up to one and a half on resilience and infrastructure, with a review in 2029.⁷⁹ That headline followed

76 Secretariat-General for National Defence and Security (SGDSN), National Strategic Review 2025, (Paris: SGDSN, 2025), pp. 6, 30, 51-53; Ministry of Defence (Belgium), STAR Plan (Brussels: Ministry of Defence, 2022), p. 20

77 Ministry of Defence (Czech Republic), Czech Armed Forces Development Concept 2035 (Prague: Ministry of Defence, 2023), p. 15; Ministero della Difesa, “Documento Programmatico Pluriennale della Difesa per il triennio 2025-2027,” Rome: Ministero della Difesa, 2025, p. 16; Ministry of Defence (Latvia), National Defence Concept (Riga: Ministry of Defence, 2023), pp. 13–14.

78 Ministry of Defence (UK), Strategic Defence Review 2025 (London: Ministry of Defence, 2025), p. 4.

79 North Atlantic Treaty Organization, The Hague Summit Declaration, 25 June 2025, <https://www.nato.int/en/about-us/official-texts-and-resources/official-texts/2025/06/25/the-hague-summit-declaration>, (Accessed, 25.06.2026); NATO, “Defence Expenditures and NATO’s 5% Commitment,” <https://www.nato.int/en/what-we-do/introduction-to-nato/defence-expenditures-and-natos-5-commitment>, (Accessed, 25.06.2026)

the Washington summit a year earlier, where more than two thirds of allies had already reached the older two percent floor.⁸⁰ German Defence Minister Boris Pistorius captured the bargain behind the numbers, arguing that “in order to keep NATO transatlantic, it is necessary to make it more European,” and that “we Europeans have to contribute the lion’s share to conventional deterrence and defence in Europe.”⁸¹ The weakness of this path is that the American half of the deal is thinning even as Europe pays in. In October 2025 Washington declined to replace a rotational brigade on NATO’s eastern flank in Romania, cutting its presence there by several hundred troops.⁸² Even the pledge is softer than it looks, since the target runs to 2035, carries a review in 2029, and already saw Spain secure an exemption.⁸³ The risk is real enough that the European Council on Foreign Relations now urges allies to prepare for American abandonment within the five-to-seven-year window in which it judges the danger of Russian aggression to be highest.⁸⁴ Continuity, in other words, asks Europe to underwrite an Alliance whose guarantor is quietly stepping back, and Germany’s own strategy concedes the point when it frames its build-up as a way to “lighten the burden on the United States.”⁸⁵

European Backbone

The second answer does not wait on Washington. It tries to build the backbone Europe has always rented from the United States, and it runs along two tracks. The first is the European Union. France is its engine, casting the pres-

80 NATO, Washington Summit Declaration, 10 July 2024, <https://www.nato.int/en/about-us/official-texts-and-resources/official-texts/2024/07/10/washington-summit-declaration> (Accessed, 25.06.2026).

81 Boris Pistorius, keynote remarks, Munich Security Conference 2025, Federal Ministry of Defence (BMVg), February 2025, <https://www.bmvg.de/en/news/strengthening-nato-s-eastern-flank-means-strengthening-us-5586724> (Accessed, 25.06.2026).

82 Jen Judson, “The US Draws Down Some Troops on NATO’s Eastern Flank,” Defense News, 29 October 2025, <https://www.defensenews.com/global/europe/2025/10/29/the-us-draws-down-some-troops-on-natos-eastern-flank/>; Emily Rauhala and Kate Brady, “U.S. to Withdraw Some Troops from Romania, NATO’s Eastern Flank,” Washington Post, 29 October 2025, <https://www.washingtonpost.com/world/2025/10/29/romania-nato-us-troops-withdrawal/> (Accessed, 25.06.2026).

83 Atlantic Council, “Experts React: NATO Allies Agreed to a 5 Percent Defense Spending Target,” New Atlanticist, 25 June 2025, <https://www.atlanticcouncil.org/blogs/new-atlanticist/experts-react/nato-allies-agreed-to-a-5-percent-defense-spending-target-in-a-low-drama-summit-now-what/> (Accessed 25.06.2025).

84 European Council on Foreign Relations, Making Defence European Again (London: ECFR, 2025), <https://ecfr.eu/publication/making-defence-european-again/> (Accessed 25.06.2025).

