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LITHUANIAN FOREIGN POLICY REVIEW



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LIANA FIX
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ANDRIUS KUBILIUS
Europe Must Learn to Defend – and Fight – as Europe

VOLODYMYR YERMOLENKO
Europe Needs Ukraine More Than It Thinks

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Editor's Note

A foreign policy journal has a built-in problem: events move faster than the publishing cycle.

Most of the conversations in this volume took place in early autumn 2026. We knew some headlines would change before publication, so we focused on questions with a longer life – the shifts in European and transatlantic security that are likely to matter well into 2027.

The issue begins with **Lithuania's Foreign Minister Kęstutis Budrys**. I am grateful to him for taking part. Our conversation ranges from NATO's transformation and the future U.S. role in Europe to Ukraine, enlargement and Lithuania's Presidency of the Council of the European Union in 2027 – some of the defining questions for Lithuanian foreign policy in the year ahead.

Michael Kimmage looks at the U.S. under Donald Trump and asks how much of the disruption represents lasting change. **Liana Fix** turns to Germany, rearming at speed while facing uncertainty over the American role, the Russian threat and domestic political pressure.

European Commissioner for Defence and Space Andrius Kubilius asks whether Europe can become more capable while continuing to organise so much of its defence through national systems.

Héloïse Fayet and **Élie Tenenbaum** discuss France's more European nuclear posture, the limits of strategic autonomy and what these changes mean for the eastern flank. **Kristi Raik** looks at enlargement and the future shape of the European Union. **Volodymyr Yermolenko** asks not only how Ukraine must change



to join Europe, but how Europe itself may have to change. Ukraine's military experience and defence industry are increasingly becoming part of Europe's own security debate.

Ole Andreas Lindeman looks at the growing weight of Nordic-Baltic cooperation and the value of long-built trust and practical cooperation. **Edward Lucas** examines how Russia uses history and identity as political weapons. **Arvid Bell** turns to the way foreign policy itself is analysed – and how simulations, scenario work and new technologies can help test assumptions before events do it for us.

Taken together, these conversations address the questions likely to define the next phase of the security debate. The purpose of the *Lithuanian Foreign Policy Review* is to add to that wider conversation from a Lithuanian and transatlantic perspective by bringing in leading analysts and policymakers from around the world and looking beyond the immediate headline. This volume does exactly that.

I am grateful to all our contributors for the time and thought they gave to these conversations. I also want to thank the Ministry of Foreign Affairs of Lithuania for its continued partnership with the Lithuanian Foreign Policy Review. Its support remains important to the journal and is provided with full respect for our editorial independence.

Linas Kojala
Editor-in-Chief
Lithuanian Foreign Policy Review



Kęstutis Budrys: NATO Works, and NATO Is Transforming

On NATO 3.0, Europe's defence, Ukraine, Lithuania's 2027 EU Presidency and relations with China

Interview by Linas Kojala, Editor-in-Chief
of the Lithuanian Foreign Policy Review

Europe is being asked to defend itself – but not without America. For Kęstutis Budrys, that is the bargain now taking shape inside NATO: Europeans must carry much more of the conventional burden, while the United States remains essential to deterrence. In this interview, Lithuania's foreign minister talks about what that means for the U.S. military presence in Europe, how Ukraine can strengthen its hand, and what Lithuania prioritizes during its 2027 EU Council Presidency – from enlargement and competitiveness to the EU budget and relations with China.

Kęstutis Budrys is Minister of Foreign Affairs of Lithuania. Before taking office, he served as Chief National Security Adviser to the President of Lithuania and Head of the National Security Group, as well as Secretary of the State Defence Council and Chair of the Intelligence Coordination Group. Earlier, he spent six years as Deputy Director of Lithuania's State Security Department. He has more than twenty years of experience in national security and holds degrees in political science and international relations from Vilnius University.



Foreign Minister Kęstutis Budrys
Ministry of Foreign Affairs of Lithuania

NATO 3.0

Linas Kojala: *Some argue that NATO is effectively "dead" – that political uncertainty and changing U.S. priorities have hollowed out the Alliance. You reject that view. Why? And what does "NATO 3.0" – a concept advanced by U.S. Under Secretary of War for Policy Elbridge Colby, under which Europeans assume much more responsibility for conventional defence while the United States remains the key strategic and nuclear backstop – mean in practice?*

Kęstutis Budrys: If there were a crisis requiring collective defence under Article 5, I have no doubt that it would work. So I completely disagree with the claim that NATO is dead.

NATO works, and NATO is transforming. It remains probably the only place in the Western world where military planning takes place continuously on this scale and where there is the capacity to put everything together into a coherent military plan.

Consider the planning of the coalition of the willing regarding the potential operation in Ukraine, once conditions allow. We could not plan something like that without American and NATO planning capabilities because Europe simply does not have all of those capabilities itself.

The real question is how NATO now transforms. The message from the Americans is very clear: Europe has to do its homework. They want a stronger Europe and they want Europeans to assume much more responsibility for conventional capabilities. This is essentially what NATO 3.0 means.

I have now seen President Donald Trump at the NATO summits in The Hague and Ankara. His message was essentially the same on both occasions: NATO will work, but Europeans have to do more. Secretary Marco Rubio is repeating something that American secretaries of state have been saying in different forms since the Cold War – Europe has to spend more on defence and develop more capabilities.

And Europe hears that message. Defence readiness has become a strategic priority for the EU, as laid out in the Defence Readiness Roadmap 2030. The focus is clear from initiatives such as Rearm Europe, SAFE and EDIP; multiple European flagship initiatives to close critical capability gaps and boost defence-industrial production; the Military Mobility Package, to harmonise rules for Allied force movement and adapt our transport infrastructure; the Defence Industry Transformation Roadmap, on building out the EU's defence-industrial ecosystem from R&D to development, production, military testing and battlefield feedback; and the Defence Readiness Omnibus, to cut red tape for defence industries. These are instruments to bolster Europe's conventional power.

These are all welcome steps – but we must move with speed. If and when delivered, they will not only bolster European conventional power but will also strengthen NATO, which remains the backbone of our collective defence efforts. We should therefore spend less time discussing whether NATO is dead or inventing alternative institutions. We should concentrate on strengthening NATO together with the United States.

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Kojala: *The U.S. force-posture review in Europe has put a sharper focus on what Washington expects from its allies and on how it decides where to station American forces. Is the relationship becoming more transactional – with political ties increasingly affecting the U.S. military footprint?*

Budrys: Lithuania has good reasons to be confident. Compared with many other NATO allies, we have an exceptionally strong

relationship with the United States, politically and economically.

We also try to position the United States positively within the European Union agenda – looking not only at areas of disagreement, such as tariffs, but at areas where we can cooperate. There are many of them, from critical minerals and artificial intelligence to infrastructure.

One thing that is becoming clearer is that when the United States considers where to position its armed forces, it will look not only at the map and military strategy, but also at the broader political relationship with the particular country. That dimension existed before, of course, but it is now being stated much more openly.

By those criteria, I think Lithuania is in a very good position. I hope that Lithuania will come out of the force-posture review in a strong position.

Editor's note – *As of late September 2026, the U.S. review of its force posture in Europe was still under way. Washington had announced reductions elsewhere in Europe, while the Lithuanian government confirmed a new rotation of U.S. troops to Lithuania.*

Can Europe replace America?

Kojala: *One response to Trump in parts of Europe has been to argue for much greater strategic autonomy from the United States. You appear somewhat sceptical. Where does legitimate European rearmament end and unrealistic talk about replacing America begin?*

Budrys: I remember a closed discussion at the Munich Security Conference with German business leaders where there was a great deal of anger with America and an argument that Europe should simply do everything separately.

I deliberately sharpened the argument and said: fine, with this strong European industrial base, shall we also start developing nuclear weapons? The room suddenly went quiet.

The point was to illustrate the scale of the American role. Today there are capabilities without which Europe cannot provide credible deterrence on its own.

Europe certainly has things it needs to develop itself. Long-range strike is one example. Europe should have the capability to guarantee that if Russia attacked us, we could strike back.

But when you reach the nuclear level, nobody wants a world of uncontrolled nuclear proliferation. That is one important reason why the American role will remain essential.

I therefore see no basis today for the scenario in which America leaves NATO. But if Europeans simply ignored the American message, failed to increase their capabilities and expected the United States to carry the burden indefinitely, then, over subsequent administrations, America could move much further in that direction. That would be a much more serious structural change.

Kojala: *In August 2026, CIA Director John Ratcliffe visited Moscow. Subsequent reporting, citing unnamed sources, indicated that he raised concerns about a possible Russian test of NATO. More broadly, Washington has used both intelligence channels with Moscow and selective public disclosure of Russian intentions. What purpose do these tools serve – and how should allies such as Lithuania interpret them?*

Budrys: I would see this primarily as an example of semi-public intelligence diplomacy. The fact that such a meeting takes place may be known publicly, while the substance remains confidential. That distinction can itself be part of the message.

William Burns used this kind of intelligence diplomacy extensively when he was CIA director. One important element of the American approach before the full-scale invasion was precisely to make Russian intentions public. The message was essentially: we know what you are preparing to do.

That made it much harder for Russia to achieve strategic surprise and to construct a false narrative around its actions.

We have seen the same logic used since then when the United States and European allies have made selected information public about

possible Russian provocations or false-flag operations. Poland has done this, and Lithuania has done it as well.

This should not be interpreted as one ally suddenly possessing some information that the others do not have. NATO allies operate within a shared intelligence environment. Of course, not everyone has exactly the same capabilities or access to every piece of information, but there is very close intelligence cooperation.

What I would reject is the idea that Washington could be discussing matters directly affecting Lithuania or the Baltic states while leaving us uninformed. From my own experience, if the United States had intelligence about a serious threat to Lithuania, it would be very much in the American interest for us to know and to be prepared. The United States does not want an adversary to achieve surprise against an ally.

It is also important not to assume that every high-level U.S.–Russia contact is primarily about the Baltic region. Washington and Moscow have a much wider agenda and a number of issues on which communication may be necessary. So the existence of such a channel should not in itself be interpreted as evidence of some larger shift in U.S. policy.

Ukraine's cards

Kojala: *Donald Trump once told President Zelensky that Ukraine did not have the cards. You argued that Ukraine has since acquired cards. What changed – in Ukraine itself and in Washington's assessment of the war?*

Budrys: One of the biggest lessons for us is what Ukraine did during this period.

Alongside all the public drama – claims that everything was over, that America was withdrawing and that alternatives had to be found – Ukraine kept working patiently. It looked for other channels, proposed different options, kept engaging the Americans, negotiated over critical minerals and worked through the disputes over intelligence cooperation.

That produced results. We have moved from President Trump telling Zelensky that he did not have the cards to him acknowledging that Ukraine now does have cards. Ukraine acquired more leverage over that period.

Another important change was the growing American understanding of Russia. I have no doubt that Washington genuinely hoped it could mediate an agreement, achieve at least a ceasefire and ultimately reach peace. At some point, however, there was clearly an understanding that this would not be so simple and that additional leverage would be required to bring Russia to the table – including military leverage.

The third important factor is Europe taking over the burden of supporting Ukraine financially and politically. That changed the equation as well. It became much harder to argue that if the United States did not carry the entire burden, Ukraine would simply collapse.

The result of these factors is that Ukraine is in a better position today. At the same time, militarily, the coming winter will be very difficult.

Kojala: *Lithuania depends heavily on the United States for security, but transatlantic disagreements have included issues ranging from Greenland to the International Criminal Court. How far can Lithuania accommodate Washington without compromising its own principles?*

Budrys: We have not had a single situation in which Lithuania has had to cross what we would regard as our fundamental principles in order to preserve the relationship with the United States.

There was no ambiguity in our position regarding Greenland, Denmark's territorial integrity and sovereignty. Both through the Nordic-Baltic format and through the common European Union position, Europe sent a clear message.

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Kęstutis Budrys and U.S. Secretary of State Marco Rubio sign a bilateral agreement on critical minerals cooperation in Washington, D.C. Ministry of Foreign Affairs of Lithuania

The same applies to the International Criminal Court. Lithuania will maintain the common European position. We regard accountability and justice as important principles.

Of course, we have considered hypothetical scenarios in which some political disagreement might be linked to another issue, including the deployment of forces. Governments have to think through such possibilities. But we have not actually been placed in that situation.

I believe we can continue to manage the relationship without facing a choice between our security interests and our principles.

Kojala: *You have warned that scepticism towards the United States is becoming very strong in parts of Europe. What do you think Europe is getting wrong about its relationship with America – and how should it reconcile a stronger European defence pillar with continued dependence on the United States?*

Budrys: Europe needs a much more open and serious discussion about its relationship with the United States.

The mood in many parts of Europe is very different from what you often hear in Lithuania. Scepticism towards America is enormous, and that can have serious consequences.

One problem is that Europe does not always adequately understand the extent of its current dependence on the United States in defence.

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One problem is that Europe does not always adequately understand the extent of its current dependence on the United States in defence.

That does not mean Europe should remain weak. Quite

the opposite – Europe needs to become much stronger. But strengthening Europe and weakening the transatlantic relationship are not the same thing.

For Lithuania, and particularly looking towards our European agenda, the objective should be to strengthen the European pillar while preserving a strong United States inside NATO.

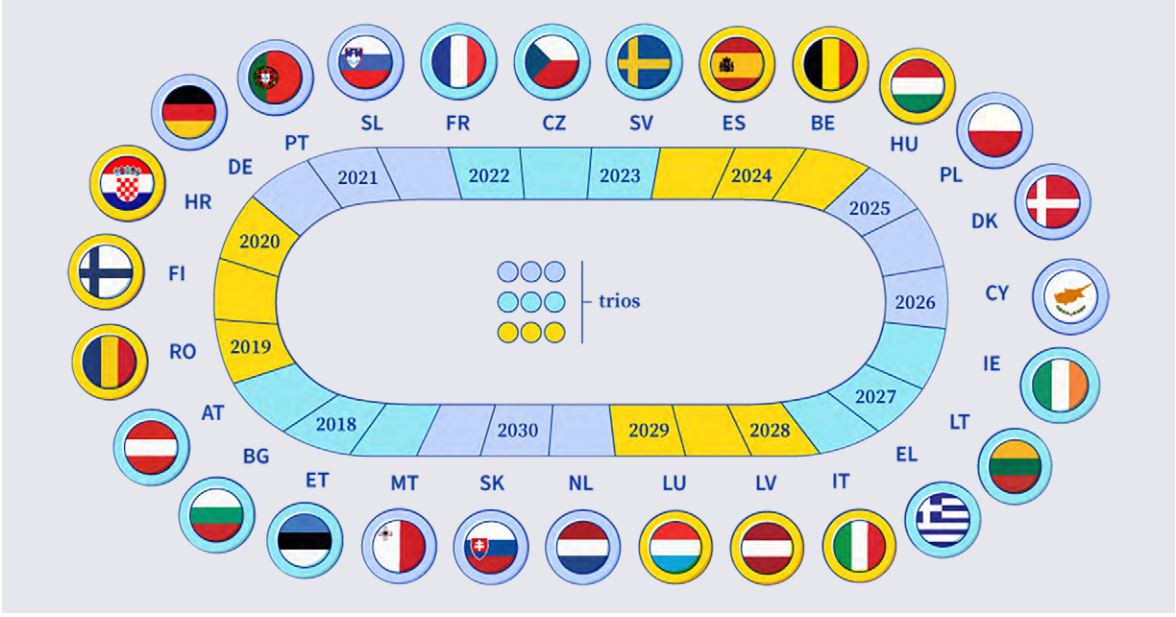
Lithuania's 2027 EU Presidency

Kojala: *Let's turn to another major focus of Lithuanian foreign policy in 2027 – the Presidency of the Council of the EU. Lithuania first held the Presidency at a highly consequential moment in 2013. The Ukrainian government's decision to suspend preparations for the Association Agreement helped trigger the Euromaidan protests, just days before the Eastern Partnership Summit in Vilnius. How would you describe the geopolitical moment in which Lithuania will assume the Presidency for the second time, in 2027?*

Budrys: Lithuania will assume the Presidency of the Council of the EU for the second time, following its first Presidency in 2013. From January 2027, the Lithuanian Presidency will take place in a profoundly different geopolitical and geo-economic environment. Europe is facing Russia's war of aggression against Ukraine, growing hybrid threats, regional instability, and mounting challenges to its competitiveness and resilience.

But while it is very different, today's situation traces back to 2013, when the Ukrainian people showed their democratic will to move closer to the EU, to which Russia responded with fear and aggression. So, we keep this past in our minds and want to advance Ukraine's historical march to the EU, and support for Ukraine, as well as Ukraine's integration, will be key priorities.

European security, including economic security and resilience, will be our cross-cutting Presidency priorities. We will work to strengthen the EU's ability to withstand and respond to evolving challenges, boost our defence capabilities and cooperation, and build a more competitive and robust economic base to power our rearmament.



