Rearming Europe To Win Ukraine's Long War

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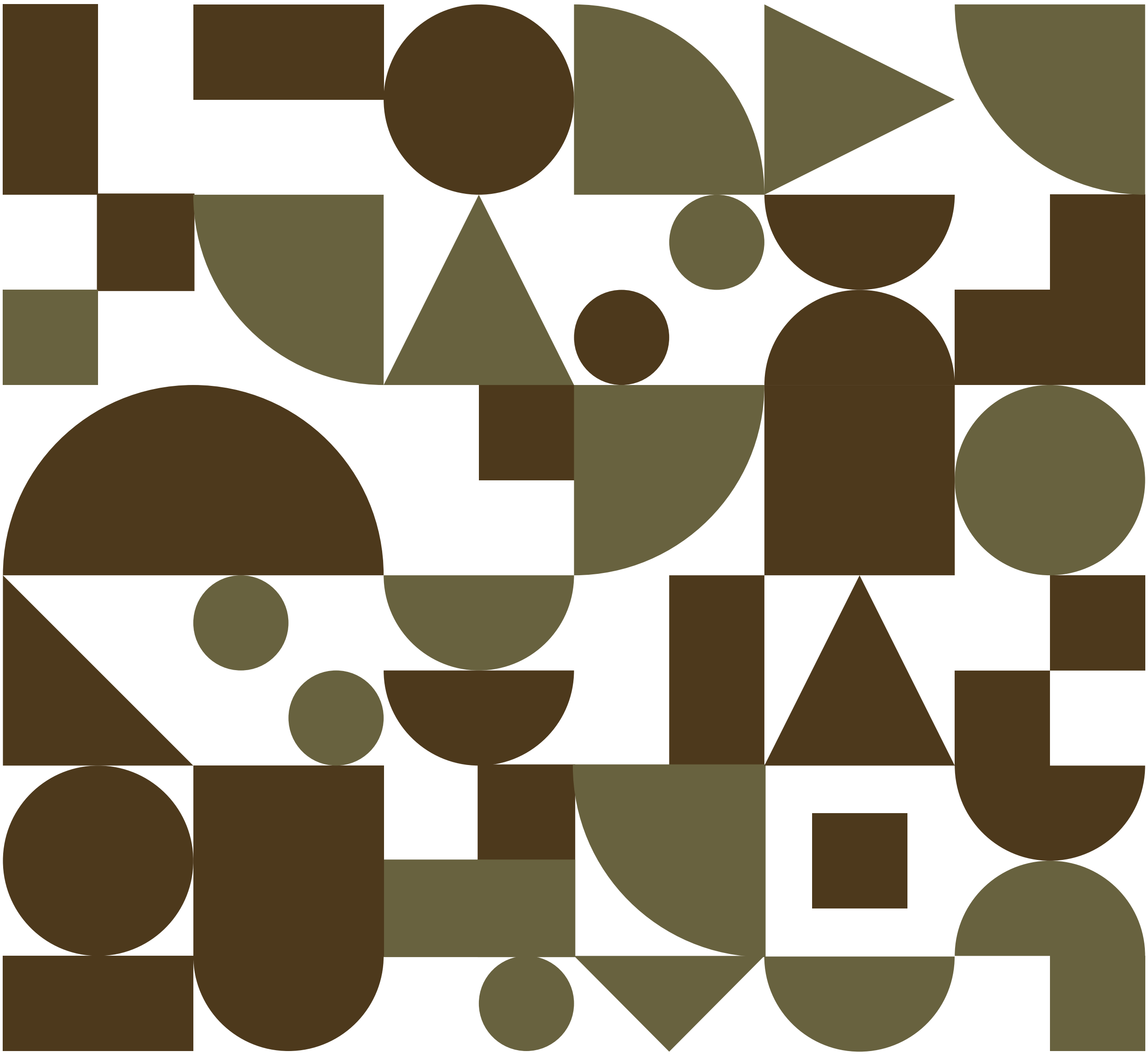