85 Federal Ministry of Defence (Germany), Military Strategy (Berlin: BMVg, 2026), p. 20.

ent as a rupture and demanding “a clear ambition to prioritize European-made solutions, an approach that France will continue to promote across all instruments aimed at building Europe’s strategic autonomy,” with a declared “European preference” in procurement.⁸⁶ The Netherlands translates the same idea into industry, defining its role as a contribution to “an increased European strategic autonomy in security and Defence.”⁸⁷ Brussels has supplied the machinery. The 2022 Strategic Compass created a rapid deployment capacity of up to five thousand troops, and in March 2025 the Commission’s Readiness 2030 plan promised to mobilise close to €800billion, anchored by a €150billion loan instrument called SAFE.⁸⁸ The industrial targets that follow are the real measure of autonomy, asking member states to buy half of their equipment inside Europe and to procure 40% of it together by 2030.⁸⁹ The difficulty is the distance between this framework and the behaviour beneath it. By the Commission’s own account, around 78% of the equipment EU states bought in the first 16-months after the invasion came from outside the Union, 63% of it from the United States, and longer arms transfer data shows American suppliers providing some 64% of European NATO imports across 2020 to 2024.⁹⁰ The cause is a fractured base. Europe fields more than a 170 separate weapons systems against roughly 30 in the United States, which leaves it without the scale to produce necessary

86 SGDSN, *National Strategic Review 2025* (Paris: SGDSN, 2025), p. 7, 30; Ministry of the Armed Forces (France), *Actualisation de la Loi de programmation militaire 2024–2030* (Paris: Ministère des Armées et des Anciens combattants, 2026), p. 12.

87 Ministry of Defence (Netherlands), *Defence Strategy for Industry and Innovation (D-SII) 2025–2029* (The Hague: Ministry of Defence, 2025), p. 4, 10.

88 European External Action Service, *A Strategic Compass for Security and Defence*, March 2022, https://www.eeas.europa.eu/eeas/strategic-compass-security-and-defence-1_en (Accessed 25.06.2025); European Commission, “Commission Unveils the White Paper for European Defence and the ReArm Europe Plan/Readiness 2030,” press release IP/25/793, 19 March 2025, https://ec.europa.eu/commission/presscorner/detail/en/ip_25_793 (Accessed 25.06.2025)

89 European Commission, *European Defence Industrial Strategy (EDIS) factsheet*, 5 March 2024, https://defence-industry-space.ec.europa.eu/eu-defence-industry/edis-our-common-defence-industrial-strategy_en (Accessed 25.06.2026); European Parliamentary Research Service, *European Defence Industrial Strategy briefing*, EPRS_BRI(2024)762402, [https://www.europarl.europa.eu/RegData/etudes/BRIE/2024/762402/EPRS_BRI\(2024\)762402_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2024/762402/EPRS_BRI(2024)762402_EN.pdf) (Accessed 25.06.2026)

90 “Bolstering European Defense in an Era of US Retrenchment: Insights from the Draghi Report,” *Georgetown Journal of International Affairs*, 9 April 2025, <https://gjia.georgetown.edu/2025/04/09/strengthening-european-defense-in-an-era-of-us-retrenchment-insights-from-the-draghi-report/> (Accessed 25.06.2026); SIPRI, *Trends in International Arms Transfers, 2024*, March 2025, https://www.sipri.org/sites/default/files/2025-03/fs_2503_at_2024_0.pdf (Accessed 25.06.2026)

equipment in required volumes.⁹¹ An integrated single market for defence, is one of the missing condition, and without it the new money keeps leaking abroad.⁹² The contradiction is sharpest in the SAFE fund itself, whose largest single recipient at roughly forty four billion euros is Poland,⁹³ much of whose record buying runs to American and South Korean platforms already under contract.⁹⁴ But even when European's work together, the result is often failure. A series of Franco-German collaboration have either failed or are on the brink of failure.⁹⁵ The scale of the effort is not in doubt. But European autonomy is funded and written down, yet it remains an industrial promise for the 2030s rather than a capability available today.