Schedule of presidencies of the Council of the EU. Council of the European Union



Foreign Minister Kęstutis Budrys
Ministry of Foreign Affairs of Lithuania.

In addition to this, the present reality requires a clear focus on security broadly conceived. European security, including economic security and resilience, will be our cross-cutting Presidency priorities. We will work to strengthen the EU's ability to withstand and respond to evolving challenges, boost our defence capabilities and cooperation, and build a more competitive and robust economic base to power our rearmament.

At the same time, Lithuania will assume the Presidency at the midpoint of the EU's political cycle, when a wide range of legislative and non-legislative initiatives will need to be advanced and brought to completion. Here, improving Europe's competitiveness and productivity will be key tasks. This connects to another major task of the Presidency – to move the negotiations on the next EU seven-year budget, the Multiannual Financial Framework, forward. This will make the Presidency both politically significant and demanding in terms of delivering concrete results.

So, while the circumstances of 2013 and 2027 are very different, one thing remains the same: Lithuania will once again take on the Presidency at a consequential moment for Europe – when our unity, resilience and the ability to act will matter greatly.

Kojala: ***The Council Presidency is primarily a coordinating and consensus-building role, but it also gives a country some influence over the sequencing and emphasis of the EU agenda. What would you like Lithuania to have achieved by the end of its six months in the Presidency?***

Budrys: Lithuania will approach the Presidency as an honest, impartial, and constructive broker, with the role of the Council at the centre of our efforts. We will work to bring EU Member States together, facilitate compromise within the Council, and ensure close cooperation with the European Commission, the European Parliament and other EU institutions and partners. Our aim will be to safeguard continuity and stability in the EU agenda, a smooth and effective legislative process, constructive cooperation among Member States, and strong coordination across the EU institutions. Indeed, we do not only want to be good facilitators during our Presidency, but we want to actively improve EU-level coordination in a lasting way, for example, by creating a Council working group on economic security – currently, Member States do not have a place to discuss this issue, even though it has become a key concern for the EU.

By the end of the six-month Presidency, we would like to see tangible progress across our five priority areas: strengthening European security and defence

and maintaining strong support for Ukraine; advancing EU enlargement and European values, with Ukraine and Moldova moving closer to the Union; boosting competitiveness, innovation and technological capacity; reinforcing internal security, preparedness and democratic resilience; and strengthening social security in response to demographic challenges. A key element will also be the 2028–2034 Multiannual Financial Framework, where we will seek political agreement that reflects the Union's long-term interests and priorities.

Ultimately, the quality of the Presidency matters to more than 440 million European citizens, and we want to deliver a responsible, effective and results-oriented Presidency. Our overarching ambition is to make a meaningful contribution to a stronger, more resilient and more competitive European Union.

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Kojala: ***Ten countries are currently involved in the EU enlargement process. Germany and France have advocated greater integration of candidate countries into EU programmes and the Single Market before full membership, while Chancellor Friedrich Merz has also proposed an "associate member" status for Ukraine. What role, if any, should this kind of gradual integration play in enlargement? And do you see Ukraine as a distinct enlargement case, or should essentially the same approach apply to all candidates?***

Budrys: Lithuania advocates for the swiftest possible and full-fledged integration of new members. Today, EU enlargement is not merely a technical process, but a geostrategic necessity. Ukraine is fighting not only for its own survival, but for Europe's security. Despite the war, it continues to implement reforms and prepare for EU integration. Ukraine's swift integration strengthens the entire EU.

Seeing enlargement as a necessity, we must accelerate and streamline the process – because once momentum is lost, direction is lost. A long and fragmented path contradicts the strategic purpose of enlargement. Decision-making must become faster and more resilient to unjustified political blockages and veto abuse. A credible enlargement policy requires a credible process. That's why Lithuania has already made suggestions for, and supported, a faster opening and approval of negotiation chapter clusters, among other solutions.

Lithuania advocates for the swiftest possible and full-fledged integration of new members. Today, EU enlargement is not merely a technical process, but a geostrategic necessity.

Gradual integration can support accession – but it must never replace it. Any intermediate steps must be reversible, linked to reform progress, and available to all candidates on equal terms. Candidate countries must commit to rapid and sustained reforms. Their transformation is essential for a smooth and successful accession process. But the transformation that comes with accession is also why citizens of these countries want to be part of the EU – these are reforms that strengthen the state and society, and so we must help candidate countries implement them as far as possible, rather than lower the bar or cut corners.

But it's not just the candidate countries that need reform. The EU needs targeted reform in some of our policies and coordination processes to function more efficiently after enlargement. Enlargement and internal EU reform are interlinked processes that must advance together; internal reform debates must not slow down enlargement. The strategic outlook must remain clear and unified: full, swift, and successful membership for Ukraine and all candidate countries is in our interest, and we must rapidly do our homework to be able to deliver on it.

Kojala: *Mario Draghi's report gave the EU a fairly stark diagnosis of its competitiveness problem. Since then, the Commission has launched the Competitiveness Compass, simplification measures and a new Single Market roadmap, but many of the underlying problems remain. What would meaningful progress on European competitiveness look like over the next few years?*

Budrys: EU competitiveness challenges, identified also by Enrico Letta and Draghi, are well known and long-standing: the incomplete and fragmented Single Market, high energy prices, the innovation gap, lack of productivity and scale-up, insufficient capacity to transform innovation into commercial success, and insufficient economic growth in response to growing investment needs. The reports have attracted political attention, placing EU competitiveness at the top of the political agenda, and have resulted in ambitious proposals from the Commission. However, meaningful progress should be measured not by the number of strategies adopted, but by tangible results for European businesses, workers and citizens. The EU's competitiveness still falls short of its full potential, and renewed political attention is essential. Competitiveness will therefore be one of the main priorities of Lithuania's forthcoming Presidency.

First, we must create a fully functioning Single Market by 2028. This requires implementing the One Europe, One Market roadmap by the end of 2027, the forthcoming Single Market Roadmap to 2028, removing the most damaging cross-border barriers, strengthening mutual recognition, advancing the simplification and Omnibus agenda, and reaching a timely agreement on the 28th regime. A European company should be able to establish itself, raise capital and operate across the EU easily.

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Second, closing the innovation gap. Increasing R&D spending, especially in cutting-edge technologies like AI, semiconductors, and biotechnologies, could boost productivity in the EU while contributing to its strategic autonomy. While the EU and the euro area have recently increased their R&D spending, they both still lag behind global leaders in R&D intensity, with a rate of 2.1% of GDP in 2023, compared to 2.6% in China, 3.6% in the U.S., 3.4% in Japan, and 5% in South Korea.

But our focus must extend throughout the innovation cycle, not only R&D. A critical task is for Europe to become a place where innovative companies can scale up. In the past 50 years, no company created from scratch in the EU has reached a market capitalisation above EUR 100 billion, while all six U.S. companies valued above EUR 1 trillion were created during that period. Moreover, close to 30% of European-founded unicorns have moved their headquarters abroad. This is closely linked to access to finance. U.S. venture-capital funds have a combined size of approximately EUR 930 billion, compared with only around EUR 150 billion in the EU.

Here we can be not only an honest broker, but also a practical example. Lithuania raised four homegrown unicorns and contributed to the growth of another six. According to the Global Innovation Index, the combined value of Lithuania's

unicorns reaches almost 10% of GDP, the highest share globally, underscoring the country's attractiveness for innovation and investment. Only 26% of Lithuanian scale-ups have moved their headquarters abroad, the lowest relocation rate among Central and Eastern European countries. To bridge the scale-up gap, Europe must mobilise substantially more private investment by completing the Capital Markets Union and delivering the Savings and Investments Union. European savings must be put to work more effectively in support of European innovation, infrastructure and industrial scale-up. Here, our experience in building a venture-capital ecosystem and using national credit institutions can be instructive for other capitals and the EU institutions.

Third, Europe needs a stronger and more resilient industrial base. We should agree on the Industrial Accelerator Act and develop lead markets for European products, promote industrial production in Europe through both supply and demand tools, and reduce both energy prices and strategic dependencies, especially on energy and raw materials.

A note on energy. The share of Russian gas in EU imports declined from around 45% in 2021 to 13% in 2025, which is substantial progress, but Europe still paid Russia more than EUR 15 billion for gas in 2025, which ultimately supported its war economy. Ensuring energy sovereignty requires strong political will but is achievable, as Lithuania demonstrated by completely stopping Russian natural gas imports already in 2022. However, while Europe is moving towards greater energy resilience, cost remains an issue. Industrial electricity prices in the EU remain around 2 to 2.5 times those in the United States, while industrial gas prices can be three to five times higher. Lowering energy prices requires faster investment in grids, generation, storage and cross-border interconnections, together with quicker permitting and a fully integrated European energy market.

We also need diversified supplies of critical raw materials, especially to secure our rearmament agenda and build out a stronger European semiconductor ecosystem. Therefore, Lithuania will also seek progress on the Critical Raw Materials Centre as well as other initiatives in this space, including with our transatlantic partners. Similarly, Lithuania seeks progress on the Chips Act 2.0 and will also work to strengthen EU–U.S. cooperation in building a trusted and secure transatlantic AI value chain.

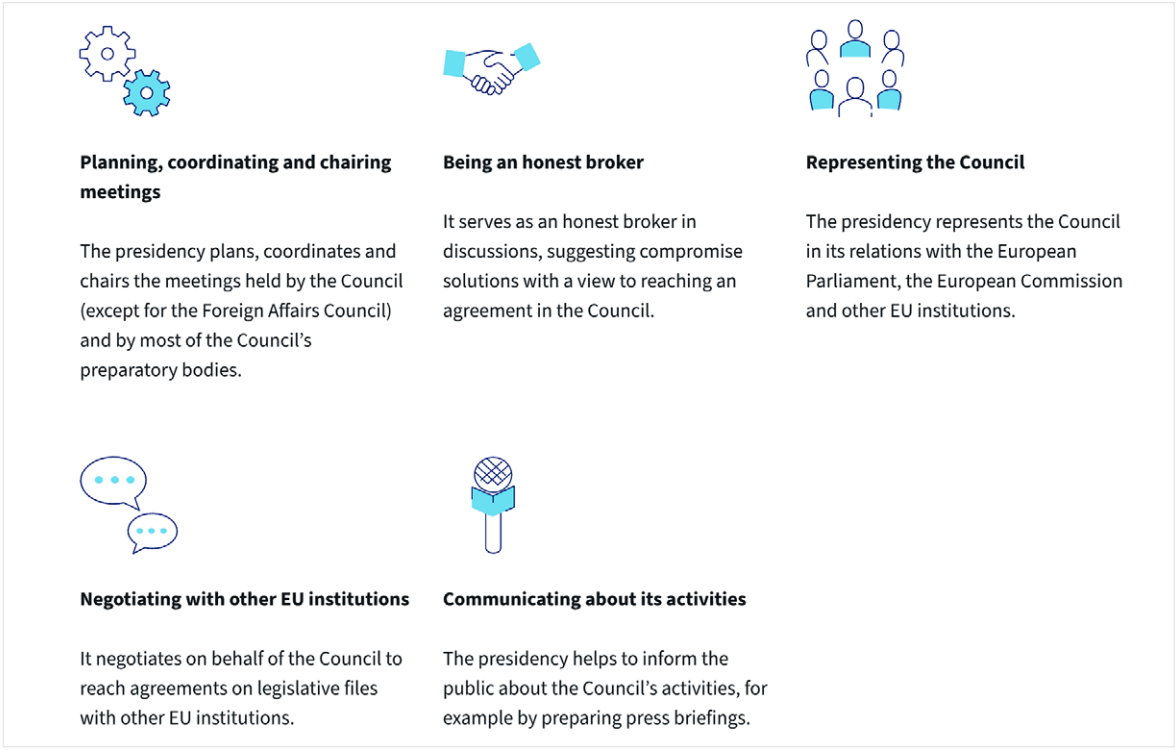
Finally, and relatedly, competitiveness also has an external dimension. We must strengthen global partnerships, diversify trade and secure reliable supply chains, including defence, raw materials and semiconductors. At the same time, we should gradually extend the benefits of the Single Market to Ukraine, Moldova and the Western Balkans. A larger, better integrated and more resilient European economic area would strengthen both our prosperity and our geopolitical weight.

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Kojala: ***The Commission has proposed a 2028–2034 EU budget of almost €2 trillion, equivalent to around 1.26% of EU gross national income. Lithuania's Presidency is likely to coincide with a crucial stage of those negotiations. Given the growing demands on the EU – from defence and Ukraine to competitiveness and enlargement – does Europe have sufficient resources to match its ambitions? If not, where should additional financing come from?***

Budrys: The Commission's proposal provides a good basis for negotiations and a necessary level of ambition. It should not be reduced. Whether the future EU budget will ultimately be sufficient will depend on whether we protect the proposed funding for Europe's key priorities and secure an adequate and sustainable financing solution on the revenue side.

Security, defence and competitiveness are indispensable new priorities, but Cohesion and the Common Agricultural Policy remain essential to Europe's competitiveness, modernisation and convergence. The right balance is to finance our new strategic priorities adequately



Key tasks of the Council of the EU presidency. Council of the European Union

without doing so at the expense of policies that continue to deliver European added value.

For example, CAP direct-payment convergence remains essential – under the current MFF, Lithuania has reached only 79% of the EU average. Cohesion Policy should also remain a genuine convergence and investment policy, rather than be used as a crisis instrument. To the extent that both of these programmes need improvement, it is about simplification and renewed focus on growth-enhancing programmes.

In the next MFF, Europe's security and resilience must be much more clearly reflected across the budget. For Lithuania, the EU's eastern border must be recognised as a horizontal priority across the entire MFF. The security reality of the regions bordering Russia and Belarus has fundamentally changed and this requires more investment in critical infrastructure security and support for regional competitiveness. We must keep in mind that the eastern flank has been a space for incredible economic growth in the last two decades, and with our innovation ecosystems, talent pool, and hungry companies we have a good basis to grow further and advance the EU's competitiveness agenda.

The proposed Competitiveness Fund is another important element. The Commission proposes €234.3 billion – this ambition should be preserved, particularly for defence. Competitiveness and security are two sides of the same coin. At the same time, programmes such as Horizon Europe and the Competitiveness Fund should deliver benefits across the Union, rather than concentrating investment in only a few Member States. Here, Lithuania, like other Member States, needs to do its own homework, but ensuring fair access and targeted programmes also remains a must.

Connectivity is equally strategic. Funding for the Connecting Europe Facility and military mobility should be protected, including projects such as Rail Baltica, which strengthen the Single Market, European connectivity and the security of the eastern flank.

And, of course, Ukraine must remain a central priority. The

proposed €100 billion Ukraine Reserve should be considered a minimum.

All of this, however, is the expenditure side of the equation. If we want to square the circle of the next MFF, we also have to look seriously at the revenue side. This means discussing new own resources. Lithuania's position is clear: new own resources should be linked to an increase in the size of the EU budget. If the ambition and size of the MFF are maintained, we are open to discussing additional own resources as part of the overall package.

But there is an important principle here: new own resources should bring genuinely new money to the European budget rather than simply shifting revenues from national budgets to the EU level. They should also be simple, transparent and ensure a fair distribution of the burden across Member States.

In other words, an ambitious budget requires an ambitious financing solution. As we often say, show me your budget, and I will know your priorities. If security, competitiveness, Ukraine and enlargement are truly shared European priorities, they have to be reflected both in the size of the budget and in the way it is financed.

Finally, Lithuania approaches the MFF negotiations in a constructive spirit. We want to help build a compromise that can command broad support among Member States. Our objective should be to reach agreement in the Council by the end of 2026, so that the institutional negotiations with the European Parliament can move forward at full speed during the Lithuanian Presidency.

Relations with China

Kojala: *You recently said that Lithuania wants to normalise relations with China on the basis of pragmatic national interests, while respecting its obligations under international law and principles such as sovereignty, territorial integrity and human rights. What would successful normalisation with Beijing look like in practical terms? And where are Lithuania's red lines?*

Budrys: For Lithuania, the term "normalisation" has a concrete, technical meaning: we aim to maintain functional diplomatic relations with the PRC, aligned with the standards of other EU Member States. Practically, this means restoring full diplomatic representation on both sides, ensuring that both the Embassy of Lithuania in Beijing and the PRC Embassy in Vilnius are properly staffed, accredited and operating normally under the regulations and protections of the Vienna Convention on Diplomatic Relations. Furthermore, Lithuania seeks to re-establish regular working-level and political consultations. These routine diplomatic channels are essential for defining areas of mutually beneficial bilateral and multilateral cooperation, managing disagreements, coordinating on consular matters, and preventing misunderstandings from escalating into crises.