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AUTHOR
FRANÇOIS HEISBOURG

45, RUE D'ULM 75005 PARIS
LEGRANDCONTINENT.EU
GEOPOLITIQUE.EU
GEG@ENS.FR

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Rearming Europe To Win Ukraine's Long War

FRANÇOIS HEISBOURG • SENIOR ADVISOR FOR EUROPE, IISS. SPECIAL ADVISOR, FRS

Words Without Substance

Over the course of the three decades that followed the end of the Cold War, Europeans were able to believe that their security faced no external existential threat. Of course, violence was always lurking with the wars that followed the breakup of Yugoslavia and jihadist terrorism. These threats, however, could be easily dealt with – thanks to the support of the United States – without major budgetary difficulty. Across the continent, the resources dedicated to defense fell by almost a third compared with Cold War levels, to less than 2% of GDP almost everywhere.

At the dawn of the new millennium, war had become something that only happened to others: Somalians, Afghans, Iraqis, Congolese, Syrians. Europeans were involved, or not, in these distant conflicts in which the victims numbered in the hundreds of thousands. By choice, not obligation.

At the time, Europeans – the French especially – were gladly discussing common defense, battle groups and, more recently, strategic autonomy. To paraphrase the Abbé de l'Attaignant's poem, we were happy to talk about it – albeit less gracefully – without giving it substance. Not a single one of the battle groups created to much fanfare in 2006 ever saw the battlefield. Our coalition wars were generally led by the Americans or carried out within the NATO framework in the Persian Gulf, in Bosnia, Kosovo, Afghanistan, Libya, or against the Islamic State. Why should we step away from this platonic arrangement when the Americans were always there just in case? Moreover, just mentioning it was enough to raise the specter of an American withdrawal: this was evident in the horror of Madeleine Albright, Secretary of State under Clinton, when the Europeans voiced claims that, in her eyes, could lead to thorny overlaps of strategic functions and result in unacceptable discrimination to the detriment of the United States.

This Europe of grand pronouncements and little result is the world of yesterday. It should have ended at the latest in 2014 following the invasion and annexation of Crimea, a power play that threw into question the very foundations of the European security order established after the Second World War. At the time, Russia was not in a position to militarily counter a Western reaction that went beyond economic sanctions, the limits of which we were well aware. Prompt and substantial military aid to Ukraine may have dissuaded Russia from further pressing its advantage. Additionally, although we could for a time believe in the longevity of good strategic weather, storm clouds were building as early as 2007 in the wake of Putin's revisionist speech in Munich. The more clear-sighted among us were troubled by this, but without any notable tangible effects.

It would take the attempted full-scale invasion of Ukraine on February 24, 2022 for the changing era to fully emerge in all its brutality. The "trente paresseuses" of the post-Cold War era were well and truly over.

The war's three dimensions

The clash of arms that erupted on February 24, 2022 naturally focused on the Ukrainian dimension of Europe's first war between states this century. As early as July 2021, President Putin had laid out his detailed vision of the "historical unity of Russians and Ukrainians", which he reiterated in a lengthy televised address on the eve of the invasion. In this manifesto there is no place for either a Ukrainian nation or state. It is this pursuit of ultimate war that continues to underpin the objectives of Russian operations: "denazification" (the fall of the democratic Ukrainian government led by a broadly elected Russian-speaking Jew); demilitarization (no Ukrainian army); neutralization (no membership to either the European Union or NATO); recognition prior to any discussion of the annexation of one-fifth of Ukrainian territory (including, therefore, the as yet unconquered areas of the Kherson, Zaporijia and Donbass regions).

A Russian victory on this basis, with the absorption and subjugation of a country like Ukraine, would in itself alter the strategic and military balance in Europe, not to mention the effects of the likely exodus of a large portion of Ukraine's 40 million inhabitants to the Union. The invasion and annexation of sovereign states would once again become the practice it used to be throughout Europe prior to 1945.

Of course, even if victorious, Russia will at first emerge weakened by a war that will have caused massive losses, with up to 100,000 killed, and thousands of tanks. But, during the Crimean War (1853-1856), Napoleon III's France, with its modest population of 30 million, suffered comparable losses (95,000 dead). It nevertheless recovered quickly, delivering victory in Italy as soon as 1859, during which France annexed Savoy and the county of Nice. The same could be true of the vast country of Russia with its largely untouched oil and gas revenues, and its 140 million inhabitants which will also be able to recover.

