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Defence : From Strategic Dependence to European Military Autonomy ?

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Given that Europeans do not get to vote in US federal elections, and European governments are having less and less influence over the direction of strategy in Washington, they need to reset their strategic mentality. Along with the long-standing military dependency on the US has come, for many Europeans, an intellectual dependency on Washington. The cost of Europe's outsourcing of its defence to America, apart from the industrial damage it has caused, is a laziness and cautiousness in strategic affairs. Those US officials and commentators who are tired of Europe's dependency are right, even if they find the prospect of losing defence contracts to European competitors worrying . It will take time for Europeans to develop their own strategic awareness, but the early signs are that Europe is heading in this direction. There are grounds for optimism, with defence industries boosting manufacturing, more capabilities filling military inventories and defence investment at a new high.

This article is part of the project launched by the Observatoire Europe whose director is Bruno Dupré.

THE DEBATE on Europe's dependence on the United States (US) often begins with defence spending. This is misleading. European allies collectively spend well over €400 billion annually on defence and have announced substantial increases since Russia's full-scale invasion of Ukraine. The central issue is not primarily one of defence expenditure, even if the US president insists it is, but of military dependence. Europeans continue to rely on the US for the capabilities that enable modern joint operations, the industrial capacity needed to sustain prolonged conflict and much of the command architecture that underpins collective defence in Europe. This dependency is being questioned in a context where the US is actively handing primary responsibility for conventional defence to Europe. This comes in a context where the US administration has, in the recent past, threatened to seize Greenland and is assessing how far to reduce its military forces in Europe.

Clearly, transatlantic trust is at an all-time low, and Europeans are questioning the unquestioning faith they had in the US in the past. Europeans remained steadfast in their opposition to the US war on Iran in 2026, but this only led to the accusation that Europeans were unreliable allies, not least because many allies denied the US the use of the airspace needed to conduct bombing runs on Iran. And in the case of the subsequent closure of the Strait of Hormuz, we see Europeans nevertheless bearing the brunt of energy costs and energy supply gluts because of US military action that Europe wants no part of, even if many European governments have underlined their opposition to the regime in Iran. Nevertheless, Europeans appear to be at the receiving end of decisions that they had no part in formulating.

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Europe is in a peculiar situation. On the one hand, Washington has made it abundantly clear that it expects Europe to take up "primary responsibility" for Europe's conventional defence. Europeans seem to have made their peace with this proposition, not least because many Europeans understand that it is in their direct national security interests to do so. Yet, even with this mammoth task ahead of them, many European governments exhibit an undiminished faith that the US will nonetheless indefinitely support European defence. This appears to be the case even though the US has made force drawdowns in Europe, and has delayed and/or cancelled Tomahawk, Patriot and HIMARS deliveries to Europe in 2026. Still, as long as Europeans believe that the US will always be there for them, as the NATO Summit *communiqué* of July 2026 indicated with its reference to the "ironclad" commitment to Article 5, the case for more European military autonomy will struggle to find its place.

On the other hand, there is a troubling political undercurrent in US strategy and domestic politics. At the service level, life appears to go on as before. European military planners still work alongside their American counterparts in NATO and EUCOM, where they each invest considerable effort into continuing to deter Russia. Although here, recent comments by SACEUR on his theory of victory in case Russia attacks Europe – through a "block, blunt, break" strategy – raise questions about NATO's (and more importantly the US') appetite for nuclear escalation, in case it is warranted, as the theory is about denying territory and holding Russia rather than controlling escalation dominance. At the political level, however, all is not well. The truth is that the US federal government struggles to speak with a coherent voice, and perhaps the cacophony of ideas streaming from Washington – sometimes on a daily or even hourly basis – is designed to keep Europeans on their toes.

Some parts of the current administration appear to have a civilisational grudge or hatred of Europe : this partly explains US tariff policy towards the EU and its dislike of European digital regulation (recall that the EU was once dubbed "a foe" by President Trump). In defence and strategy, the way the US oscillates between "realism" and "ideology" is a cause of concern for the future of NATO and European security. Realism holds the precept that the US may, at a time of its choosing based on competing interests elsewhere, decide not to support the defence of Europe. A more ideological stance would come to the same conclusion, but it would dress it up as a demonstration of "American

First" principles and the supposedly inherent civilisational weakness of Europe. American realism and ideology should lead to the same conclusion for Europeans : the US security guarantee is only a security guarantee as long as the US wants to guarantee security for Europe.