Lithuania's primary red line is absolute respect for our sovereignty. Having experienced – and continuing to experience – PRC economic coercion, we firmly reject the use of economic pressure to influence our foreign policy. The normalisation of diplomatic relations must be rooted in mutual respect, international law, and the Vienna Convention. Additionally, Lithuania remains fully aligned with the EU's policy toward China and dedicated to our commitments with transatlantic partners, especially on the urgent challenges to our collective economic security. The restoration of diplomatic ties with the PRC cannot come at the expense of European and transatlantic solidarity. We also remain firm in our stance against China's active role in supporting Russia's war of aggression against Ukraine. Finally, Lithuania will continue to support the status quo in the Taiwan Strait, as we consider cross-strait stability vital to the European security environment. ●

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Michael Kimmage: America's Foreign Policy Debate Is Far from Over

What Trump has changed – and what he has not – in Ukraine, NATO and Europe

Interview by Linas Kojala, Editor-in-Chief of the Lithuanian Foreign Policy Review

Donald Trump's second term has unsettled many of the assumptions on which transatlantic relations rested. Yet Michael Kimmage, a leading historian of U.S. foreign policy, argues that the picture is more complicated than that of an all-powerful president remaking the world at will. Trump has a method, he says, rather than a doctrine: pressure, leverage and unpredictability, often directed at allies as much as adversaries.

In conversation with Linas Kojala, Kimmage discusses the limits on presidential power, the durability of NATO and the difficult choices facing Europe over Ukraine. He also examines the Democratic Party's unsettled foreign-policy debate, Europe's growing strategic role, and why a meaningful ceasefire or a major Russian change of course remains unlikely under Vladimir Putin.



Michael Kimmage Kennan Institute

Michael Kimmage is the founding director of an independent Kennan Institute, a professor of history at the Catholic University of America and a non-resident senior fellow at the Center for Strategic and International Studies (CSIS). From 2014 to 2016, he served on the U.S. Department of State's Policy Planning Staff, covering Russia and Ukraine. He has also held appointments at the German Marshall Fund and the Center for Strategic and International Studies. His books include The Abandonment

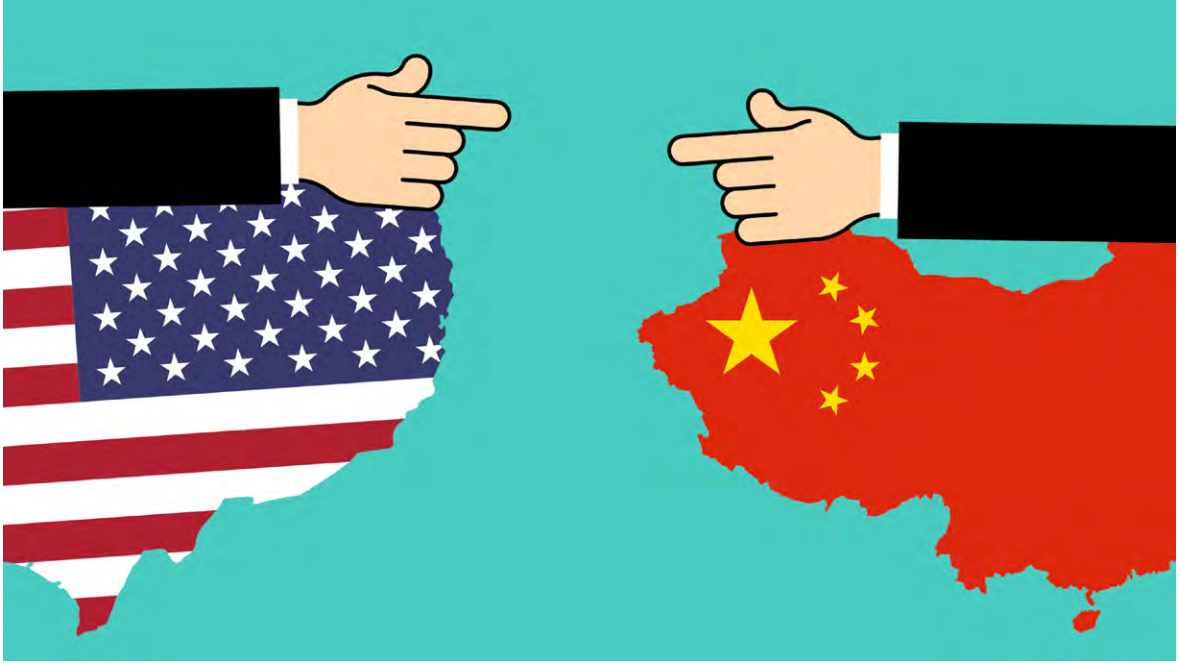


Illustration of the U.S.–China trade war. Stockvault

of the West (2020) and Collisions: The War in Ukraine and the Origins of the New Global Instability (2024).

A nonlinear foreign policy

Linas Kojala: *We now have roughly a year and a half of evidence from Donald Trump's second presidency. How would you define the foreign policy of Trump 2.0?*

Michael Kimmage: I think it is worth beginning with a few general descriptors and then trying to understand what may be a main line of action and thinking in the White House. One descriptor I would begin with – I do not think it is a controversial point, but I think it is helpful – is that it is nonlinear.

I do not think that the Trump administration chooses a goal two years from now and then proceeds toward it in some linear fashion. Maybe in certain technology areas, AI competition with China is a through line – actually also from the Biden administration. But nonlinear certainly describes the policy toward Russia. To a degree, in a less dramatic way, it describes the policy toward China. It very much describes the policy toward Europe.

So I think nonlinear is important. That can mean that what is true on Wednesday is not exactly true on Thursday.

Second, the friend–foe distinction, which is very strong in domestic American politics, is blurry with Trump in foreign policy. That is surprising in the context of traditional American foreign policy.

If we take Europe as the core focus of this conversation, the friend–foe distinction is not easy to ascertain, and it changes. There was a lot of rhetoric about working with Russia in the first six to eight months of the second term. That is kind of gone. Ukraine can be a country that the Trump administration stigmatizes as a freeloader and a country that is going to lose the war, but it can also be framed as a defense-industrial innovator and a natural American partner. The EU and the various countries of Europe go in and out of the friend–foe distinction.

Beyond that, there is clearly a new assertiveness in American foreign policy. Trump has used American power in very assertive ways – economic statecraft in particular, but since the beginning of 2026 also military power – to create realities on the ground that, at least at the beginning, are under American control or dictated by American decisions. The after-effects of these decisions, as we are seeing in Iran, can be messier than the White House predicts.

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U.S. President Donald Trump welcomes NATO Secretary General Mark Rutte to the Oval Office in June 2026. NATO

Coercion and pressure have become much more prominent tools of American foreign policy. I would not say that coercion and pressure were absent before 2024. That would be absurd. But in the past – and I think this was true of Republican and Democratic presidencies – there was a sense that the United States is a major superpower and benefits from the legitimate buy-in of allies and a loose network of global partners. You do not press for every advantage that you could, because the legitimacy of those relationships is important. That was a long-term investment in the eyes of presidents before second-term Donald Trump.

Second-term Donald Trump does not think that way. He likes the pressure points and the leverage they give him. He does not seem to care all that much about long-term patterns of legitimacy. He is willing to seek certain kinds of short-term advantage by using the full ensemble of pressure points that he has as an American president. That seems to me an important through line, perhaps, or agenda.

Beyond that, it is difficult for me to say what the core goals of second-term Trump are in any coherent manner other than very large generalities, such as prosperity, status, position, and leverage. We do not see a democracy agenda. We certainly do not see a Europe-first agenda. I do not think we see a China-first agenda.

This is not unusual for second-term American presidents. They start by thinking that they can control the world, and they find over time that the world begins to control them. That is the story of the second-term Obama presidency, as it is becoming the story of the second-term Trump presidency.

Kojala: *A foreign-policy doctrine implies some consistency between a president's stated vision, rhetoric and the actions of the administration. Does Trump's second term meet that test?*

Kimmage: I do not see a doctrine. There may be verbal gestures toward it, but I do not see language being married to action. Bill Clinton also improvised and faced unexpected crises, in the former Yugoslavia and elsewhere. But he had articulated a vision of globalization, American leadership, and democratic values. Despite contradictions and hypocrisies in pursuing it, there was not a huge gap between what he said as a campaigner and president and what his administration did. There you can speak, if not of a doctrine, at least of a settled position. I do not see that in Trump's second term. Maybe it exists behind the scenes, but I find it hard to identify.

Can unpredictability deter?

Kojala: *Niall Ferguson has argued that Joe Biden's predictability allowed adversaries to calibrate their actions just below clearly stated American red lines. Trump operates differently: both the threshold for action and the scale of any response are often unclear. In theory, that uncertainty could make Moscow, Beijing or Tehran more cautious because they cannot confidently anticipate the American response. On balance, has Trump's unpredictability strengthened deterrence?*

Kimmage: It is a fair point. Going back to the lead-up to the invasion of Ukraine in 2021 and 2022, there were many things the Biden administration did well. It handled intelligence and diplomatic side well. But you cannot say that the Biden administration succeeded in deterring Russia, because the war happened.

Biden's predictability allowed Putin to read him and anticipate how the United States might respond to an invasion of Ukraine. Biden had made the very unfortunate statement that a "minor incursion" might be treated differently. This was not simply excessive predictability; it was a particularly damaging form of it, and I think that criticism is justified.

I think it could be levied even more at Obama, who had a very tight process as president, really wanted to avoid certain outcomes, and was afraid of, quote unquote, "doing stupid shit." There was a cautiousness and predictability that allowed other leaders to act in certain ways and take advantage of it.

I wrote a piece in *Foreign Affairs* at the beginning of Trump's second term called "The World Trump Wants." I tried to be even-handed. Trump's nationalism does not appeal to me, but there were some things, including unpredictability, that might have made Trump an effective problem-solver. Armenia–Azerbaijan may be an instance of the United States coming in, helping to resolve a conflict, exerting influence, and limiting Russia's influence. That is not exactly a function of Trump's unpredictability, but of his ability to move into situations, act quickly, and not have too many preconceived notions.

The unpredictability vis-à-vis Ukraine is not the most commonly told story, but if you look at how active the CIA has been under Trump in the second term, and at certain changes in the CIA's relationship with Ukraine that I think have mattered for Ukraine's targeting of Russia's oil infrastructure, that honors the spirit of your question. Russia has to reckon with it. That is not Trump's rhetoric about Russia and Ukraine, but it is the reality of his administration: there is a kind of unpredictable support for Ukraine. If Russia were to make a big move, or move against a NATO member state, that unpredictability could be useful.

I will go that far in defending President Trump's record on unpredictability. But I do not think a responsible answer can stop there. There are many forms of unnecessary and negative unpredictability: minimizing exercises with South Korea for no understandable reason; not being openly committed to Article 5 and to security commitments within NATO; and being fickle about troop numbers, which I know is a sensitive issue in Lithuania. I do not see how that serves American or European interests or does the work of deterrence.

Ideally, you want to be unpredictable with your adversaries and predictable with your allies, even if that predictability exists behind the scenes through consultation and diplomatic work. There, Trump has left a huge amount to be desired. If the unpredictability at which Trump excels were more targeted, it would be dramatically more effective.

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Ukraine: a realistic scorecard

Kojala: ***Let us turn to Ukraine. You have argued against both easy optimism and fatalism about the war. On that realistic scorecard, how do you assess Trump's policy? The United States has continued to provide intelligence support, and Europe***

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may have been pushed to do more. But the administration has also publicly clashed with Zelenskyy, blurred responsibility for Russian aggression and cast doubt on America's long-term commitment. What is the balance sheet?

Kimmage: I always try to be as fair-minded as possible, not to lead with prejudicial judgments, and to have as much intellectual balance as possible. In that spirit, one can say that it could be worse. There could have been a complete American withdrawal from Ukraine. NATO could be in worse shape. As you and I and others have argued, the Alliance is still effectively there. The targeting and intelligence support that the United States provides Ukraine matters.

It could be argued – and I find this point a little complicated and hard to make – that Trump has done Ukraine and Europe a service by pushing Germany and other countries to invest more in Ukraine's war effort. The fact that Europe is doing more is objectively a good thing. That is as much balance as I can provide on the side of what Trump has done well or capably.

Editor's note – *NATO reports that European Allies and Canada increased defense expenditure by nearly 20 percent in real terms from 2024 to 2025, to more than $571 billion in 2021 prices.*

But that is overshadowed by what seems to me a series of completely unnecessary decisions and, even more than decisions, an attitude toward the war in Ukraine. It is worrisome, even depressing, to review the last eighteen months from a U.S. perspective. It starts with Trump's inability to describe the conflict as it is: a function of Russian aggression, an unprovoked war in which we do not just have two squabbling partners somewhere in distant Eastern Europe, as the Trump administration often implies, but one country that has clearly aggressed against another.

Ukraine wishes to join the European family. It is a rough-and-tumble democracy and, by traditional standards of American policy, would be deserving of basic levels of material and rhetorical support. The completely unnecessary public fights picked with Ukrainian President Zelenskyy are another problem. These completely unnecessary, public, and social-media-driven disputes are an objective negative.

Removing some of the underpinnings of the transatlantic relationship through sanctions, and meddling in domestic European politics – as both Vice-President JD Vance and Secretary of State Rubio did at Munich by seeming to support the Alternative for Germany and other far-right European parties – is not helpful.

Not communicating a long-term commitment to support both what Ukraine is as a country and what Ukraine represents in Europe is, let me be as polite as possible, a missed opportunity.

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Russia gets presented as a country with which you can deal in conventional diplomatic terms to achieve some kind of long-term, stable settlement. Approaching Russia in that way is to get the whole question wrong from the beginning. I am not saying that there will not be a settlement in Ukraine or a negotiated ceasefire. But presenting Russia in the current moment as a reasonable, responsible negotiating partner does a disservice to everyone involved. It also makes European cooperation with the United States more difficult.

A final point: the administration did not foresee in Iran that there are trade-offs that matter in Europe – the interceptor question, the Patriot missile question, and questions that may emerge six months from now about materiel the United States has expended in Iran and which is no longer available directly or indirectly for Ukraine. That has also been a debit in the war. I do not think Trump waged war in Iran because of Ukraine; the conflicts are very separate in his mind. But they are interconnected in reality. The more you struggle in Iran,

the less you can do on the Europe and Ukraine front.

The nightmare scenario would be the war in Ukraine, an unfinished war in Iran, and a crisis in the Indo-Pacific, with the United States struggling to manage all three simultaneously. So I find it rather bleak and almost unforgivable what the Trump administration has done over the last eighteen months in Ukraine. But, as the first part of my answer indicates, it is not one hundred percent bad news.

Trump has not won the argument

Kojala: *Yet American society still seems broadly supportive of Ukraine, including parts of MAGA. A June 2026 survey found that 61 percent of registered voters supported providing U.S. weapons and military funding to Ukraine, including 52 percent of likely Republican primary voters. It also found that 83 percent of Trump voters supported tougher sanctions on Russia.*

Kimmage: Here I want to make the point that matters most to me to say to your readers. It is a longer-term point, and it is just my opinion, but I do not think Trump has won many of the basic arguments of American foreign policy.



U.S. Special Envoy Steve Witkoff and Jared Kushner meet Ukrainian President Volodymyr Zelenskyy in Kyiv in September 2026 during talks aimed at ending the war.
Official White House Photo by Daniel Torok

I do not think Trump has won many of the basic arguments of American foreign policy.

He may have done so on the campaign trail. But when Americans vote, they do not vote on foreign policy in presidential elections. The most famous example is George H. W. Bush losing in 1992 after all of his geopolitical triumphs. He lost for domestic and economic reasons. I do not think Americans in 2024 were voting on Trump's attitude toward NATO, Ukraine, or Europe. That was in the background.

As president – and this is where it really matters – he has not won the second-term arguments he is trying to win. I do not think he has won the argument on tariffs. I do not think the American business community or the population is convinced that tariffs are a great idea. He has absolutely not won the argument on the Iran war. Look at the polling and statements from many American public figures.

He has not won the argument on Ukraine. From an American point of view, it is a little confusing to see what the United States is doing: it is not out, but it is not entirely in. Trump has not won the argument that this is some trivial crisis that can be resolved with a bit of deft diplomacy. Americans care more about Ukraine than that.

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Nor do I think Trump has won the argument on Europe. I do not know exactly what his argument is, but it seems to be: we will try to form an alliance with the independent nation-states of Europe, hoping that far-right parties come to power in those states, and then supplant the relationships we now have with the EU and mainstream Europe. First, that has not worked for the United States. Second, I do not think it is a popular viewpoint, including within the Republican Party, where I think most people would be more or less Reagan Republicans on foreign policy if they were allowed to be.

The fracturing of MAGA on Ukraine is almost a case study of Trump not winning the argument. Trump lost the argument within parts of MAGA on Iran. Marjorie Taylor Greene, Tucker Carlson, and others broke with Trump on Iran. Because they broke with him on Iran, it became easier for figures such as Laura Loomer to break with him on Ukraine.

I do not want to give Lithuanian or European readers any false sense of hope or optimism when it is important to confront present realities. But Trump not winning the argument really matters. If you want to be a transformative American president, you should look historically at Ronald Reagan and Franklin D. Roosevelt – presidents who won arguments over the long term. You have to win not only with your own party, which Trump has not done, but with the other party and with society.