The Coalition of the Willing

The second track of self-reliance is faster and looser. Where the Union moves by consensus, smaller groups of the willing able act, and they are convened mostly from London. The British review makes this an explicit design, embracing “minilateral activity, including through the Joint Expeditionary Force, E3, and E5 formats,” and treating the ten-nation Joint Expeditionary Force as a “capable and willing coalition” for the north.⁹⁶ Britain has kept the format active, running its largest Joint Expeditionary Force exercise across the Nordic and Baltic states in 2025.⁹⁷ The bilateral scaffolding is

91 European Commission, “The economic impact of higher defence spending”, European Commission, May 2025, https://economy-finance.ec.europa.eu/economic-forecast-and-surveys/economic-forecasts/spring-2025-economic-forecast-moderate-growth-amid-global-economic-uncertainty/economic-impact-higher-defence-spending_en (Accessed 25.06.2026)

92 Mario Draghi, The Future of European Competitiveness (European Commission, September 2024), summarised in “Europe’s Fragmented Defence Industry Needs Coordination to Avoid Supply Crisis-Draghi Report,” Euronews, 11 September 2024, <https://www.euronews.com/my-europe/2024/09/11/europes-fragmented-defence-industry-needs-coordination-to-avoid-supply-crisis-draghi-repor> (Accessed 25.06.2026).

93 “Poland Allocated Largest Share of New EU Defence Programme, with €44bn in Loans,” Notes from Poland, 9 September 2025, <https://notesfrompoland.com/2025/09/09/poland-allocated-largest-share-of-new-eu-defence-programme-with-e44bn-in-loans/> (Accessed 25.06.2026).

94 International Institute for Strategic Studies, “Europe’s Defence Procurement since 2022: A Reassessment,” October 2024, <https://www.iiss.org/online-analysis/military-balance/2024/10/europes-defence-procurement-since-2022-a-reassessment/> (Accessed 25.06.2026).

95 Andreas Noll, “Failed joint jet project spotlights Europe’s defense dilemma”, DW, June 2026, <https://www.dw.com/en/failed-joint-jet-project-highlights-europes-defense-dilemma/a-77572732> (Accessed 25.06.2026)

96 Ministry of Defence (UK), Strategic Defence Review 2025 (London: Ministry of Defence, 2025), p. 15, 75.

97 “TARASSIS draws to a close,” Joint Expeditionary Force, 2025, <https://jefnations.org/2025/10/24/tarassis-draws-to-a-close/> (Accessed 25.06.2026)

dense. Through a formal Security and Defence Partnership with the European Union in May 2025, Britain was offered a route back into continental defence after Brexit, while Sweden and Finland deepened Nordic cooperation now that both sit inside the Alliance.⁹⁸ The most visible product is the coalition assembled around Ukraine, co-led by Britain and France from a joint headquarters and designed as a reassurance force for any ceasefire.⁹⁹ The coalition has been candid that the force leans on Washington, pressing the United States for an air and intelligence backstop.¹⁰⁰ Türkiye anchors the coalition's maritime component, leading it from a command in Istanbul, astride a Black Sea no Western European force can reach without it.¹⁰¹ But this coalition overall still leans on American enabling for strategic lift, the suppression of enemy air defenses, intelligence and munitions, so a European force without an American backstop remains thin, and the spread of overlapping groups risks the very fragmentation it is meant to escape.

The Nuclear Ceiling

Beneath both answers sits a guarantee Europe has never had to supply for itself. NATO still rests its ultimate security on American strategic forces, which its concept calls “the supreme guarantee of the security of the Alliance.”¹⁰² The doubt is no longer about capability but about credibility, a doubt sharpened by an American administration whose commitments allies find harder to predict,¹⁰³ and Europe has begun, carefully, to fill the

98 European External Action Service, “Security and Defence: EU and UK Conclude a Security and Defence Partnership,” 19 May 2025, https://www.eeas.europa.eu/eeas/security-and-defence-eu-and-uk-conclude-security-and-defence-partnership_en (Accessed 25.06.2026); Government of Finland / Ministry of Defence, Government Defence Report (Helsinki: Ministry of Defence, 2024), 24.

99 Centre for Eastern Studies (OSW), “The Coalition of the Willing on Security Guarantees for Ukraine,” 14 July 2025, <https://www.osw.waw.pl/en/publikacje/analyses/2025-07-14/coalition-willing-security-guarantees-ukraine-less-ambitious-more> (Accessed 25.06.2026)

100 The German Marshall Fund, “Coalition of the Willing,” May 2025, <https://www.gmfus.org/news/coalition-willing> (Accessed 25.06.2026)

101 Ragıp Soylu, “Türkiye Edges Closer to Leading Black Sea Mission under Ukraine Security Guarantees,” Middle East Eye, 2025, <https://www.middleeasteye.net/news/turkey-edges-closer-black-sea-mission-under-ukraine-security-guarantees>. (Accessed 25.06.2026)