What can Europe make of this turbulent situation ? In one sense, some European leaders have found an albeit shallow solution : genuflect in front of President Trump and hope he is distracted from disruptive ideas. This may work with President Trump, given his personality, but future presidents may see through these cheap and oftentimes cringeworthy displays of supplication. This paper argues that Europe's only option in the current transatlantic climate is to build its own military autonomy. This may appear to be a somewhat self-evident aim. However, in calling for more European military autonomy, we include not only the conventional capability or industrial dimensions but also a reference to Europe's overall security architecture.

Operational dependence

The first challenge for Europe's military autonomy concerns operational dependence. NATO remains the cornerstone of European collective defence, but the Alliance's military effectiveness still depends disproportionately on American assets and politics. This dependence is particularly acute in intelligence, surveillance and reconnaissance (ISR), strategic airlift, aerial refuelling, integrated air and missile defence, electronic warfare, cyber capabilities and space-based services. These capabilities allow forces to deploy, communicate, identify targets and sustain operations. Without them, European combat formations collectively become significantly less effective regardless of the number of personnel or platforms available.

Some today speak of developing a "European Way of War" or the idea that Europeans would not defend Europe or fight Russia as Americans would. In this sense, the Europeans would need to find their own distinct way of deterring Russia. Here, the objective should not be to replicate every American capability. Such an ambition would be financially unrealistic and strategically unnecessary. Rather, Europeans should identify those operational functions that they would need to conduct a major military operation in Europe if US military support were delayed, reduced or prioritised elsewhere. This functional approach shifts attention away from headline capability targets towards the enablers that determine whether European forces can actually fight. Europe should prioritise four capability areas.

First, Europe requires substantially greater strategic enablers. Additional heavy airlift, aerial refuelling aircraft, logistics hubs, ammunition stockpiles and military mobility infrastructure would significantly improve Europe's capacity to reinforce Europe's Eastern Flank without relying almost exclusively on American support. The issue is not only deployment but sustainability. European forces must be capable of maintaining operations over extended periods without depending on US logistics and supplies. To be fair, Europe has already started to fund such infrastructure, especially in terms of military mobility and the transport networks needed to facilitate movements of military equipment and troops. What it requires, sooner rather than later, is increased contracts for systems such as the A400M and A300 MRTT to enhance Europe's air-to-air refuelling and air transport capabilities.

Second, Europeans require a more autonomous intelligence architecture. Considerable progress has been made through NATO intelligence structures and national investments, yet dependence on US satellite imagery, strategic intelligence and space-based services remains substantial. European governments should accelerate investment in sovereign satellite constellations, secure communications, intelligence fusion centres and space surveillance capabilities. Here, the objective is to ensure that intelligence gathering and political decision-making in Europe are not constrained

by the (un)availability of US assets. The idea for a sovereign European “combat cloud” should be pursued at speed, as modern warfare requires an ability to source, manage and operationalise data. Whether the “combat cloud” being developed as a strand of the failed FCAS project can be salvaged remains to be seen, but Europe does need its own sovereign digital backbone.

Third, integrated air and missile defence has become one of Europe’s most urgent military priorities. Russia’s extensive use of missiles and drones against Ukraine demonstrates that territorial defence increasingly depends upon layered air defence systems capable of countering ballistic missiles, cruise missiles and unmanned systems simultaneously. Existing European initiatives – including the German-led European Sky Shield Initiative – represent useful starting points, but they remain fragmented, and procurement decisions continue to be driven largely by national requirements. Greater interoperability, common procurement and joint maintenance arrangements would produce both military and industrial benefits. In this regard, the French-led “Integrated Anti-Ballistic Missile Coalition” may stand a better chance of bringing together Europe’s industrial base and research and operational experience, because it does not seek to reinforce a technological dependence on non-European missile systems.

Fourth, Europe must improve its capacity for command and control (C2) and operational planning. NATO’s command structure may remain indispensable for collective defence, but Europeans should possess sufficient C2 and operational autonomy capable of planning and conducting large-scale operations within the European theatre. This is particularly important for scenarios in which the United States chooses to support Europe without leading military operations directly. The aforementioned “combat cloud” could be one important element of a more sovereign European C2 structure, but C2 relies on more than just data fusion capabilities. It must additionally rely on secure communications and trained personnel. Any European sovereign C2 structure must be defined in terms of a context in which NATO and SHAPE become politically paralysed.