Trump is not in that position. He has not won the argument. After arguing since 2024 that everything has changed and MAGA has remade the world, we may see a strong rethink that takes things back in a more conventional direction. That is what I would hope for, so I want to be careful with the answer, but I do not find it implausible.

The limits of presidential power

Kojala: *Who else still matters in U.S. foreign policy? From Europe, it can seem that everything now rests with the president: Congress has largely stepped back, the courts rarely shape foreign-policy decisions, and independent agencies have little room to restrain the White House. Is that an accurate reading of the system? And is this a Trump-era phenomenon, or will it outlast him?*

Kimmage: One wants to be careful with the idea of an all-powerful Trump. It is a circular idea that becomes difficult to refute, which makes me suspicious of it. Let me offer two counterarguments to the claim that only Trump matters.

The first is that the constraints on Trump – thinner than one might have expected in 2024 – are real, but often invisible. We will have better ways of answering this question five or ten years from now. But you can ask why Trump does not pursue making Canada the fifty-first state, or taking Greenland by military force. I doubt the United States would lose a war if it seriously waged one against Greenland, so I do not think the question is capacity.

But I am convinced that if the United States initiated hostilities against Canada or Greenland, Congress would be deeply opposed, or at least muddled and confused in a way that would block Trump. Iran is an interesting case study, and so far Trump has not been stopped there. But there was considerable ideological support in Congress, especially at the beginning, for what Trump was doing in Iran. That may not be an example of a missing guardrail so much as agreement with Trump's policies.

On Canada and Greenland, I think Congress matters because of what it could do. It is hard to prove empirically because it has not happened, but I think it is a constraint. Trump is self-indulgent and erratic, but also a canny politician. I think he knows where some of these guardrails are and is smart enough in many cases not to cross them. With Ukraine, NATO, and Europe, if Trump went considerably further in alienating European partners or minimizing



U.S. President Donald Trump arrives in Ankara for the NATO Summit and is welcomed by *Turkyie* President Recep Tayyip Erdoğan. NATO

support for Ukraine, I think Congress could become a real problem for him. It may be a hypothetical power, but I think it is also a real one.

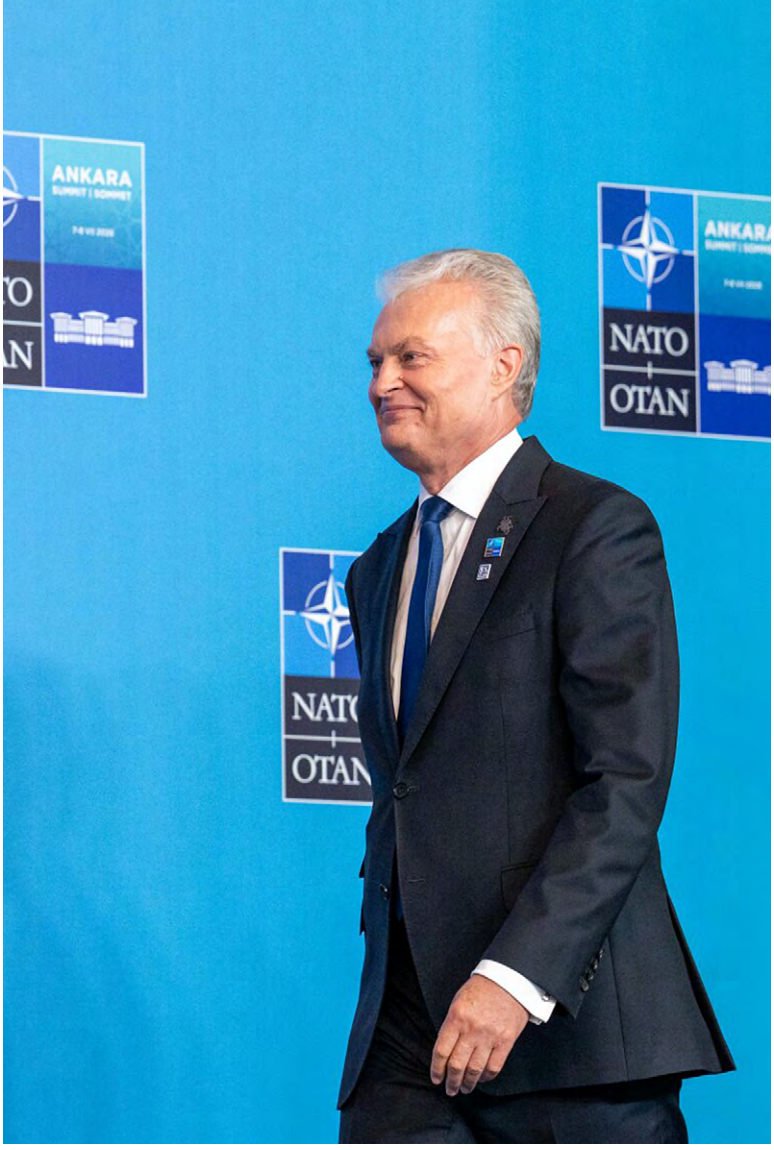
Editor's note – *Since 2023, U.S. law has prohibited a president from unilaterally withdrawing from the North Atlantic Treaty. Under 22 U.S.C. § 1928f, withdrawal requires either the consent of two-thirds of senators present or an act of Congress; the law also bars the use of appropriated funds to support an unauthorized withdrawal. The provision has not yet been tested in court.*

The second point is that we need to think holistically about foreign policy. Powerful as a president is, and powerful as the U.S. government is, it is not the only agent of American engagement with the outside world. In Europe, the business community and economic connections are enormously consequential. Europe is a huge source of investment in the United States and a considerable market for it. Joint innovation and collaboration happen in universities, think tanks, investment banks, pharmaceutical companies, and elsewhere. As much as there was a nationalist response to the COVID pandemic, there was also transatlantic creativity in developing and distributing vaccines.

The people-to-people part of the equation is important when it comes to Europe. An American president can break a lot, and Trump has broken quite a bit in the transatlantic relationship. But there are structural limits to what the government can do. I think Trump recognizes that the economic costs of a real rift with Europe would be huge for the United States.

The people-to-people part of the equation is important when it comes to Europe. An American president can break a lot, and Trump has broken quite a bit in the transatlantic relationship. But there are structural limits to what the government can do. I think Trump recognizes that the economic costs of a real rift with Europe would be huge for the United States. Europe, especially the EU, may not yet be a military superpower in 2026, but it is certainly an economic and trade superpower. These relationships impose constraints, partly because of Europe's position but also because of the enormous interconnection between the United States and Europe, which anchors the transatlantic relationship.

Editor's note – *EU–U.S. trade in goods and services reached €1.8 trillion in 2025 – around €4.9 billion a day. U.S. exports to the EU support 2.6 million jobs in the United States, while EU companies' investments employ a further 2.4 million people there. Yet the economic cost of the tariffs is beginning to show. EU goods exports to the United States fell by 30.4 percent year-on-year in the first quarter of 2026. The figures are partly distorted by the front-loading of trade before the tariffs took effect, so they should not be read as measuring the tariffs' effect alone. But they point to a disruption of transatlantic commerce.*



Lithuanian President Gitanas Nausėda at the 2026 NATO Summit in Ankara. Robertas Dačkus / Office of the President of Lithuania

Where Trump may be very powerful – and it is an open question how much this matters in the larger scheme – is in the media space. He defines the United States to the world. It is not the American business community that does so; it is the president, and certainly this president, with his command of social media and the media in general. He sets the tone of the conversation. That matters, but I do not know if it matters as much as these other factors. Contextualizing his power is important.

I would add as a footnote that what one feels in Washington in the second year of Trump's second term is that the president is weaker than he was in his first year. That is an institutional, atmospheric, emotional, and perhaps practical question. The midterm elections, lame-duck status, and the Iran war are all contributing to a weakening of the presidency. If the president can weaken – if our perception is correct – then by definition he is not all-powerful.

The Democratic foreign-policy debate

Kojala: *On the Democratic side, do you see an emerging foreign-policy consensus? Without a clear 2028 presidential frontrunner, is the party beginning to coalesce around a set of ideas, or are its internal differences still too significant to speak of a coherent vision?*

Kimmage: There is definitely flux, precisely because there is no leader and because there are many questions – interestingly, not so much about the Obama legacy as about the Biden legacy. It is important to acknowledge that Trump has reframed the debate, even for Democrats. On China and trade, even if most Democrats say they disagree with Trump, he has set the agenda and Democrats are responding to it. That contributes to the flux.

I am happy to answer your question by making a prediction, with all the caveats that go into making predictions. I think the flux is confined to perhaps two core issues for Democrats at the moment. By "Democrats at the moment," I mean the more engaged people who would vote in primaries. When we get to a general election in 2028, the dynamic will shift and a centrist logic will take hold to a greater degree.

The first issue is a real recalibration of the relationship with Israel. That is happening among Republicans, in Europe, and in many places. I think it is real. You have seen the change in Rahm Emanuel's attitude. He is a conventional establishment Democrat of Jewish background, and he has changed what he says about Israel and rethought his position. Further to the left, you could look at New York Mayor Mamdani and other figures. There is a much more critical attitude toward Israel. In policy terms, that would translate into a much colder relationship, much less military aid, and perhaps a real rupture if Netanyahu were still in power. You could have a high-friction relationship between the United States and Israel.

Editor's note – *Pew Research Center polling conducted in March 2026 found that 60 percent of Americans held an unfavorable view of Israel, up from 53 percent in spring 2025. Fifty-nine percent said they had no confidence in Benjamin Netanyahu to do the right thing in world affairs.*

The second issue seems more prosaic or modest, but it may be just as consequential. There is real dislike in the Democratic Party focused on the people who served in the Biden administration. Biden himself has clearly retired, and Kamala Harris is not much in the public eye. But this includes figures such as Jake Sullivan, Antony Blinken, and others. There is a desire for a new generation of people. I do not think anybody knows exactly who they are, but personnel is policy. That is a legitimate axiom about foreign-policy formation. A new cohort, generation, and group of people could have very different policy ideas. So there is flux in those two areas: personnel and Israel.

There was a recent interview by *The New Yorker* editor David Remnick with the co-chair of the Democratic Socialists of America, Megan Romer, in which she really floundered on foreign policy and offered, in my judgment, some not particularly compelling arguments about how the world works. She offered what seemed to be an almost Trumpist argument about Ukraine – or one that went beyond Trump – in seeking a quick path to a negotiated settlement. Those are interesting news stories. Perhaps they are genuine shifts that will make themselves felt in the Democratic Party. But I am skeptical.

If you look at the two figures who matter most to the party's left of center, they are Alexandria Ocasio-Cortez and Bernie Sanders. It is very important to note that Sanders is a stalwart supporter of Ukraine. He has no issue with NATO. I do not know if he would sustain the same levels of defense spending vis-à-vis Europe that Biden and Obama did. Perhaps he would argue for less. But he is not that different from Biden and Obama when it comes to Europe, NATO, and the war in Ukraine. I think Ocasio-Cortez follows much more in his footsteps than she does the DSA model, whatever it is.

I do not think that is political calculation for them. I think Bernie Sanders truly believes that Russia is the aggressor, Ukraine is the victim, and Ukraine is a democracy that deserves the support of NATO

countries and a transatlantic or global alliance. When Ocasio-Cortez emerges, as I am sure she will, as a presidential candidate in 2027 or 2028, I think she will have a very similar view.

I am not going to say that Ocasio-Cortez and Sanders do not want to change the Democratic Party or its foreign policy. They are rethinking it, or, as they would put it, reforming it. But outside personnel and Israel, let us not forget that there could be a lot of continuity – not with Trump, but going back to Biden and Obama – especially where it matters on the European front.

Has Europe willed itself to power?

Kojala: *In August 2025, you and I argued in Foreign Policy that "Europe Has Willed Itself to Power." The argument was that, faced with Russia's war and a less reliable United States, Europe had begun to act with greater political purpose and strategic confidence. Does that still hold in 2026? Has Europe shown that it can translate this new unity into sustained military, industrial and financial support for Ukraine, while managing its own internal differences?*

Kimmage: I think so, for sure. We can go through the issues, perhaps saving Ukraine for last because it is in some ways the most troubling instance.

Starting with Greenland, I did not realize that Donald Trump Jr. and Charlie Kirk had made a trip there in December 2024, before Trump was inaugurated. I did not realize the issue was present in the transition, which shows how important it seems to have been to Trump. I think Europe has effectively neutralized it.

Part of the Greenland issue, I am convinced, is that Trump used it before the invasion of Iran as a tool of media distraction. Over the second half of 2025, Europe figured out how to manage the issue without making Denmark feel isolated or allowing it to spill over into a giant NATO crisis. Europe also communicated clearly to Trump that this was a red line and that, despite the alliance and the long history of good relations, Europe would not budge or compromise. That is important.

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On the core foreign-policy issues that matter to Europe, I think there has been consensus and clarity. Germany has been productive but not dominant, which is good. One does not want European foreign policy to become German foreign policy, or vice versa. On the United States, perhaps a little less on China, but also on Russia, it feels to me that Europe is speaking in one voice. The vanishing of Viktor Orbán over the last year has made that job structurally and institutionally easier, and that matters.

It is not a perfectly efficient machine. When you think of von der Leyen, Rutte, and the different heads of state, it is not a perfectly square box; it is some other geometry. I think that suits the European reality of different countries, populations, and constituencies. But it is effective on the core issues – in messaging and action.

On Ukraine, what is good is that there was no rush to follow Trump down the ill-formed negotiating path he put forward in 2025, but it was not rejected out of hand either. That worked. There is discussion of a European envoy to Russia and the resumption of some diplomatic relations. But it is good that Europe has not fallen into the trap of premature negotiation or negotiating over the heads of Ukrainians. Defense spending is also on an upward trajectory.

Editor's note – *In 2025, European donors allocated around €68 billion in support for Ukraine. This largely compensated for the collapse of U.S. support, which fell by 99 percent. The trend has*

continued in 2026: Europe has provided all new aid allocations, while the United States has provided none. Yet the picture is uneven. Military aid in the first half of 2026 was close to the previous year's level, but financial and humanitarian assistance was 41 percent lower. The new EU €90 billion Ukraine Support Loan may help close that gap, but Europe still relies on U.S.-made systems, including Patriot air defence.

The cautionary note is that we are now in the fourth year of this war. From a European point of view, uncertainty about the American commitment to Ukraine was already part of the 2024 Republican campaign, for both Vance and Trump. It is very unfortunate that we are in the position we are in with interceptors and Ukrainian air defenses. You can fault the United States for that, and you should. The United States should be doing more. I wish the Iran war had not begun and the focus had stayed more on Europe.

But it is also a source of deep regret and concern to me that Europe, with all of its wealth and defense-industrial capacity, has not found more of an answer. We are entering the winter, and it is going to be very hard for Ukraine. The last twenty-four hours were hard enough; the last couple of weeks have been difficult on air defense.

Let me conclude not with skepticism but with a recommendation. The power Europe has amassed financially and economically to support Ukraine and see it through to some version of victory now needs to focus on the hard practicalities of Ukrainian defense with urgency. We cannot forget that Ukraine can lose this war. Ukraine has been brilliant at defending itself and valorous. It shows no sign of wanting to give up, and its political structures are viable. It is not on the cusp of defeat in any sense. But defeat could happen. I worry that at times we lose sight of that, and as a result lose our urgency.

The power Europe has amassed financially and economically to support Ukraine and see it through to some version of victory now needs to focus on the hard practicalities of Ukrainian defense with urgency. We cannot forget that Ukraine can lose this war.