In Moscow's view, the war clearly goes beyond the Ukrainian objective. The clash of arms managed to overshadow President Putin's diplomatic statement of objectives for all of Europe in December 2021, ten weeks before the invasion began. At that time, Russian diplomacy presented the United States and NATO – but not the EU or its member states – with two so-called security treaties. These texts, presented as take-it-or-leave-it ultimatums, stipulated that NATO could not come to the aid of the 11 member states that had joined the organization after the collapse of the USSR in 1991; in other words, Europe would be set back thirty years in strategic terms. Moreover, no new states would be eligible to join the Atlantic Alliance; as a result, Finland and Sweden – among others – would lose their sovereignty in terms of security and defense policy. This Russian demand was unanimously opposed even before the start of the war. Statements made by the Russian and French presidents during their last meeting in Moscow on February 7, 2022, began with this subject, which dominated their discussions.

These objectives have not been abandoned. If Russia is victorious in Ukraine, despite all the support provided by the West, it is sure to be back with a vengeance once the wounds of war have been healed in two or three years' time.

Finally, and here too, events precede the start of the invasion, and Russia is bringing a global dimension to its undertaking. On February 4, 2022, coinciding with the Winter Olympics in Beijing, Presidents Xi and Putin made a joint declaration of "no-limits friendship" between their two countries. Although subsequent events have shown that there are indeed some limits to this friendship, this partnership is of great strategic and diplomatic importance: Russia provides China with considerable depth in terms of energy and agriculture, and China compensates for the shortcomings of the Russian economy. The two countries support each other at the UN and cooperate militarily in the Pacific – the world's most important zone in strategic and economic terms.

In each of these dimensions, European interests are, to varying degrees, at stake. Like the Russians and, to a certain extent, Biden's United States, Europeans must operate in a more or less integrated way in these three dimensions.

Good news, bad news, very bad news

From the very first hours, and for the first eighteen months of the war, there was a prevailing sense of surprise. Surprise, except in Moscow and Washington, that the invasion had even happened. But also surprise, except perhaps in Kiev, that the invasion was immediately met with fierce and effective resistance, while Moscow expected the Ukrainian government and its capital to fall within the first four days of the "special military operation". Such a rapid outcome would have rendered Western military support irrelevant. Finally, everyone, starting with the Europeans themselves, was surprised by the unity of Europe, particularly Germany, which proclaimed the Zeitenwende, the changing of an era: it gradually rose to become the leading European arms donor to Ukraine, with 7 billion euros planned in 2024. The key point here is that, in 2022, France lost the opportunity to lead Europe in the face of the Russian invasion: Emmanuel Macron had spent too much time in his vain attempt to win over a Putin impervious to the charms of "at the same time" (*en même temps*).

In fact, the Union immediately decided on and implemented major sanctions. These sanctions notably had the unexpected effect of virtually eliminating Europe's dependence on Russian gas. A European fund to finance military aid was set up, while European states played an active part in the "Ramstein Group", which brought together, under the leadership of the United States, some fifty countries around the world in support of the Ukrainian war effort. Over two years of war, European military aid – including from the United Kingdom and Norway – achieved parity with that provided by the United States, an unexpected result. Finally, Moscow was surprised that the Americans did not sacrifice their commitment in Ukraine on the altar of their strategic priority in the Indo-Pacific; on the contrary, the Biden administration saw a defeat in Ukraine as undermining the credibility of the United States in the face of China.

And so, less than a year after the start of the war, the Ukrainians had recovered half of the territory captured by Russia since February 24th and liberated Kherson, the only regional capital to have fallen. Over the course of 2023, Ukraine managed to limit the initially devastating effects of Russian missile and drone strikes against Ukrainian cities and infrastructure – particularly the electrical grid – and to break the Russian naval blockade of the Black Sea. This last point is crucial, given the Ukrainian economy's dependence on agri-food exports, and the importance of these exports to a number of countries in the South that import Ukrainian grain.