Finally, while the US has flagged the need for Europeans to focus on taking “primary responsibility” for conventional defence, one cannot so easily neglect the nuclear dimension – not least because the nuclear and conventional dimensions are interlinked in deterrence. This is the most sensitive aspect of calls for European military autonomy, because many European allies rely on US nuclear forces as the genuine aspect of deterrence that lies behind Article 5. Still, even here, the French president has launched an interesting nuclear initiative called “Forward Deterrence”, whereby French sovereign nuclear forces could be stationed in other European countries to enhance Europe’s overall deterrence posture and complicate the strategic calculations of Europe’s adversaries. While France’s nuclear forces will remain fully sovereign and subject to France’s nuclear doctrine, the interest from other European allies (including Germany) to develop this “archipelago of forces” is extremely timely.

Industrial dependence

Reducing Europe’s military dependence also requires Europeans to address their defence industrial weaknesses. The war in Ukraine has demonstrated that modern warfare is determined not only by technological sophistication but also by industrial endurance. Production capacity, supply chains, skilled labour and manufacturing resilience have become strategic assets in their own right. For decades, European defence industries were optimised for efficiency rather than surge production. Small production runs, fragmented procurement and irregular orders led to a defence industrial base capable of producing advanced equipment, but often unable to expand output rapidly during crises. Ammunition production after 2022 exposed these structural limitations. Governments announced ambitious replenishment plans, yet industrial expansion proved slower than anticipated because firms lacked long-term demand signals, access to finance, skilled workers and secure supply

chains.

For Europe's defence sector to help meet European military needs, public authorities should therefore prioritise sustained production over isolated procurement initiatives. Multi-year procurement contracts, common demand aggregation, advance purchase commitments and coordinated stockpile planning would provide industry with the predictability required to invest in additional production capacity. Europe's objective should be to create an industrial base capable of responding rapidly during crises rather than one optimised solely for peacetime efficiency.

The EU is specifically helping in this regard with direct financial support designed to incentivise collaborative solutions between European states. More than €150 billion has already been invested by the EU into Europe's defence through loans. Using the European Defence Fund as a basis for its defence innovation efforts, and stimulating joint defence development and procurement through the European Defence Industrial Programme (EDIP) and Security Action for Europe (SAFE), will enhance European cooperation. Of course, the effectiveness of these tools requires not only the right financial ambition under the next Multi-Annual Financial Framework (MFF) (2028-2034), where the Union should invest a minimum of €100 billion in defence over the next seven years, but also genuine engagement from EU member states to develop common capabilities.

Security of supply deserves particular attention. Many critical defence systems depend upon complex international supply chains involving rare earths, energetic materials, semiconductors and specialised components sourced from outside Europe. Strategic autonomy in defence cannot realistically mean complete supply chain independence. However, it should mean identifying critical bottlenecks and ensuring that single points of failure do not undermine military readiness. European policy should therefore distinguish between acceptable commercial interdependence and strategically unacceptable dependency. Here, the EU specifically needs a more coherent strategy and approach to dual-use technologies and understanding how commercial technology supply shocks may directly affect the European defence sector.

All of this has important implications for transatlantic defence industrial trade. Many European states will still "Buy American" in the near term, but the longer term requires a "Buy European" approach based on a defence sector that can produce the equipment and technologies required of European armed forces. Procurement decisions should increasingly contribute to strengthening European industrial capacity through maintenance, production partnerships, technology cooperation and supply chain integration wherever feasible. Defence procurement should therefore be evaluated not only according to military performance but also according to its contribution to Europe's long-term industrial resilience. Keep in mind that senior US officials have repeatedly stated that Europe should develop its own defence industrial base (EDTIB).

Of course, saying that Europeans need to "Buy European" is easier said than done. While Europe's defence industry has kicked into motion since the start of the Ukraine war, the reality is that European defence firms compete with each other. When this competition leads to innovation and the best price offers, a positive dynamic can emerge. However, all too often this competition is harmful to Europe as it does not allow for sufficient economies of scale and mass. Presently, we see Germany – with its enormous fiscal space – steaming ahead to seize control of the European defence sector, which inevitably creates tensions with established defence markets, including in France. The failed FCAS project (partly) fell victim to this trend, and this episode raises doubts about whether Europeans can collaborate on future defence systems.