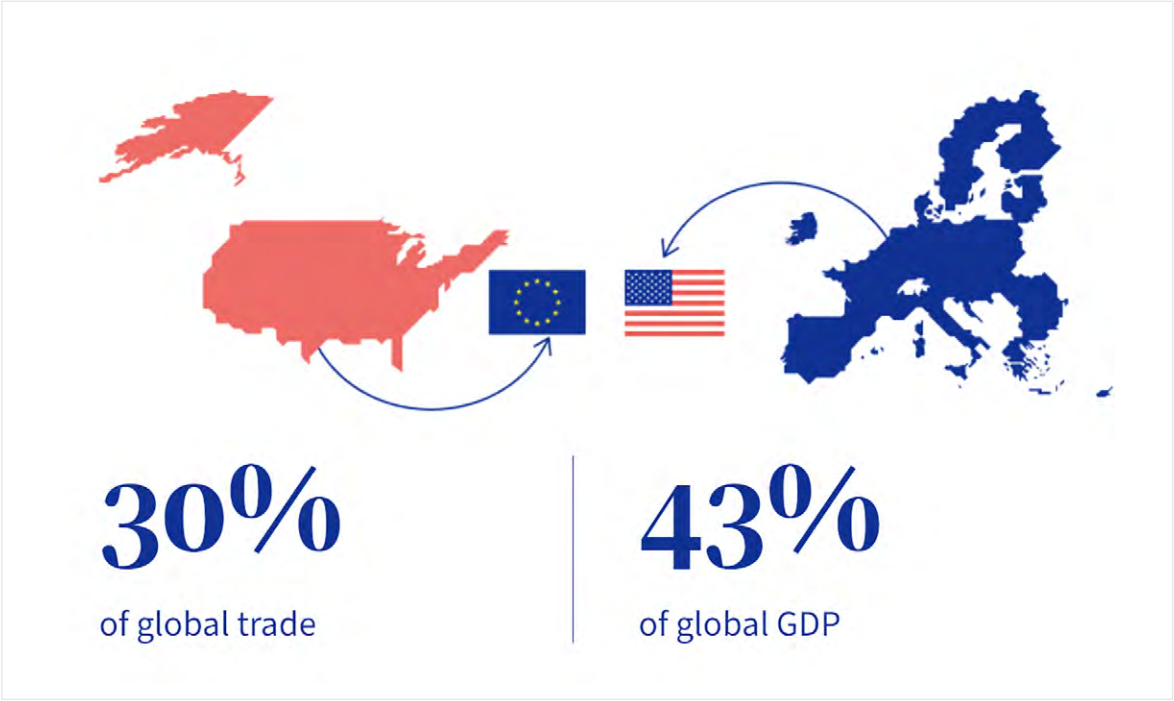
Three forecasts for the end of 2027

Kojala: ***Let us finish with three scenarios for the end of 2027. First, will there be a meaningful ceasefire in Ukraine rather than something that exists only on paper? Second, will the United States remain in NATO and maintain a stable, cooperative relationship with European allies, even if it is less engaged on some practical matters? Third, will Russia begin a meaningful strategic reconsideration of its foreign-policy choices, even if Putin remains in power?***

Kimmage: On a ceasefire, no. The scale of the war is very large, and the stakes are very high for both Ukraine and Russia. Different leadership in Russia could understand that it might be beneficial for Russia to pull out and normalize relations with Ukraine and Europe. But that is not what Putin is going to do.

Russia is not going to settle for a bit of territory and Ukraine's integration into the West. Putin will try to block that. Ukraine will not give up its connection to the West or its military power to normalize relations with Russia, as Russia would demand that Ukraine be neutral and have a very small military.

Russia is not going to settle for a bit of territory and Ukraine's integration into the West. Putin will try to block that. Ukraine will not give up its connection to the West or its military power to normalize relations with Russia, as Russia would demand that Ukraine be neutral and have a very small military. Russia would then try to take a great deal of territory *de jure* and probably prepare for the next phase of



In 2025, transatlantic trade in goods and services exceeded €1.77 trillion.
Council of the European Union

the invasion. That is what a ceasefire would mean for Ukraine on the Russian side under Putin. It is a grim point, I recognize, but it feels to me almost emphatically true.

I do not think the United States will pull out of NATO. Trump may make some crazy individual decisions; he has a record of doing that. I do not think he is becoming more moderate as he gets older. But the time for big, sweeping structural reform of the government and its foreign policy was probably in the first year of his second term. I do not think the midterms will give Trump more power. However the numbers turn out, they will probably diminish it.

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Then you get to the succession question. The conversation in the United States will shift to who will succeed Trump and who the power brokers in the Democratic Party will be. Psychologically, that also begins to diminish the president's power. Big structural shifts such as leaving NATO would be a tough sell.

Trump's difficulties in Iran could also make him more dependent on Europe. When you struggle with something as large as the Strait of Hormuz and the issues related to the Iran war, you need countries that will partner with you. Even if you do not see eye to eye, and even if Spain annoys Trump, NATO can begin to look very useful. If you are going to wage wars in the Middle East, it helps to have bases in Germany and military assets in Europe. Trump has probably made decisions that, if anything, tie him more closely to Europe than he was in the first year of his second term.

Editor's note – *A June 2026 Chicago Council–Ipsos survey found that 68 percent of Americans wanted the United States either to increase its commitment to NATO (25 percent) or maintain it at the existing level (43 percent). Majorities of both Republicans and Democrats said the alliance with Europe makes the United States stronger.*

On Russia, I do not think a meaningful strategic reconsideration is possible. It is a tragic point because of the dangers this embodies for Lithuania, the Baltics, and the region more broadly. The war is embedded in the Putinist system, in Putin's legacy, or in his sense of himself as a historic and political figure.

Russia's break with Europe will be very harmful over the long term. But the steps necessary to normalize relations would probably include a large-scale withdrawal from much of Ukraine, some acknowledgement of war crimes and stolen property, and a commitment not to do such things in the future. Only then would Europe be ready to normalize relations. That seems completely impossible under Putin.

Try to imagine a fictional Navalny who comes back from the dead and rules Russia. I do not think even Navalny would be able to make some of those

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concessions, if we look at what he said about Crimea and the environment in which he would have to advocate inside Russia. That would not be easy even for a pro-Western liberal politician.

I do not want to say that Russia is condemned to pure confrontation with the West for the next fifty years. That is far too categorical. There are always contingencies, and things can shift suddenly. Think back to the Prigozhin mutiny or the late years of the Soviet Union. But any rational reading of Russian politics is that the war now runs the Russian political order. It will be very hard for Russia to escape from that, even as the war damages the Russian economy, causes enormous loss of life, and prevents Russia from being where it should naturally be – some kind of partner to Europe. All of that is being made impossible by the war, but that will not make it easier to end it given Russia's political system.

Editor's note – *SIPRI estimates that Russia's military expenditure reached $190 billion in 2025, or 7.5 percent of GDP. Germany's foreign intelligence service, the BND, has offered a broader estimate for 2025, putting Russia's actual military burden at roughly 10 percent of GDP. The 2026 budget plans 14.9 trillion rubles in military spending, or 6.3 percent of GDP, but SIPRI expects the budget to be amended during the year. Drawing on Russian Finance Ministry data, economist Janis Kluge estimated that Russia spent 5.9 trillion rubles on war-related military purposes in the first quarter alone – 46 percent of federal expenditure. The difference reflects both methodology and the extensive use of classified budget lines and war-related expenditure outside the formal defence budget.*

Liana Fix: Germany Is Caught in a Triple Dilemma

On German rearmament, Europe's missing defence Plan B, the political risks around the AfD, and why Ukraine is becoming a security provider rather than a recipient

Interview by Linas Kojala, Editor-in-Chief
of the Lithuanian Foreign Policy Review

Germany is rearming faster than almost anyone would have thought possible a few years ago. But for Liana Fix, the real question is what happens next. A stronger Germany may emerge just as America becomes less willing to carry Europe's defence – and as political forces deeply sceptical of the current European order grow stronger at home. Her argument is that Europe has little choice but to prepare for both possibilities: a NATO in which Europeans do much more, and a Europe that may one day have to defend itself with far less American help. Ukraine, in that calculation, is not simply a country to be supported. Its army and defence industry are increasingly part of Europe's own security.

Dr Liana Fix is a Senior Fellow for Europe at the Council on Foreign Relations (CFR), where she leads the Securing Ukraine's Future Initiative. A historian and political scientist, she is a leading authority on European security, transatlantic relations, Russia and Eastern Europe, and European China policy. She is the author of Germany Rearmed: The Return of War and the End of Illusions (Hurst, 2026). Together with Michael Kimmage, she is the co-author of the "Ukraine Scenarios" series in Foreign Affairs.

The myth of German pacifism

Linas Kojala: *In Germany Rearmed, you challenge what you call Germany's "myth of pacifism". What exactly was that myth built on? And how much has really changed since the launch of the Zeitenwende?*

Liana Fix: The book argues that Germany has never actually been a pacifist country. During the Cold War, West Germany's defence spending was above 3% of GDP, and after 1990 Germany took part in numerous international missions, including its first ground combat mission in Afghanistan.

But in German society, a "quasi-pacifistic" identity took root, especially after 1990: a preference for civilian means and restraint in the military use of



Liana Fix signs copies of her book following a presentation at the Royal United Services Institute (RUSI) in London. Liana Fix / X

In German society, a “quasi-pacifistic” identity took root, especially after 1990: a preference for civilian means and restraint in the military use of force, the idea that Germany had left military power behind and should use it only as a last resort. It filled the void in German foreign-policy identity after 1945 with a normative aspiration: finally, Germans were on the right side of history.

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It was, of course, also highly hypocritical and often a useful fig leaf. You could invoke Germany’s historical lessons to justify military intervention, or to refrain from it. Meanwhile, energy and business ties with Russia and China grew, and Germans told themselves this was the perfect symbiosis between “doing business and doing good”.

The Putin shock in 2022 was enough to jump-start the transformation and to put the myth seriously in question. It was not enough to make defence the most urgent political priority, because as long as Biden was in the White House, the Russian threat looked manageable and Trump looked like an aberration. History had to repeat itself twice.

The re-election of Donald Trump and the historic loosening of Germany’s debt brake for defence was the real turning point. Spending is moving from €85.5 billion in 2025 to €162 billion in 2029 – more than current French and British spending combined. At the level of discourse, the myth has collapsed: “military restraint” and “civilian power” have simply disappeared from German political vocabulary. We see a return to ideas of the Cold War about deterrence and defence: to be ready to fight in order not to have to fight.



NATO Secretary General Mark Rutte meets Ukrainian President Volodymyr Zelenskyy and leaders of France, Germany, Italy, Poland and the United Kingdom at the 2025 NATO Summit in The Hague.
NATO

willing? A European Defence Union? – if the U.S. security umbrella further weakens. Germany will become even more dependent on the French nuclear "forward deterrence" concept if the United States continues to adapt its force posture, but it will also have to make concessions to France in return, especially on joint European debt for defence.

And lastly, there are of course fears on both sides about the ascent of far-right populists to power, which would effectively end the Franco-German motor and European integration. There is no honest conversation taking place in Berlin or Paris – as there was during German unification in 1990 – about how the power balance in Europe, and specifically between France and Germany, can be managed to prevent a return of rivalry that U.S. hegemony in Europe has subdued for a long time.

Editor's note – *In March 2026, France and Germany created a bilateral nuclear steering group for strategic dialogue. Germany agreed to participate conventionally in French nuclear exercises, while President Emmanuel Macron set out a concept of French*

"forward deterrence". The decision to use French nuclear weapons remains exclusively with the French president.

Germany's triple dilemma

Kojala: ***You have argued in the German media that Germany's neighbours are already asking what its growing military power would mean if the AfD became more influential. Can Europe base more of its security on Germany without knowing what kind of government Berlin may have in ten years? What safeguards could make German military power more predictable?***

Fix: Germany is in a triple dilemma, caught between the threat of Russian aggression, the threat of American abandonment, and the threat of a far-right rise to power at home. That is the greatest strategic challenge German policymakers have faced since 1945, and the third element is the one that turns the other two into a genuine European problem.

What is specific about the AfD is that it did not take the Meloni route of normalisation. It has radicalised from a Eurosceptic party into one with a neo-Nazi faction, particularly strong in the East, under domestic intelligence surveillance, with regional branches confirmed as hostile to the constitution. The AfD is not against rearmament; but it wants a Germany disentangled from the EU and NATO in their current form, the United States recast as a *raumfremde Macht* – in Carl Schmitt's terminology, an outside power whose influence in Europe should be limited – and rapprochement with Russia.

Safeguards should be structural rather than declaratory. They will not fully prevent the AfD from leading Germany out of its deep integration into the EU and NATO, but they can at least provide a temporary obstacle and slowdown. In short, safeguards should aim to integrate Germany's military power, its army and capabilities, and its defence-industrial base as deeply into Europe as possible so that it becomes difficult for the AfD to disentangle them.

The more Germany's defence industry is dependent on other European defence industries, the more difficult it will be for the AfD to make Germany an autonomous military power. The more Germany is integrated into multinational military formations, the more difficult it will be to withdraw Germany from Europe's joint defence against Russia. And the more Germany is financing Europe's rearmament through joint

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debt, the more it becomes a European rearmament effort, not only a German rearmament effort. These are three constraints through deeper European integration that can help ameliorate the risk.

Editor's note – *The AfD received 20.8% of the vote in Germany's 2025 federal election, becoming the second-largest party in the Bundestag. Germany's federal domestic intelligence service classified the party as a confirmed right-wing extremist organisation in 2025, but a Cologne court temporarily blocked that designation in February 2026 while the legal challenge continues. Several regional AfD organisations remain separately classified as confirmed right-wing extremist by state intelligence authorities.*

Does Europe have a defence Plan B?

Kojala: ***You have argued that Europe urgently needs to invest together in artillery, air defence and other capabilities previously provided by the United States. How far can Europe realistically get by 2030 – and what role could the United States still play in European security by then?***

Fix: After 2022, a great many contracts went to the United States, which now creates a conundrum. The Iran war demonstrated that American stocks are insufficient, and waiting times might become too long and undermine European deterrence.

So the real question is whether Europe can acquire in Europe the capabilities the Americans used to provide, and what happens if the American withdrawal moves faster than Europe's capacity to produce. Defence planning for Europe, including standardisation and interoperability, currently happens only in NATO and relies heavily on American strategic capabilities. There is no "European-only" alternative to that, but it would be urgently needed.

And lastly, in the worst case, Europeans have to prepare for Washington to weaponise Europe's dependence on American systems and technology.

Europe really has two options: invest in a more European NATO on the assumption that the United States does not fully abandon Europe, or plan for a Europe-only alternative as a Plan B. Neither is easy, and both will probably have to be done at the same time, as it is unclear whether European alternatives could produce the same deterrent effect in the short term.

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Editor's note – *In May 2026, the United States announced that about 5,000 troops would be withdrawn from Germany, with the drawdown expected to take up to a year. As of late September, it was still being implemented while the Pentagon conducted a broader review of the U.S. military posture in Europe. At the same time, Washington continued rotational deployments on NATO's eastern flank, including a planned new rotation to Lithuania.]*

Ukraine as a security provider

Kojala: ***As the United States steps back, Europe increasingly depends on Ukraine. That changes the usual picture of Ukraine as a country waiting***

to be rescued. If Ukraine is becoming essential to Europe's own defence, what should its role be in Europe's political and security architecture? Can that relationship work without NATO membership – and what happens if Ukrainians become disillusioned with the lack of a Western integration pathway?

Fix: In 2022, our support was partly altruism: we helped because it was morally right. That has changed completely. The more the United States disengages, the more Ukraine becomes a security provider rather than a recipient. Kyiv survives on European money, but it is Ukraine that is holding the Russian army down, while our central problem is acquiring the capabilities the Americans used to supply.

Ukraine will be a production site for exactly what we may need most – drones and counter-drone systems. So Ukraine's place in the architecture is as an outpost of Europe's defence, and it should be deeply integrated into any European defence structures that are emerging in parallel to NATO.

Ukraine needs to be inside European defence planning and financing, Ukrainian firms inside the European defence-industrial base rather than adjacent to it, European money buying Ukrainian production, and Ukraine treated as a security ally.

The question of NATO membership has less relevance than it had in the past at a time when NATO's role as the main provider of European security is in question. Parallel structures of European defence – either EU-based or coalition-of-the-willing-based – will need, as their first task, to establish and structure this new security alliance with Ukraine, in which we are de facto already.

Ukraine may become frustrated with slow EU integration and a lack of NATO integration, but the key is to provide an alternative European defence-integration framework in which Ukraine is a central pillar. Unfortunately, we are still lacking the name and the concept for that.

Kojala: *You have argued that Ukrainian innovation and deep strikes have exposed serious Russian weaknesses. What should we actually measure when judging the military balance? And what would persuade you that Moscow had genuinely reconsidered its war objectives, rather than accepted a pause to recover?*

Fix: The battlefield is very dynamic, and both sides



The German Army's 45th Armoured Brigade is formally inaugurated in Vilnius on 22 May 2025. The brigade, permanently stationed in Lithuania, is expected to reach full operational capability by the end of 2027, with approximately 5,000 military and civilian personnel.
A. Pliadis / Lithuanian Ministry of National Defence

are constantly adapting. Unfortunately, I do not see a scenario in which Russia under Putin's leadership will seriously reconsider its war objectives. A ceasefire will therefore always be a pause to recover; the war under Putin is a generational one.

Only in a post-Putin scenario may we actually talk or negotiate about something that truly resembles a peace agreement.

Germany's brigade in Lithuania

Kojala: *Germany's deployment of a brigade to Lithuania by the end of 2027 is a landmark project for NATO and perhaps the most concrete test of the Zeitenwende outside Germany itself. How do you assess its progress – and could such a commitment be reconsidered if German politics shifted sharply to the right?*

Fix: In 2014 and 2016, it was Germany that insisted on rotational rather than permanent stationing in Poland and the Baltic states, on the grounds that permanent troops would violate the NATO–Russia Founding Act of 1997. A decade later, Germany is building a permanent brigade there.