Russia's powerful air force and Black Sea fleet faltered against a Ukraine whose navy is anecdotal and whose air force is numerically weak.

On the diplomatic front, and despite all the talk about the "Global South", more than two-thirds of countries voted repeatedly against Russia at the UN General Assembly, while barely a quarter abstained and fewer than ten voted in support. These pleasant surprises concealed some less sunny realities, which are now coming to light. While Ukraine is resisting, it is not winning: more than one-sixth of its territory is currently occupied, fortified, annexed and being progressively Russified. In 2023, Ukraine's ground counter-offensive to sever the territorial continuity between Russia and Russian-occupied southern Ukraine failed. Successfully defending oneself, as the Ukrainians did in 2023, and recovering territory now deeply held by the invaders, are two different things. Although Russia's invasion plan certainly failed in its primary military objective, the invader managed to occupy the Ukrainian south within three days, from the edge of Mykolaïv to the outskirts of Mariupol.

Despite its losses, Russia has learned not to disregard Ukrainian resistance and has adapted its tactics accordingly: effective mine and fortification warfare, successfully learning drone combat, and a certain superiority in terms of electronic warfare. Russia is also adding to its strengths, notably with the arrival of weapons from Iran and North Korea. Despite the Wagner militia's mutiny in June 2023 and Western sanctions, Putin's power shows no signs of economic, social or political collapse.

The White House, which is often imitated by the Europeans, reacted slowly and hesitantly, even preventing the shipment of crucial military equipment to the battlefield, due to excessive fear of Russian reactions. It took sixteen months for the first Western heavy tanks to arrive. Twenty-three months after the start of the invasion, not a single Western-made combat aircraft had reached Ukraine. Neither the United States, except to a very limited extent, nor Germany, which has nearly 600 Taurus models, have delivered cruise missiles capable of striking the Russian military. Only the UK and France broke free of these restrictions by delivering Franco-British SCALP-Storm Shadow cruise missiles beginning in the summer of 2023; these missiles played a major role in the fight against the Russian fleet in the Black Sea and the Russian presence in Crimea, helping to break the blockade. Contrary to the fears expressed in Berlin and Washington, this did not lead to an unchecked escalation of the war. In the view of Germany and the United States, Ukraine should be able to restore its territorial integrity by withstanding the Russian assault, but without being able to respond deeply into the enemy's territory.

The "*trente paresseuses*" are being paid for today in Ukraine at a high cost. With the exception of South Korea vis-à-vis its terrifying neighbor to the north, no Western nation – not even the United States – has retained either the military-industrial capacity or the stockpiles of weapons and ammunition needed to rapidly wage a modern war between two major states. Washington had to source shells from South Korea and obtain ammunition from Japan for the Patriot missiles required for Ukraine's anti-missile defense.

On the European side, things were no better; in the course of twenty-two months of war, the Union as a whole was able to deliver around 300,000 155 mm shells, enough for Ukraine to fight its war for twelve weeks. This was four times less than American shipments before they fell to zero in January 2024. France is now producing 2,000 "full rounds" per month and plans to increase this to 3,000: enough to keep Ukraine at war for half a day, at the rate it has been waged for the first 20 months. However, Ukraine does not, or not yet, have the necessary factories on its soil to produce heavy artillery shells. The EU has now set a production target of 1.3 to 1.4 million shells a year by the end of 2024, a figure close to the US plan of 1.2 million by 2025. In the meantime, Ukraine currently needs more than 3.5 million shells per year, before the still uncertain promises made for 2025 are realized. Once the British and French reach their limits in terms of SCALP missile supply, and before their production possibly resumes, the Ukrainians will be left to face their losses alone, while Germany withholds its Taurus missiles, and the United States has parsimoniously supplied rare ATACMS missiles.

That's not the worst of it. We are now facing the prospect of American disengagement. This first manifested with the refusal of Congress to approve appropriations for the 2024 year. The immediate effect was the rationing of shells on the front line, with the daily consumption of shells falling from 8,000 to 2,000 in January. Today, four to five Russian heavy artillery shells are fired for every Ukrainian one. American anti-missile systems – Patriot, NASAM – are in short supply, with interception rates dropping from 80% to 40% against Russian cruise missiles, and to almost zero against hypersonic "Kinjal" and other "Iskander" missiles.