102 North Atlantic Treaty Organization, NATO 2022 Strategic Concept, Madrid, 29 June 2022, p. 8.

103 Zuzanna Gwadera, “US allies question extended deterrence guarantees, but have few options”, International Institute for Strategic Studies, March 2025, <https://www.iiss.org/online-analysis/military-balance/2025/03/us-allies-question-extended-deterrence-guarantees-but-have-few-options>

space. France's strategic review repeats that French vital interests now carry a European dimension, records a March 2025 offer of a strategic dialogue on protecting European allies, and keeps the decision to launch in French hands alone while ruling out tactical use, and its programming law confirms that the arsenal will be enlarged.¹⁰⁴ Britain has moved in parallel, committing fifteen billion pounds to a new sovereign warhead, keeping its deterrent assigned to NATO, and binding itself to France through a 2025 declaration that "there is no extreme threat to Europe that would not prompt a response by our two nations."¹⁰⁵ The political demand is rising. Chancellor Friedrich Merz has said Germany must "have discussions with both the British and the French about whether nuclear sharing, or at least nuclear security from the UK and France, could also apply to us,"¹⁰⁶ and Poland's prime minister has spoken of "seriously talking to the French about their idea of a nuclear umbrella over Europe."¹⁰⁷ Yet the ceiling is low. France and Britain hold roughly two hundred and ninety and two hundred and twenty five warheads against a Russian deployed strategic force of nearly 1,700, they lack the shorter range options the Americans field, and neither will surrender the trigger, which leads analysts to conclude that the two cannot fully replace the American umbrella in the near term.¹⁰⁸ A European deterrent is a hedge, not a replacement for the guarantee whose weakening called it into being.

104 SGDSN, National Strategic Review 2025 (Paris: SGDSN, 2025), p. 35-36

105 Ministry of Defence (UK), Strategic Defence Review 2025 (London: Ministry of Defence, 2025), p. 9, 41; Government of the United Kingdom, "Northwood Declaration: 10 July 2025 (UK–France Joint Nuclear Statement)," GOV.UK, <https://www.gov.uk/government/news/northwood-declaration-10-july-2025-uk-france-joint-nuclear-statement>.

106 Linus Höller and Rudy Ruitenberg, "Germany Won't Build Nukes but Could Flash French, UK Weapons to Deter Foes, Merz Says," Defense News, 18 February 2026, <https://www.defensenews.com/global/europe/2026/02/18/germany-wont-build-nukes-but-could-flash-french-uk-weapons-to-deter-foes-merz-says> (Accessed 25.06.2026)

107 Poland Declares Interest in French Nuclear Deterrent – or Even Developing Its Own," Notes from Poland, 10 March 2025, <https://notesfrompoland.com/2025/03/10/poland-declares-interest-in-french-nuclear-deterrent-or-even-developing-its-own/> (Accessed 25.06.2026)

108 Astrid Cgereuil and Doreen Horschig, "Can France and the United Kingdom Replace the U.S. Nuclear Umbrella?," CSIS, 2025, <https://www.csis.org/analysis/can-france-and-united-kingdom-replace-us-nuclear-umbrella> (Accessed 25.06.2026)

From Stack to Strategy

The architecture actually emerging is a stack rather than a choice. NATO remains the legal and planning frame, the Union strains to build the industrial base beneath it, coalitions of the willing supply the muscle the larger bodies cannot move quickly, and a Franco-British nuclear pairing lifts the threshold under all of it. The phrase that will travel to the Ankara summit, a stronger Europe in a stronger NATO, describes this layering rather than a slogan. But the capacity ledger sets the terms, and on present trajectory the honest answer to the question that frames this chapter is dependence. The instruments of autonomy are real and growing, yet the money still flows to American factories, the coalitions still need American enablers, and the nuclear hedge cannot yet stand alone. The realistic aim is not full autonomy but a managed reduction of dependence, pursued while the American backstop still holds and while the warning window, which European intelligence services place around the end of the decade, remains open. The Ankara Summit will be a test of European-American Dependence and Strategic Autonomy.

CONCLUSION: WHAT ANKARA WILL ACTUALLY TEST

Three findings run through this report, and none of them reduce to the comfortable story of a Europe rallying behind a common threat. The first is that the apparent continental consensus on Russia, visible in the surface-level reading of post-2022 strategy documents, dissolves on closer examination into three distinct sub-regional security complexes. Finland and Estonia treat a Russian conventional attack as a matter of operational planning, not strategic abstraction. Germany and Denmark frame the same threat as a systemic challenge to be managed through deterrence institutions. Italy and Spain barely register it as a primary concern, focusing instead on migration pressure, Sahel instability, and Mediterranean access. These are not minor differences in tone. They translate directly into competition over how NATO and the EU allocate resources, which capabilities get prioritized and whose threat perception sets the collective agenda.