Despite initial difficulties finding enough voluntary soldiers, Germany is very serious about this project – it is called the beacon project of the Zeitenwende. It is designed not merely as a tripwire but as an actual fighting force, to reassure Lithuania and the other Baltic states that Germany will come to their defence. So it is not symbolic anymore. It also has an important political function: it is an insurance against cowardice in case of a crisis. Five thousand soldiers and their families are much more difficult to evacuate than the previous 500 soldiers if Russia escalates – it is the same function that U.S. soldiers had in West Berlin. It compels Germany to solidarity; Germany will be tied to the fate of Lithuania. Given the prevalence of Deutsche Angst – Germany's deep-rooted aversion to military and geopolitical risk – that matters enormously at home. And the brigade has the military capacity to slow a Russian advance.

AfD voters are indeed the ones who are least willing to defend allies, and the brigade in Lithuania will be an obstacle on the path of rapprochement with Russia that the AfD foresees. However, with 5,000 soldiers, reversal would be visible and costly, and harder to act on than the previous 500.

Editor's note – *Germany's 45th Armoured Brigade remains scheduled to reach full operational capability in Lithuania by the end of 2027, with about 4,800 military personnel and 200 civilian Bundeswehr employees. As of September 2026, the Bundeswehr said roughly 80% of posts were already filled voluntarily, although several hundred specialist positions may still require mandatory assignments or temporary rotations. Lithuania says the main Rūdninkai infrastructure remains on schedule, with the first phase progressing ahead of its contractual deadline.*

Kojala: *Looking towards 2030, how likely are three outcomes: Germany becoming Europe's leading conventional military power, NATO retaining a potentially smaller but still credible American role, and Ukraine becoming fully integrated into the EU and Europe's security system?*

Fix: It would certainly be the best-case scenario, and it is not unattainable. At least two of these, in whatever combination, need to happen for a broadly positive outcome.

The greatest challenge for that scenario is the rise of the far right in France and Germany. It will destroy any trust in these two countries as security providers in Poland and the Baltic states, and lead to a regionalisation of European security – with a north-eastern bloc going its own path.

This can still provide some deterrence. But the ideal of a Europe that can defend itself would collapse, and Europe would return to the chaotic state of bilateralism – bilateral relationships among certain countries, some alliances, some rivalries, and much friction. ●

Andrius Kubilius: Europe Must Learn to Defend – and Fight – as Europe

On NATO 3.0, a European Security Council, defence-industrial fragmentation, Ukraine and the choices facing Europe

Interview by Linas Kojala, Editor-in-Chief
of the Lithuanian Foreign Policy Review

Europe is entering a period in which assumptions that held for decades can no longer be taken for granted. Andrius Kubilius argues that the challenge is not simply to spend more on defence, but to change how Europe thinks, decides and acts – and to do so much faster than its institutions are used to. That means taking greater responsibility inside NATO, reducing the fragmentation of Europe's defence effort and treating Ukraine not only as a country to support, but as part of Europe's future security architecture.

Andrius Kubilius has served as European Commissioner for Defence and Space since December 2024. He was Prime Minister of Lithuania in 1999–2000 and 2008–2012, a member of the Lithuanian parliament from 1992 to 2019, and a Member of the European Parliament from 2019 to 2024.



Andrius Kubilius, the EU's first Commissioner for Defence and Space.
EPP

Europe's defence responsibility

Linas Kojala: *You have argued repeatedly that Europe must be ready to defend itself – perhaps by 2030, ideally sooner. Looking at where we are now, what gives you confidence that this shift is actually under way, and where are the biggest gaps?*

Andrius Kubilius: I would say this is not really my idea. I am repeating what has now become NATO's own strategic direction. At the Ankara Summit in 2026, the Alliance endorsed a new approach – what is often called NATO 3.0 – under which the United States is asking Europe to assume a greater role in Europe's conventional defence. The United States would retain a supporting role in the conventional domain and keep the nuclear umbrella.

If Europe is to carry that responsibility, it has to be ready for it. For a long time, we did not invest enough. During the Cold War, Europeans and Americans both invested heavily because the Soviet threat was obvious. After the Cold War, Europe relaxed and enjoyed the peace dividend while the United States continued to provide much of the security. That period is over.

Europe therefore has to take more responsibility for its own conventional security. We have plans, both in NATO and the EU, for what capabilities, production and armaments need to be developed. We have started moving, but a large part of the road is still ahead.

The biggest problems are probably not material. They are political and psychological. What we need most is speed – and an understanding of how deep the transformation will be, both inside NATO and inside Europe. Many institutions, doctrines and decision-making mechanisms were built for peacetime and no longer fit the challenges we face today.

Editor's note – *"NATO 3.0" is the term used by Elbridge Colby, the U.S. Under Secretary of War for Policy and one of the principal architects of the current U.S. defence strategy, for a rebalanced Alliance in which European allies assume primary responsibility for Europe's conventional defence, while the United States retains its nuclear guarantee and a more limited conventional role. NATO Secretary General Mark Rutte has also used the formulation.*

Why a European Security Council?

Kojala: *In her September 2026 State of the Union address, European Commission President Ursula von der Leyen said the Commission would set out proposals to make a European Security Council a reality – an idea you have also advocated. What problem would such a body solve that existing EU, NATO or coalition formats do not?*

Kubilius: It would address several problems. First, if Europe is going to assume the primary role in its conventional defence, Europe itself has to understand what it needs to do. The Americans cannot design that transformation for us. Europe needs a structure that can take responsibility for thinking through those changes.

Second, the value of a European Security Council is that it would not be limited to EU member states. It could include countries such as Canada, Ukraine, the United Kingdom and Norway. For me, one of the most important elements is that this creates a platform for integrating Ukraine's battle-tested defence potential with Europe. There is no other obvious platform for doing that quickly. Expecting NATO membership for Ukraine in the near term would probably be naive. EU membership is being worked on intensively, but that can also take time. Meanwhile, Russia is also gaining military experience through this war. If we want to deter that threat, Ukraine's military and defence integration with Europe is essential.

Third, such a platform can help European leaders find solutions that make Europe more united on defence. Europe has to learn to defend – and fight – as Europe, not simply as a combination of 27 states.

Kojala: *A long-standing concern in parts of Europe is that a stronger EU role in defence risks duplicating NATO. If Europe is now expected to take more responsibility for conventional defence, where should the division of labour lie?*

Kubilius: The European Union has never duplicated NATO, and it is not trying to. NATO is a military power; the European Union is an economic and regulatory power. The EU has instruments that NATO does not have and can use them to strengthen Europe's defence potential. It can mobilise financing, as we are doing through SAFE and the Ukraine Support Loan. It can build defence-industry programmes. NATO does not have those instruments.

Without them, Europe will not be able to build the capacity required to assume primary responsibility for its conventional defence. I consider myself a strong transatlanticist, but being a transatlanticist also means understanding the American position. If the United States says it has to prepare for the possibility of two major conflicts at the same time – a Russian war against Europe and a Chinese attack on Taiwan – I understand that logic.

For smaller countries, this matters even more. Large European states can, at least partly, provide for their own defence. Lithuania and other smaller states depend much more heavily on a functioning system of collective defence. Until now that system has been strongly transatlantic, with the United States in the leading role. That is changing.

For us not to think seriously about what a stronger European pillar of collective defence should look like would be a major mistake. The status quo will not hold. The way things worked until now is not the way they will work in the future. We need to participate in shaping that change, not simply deny that it is happening.



The status quo will not hold. The way things worked until now is not the way they will work in the future.

How far can defence integration go?

Kojala: *Defence still remains largely a national responsibility, and most European decisions depend on agreement among member states. But if that model is proving too slow for the security environment Europe now faces, where do you see realistic room for change?*

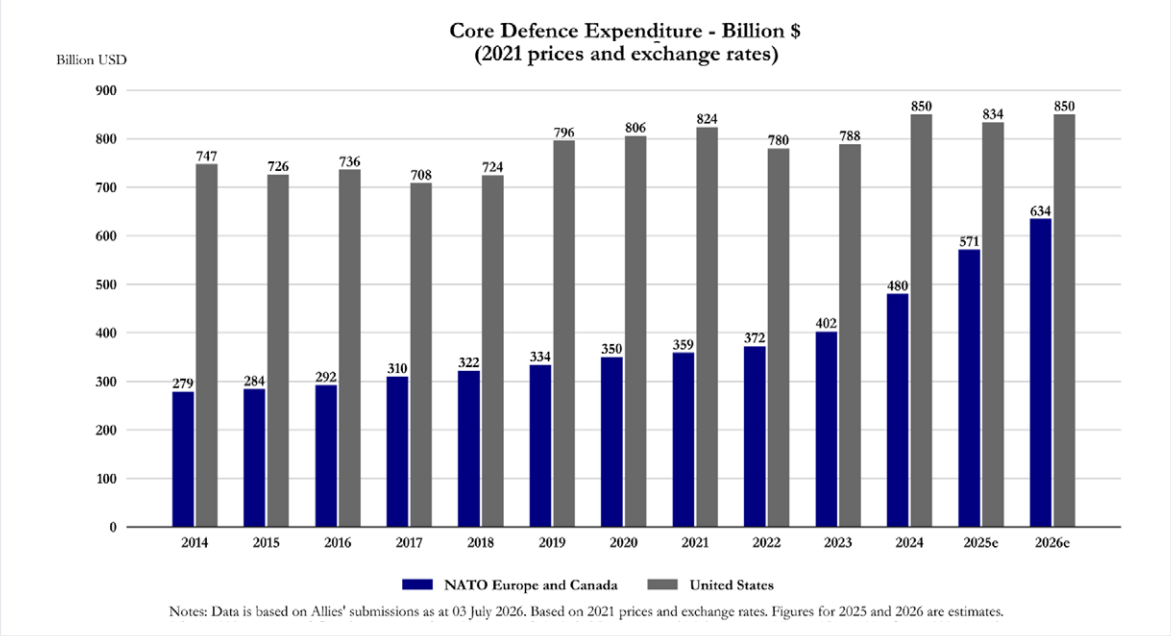
Kubilius: We will see how far it goes. But it is worth remembering that the founders of European integration thought about defence much more ambitiously than we sometimes do today. Jean Monnet, Konrad Adenauer and others supported the idea of a European Defence Community, including common forces. That project failed, but the ambition was clear: Europe should be capable of taking responsibility for its own defence.

Today, we need a basis for discussing new principles of European defence. One of our biggest problems is that defence is still managed almost entirely bottom-up. We also need top-down leadership. I agree with those who argue that in foreign policy we cannot continue to rely entirely on unanimity, and I think the same applies to defence. The bottom-up principle will remain, but it has to be balanced by much stronger top-down leadership.

The current security crisis gives us a reason to rethink arrangements that were built for a different era. Monnet used to say that Europe would be forged in crises. This crisis should be used to make Europe much stronger in defence. That would also strengthen NATO and, in my view, the transatlantic partnership – because it would become a partnership between two stronger and more equal pillars.

Editor's note – *The Treaty establishing the European Defence Community was signed in Paris in May 1952 but never entered into force after the French National Assembly rejected ratification in August 1954. Gaullists opposed placing French forces in a supranational structure and feared excessive U.S. influence, while Communists rejected West German rearmament and the anti-Soviet logic of the project. The Treaties of Rome followed in March 1957, establishing the EEC and Euratom rather than a common defence policy.*

Kojala: *The debate often gets reduced to the phrase "European*



NATO

army," which can obscure the practical issue. If the United States gradually reduces its conventional role in Europe, which capabilities would Europeans actually need to replace?

Kubilius: There are many concrete things Europe needs to build together. The EU can help member states agree on projects and provide financing for capabilities that individual countries have struggled to develop on their own.

We also have to make sure that if the United States reduces its troop presence in Europe, it does not leave dangerous capability gaps. That is especially important for strategic enablers – space-based intelligence, air-to-air refuelling, heavy airlift and other capabilities where Europe remains strongly dependent on the United States.

But there is also a manpower and command question. If the American force in Europe becomes smaller, how do we replace the rapid-reaction capability that U.S. forces provide? Some people assume that you can simply combine pieces of 27 national armies and call that a rapid-reaction force. Experts will tell you that a combination assembled from 27 different systems is not automatically equivalent to a force that trains, commands and operates as one army.

> Europe has to learn to defend – and fight – as Europe, not simply as a combination of 27 states.

So we may need to think about a permanent European capability, not simply forces that come together once a year for an exercise. Europe has tried versions of this before, including EU battle groups, but they never became the kind of operational instrument they might have been.

That is why I would frame the question differently. It is not whether we need a European army. The question is what replaces the American rapid-reaction capacity if it is no longer in Europe.

Editor's note – *EU Battlegroups were created as multinational rapid-response units of around 1,500 troops, with two groups traditionally kept on standby on a rotating basis. They became fully operational in 2007 but were never deployed, largely because of political disagreement, financing and questions over when and how they should be used. The concept has since been folded into the EU's larger Rapid Deployment Capacity of up to 5,000 personnel.*

The question is not whether we need a European army. The question is what replaces the American rapid-reaction capacity if it is no longer in Europe.

Kojala: ***This comes up again and again in discussions about European defence: we spend a lot, but the money is spread across too many different systems and national markets. What has to change for Europe to buy more together, reduce fragmentation and get more military value from the money it already spends?***

Kubilius: Why do we have this problem? Because we have 27 defence policies, 27 armies and, as a consequence, 27 national defence industries. Mario Draghi's report described very clearly what this fragmentation costs us.

We have 27 defence policies, 27 armies and, as a consequence, 27 national defence industries.

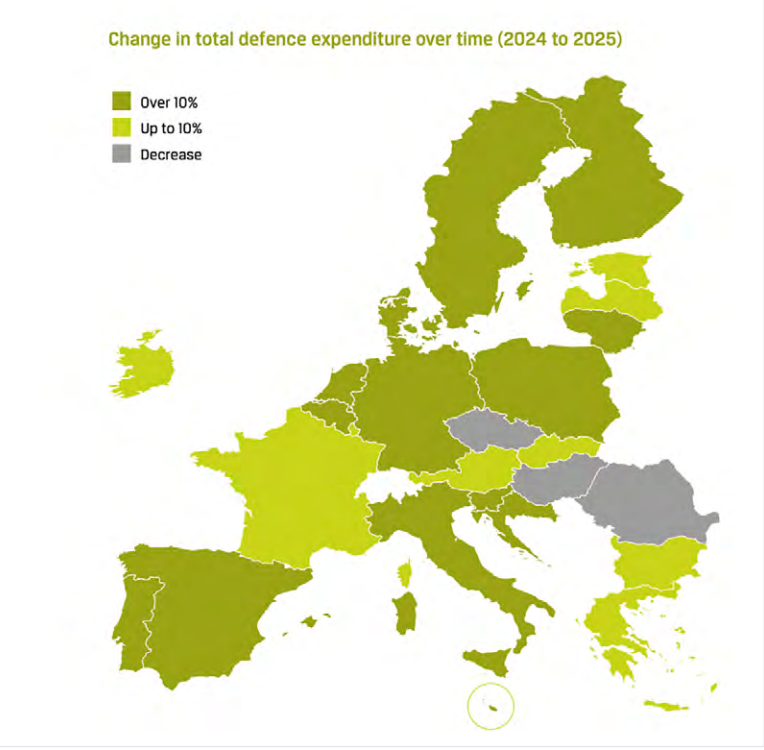
The answer is to become more united. Institutionally, that is part of the argument for a European Security Council. Economically, we need to build a real single market for the European defence industry.

That means overcoming deeply rooted habits. Every government wants to protect its own industry, particularly countries with large national defence companies. In some of those markets, major companies sell the overwhelming majority of their output to their own governments, and much of the procurement is done through direct awards rather than genuine competition. The result is that we do not really have a common market.

That also makes it much harder for start-ups and smaller defence companies to enter procurement chains. And it slows down the transformation of military doctrine because established producers have weak incentives to change. Valerii Zaluzhnyi, Ukraine's former Commander-in-Chief, once put this to me very simply: if a company knows that the government will buy what it produces anyway, why take the risk of producing something new?

These are structural problems. Changing them requires political leadership and institutions capable of creating that leadership at the European level.

Editor's note – *The Draghi report identified fragmentation as one of the central weaknesses of Europe's defence sector. The latest European Defence Agency data show that only 24% of defence-equipment procurement was collaborative in 2025 – still*



EDA

well below the 35% benchmark agreed by EU defence ministers in 2007.

Kojala: *Where do you already see evidence that European militaries are beginning to adapt their doctrine rather than simply spending more on the old model?*

Kubilius: One example that impressed me was the United Kingdom's Strategic Defence Review. It formulated the change through three numbers – 40–40–20 – which, in my view, reflects the lessons of the war in Ukraine. Forty percent of future battlefield effects would come from lighter drones, including FPV and kamikaze drones; another 40 percent from heavier drones and long-range weapons; and 20 percent from traditional capabilities such as artillery and tanks.

In Ukraine, various types of drones already account for an enormous share of battlefield effects. I saw the British approach as a clear example of military doctrine being rethought. I cannot yet judge how fully it has been implemented, but the direction is important.

Across Europe, we still have too little of this. And it connects back to the same market problem: if industries do not have to compete and governments remain heavily tied to national producers, there is less pressure to change what is being produced.