Political and institutional dependence

A more capable Europe also requires institutional adaptation. The respective roles of NATO and the EU have become clearer since Russia invaded Ukraine, but important ambiguities remain. NATO will likely continue to provide collective defence, military planning, force generation and deterrence against Russia, at least in a more "Europeanised NATO". The EU, by contrast, possesses regulatory, financial and industrial instruments that NATO simply does not have. The EU's comparative advantage lies in defence industrial policy, military mobility, infrastructure investment, joint procurement incentives and supply chain resilience. Yet, with a view to potentially more political turbulence in NATO, the EU should not be excluded from questions of a more demanding military nature, even though it has not traditionally had to think about European conventional defence or deterrence.

Political coordination between NATO and the EU will remain important. European governments continue to pursue defence planning primarily through national processes despite being part of NATO or the EU. The result is persistent fragmentation across procurement programmes, force structures and industrial investment. Greater defence spending alone will not resolve this problem. Without stronger coordination, Europe risks reproducing existing inefficiencies at a larger scale. National defence priorities will inevitably differ according to geography, threat perception and industrial interests. However, greater convergence around common capability priorities would improve military effectiveness while reducing unnecessary duplication. This is particularly relevant for high-cost capabilities that few European states can develop independently.

Yet talk of the need for more EU-NATO coordination perhaps misses the severity of the situation Europe finds itself in. Is NATO the most effective framework Europe has to develop its defence ? If the US leaves NATO, then perhaps NATO becomes more relevant than before : and let us consider that NATO includes important military partners such as the UK, Türkiye, Canada and Norway. If the US does leave the alliance, NATO may well be the only rational location for Europe's defensive efforts. However, what if the US does not leave NATO and uses its position to create political gridlock in the alliance ? It may decide not to fill positions earmarked for American citizens, or it may fundamentally disagree with European decisions (i.e. *vis-à-vis* Russia) and decide to enforce deadlock through non-consensus. Decision-making paralysis under such circumstances would be a catastrophe for European security.

Beyond a NATO that remains under the political control of the US, what are the other defensive frameworks available to Europeans ? One avenue is to create *ad hoc* coalitions of states. We have seen the creation of such European coalitions grow out of the war on Ukraine. *Ad hoc* arrangements allow allies to create flexible memberships, but they cannot substitute for integrated C2, and there is no guarantee that they will be militarily successful in multi-domain operations. The EU is the other avenue. True, the immediate dilemma is that the Union is not nimble enough and is constrained by the principle of unanimity. Still, the benefit of working through the Union is that a more integrated defence planning system could be created, unifying military planning with industrial planning and the full gamut of the EU's security apparatus (i.e. cyberdefence, critical infrastructure, civil protection, etc.). Whichever framework is selected, the fundamental requirement is that Europe maintains its political and military autonomy in decision-making.

Conclusion

Given that Europeans do not get to vote in US federal elections, and European governments are having less and less influence over the direction of strategy in Washington, they need to reset their strategic mentality. Along with the long-standing military dependency on the US has come, for many

Europeans, an intellectual dependency on Washington. The cost of Europe's outsourcing of its defence to America, apart from the industrial damage it has caused, is a laziness and cautiousness in strategic affairs. Those US officials and commentators who are tired of Europe's dependency are right, even if they find the prospect of losing defence contracts to European competitors worrying. It will take time for Europeans to develop their own strategic awareness, but the early signs are that Europe is heading in this direction. There are grounds for optimism, with defence industries boosting manufacturing, more capabilities filling military inventories and defence investment at a new high.

Those European governments and constituencies that somehow cling to the idea that the "old" America will return, one that will unquestionably underwrite and pay for European security, are mistaken. That old America has changed forever, regardless of the president sitting in the Oval Office. The only option is for Europe to build its own military autonomy. In the short term, we can expect continued reliance on the US defence industrial base by certain European governments. However, more and more, European suppliers are being preferred for major defence contracts : think of the AWACS replacement, moving from Boeing to Saab, Canada's decision to purchase German submarines or even Sweden's decision to buy French frigates. The European defence industry is showing signs of recovery, based on the excellence of European defence innovation, technologies and production. This is a source of pride, but one that comes with challenges.