The second finding is that threat perception, on its own, explains relatively little about what European states actually build. Economic weight and industrial capacity are the binding constraints. Latvia, sitting on the eastern flank with a defence budget near 3,5% of GDP, maximizes everything it can mobilize.

Germany, with far greater resources but lower existential exposure, builds breadth without urgency. Luxembourg, small and geographically sheltered, does not attempt mass at all. The capacity axis sets the ceiling; the intensity of perceived threat determines how hard a state pushes toward it. This pattern holds across the full range of documents examined, from the Bundeswehr's detailed expansion targets to Norway's maritime-first posture to Belgium's rebuilding from an expeditionary baseline.

The third finding is the most consequential for what happens in Ankara. The collective architecture Europe is assembling, NATO continuity reinforced by EU industrial ambition and UK-led minilateral coalitions, is a stack of overlapping instruments rather than an integrated strategy. Each layer addresses a real gap: the Alliance provides the legal and planning frame; the EU's SAFE instrument and EDIS targets are meant to build the industrial base; the Joint Expeditionary Force and the Ukraine reassurance coalition provide operational mobility. But the layers do not reinforce each other cleanly. The SAFE fund's largest recipient, Poland, is spending a disproportionate share on American and South Korean platforms. The coalitions of the willing still require American strategic lift, intelligence, and air defence suppression to function. The Franco-British nuclear pairing, a genuine development, covers roughly 515 warheads combined against a Russian strategic force of nearly 1,700, and neither Paris nor London will surrender the firing decision. At every layer, the rhetoric of autonomy runs ahead of the procurement data.

The table below distils the full dataset across twelve countries. Read column by column, it shows how threat cluster, force model, and declared capability priorities map onto each state's dependence on American enablers and its stated trajectory toward autonomy. The pattern is not random. States in the Russia-primary cluster tend toward more urgent force expansion but remain structurally dependent on US intelligence and air defence networks. Broad-spectrum states, led by France, are the most ambitious in autonomy claims but also the most invested in preserving the nuclear backstop they themselves would need to replace. The picture that emerges from the table is not a continent moving toward strategic independence. It is a continent negotiating the terms of a more equitable dependence.

TABLE 1: EUROPEAN DEFENCE POSTURES; THREAT CLUSTER, FORCE MODEL, AND AUTONOMY TRAJECTORY

Country	Threat Cluster	Force Model	Key Capability Priority	US Dependence	Autonomy Trajectory
Germany	Russia-primary	Full-spectrum (rebuilding)	Long-range strike, IAMD	High (procurement)	Europeanisation within NATO
United Kingdom	Broad-spectrum	Full-spectrum (NATO-first)	SSN-AUKUS, GCAP, LRW	High (enablers)	Minilateralism + nuclear role
France	Broad-spectrum	Full-spectrum (autonomous)	Nuclear, deep strike, drones	Low (preference)	Strategic autonomy driver
Italy	Broad-spectrum/South	Full-spectrum (Med-oriented)	Seabed infra, IAMD, deep strike	Moderate	Mediterranean framework nation
Finland	Russia-primary	Total defence + conscription	F-35, corvettes, long-range fires	Moderate	Nordic-Baltic integration
Sweden	Broad-spectrum	Total defence + conscription	Mechanized brigades, rocket arty	Moderate	Nordic-Baltic integration
Norway	Russia-primary	Total defence (maritime-led)	ASW frigates, submarines, LRPG	High (ISR backstop)	NATO anchor, Arctic focus
Netherlands	Russia-primary	Professional (rebuilding)	Tech/industrial, tank bn, F-35	High (procurement)	Industrial autonomy emphasis
Belgium	Broad-spectrum	Professional (rebuilding)	Layered AD, F-35, mot. brigade	High	European pillar within NATO
Czechia	Russia-primary	Professional (conscription debate)	Mech. brigade, IAMD, UAS	Moderate-high	Transit/reception hub
Latvia	Russia-primary	Maximalist / total defence	Air def, coastal def, MRL	Critical	Allied forward presence demand
Luxembourg	Broad-spectrum	Niche enabler	ISR, med. teams, cyber, space	High (structure)	Multilateral frameworks only

Source: Authors' compilation based on national security and defence strategy documents (2022–2026). AD = Air Defence; IAMD = Integrated Air and Missile Defence; LRW = Long-Range Weapons; MRL = Multiple Rocket Launcher; UAS = Unmanned Aerial Systems; LRPG = Long-Range Precision-Guided munitions; ASW = Anti-Submarine Warfare.