Editor's note – *The UK Strategic Defence Review formally uses a "20–40–40" model for the future Army: 20% crewed platforms, 40% reusable uncrewed systems and 40% consumables. Kubilius is referring to the broader shift behind the model toward uncrewed and expendable capabilities.*

Can SAFE change national procurement habits?

Kojala: *The EU launched Security Action for Europe – SAFE – in 2025, offering up to €150 billion in loans for defence investment, with joint procurement as one of its main objectives. Can an instrument like this facilitate the change in the way European countries purchase defence equipment?*

Kubilius: Structurally, joint procurement has a very simple logic. Larger joint contracts give companies a longer planning horizon and allow them to expand production lines with more confidence. They also reduce prices. The larger the contract, the more room there is for the producer to lower the unit cost. In some of our programmes for joint ammunition procurement, we saw prices fall by as much as 20%.

So part of this is simply learning the economics of defence: why larger common contracts make sense both for the buyer and for the producer. That will take time.

We also never expected SAFE by itself to transform defence procurement. SAFE provides €150 billion in loans. That is substantial, but if EU member states meet their NATO commitments and raise core defence spending toward 3.5% of GDP, they will spend more than €6 trillion on defence over the next decade. So we are comparing €150 billion with more than €6 trillion. The Commission can influence the first figure, but it does not control how governments spend the much larger national budgets.

What we can do is demonstrate that joint procurement and common projects are strategically useful and economically rational.

Editor's note – *By September 2026, 18 national SAFE plans had been approved and more than €12 billion had already been disbursed. SAFE is designed mainly around joint procurement involving at least two eligible countries, although some single-country contracts signed before 30 May 2026 are exempt. At least 65% of component costs must come from the EU, EEA-EFTA countries or Ukraine.*

Kojala: *Do you actually see joint procurement increasing across Europe? Are there already signs that countries are coordinating purchases more closely than they did a few years ago?*

Kubilius: Yes, I think we are now entering a new stage with European defence projects of common interest. We started with five and there will be more. These are genuinely pan-European capabilities – for example air and missile defence, anti-ballistic systems, drone defence, space and the Eastern Flank Watch. No single country can build an air-defence architecture for the entire European continent by itself.

This is the first time the European Union is trying to help member states develop defence projects of this scale together. Earlier attempts to promote cooperation, including through PESCO, did not produce everything we hoped for. I see common capability development as a more significant step than joint procurement alone. If we develop the projects together, the joint purchases will follow.

Kojala: *If Eastern Flank Watch is now moving from concept to implementation, what needs to happen first for the project to become credible on the ground?*

Kubilius: The name is slightly metaphorical, but the concept is concrete. It brings together ground defence, air defence, surveillance, counter-drone capabilities and other elements along the eastern flank from the Baltic Sea toward the Black Sea.

Ukraine's participation is extremely important because many of the lessons and technologies we need will have to come from Ukraine. I would encourage Lithuania and other countries in the region to be much more active in shaping these projects rather than waiting for Brussels to tell them what to do.

The recent drone incidents in Europe make the urgency obvious. We need to connect information systems so that if a drone crosses from one country into another, everyone can see it and react. We also need the most economical way to deal with an isolated drone while building a system that can scale very quickly if the threat is not one drone but hundreds or thousands.

The scale of the war in Ukraine is sobering. Ukraine is expected to use around 10 million drones in the war in 2026, while Russia is preparing to produce and use a similar number against Ukraine. Ten million drones is close to 30,000 a day. That gives you an idea of the scale we may have to deal with in a real conflict.

Editor's note – *Eastern Flank Watch is one of five European Defence Projects of Common Interest proposed by the Commission in July 2026. The Commission estimates that it could require €60–100 billion in investment. It is intended to complement NATO planning and allied deployments on the eastern flank.*

Ukraine as a part of Europe's defence architecture

Kojala: *In conversations in Kyiv, I have heard more frustration about the fact that its path into Western institutions remains slow. How does Europe avoid a situation in which Ukrainians conclude they ultimately have to rely mostly on themselves? And what can deeper integration into Europe's defence architecture look like before the membership questions are settled?*

Kubilius: I am not surprised by Ukrainian frustration. The war has gone on for years, and Ukrainians hear us repeatedly say that they are defending all of Europe. It is completely understandable that they expect Europe and the West to increase support.

The path to peace is not simply another delegation travelling somewhere. It is peace through strength, and that strength has to be on Ukraine's side. Europe now carries the overwhelming share of military support for Ukraine. The support is significant, and in 2026, we also created the Ukraine Support Loan, with €60 billion allocated for defence.

But the reality is that Ukraine still sees a financing gap. We have to admit that our support so far has allowed Ukraine to survive. But support for survival is not enough to bring peace. Ukraine needs enough strength to convince Putin that continuing the war will be more damaging to Russia than ending it.

That means Europe needs a clearer strategy of its own. Until now, we have often been in a



An apartment building in Kyiv after a Russian attack on the city on the night of 2 July 2026.
State Emergency Service of Ukraine

Our support has allowed Ukraine to survive. But support for survival is not enough to bring peace.

waiting mode: we support Ukraine, but then wait for Ukraine itself or Washington to deliver the peace. Europe has to decide more clearly what outcome it wants and what resources are needed to reach it.

That is also why the idea of a European Security Council with Ukraine participating matters. Integrating Ukraine into the construction of Europe's security architecture is not only something Ukraine needs. Europe needs it as well.

Kojala: *Lithuania will hold the presidency of the Council of the EU in the first half of 2027. It will have some convening and agenda-shaping power. Which defence and security priorities should Vilnius use that window to push?*

The European Union is not an ATM. It is the house we live in.

Kubilius: I would strongly welcome more Lithuanian initiative. I have said publicly that in the corridors of Brussels I sometimes miss a stronger Lithuanian voice – and, more broadly, a stronger Baltic voice – on some of these questions.

There will be many issues already on the EU agenda: military mobility, the next EU budget and major defence programmes. But Lithuania should also have its own priorities where it can make a real contribution.

The first is Eastern Flank Watch – whether we call it that, the Baltic Defence Line or a broader Baltic-to-Black Sea defence concept. The second is the integration of Ukraine's defence potential with Europe. That directly relates to the future of Europe's collective defence system.

Lithuania and the Baltic states should not assume that everything is decided somewhere in Brussels by the larger countries and that smaller states cannot shape the debate. A well-argued position will be heard, especially if it is presented together with partners in the region.

And I would encourage Lithuania to stop seeing the European Union primarily as an ATM that simply gives you money. It is the house we live in. Sometimes we focus too much on our own small room and forget about the rest of the house. The time has come to look more broadly and leave some of those provincial complexes behind. ●

Héloïse Fayet and Élie Tenenbaum: France Is Pushing Its Vital Interests Further Out

On France's changing nuclear role in Europe, the limits of European strategic autonomy, and what a more uncertain transatlantic relationship means for the eastern flank

Interview by Linas Kojala,
Editor-in-Chief of the Lithuanian Foreign Policy Review

Europe is preparing for a security order in which the United States may do less and Europeans will have to provide more of their own deterrence. France occupies an unusual position in that debate: it is the EU's only nuclear power, has long argued for greater European strategic autonomy and is now giving its deterrent a more explicitly European dimension. Héloïse Fayet and Élie Tenenbaum assess how far Europe can actually go without the United States – and where France fits into that transition.



A French Air Force Mirage 2000N during Exercise Capable Eagle. Sgt Ralph Merry / ABIPP / RAF

Héloïse Fayet is a Research Fellow at Ifri's Security Studies Center and Head of its Deterrence and Proliferation programme. Her work focuses on nuclear deterrence, proliferation and strategic stability. Élie Tenenbaum is Director of Ifri's Security Studies Center. His research focuses on military strategy, European security and defence, irregular warfare and hybrid threats.

France's "forward deterrence"

Linas Kojala: *Héloïse, Macron has gone further than before in opening French nuclear deterrence to European allies – through exercises, consultations and possible deployments. What does "forward deterrence" actually change for countries on Europe's eastern flank?*

Héloïse Fayet: Forward deterrence finally gives a framework to a long-standing idea in French nuclear doctrine: France is not isolated on the European continent, and its vital interests, those defended by nuclear weapons, are interwoven with those of its allies and partners in Europe. Paris will keep sole control over the decision and will ask for no financial contribution in exchange for protection; what changes is the reach of its vital interests, which France is pushing further out.

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The countries taking part in the framework (ten to date) will have a specific relationship with France, built on bilateral Nuclear Steering Groups, discussions on doctrine and threat perceptions, intelligence sharing, joint exercises and more. Countries outside the initiative, such as the Baltic states, are nonetheless not set aside: President Macron made clear that the definition of French vital interests is not limited to France and its forward deterrence partners and could encompass the whole continent.



German Chancellor Friedrich Merz, French President Emmanuel Macron, Finnish President Alexander Stubb and other European leaders meet U.S. President Donald Trump in the Oval Office on 18 August 2025, following his call with Russian President Vladimir Putin.
Official White House Photo by Daniel Torok

For countries on Europe's eastern flank, and particularly Poland and Finland, the two participants located there so far, forward deterrence is meant to complicate Russia's strategic calculus by adding layers of security guarantees, at a time when U.S. extended deterrence may be seen as less credible. It also opens a privileged channel of communication with France, adds value to the bilateral relationship and fosters a shared strategic culture.

Kojala: *How do you think Moscow is likely to read "forward deterrence"?*

Fayet: The Russian Ministry of Foreign Affairs issued a lengthy statement after Macron's March 2026 speech, describing the initiative as provocative and detrimental to strategic stability. Moscow repeated these criticisms at the Non-Proliferation Treaty (NPT) Review Conference in May 2026, arguing that forward deterrence amounts to nuclear sharing and to proliferation towards the European countries taking part. This reaction is much stronger than the one that followed the Northwood Declaration between France and the UK, which had already affirmed that there was "no extreme threat to Europe that would not prompt a response" from the two nations, and it suggests that Moscow considers the French initiative credible. Threats against countries that joined later, such as Finland in September 2026, point the same way: Russia is taking the consequences for its own strategy seriously. Much attention has gone to the possible deployment of nuclear-capable aircraft, with or without nuclear weapons, in times of crisis, but I would argue that Russia feels more threatened by the growing conventional coordination within NATO and by the reinforcement of the French posture on the eastern flank, which forward deterrence underscores.

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Élie Tenenbaum: Military experts in Russia have paid particular attention to French forward deterrence and are closely monitoring the latest developments, especially the signing of bilateral agreements with individual European states and the establishment of high-level steering groups. It is already affecting their calculations, tying down resources in their posture and planning, even in peacetime.

How dependent is Europe on the United States?

Kojala: *Élie, Europe still relies heavily on the United States for capabilities such as intelligence, targeting, command and control. How much of that dependence can realistically be reduced over the next few years, given the limitations of Europe's defence industry and the budgetary and political constraints across the continent? From Paris, how does the transatlantic relationship look today?*

Tenenbaum: Dependence (or conversely, autonomy) is a layered cake. You can be dependent on an ally for a capability that you do not have, like the Precision Strike Missile (PrSM), which only the U.S. Army owns, or the Space-Based Infrared System (SBIRS), which detects intercontinental ballistic missile launches and which only the U.S. operates in the West. You can own a capability but in such small quantities that you depend on the ally for resupply and to augment it in times of high demand, as with many air-launched guided munitions, which are present only in small numbers in European stockpiles. Then you can own a capability, even in substantial numbers, but depend on the ally for maintenance and repair, like the F-35, which is present in European air forces but whose readiness depends on intensive U.S. software and hardware support. Finally, you can even produce equipment locally and still depend heavily on a complex supply chain with bottlenecks upstream, as in the case of German-assembled Patriot missiles, or European-designed systems that rely on imported electronic components. True autonomy is therefore always hard to achieve and very expensive.

France has made this a goal for some core military capabilities, especially those related to nuclear deterrence, but at the price of limited European

integration, limited production capacity, low output and a state-controlled industry. That is one of the reasons why France's defense industries have not benefited as much as one could have expected from the European boom in defense demand. Ideally, France would like to see the rest of Europe embark on its own vision of strategic autonomy. The EDIP and Ukraine Support Loan criteria, which require 65% European components and a design authority located in Europe, are a good example of where Paris thinks European defense should be going. But such criteria only work if European industry can deliver at scale, which remains the real test.

Regarding transatlantic relations, I think the direction of travel is pretty clear, but we still do not know the speed and eventual scope of the U.S. reduction in its contribution to European conventional defense. Europeans need to plan for a scenario in which Europe is no longer the priority theater for the U.S. This does not mean that no support will arrive; rare, exquisite systems that the U.S. needs elsewhere will simply not come, or only in very limited quantities. We therefore need to wire ourselves to absorb the first shock, with stockpiles for at least six months of high-intensity fighting (today, it is more likely weeks), so that we have time to rewire to a real war economy if it comes to that. This requires a theory of attrition, which we still lack. We also need a theory of escalation in which nuclear signaling will be key, because it sits at the top of the ladder, and credibility requires that we have laid out every intermediate step; otherwise it will be seen as a bluff. If we get there, Europe may successfully deter, mostly on its own, any Russian temptation to launch an open aggression.

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All this shows how much dependence and autonomy also involve intangibles: the ability to command large military formations because you have the experience and the right seasoned staff officers, the ability to think for yourself with your own doctrine and theory of victory, and the ability to envision escalation dynamics in the duel of wills with your opponent. All of these are hard to objectify, but they are the real key to autonomy.

Kojala: *France and Germany have moved ahead significantly on nuclear deterrence in 2026. In March they created a bilateral Nuclear Steering Group; in July French Rafale aircraft from the Strategic Air Forces deployed to Nörvenich in Germany; and German forces are due to take part in a French nuclear exercise. At the same time, the fighter component of the Franco-German FCAS project has been cancelled. Are we really seeing a qualitative change in Franco-German defence cooperation?*

Fayet: The Franco-German relationship has always been bumpy, yet overcoming those differences is a prerequisite for a strong Europe and for a credible deterrence and defense posture. FCAS is not entirely dead: the fighter project has indeed been cancelled, but other strands, such as the collaborative combat cloud, may still materialize. In any case, FCAS was largely a political project, which the main defense companies on both sides, Dassault Aviation and Airbus, resisted from the outset, so its failure comes as little surprise.

Germany was the first country with which a Nuclear Steering Group met after the speech, and its forthcoming participation in a French nuclear exercise confirms a mutual interest in closer cooperation, which cannot progress as long as resentment lingers.



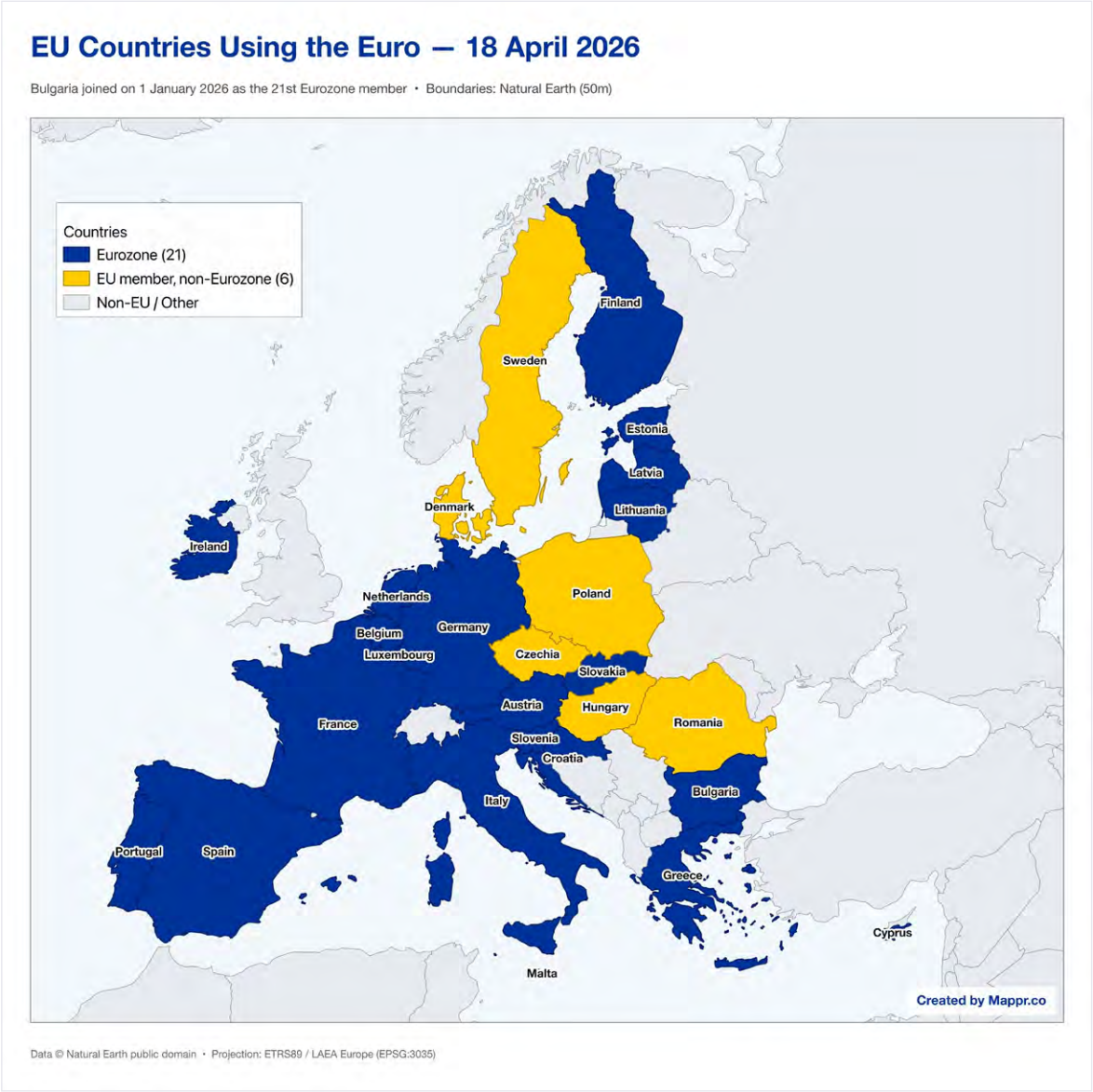
Return to the East: The Russian Threat and the French Pivot to Europe's Eastern Flank was published by Ifri in 2024. Ifri

New industrial projects are emerging, among them JEWEL (a joint Franco-German early-warning project), ELSA (the European Long-Range Strike Approach) and broader European initiatives. Forward deterrence addresses more strategic questions and is meant to remain shielded from industrial setbacks, although building a joint strategic culture remains a challenge, notably regarding the relationship with NATO and the U.S. Still, Germany was the first country with which a Nuclear Steering Group met after the speech, and its forthcoming participation in a French nuclear exercise confirms a mutual interest in closer cooperation, which cannot progress as long as resentment lingers.