This somewhat abstract accounting translates into very real destruction. Today, European defense resources are unable to make up for this shortfall: only one French-Italian "Mamba" anti-missile system has been deployed in Ukraine.

At the time of writing, the U.S. Congress, in the midst of its pre-election tug-of-war, has still not voted on appropriations for 2024. Congressional isolationism over the past few months has certainly been fueled by a polarized pre-election environment unlike anything seen since the years leading up to the Civil War. But it is by no means clear that this polarization will disappear, while American impatience with a Europe judged incapable of taking "its" war into its own hands is widely shared. This is also fueled by the only major issue which currently enjoys bipartisan political consensus in the United States, namely the desire to counter China's power. In view of the difficulties the United States is now having in fueling its war machine in the face of existing wars (Ukraine, Gaza) and potential wars (Taiwan), Europeans have been warned: the war in Ukraine will increasingly be their war.

The European Union has so far managed to deal with its own financial problems. The 50 billion euro package initially planned for the years 2024-2027 was able to be approved despite Hungary's initial anti-Ukrainian veto. This aid is vital for preserving the stability of Ukrainian public finances, which underpins the Ukrainian war effort. For the moment, however, it has little impact on direct military aid, which remains largely a matter for individual countries.

In the case of the USA and Europe, the confiscation of Russian central bank assets frozen in Western countries would solve the financial problem, with sums totaling around $300 billion. In practice, however, this would require the agreement of the G7 countries – Japan, the USA, Canada, France, Germany, the UK and Italy – as well as the EU itself. The advantage, but perhaps also the drawback, of this approach is that it avoids the need for agreement by the US Congress. It would be a technocratic solution to a political problem. This would set a major precedent and could weaken the international financial system. Even when tensions with Iraq and Iran were at their highest, funds frozen by foreign sanctions were not confiscated.

Last but not least weighs the potential re-election of a Donald Trump who is running to win and preparing for his enthronement, whereas in 2016 he didn't think he would win and hadn't organized accordingly. He would be back in charge with both the will and the means to implement his anti-European, anti-NATO, Putin-aligned agenda. If his recent comments on settling Ukraine "within 24 hours", or that Europe should not count too much on the United States, or his "invitation" to Russia to attack countries in arrears on payments to Washington are anything to go by, Hurricane "Donald" would be swift, brutal and radical. At best, the United States would, like Erdogan's Turkey, become a dormant partner of NATO and at worst, a strategic partner with Russia, which it would try to pull away from its strategic partnership with China at the expense of concessions made at the expense of a scorned Europe.

There's nothing fanciful about this view. In 2019, at the Fort de Brégançon, in the presence of Vladimir Putin, Emmanuel Macron called for bringing Europe and Russia closer together in order to liberate it from China's embrace. In 2020, he reiterated this grand vision at the Munich Security Conference, France having organized a strategic dialogue with Russia that was, by all accounts, completely sterile. If the French could have dreamt of such a reversal of alliances, why wouldn't a re-elected Trump, knowing that he would have even greater motives and far more means? Why not "Trump in Moscow" just as there was once "Nixon in Beijing"?

It is worth noting in passing that a scenario in which the United States descends into political and constitutional turmoil would be no less damaging. This could be the case if the election's outcome was not accepted by a large part of the electorate and institutions, including an increasingly controversial Supreme Court.

Doing away with "bonsai armies"

Given these conditions, Europeans must follow a few fundamental principles in taking concrete steps for 2024 and beyond. First, the worst-case scenario is sufficiently likely to over-determine the actions we take. On one side, this includes Trump's victory, with the impacts mentioned above; on another, Putin's refusal to enter into negotiations that are in line with Ukraine's vital interests; and finally, Beijing's continued close China-Russian partnership with its Asian neighbors and the collective West. To this we could add the predicted rise in power of populist parties in the June 2024 European elections, though this does not mean a change in power within the EU Member States, which remain the main source of security and defense policy, directly and indirectly via the European Council.