What does all this mean for Ankara? The summit arrives at a moment when the gap between Europe's declaratory ambitions and its material capacity is wider than at any point since the Cold War. The 5% GDP spending target agreed at The Hague in June 2025 is a political achievement, but

it carries a 2035 deadline, a 2029 review, and an immediate exemption for Spain. Meanwhile, Washington quietly withdrew a rotational brigade from Romania in October 2025, signaling that American retrenchment is already underway rather than merely threatened. European intelligence assessments place the Russian conventional threat window around the end of this decade, precisely when the Hague spending targets are still years from being met.

The honest assessment is that Ankara will not resolve this tension. No single summit can convert fragmented national postures into a unified strategic vision, harmonize the procurement patterns that keep sending European money to American factories, or persuade France and Britain to share the nuclear trigger. What the summit can do is set the terms on which managed dependence proceeds: which European capabilities get resourced first, which US enablers remain indispensable for how long, and whether the Alliance finds bridge mechanisms that can hold its three security clusters, the existential East, the asymmetric South, and the full-spectrum West, within a single political frame.

That last task, building the bridging capacity across divergent threat perceptions, is in practice a political and diplomatic challenge as much as a military one. The states that can perform this function, holding the Russian-primary and southern-flank clusters in dialogue without reducing the collective agenda to either, are the alliance's most important operational asset heading into this summit. Whether Ankara produces the institutional scaffolding to support them or simply issues another communiqué of convergent language masking persistent divergence, will determine more about Europe's security trajectory than any single capability announcement.

ALİ MURAT KURŞUN

Ali Murat Kurşun is an Assistant Professor in the Department of International Relations at the Faculty of Political Sciences, Marmara University. He completed his Ph. D. in the Department of International Politics at Aberystwyth University. His research focuses on international society, the Middle Eastern regional order, and Turkish foreign policy.

MEHMET SALAH DEVRİM

Mehmet Salah Devrim is a Research Assistant at the SETA Foundation, where he focuses on security, defense industry, and terrorism studies. With a strong background in international relations, his areas of expertise include Turkish unmanned aerial vehicles (UAVs), open-source intelligence (OSINT), Turkish counterterrorism operations in Iraq and Syria, and data-driven policymaking. Between 2022 and 2023, Mehmet Salah Devrim was part of the Terrorism Analysis Platform Team (Terörizm Analiz Platformu ekibi), where he contributed to research and data-driven insights on security issues. He earned both his bachelor's and master's degrees in international relations from Antalya Bilim University in Antalya, Türkiye. His master's thesis explored the impact of revolutions in military affairs on warfare and international relations. Currently, he is pursuing a PhD in International Relations at the Social Sciences University of Ankara (Ankara Sosyal Bilimler Üniversitesi). Through his work, Mehmet aims to advance evidence-based security policies and contribute to a deeper understanding of evolving defense and counterterrorism strategies.

EUROPEAN SECURITY AT A CROSSROADS: Diverging Threats, Military Realities, and NATO 2026

ALİ MURAT KURŞUN, MEHMET SALAH DEVRİM

As the rules-based order erodes and transatlantic ties strain, European states approach the NATO summit in Ankara of July 2026 burdened by fragmented threat perceptions and severe deficits in industrial scale and military manpower. This report asks a single question: what do European states fear in a fragile global system, how are those fears shaped along geographical fault lines, and how far do national military responses match them once economic weight and industrial capacity are taken into account. Working from a corpus of post-2022 national security and military and defence strategy documents, read wherever possible in their original languages and supplemented by official statements, the report converts declared threats and capability commitments into data and visualizes them. It finds that the apparent continental consensus on Russia dissolves, on closer reading, into three sub-regional security complexes: a Russia-focused East, a societal and transnational South preoccupied with migration and instability, and a broad-spectrum group of larger powers. Translated into force structure, these perceptions are constrained less by fear than by capacity, dividing the continent between full-spectrum ambition, whole-of-society total defence, and niche specialization. At the level of architecture, procurement patterns and the limits of the Franco-British nuclear pairing point not to full strategic autonomy but to a managed reduction of dependence on the United States. Europe's central task before Ankara is to convert this fragmented threat matrix into a coherent strategic vision.