In the short term, Europe needs to substantially acquire strategic enablers. The easier part of this equation, and one concrete first recommendation, is to continue to develop and stockpile ammunition and missiles. Here, if Europe is to develop its military autonomy, it needs to develop and produce its own missile and anti-ballistic capacities. The French-led flagship project for an anti-ballistic capability is the way to go, but it must be backed by a clear vision that insists on sovereign European capabilities. For example, the Israeli Iron Dome system is "sovereign" in that it was developed by Israel, but the Iron Dome is dependent on the US for financing and the co-production of Tamir interceptor missiles. Europe should think twice about buying into new dependencies in missile and anti-ballistic technologies simply to meet short-term operational needs. In any case, Europe has the defence technology and firms to ensure a sovereign European anti-ballistic capacity.

The second recommendation is that Europe needs a new investment plan to drastically ramp up its production and acquisition of heavy airlift and air-to-air refuelling aircraft. The conventional belief has been that, owing to Europe's geography, the short distances between Western and Eastern Europe and the ability to land planes in European airbases, it has not been necessary to scale up production of strategic aircraft. This is a false assumption. Not only does Europe need to backfill the strategic air capabilities that would be left by the US, but it needs to provide Europe's military planners with the greatest possible operational flexibility. If Europe's airbases are being targeted or struck by missile bombardment or sabotage attacks by drones, air-to-air refuelling capabilities will be a lifeline for Europe's air forces. Europe has proven its ability to cooperate in this domain through the MRTT acquisition programme, and more air tankers are on the way for 2029, but Europe should already be planning for its air transport and air tanker needs beyond this point.

A third recommendation pertains to Europe's future C2 and intelligence needs. Europe, again, has shown its collective ability to develop cutting-edge space technologies, even though Europe still lacks adequate launch capacities. Building on Galileo and Copernicus, IRIS2 should become the EU's sovereign secure communication system. Dependencies on foreign systems, as Ukraine is experiencing with its dependency on Starlink, where the CEO of SpaceX has decided to limit Ukraine's use of the satellite system during certain military operations or for ballistic surveillance, cannot be an option for Europe. A public system such as IRIS2 needs to be the future of Europe's secure communication needs, as a proliferation of national-only solutions will dilute interoperability and further fragment Europe's space economy. The same is true of a future "combat cloud" for

Europe. While the cloud element of FCAS may still be salvaged, Paris and Berlin seem lukewarm to the idea, as expressed in their joint declaration of 17 July 2026. Here, it is recommended to turn such a “combat cloud” project from a French-German one into an EU-level flagship project to be funded directly by the EU under the European Defence Industry Programme.

If Europe is to develop its military autonomy long-term, it needs to develop more flagship projects within the EU framework. Many criticise the EU for being overly bureaucratic and sluggish, and there are national fears of a power-grab by the European Commission. Most times, however, these excuses are used as cover to avoid cooperating at the European level. Working at the EU level can help set better ground rules for military projects, to avoid any reversal of previously agreed military requirements and work shares, and the Union’s unique legal framework can ensure that European-made technologies are insulated from external political pressure and technology control. The involvement of the EU can also help protect military projects from the politics of electoral cycles, where incoming governments may decide to reformulate or cancel ongoing projects. What is more, working through the EU can help create economies of scale, which may help with the demand for products once developed : over the longer term, this can help offset a dependency on exports with more internal European demand.

To make all of this work, continued investment in European defence is required. National governments need to continue to meet their obligations, but they can support and extend their efforts by cooperating at the EU level. In the short term, this is why Europe needs a minimum of €100 billion in defence over the next seven years under the Union’s next budgetary cycle. This level of ambition could bring additional benefits in the form of additional European private investment into defence, thus relieving some of the immediate fiscal pressures facing many European governments. But money is not everything. In the short term, we can expect more of the idea of a more European NATO. That is fine, so long as it is accompanied by a deep reflection on what a “European way of war” means in practice. Once Europe breaks its intellectual dependency on US military thinking, it will be better placed to understand how it might fight for its own survival, alone, if necessary.

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