Should one or more of these scenarios prove false, the initiatives suggested here in the name of the worst-case scenario would still be valid: he who can do more, can do less.

Another principle, already endorsed by Europeans but which is sometimes forgotten, is that Ukraine is the best judge of its interests and of the strategy devised to defend them. Our aid policy must therefore be determined accordingly. As stated by President Zelensky, this strategy involves the military isolation of Crimea, considered to be the war's center of gravity. Indeed, imposing such a threat to the control of Crimea is probably the best lever available to bring Russia to the negotiating table under conditions consistent with Ukraine's vital interests. The delivery of French and British cruise missiles is consistent with Kiev's choices. Conversely, failure to deliver German Taurus' or American equivalents is not.

This principle assumes, however, that there is still strong coherence between Ukraine's war aims and those of its European partners. Territorial integrity, political sovereignty, security and defense guarantees, and eventual membership to the Union are currently shared objectives, as demonstrated by the fact that no European state has recognized Russia's annexation of Crimea, to cite an example sometimes presented as a source of disagreement. This does not mean, and Ukraine agrees, today as in 2014, that a cessation of hostilities is contingent on the prior and simultaneous success of these objectives. Just as in Germany during the Cold War and in Cyprus after it, situations of unconsented division and illegal occupation remain unresolved – provided, at least, that political and security aspects are guaranteed: West Germany joined NATO 45 years before reunification, and Cyprus joined the EU in 2004.

In any case, our European allies must not forget that any outcome of the conflict which might be perceived and presented by Moscow as a defeat for Ukraine would have fundamental strategic consequences for the European Union and European members of NATO. This scenario, combined with the withdrawal of an increasingly disengaged America, makes the question of extending France's nuclear guarantee to its European allies an immediate one. The latter now have every reason to enter into the nuclear dialogue proposed by France, notably by President Macron in 2020, and again in Stockholm recently.

There's another, empirical, principle to consider: the war of invasion will soon be entering its third year. All current and planned measures must be consistent with long-term warfare. This applies in particular to all aspects of our defense industry's organization. As a corollary to this principle, any immediate measures must be taken keeping in mind the medium-term outlook. For example, to help Ukraine improve its military situation, our countries will be able to draw more heavily on our national stocks of weapons and ammunition as soon as we decide to increase our production rates. This reasoning can also be used in reverse: the stronger and sooner Ukraine's military success, the less we'll have to draw on our stocks in the long term. However, the window of opportunity will close as soon as Russian forces are no longer "pinned down" in Ukraine.

This last assertion cannot be proven, but like their Soviet predecessors, Russian leaders pay close attention to the analysis of the balance of power. The immediate effort is naturally to maintain European and national financial and military flows. This is all the more understandable given that, contrary to popular belief, "war fatigue" is largely absent from European opinion: at the end of 2023, continuing the policy of aid to Ukraine remains supported by more than 50% of those surveyed in 18 of the 26 EU member states. In the other eight – Italy, Austria, Bulgaria, Romania, Hungary, the Czech Republic, Slovakia and Greece – where support falls short of the 50% mark, there are relative majorities, and often governments (Italy, Romania, Bulgaria and the Czech Republic in particular) that have clearly sided with Ukraine, supporting it militarily.

The current and potential future failure of the United States also requires us to improve the quality of our efforts.

It is also not impossible to leverage each individual nation's political influence. Do Germany's most motivated partners have as much influence as they could on the delivery of Taurus cruise missiles? Could France not convince Greece to agree to postpone the delivery of the SCALP missiles Athens has commissioned from us to benefit the Ukraine? After all, this is how Caesar cannons ordered by Denmark were able to be transferred to Ukraine.

In the medium term, Europe – the Union and European NATO members alike – must make the decisions required to face a Trumpian world. In budgetary terms, this means increasing the target of 2% of GDP allocated to defense by 2025, a decision made by NATO member countries following the annexation of Crimea in 2014. Between now and 2030, this target should be 3%, a period of six years representing the equivalent of a military planning law, in line with industrial and organizational lead times. The annual budgetary effort at the EU level would be about 150 billion euros. If industry is up to the task, this would be enough to replace an end to American aid to Ukraine, and to begin the possible acquisition by European allies of so-called "cornerstone" military capabilities that the Americans could fully or partially withdraw from Europe: strategic intelligence capabilities, particularly space-based; anti-aircraft and anti-missile defense capabilities and the destruction of Russian anti-aircraft assets; command and control structures, etc.

The sum may seem considerable, but Poland and Estonia have already increased their military budgets to 3% of GDP, as has Greece, which is facing Turkey. This was also the level of effort made by our partners during the Cold War, to say nothing of France, which was spending 5% to 6% of its GDP on the "special military operation" that was the Algerian War. For France, 3% is most likely the price it will have to pay to move the strategic autonomy it values from words to reality.

Some have suggested that the Union could create a European defense fund, with Thierry Breton suggesting a total of 100 billion euros over a specified period. In Davos, Emmanuel Macron proposed that the Union issue bonds dedicated to defense. Why not? But any new European loan or corresponding increase in the Union's budget, established by treaty, is likely to be more difficult to sell politically than setting objectives that each nation meets in its own way – as was the case during the Cold War. What's more, the Union's financial framework would make it impossible to involve the UK, which, along with France, has the most experienced army and the widest range of skills among Europe's allies. This money, whether European or national, will only be successfully raised and spent if there is a major and difficult change in the way our armed forces acquire weapons and munitions. At present, each of our countries produces equipment on a very small scale: France has 220 Leclerc tanks and at one time exported just over 400, but does not have a tank production line. In the space of two years, Ukraine alone has destroyed or captured over 3,000 Russian tanks, more than 500 of which have been recycled in its own armed forces. The situation regarding shells has already been mentioned. In order to progress to large-scale production, it is not sufficient to urge manufacturers to produce by brandishing budget "blueprints" full of promises. Put another way, when it comes to armaments, we cannot go from small-scale to mass production by saying "do exactly what you did yesterday, but produce more".

This transformation presupposes several non-financial initiatives in Europe, at both the national and EU levels, in areas that are within the purview of each decision-making level.

Firstly, special procedures will have to be set up to accelerate the awarding of contracts. The model here is the American Defense Production Act developed during the Korean War. It was this DPA that Trump deployed during the Covid pandemic, offering $22 billion to laboratories and manufacturers to develop the vaccine within a given timeframe. This resulted in the Pfizer-BioNTech vaccine just in time: the lives saved were worth far more than the 22 billion dollars spent. This is a challenge that Europeans at the Community level, as well as in each Member State, have every reason to tackle, particularly in a country like France, where the budgetary decision-making process has become extraordinarily cumbersome.

We need to reconsider the responsibilities of Brussels, in particular with regard to the possibility of purchasing armaments for the Union as a whole, and those of national capitals, which remain largely sovereign in this matter. These acquisitions can be made either individually, as in the case of the French Rafale jet, or through multinational cooperation, as in the case of the Italian-German-Hispanic-British Eurofighter or, potentially, the Franco-Hispano-German Future Combat Air System (FCAS). Although these initiatives are necessary, they often span long periods, which limits their immediate relevance in light of the strategic earthquake threatening the United States.

It would be better to concentrate on boosting the production of weapons and munitions that can be used on the battlefield before the end of the decade, including by deploying certain industrial resources in Ukraine itself, as Germany and France intend to do.

Furthermore, it will be urgently necessary to adapt European, national, and even regional regulations – particularly at the level of the German Länder – which impact the most environmentally sensitive industries to the needs of national defense: for example, the REACH directive for the chemical industry, or the Seveso regulations for all high-risk activities. This will be a difficult and delicate task, as each of these texts is legitimate in its own right. But there is some leeway between regulating an activity and making it impossible for a period of time that is in keeping with the urgency of national defense in the face of an invader. This is true for the industrial sector, such as ammunition production, but also in operational terms. When France wanted to move "Leclerc" armored vehicles to Romania using tank carriers at the beginning of the Ukraine crisis, national and local regulations prohibited any such transport, particularly in the part of Germany dominated by ecologists. In the end, the journey was made by train, at a reasonably slow pace. We were able to recover, as Russia had not attacked Romania in the meantime.

Finally, there is the military version of what Brussels insiders call "taxonomy", an issue that has pitted Germany against France in the energy sector: Berlin initially wanted gas, which has a high carbon content, as well as renewable energies, to have better access to government and capital market financing than nuclear power, which is a zero-carbon energy source. In terms of defense, this means being relegated to the lowest tier, alongside alcohol and tobacco, particularly in terms of corporate social responsibility (CSR); a poor CSR rating complicates access to financial markets. The example of Estonia underscores the seriousness of this decision: it had set out to build an artillery production line, hoping to benefit from a line of credit from a Swedish bank, but the bank refused, citing CSR. Furthermore, decisions are often private, not public as CSR is also imposed by the markets. This is a significant obstacle to the revitalization of Europe's defense industries. These are all small pieces of the past, inherited from the world of yesterday, and they risk jeopardizing the efforts needed for a future that is already here.

Without sweeping and rapid changes in these areas, Europe will, for a long time to come, continue to build bonsai armies on a continent where Russia will be steadily pushing its pawns forward, while the United States will watch this defeat from its distant position in the Indo-Pacific region.

It is important to remember, however, that Europe remains important to the United States in its tug-of-war with China. On the one hand, the EU is an indispensable market for Chinese trade and technology. Its single market enables it to impose its standards, including in new technologies. Americans and Europeans alike have begun to understand this, with the creation in 2021 of a Euro-American body to address investment and technology trade with China. On the other hand, in military terms, Europe remains an essential hub for American access to the Indian Ocean: at the risk of surprising, the continent and its military assets are closer to American bases in the Indian Ocean than the American West Coast is to Taiwan and the South China Sea. In other words, Europe has some leverage with which to influence American choices. All that remains is to convince Donald Trump, should he be re-elected. This was not the case during his first term.

Here too, it is time to lay the groundwork: by Tuesday November 5th, it will already be too late.

The Europeanization of NATO?

What remains to be done is to define the political and institutional framework within which Europe can support Ukraine and replace an America that is less present.

In the past, this debate was theological, and therefore unsolvable and theoretical, and therefore largely divorced from reality. Some, especially the French, prayed for a European defense that never materialized. Others, by far the majority, relied on the Americans via NATO, for good reasons – such as their credibility in the face of Russia – as well as bad ones. For example, many countries tended to want to pay as little as possible for their defense, relying on the goodwill of the American taxpayer.

The war in Ukraine has shaken things up. The Russian threat has become a reality, and an American withdrawal is likely at a time when the European Union is playing an essential role, both in terms of military aid to Ukraine and the revival of the defense industry. Paradoxically, NATO is taking a back seat, as Western military aid is bilateral, or supported by the EU in the case of Europeans. Coordination is also taking place within the Ramstein Group, which brings together 53 countries that go far beyond the NATO framework.

The trend is now twofold: the growing role of the European Union in defense matters on the one hand, and the Europeanization of NATO on the other. With or without the Americans, NATO performs functions, has an organizational culture and a structure that European institutions do not possess: command structures, standardization of equipment, and interoperability of forces at all levels are shared assets that do not need to be reinvented. Moreover, in Europe, NATO includes the United Kingdom and Norway. The same applies mutatis mutandis to the European Union, which alone has the industrial and regulatory powers without which Europe could not defend itself. In short, NATO knows how to wage war, with or without the United States, and Europe is learning how to plan defense over the long term.

In other words, the time has come to face reality. The French and their partners must stop praying for a European defense that remains entirely theoretical.

But what should we call this emerging convergence between the Union and NATO? Some English-speaking analysts are already talking about "Euro-NATO". It's a start, but it treats the Union as if it were a synonym, which is probably not a good idea. When it comes to defense and strategy, as elsewhere, misnaming things contributes to the world's ills. So, if we must move quickly to bring about this convergence, we should not be in too much of a hurry to name it. Its name will be determined through experience.