European Cooperation

Kojala: *Élie, in your work on France's "return to the East", you described how profoundly French thinking about Russia, NATO and the eastern flank changed after 2022. Has the shift gone far enough that the security of Estonia, Latvia, Lithuania and Poland is now understood in Paris as a direct French strategic interest? And Héloïse, if French deterrence is becoming more European, should the Baltic region eventually have a place in French nuclear planning and exercises?*

Tenenbaum: Yes, I think there is a realization in France right now that the security and integrity of the Baltic states cannot be dissociated from the wider European political and security construct. The Baltic states are part of the Eurozone, the same currency with which people in Lyon or Marseille pay for their baguette! How can we imagine our economy, not to mention our public debt, which depends so heavily on mutualization, remaining unaffected by a security crisis in a fellow Eurozone member? Beyond that, France has finally realized that it cannot be the leader it longs to be in Europe if it does not take into account the security interests of all



Countries using the euro. mappr.co

Europeans. We have no real choice but to live up to our commitments. And I think even populist forces that may say otherwise would realize this if they came to power. The price of inaction would be heavier than that of action.

Fayet: Regarding nuclear cooperation specifically, France should first consolidate what already exists with the ten countries in the initiative, going beyond talks and dialogue to hold one bilateral Nuclear Steering Group with each partner before the end of 2026, before considering a formal extension of the format to the Baltic states. Not belonging to the framework should not prevent strategic dialogue, however: the annual Franco-Baltic seminar could address these issues, and Track 2 exchanges could be deepened. The Baltic states would also need to build their own expertise and human resources on nuclear issues in order to sustain a long-lasting dialogue. Finally, the participation of Strategic Air Forces aircraft in

The Baltic states are part of the Eurozone, the same currency with which people in Lyon or Marseille pay for their baguette! How can we imagine our economy, not to mention our public debt, which depends so heavily on mutualization, remaining unaffected by a security crisis in a fellow Eurozone member?

air policing missions in the Baltic states, which plays on the dual-capable nature of these platforms, shows that France already thinks about the region in nuclear terms.

Kojala: ***Héloïse, you have previously argued that France needs to build institutional foundations for this European role before the 2027 presidential election because allies will inevitably ask how durable a presidential doctrine really is. How much of what Macron is building can actually survive a major political change in Paris?***

Fayet: That is the million-dollar question. The campaign for the Élysée shows worrying trends in some parties: weak support for Ukraine, complacency towards Russia and little affection for NATO and the European Union. A victory by Marine Le Pen, the Rassemblement national candidate, or, less plausibly, by Jean-Luc Mélenchon of La France insoumise would damage France's credibility as a strategic actor in Europe.

Macron also placed himself in the footsteps of General de Gaulle, who already saw a role for French nuclear weapons in the defense of Europe, and since most French parties claim to be Gaullist heirs, openly disavowing a policy presented as a Gaullist legacy would be awkward.

That would not necessarily spell the end of forward deterrence, though. Both the RN and LFI reacted with restraint to Macron's speech, reassured by the promise that nuclear weapons would not be shared with neighbors. Macron also placed himself in the footsteps of General de Gaulle, who already saw a role for French nuclear weapons in the defense of Europe, and since most French parties claim to be Gaullist heirs, openly disavowing a policy presented as a Gaullist legacy would be awkward. A new president would, moreover, probably have other priorities than a speech on nuclear policy, which typically takes 18 to 24 months to draft. One should also hope that the framework will by then be advanced enough, with strong relations and trust at the operational level, for meetings to proceed without fresh political approval.

Even so, the election of a far-right or far-left president would harm France's image and credibility. The U.S. offers a useful comparison: President Trump has taken few concrete steps to reduce the credibility of extended deterrence, since the modernization of nuclear sharing continues and additional weapons may be deployed in the UK in the coming months, yet his words weigh more heavily than his actions. France could face a similar dynamic, although the stakes are lower. Foreign policy and defense have rarely been central to presidential campaigns, and given the country's precarious economic situation and deep social divisions, the 2027 presidential campaign is unlikely to be an exception.

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Kristi Raik: We Should Keep in Mind the Cost of Non-Enlargement

On Ukraine's path to the EU, enlargement politics, the limits of unanimity and why Europe's security increasingly depends on Ukraine

Interview by Linas Kojala, Editor-in-Chief
of the Lithuanian Foreign Policy Review

Enlargement is once again a strategic question for the European Union, but the political obstacles have not disappeared. For Kristi Raik, the crucial test is whether Europe can keep Ukraine on a credible path to full membership while preparing a Union that may soon become larger and more diverse. Gradual integration can help, she argues – but only if it remains a bridge to membership rather than a substitute for it.

Dr Kristi Raik has been Director of the International Centre for Defence and Security (ICDS) since January 2025 and is an Adjunct Professor of International Relations at the University of Turku. Her main areas of expertise are European security, strategic competition in Eastern Europe, EU foreign and security policy, and the foreign and security policies of the Baltic states and Finland. She holds a PhD from the University of Turku.



Kristi Raik at the Lennart Meri Conference. LMC

Full membership – not a permanent waiting room

Linas Kojala: *Several years ago, you warned that offering Ukraine an arrangement in place of full membership would amount to a "slap in the face". Since then, staged accession and gradual integration have moved much closer to the centre of the EU debate. Can those ideas speed Ukraine's path into the Union, or do you see a risk that they become a politically convenient substitute for full membership?*

Kristi Raik: I do think it is hugely important to maintain a credible prospect of full membership for Ukraine. This is what so many Ukrainians have been fighting and dying for, and it is a promise that has already been made by the EU. Stepping back, or failing to move ahead, could be toxic for EU–Ukraine relations and for the public mood in Ukraine.

That said, I believe we should see staged accession or gradual integration as opportunities for Ukraine to move ahead, closer to full membership. As the process moves forward, it will become increasingly difficult to reverse. The EU cannot say to any European country applying for membership: sorry, for you we only offer second-class membership. That would be contrary to the treaties and to the spirit of European integration.



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At the same time, multi-speed integration within the EU has been a reality for a very long time and will probably become more important in the future, as the number and diversity of member states keep growing.

Editor's note – *EU accession negotiations cover 33 policy chapters, grouped into six thematic clusters. Ukraine received candidate status in June 2022 and formally opened accession negotiations in June 2024. As of September 2026, two of the six clusters had been opened – Fundamentals and External Relations – meaning negotiations had formally begun on only part of the acquis.*

Kojala: *Ukraine's accession is now openly discussed as part of Europe's own security. At the same time, the EU is trying to move forward with Moldova and the Western Balkan candidates, while reform performance differs greatly. How do you keep enlargement moving without holding stronger candidates back, but also without weakening the merit-based principle?*

Raik: I think the decision in 2022 to grant candidate-country status to Ukraine and Moldova, and conditionally to Georgia, brought a whole new dynamic for all candidate countries. Enlargement became a top priority for the EU again after having been downgraded for several years.



The further the process moves, the more difficult it becomes to reverse.

The EU has a sophisticated methodology for evaluating reforms in candidate countries, which provides the basis for countries to progress based on their merits. Yet political and geopolitical considerations have always been involved as well, and in times of war they are unavoidably more significant.

Kojala: *You have argued that Ukraine's membership could make the EU stronger in foreign and security policy. But enlargement also means more governments around the table and potentially more veto points. Does the EU need to change the way it takes decisions before the next enlargement – and how realistic is that?*

Raik: The EU's weight and credibility as a geopolitical actor, if we wish to use this term, would undoubtedly increase with Ukraine as a member. Will there be new problems with unity and cohesion? Possibly, although I think this risk has often been exaggerated by some of the older member states.

The experience with Hungary's previous leadership was

Treaty reform should not become a precondition for further enlargement.

very painful and showed that one country can have a really negative impact. But even in this case, the EU was nevertheless able to provide unprecedented support to Ukraine.

A treaty reform involving qualified-majority voting in all foreign-policy matters is unlikely. And it is important not to formulate such reform as a precondition for further enlargement.

Editor's note – *Under the EU treaties, common foreign and security policy decisions are generally taken unanimously, although qualified-majority voting is already possible in several defined cases. Those exceptions do not apply to decisions with military or defence implications. In June 2026, the EU described Ukraine as having made "substantial progress" when it opened the Fundamentals cluster; the Commission has since said Ukraine has shown an "impressive capacity" to deliver reforms under wartime conditions*

Kojala: *Beyond decision-making, where do you see the hardest political obstacles to enlargement inside the EU? Is it mainly about agriculture and cohesion funding, or could labour mobility, migration and other domestic concerns become just as important?*

Raik: Enlargement in general has hardly ever been very popular inside the EU. There have always been concerns that new member states will dilute some policies and make decision-making more difficult.

I think the debate on enlargement must, on the one hand, address big questions of strategy and identity: what kind of a geopolitical force is the EU? Can it shape the future of the continent and beyond? But on the other hand, it is necessary to have a very pragmatic debate and prepare for the impact of new member states in different sectors.

The distribution of money is always the most critical question. There are pragmatic solutions to be found through transitional arrangements and spending caps, if the political will is there on both sides. We should also keep in mind the cost of non-enlargement. Leaving Ukraine or the Western Balkans bitter and frustrated could be very destabilising for Europe.

Editor's note – *A June 2026 study by the Brussels-based Centre for European Policy Studies (CEPS) estimates that Ukraine's annual cohesion-policy payments would not exceed about €4.8 billion – roughly the same as Spain's projected allocation, below Italy's, and about half Poland's in a hypothetical enlarged EU. Agriculture would pose the larger budgetary challenge because of the scale of Ukraine's farming sector.*

Kojala: *Domestic politics may ultimately be the biggest uncertainty. With major elections due in several member states in 2027, how much could a political shift in one or two large countries alter the enlargement process – and does that create an argument for moving as far as possible with accession now?*

Raik: Domestic politics in some key member states is of course a source of major risks not only to enlargement, but to the EU at large. These risks are yet another reason to move forward now with membership talks and other practical steps towards accession, so that it will be more difficult to reverse the whole process later.

We should keep in mind the cost of non-enlargement.

Ukraine is increasingly seen across Europe not just as a recipient of EU support but as a contributor to European security



On 28 February 2022, just days after Russia's full-scale invasion began, President Volodymyr Zelenskyy signed Ukraine's application for European Union membership. Office of the President of Ukraine

Europe would be in real trouble securing future deterrence vis-à-vis Russia without having Ukraine on our side.

and defence. Europe would be in real trouble securing future deterrence vis-à-vis Russia without having Ukraine on our side.

Of course, there are populist forces in some member states that have a very different view on how to stabilise relations with Russia. But Ukraine's military strength and persistence are a strong argument in debates on the future of European defence, and they speak in favour of integrating Ukraine into the European security architecture.

Volodymyr Yermolenko: Europe Needs Ukraine More Than It Thinks

On Ukraine's European future, a republic of republics, and the strategic space between the Baltic and Black seas

Interview by Linas Kojala, Editor-in-Chief of the Lithuanian Foreign Policy Review

Ukraine's road to the European Union is usually described in terms of the reforms Ukraine must implement. Volodymyr Yermolenko argues that this is only half of the question: Ukraine's membership would also require Europe to change.

The EU has become indispensable to Ukraine financially, but Yermolenko doubts whether it can yet make security decisions at the speed required by war. He argues for more flexible defence coalitions inside and alongside the EU, sees the Baltic–Black Sea region as one strategic space, and believes Europe has much to learn from Ukraine's battlefield experience with drones, AI and rapid technological adaptation.

He also expects Ukrainians to become more sceptical about Europe. That, he argues, does not mean a return towards Russia. The more difficult question is what happens if Ukrainians continue to want Europe, but become less convinced that Europe can provide the security and political decisiveness they need.



Volodymyr Yermolenko was elected President of PEN Ukraine in 2022. PEN Ukraine

Volodymyr Yermolenko is a Ukrainian philosopher, writer and journalist, president of PEN Ukraine, editor-in-chief of UkraineWorld. His work brings philosophical and historical perspectives to debates about Ukrainian identity, European politics and Russia's war.

Security before procedure

Linas Kojala: *EU accession is normally framed as a process in which Ukraine changes to meet European rules. From inside Ukraine, what does membership mean today – and what, if anything, would Europe itself have to change for Ukrainian membership to work?*

Volodymyr Yermolenko: What Ukraine needs right now, above all, is security. The EU helps enormously with funding. When the Americans left us without financial support, the EU became the major force helping Ukraine. Without it, survival would be much more difficult. That is obvious.

But Ukraine needs more than that. Ukraine needs partners. Ukraine needs a coalition. We will not be able to win in this war alone. And it is equally obvious that some European states are more active than others.

Editor's note – *The EU and its member states are now Ukraine's largest providers of financial, economic, military and humanitarian support. By September 2026, the EU Council put their combined support since the start of the full-scale invasion at €220 billion, including €77 billion in military assistance. A separate €90 billion EU support loan for 2026–27 is intended to provide roughly €60 billion for defence and €30 billion for budgetary support.*

The question is whether the EU can act as a defence union in its own right. I ask Europeans all the time: do you understand that integrating Ukraine into the EU means transforming the EU as well as Ukraine?

America is potentially abandoning NATO, and we cannot be sure that things will return to the way they were after Trump. There could be a Democratic president who is very left-wing. Will the old American Atlanticism return? We do not know.

Is Europe aware of this? Is it saying that we must quickly form a defence union, perhaps as an alternative to NATO or on top of it? I do not see that happening. And if it does happen, it could take decades.

There is a way of thinking in the EU that says: if Russia attacks us, it will be in three or four years, so we should be ready by then. That is very naive. Russia is already attacking the EU through different kinds of actions.

I do not see the EU as an institution sufficiently prepared for this. It is very slow: very good for peaceful times, but very bad for wartime. In war, you need to make decisions all the time. It is better to take a bad decision than not to take any decision.

Philosophically, this brings us to the tension between procedures and decisionism. Procedures minimise the role of individuals in making decisions and involve as many stakeholders as possible. But they are slow. Decisionism places much greater weight on individuals – kings, generals, presidents – while reducing procedures and the participation of others.

During war, you need to move closer to decisionism. That does not mean cutting all procedures. It means simplifying them as much as possible. Even the Ukrainian bureaucracy is too slow at this, and I do not see enough of change happening in the EU.

The EU should provide the foundation: the single market, financial and legal support, and a major presence on the international stage. But we should also build a more flexible coalition of states: Britain, the Scandinavian countries, the Baltics and Poland. We should think of a defence union capable of acting more quickly.

> The only way to protect ourselves against empires is to create a republic of republics.

Another problem is that the EU has tried to standardise everything in the market, except armaments. EU has common standards for cucumbers, but not for howitzers or tanks. That is a huge problem.

States have treated defence as a national prerogative rather than a common responsibility. They assumed that NATO was there, and that NATO meant the United States. Europe now needs to think differently.

Editor's note – *NATO and European defence standards do exist, but fragmentation remains substantial. According to the European Defence Agency, in 2025, collaborative procurement accounted for 24 per cent of EU equipment spending – still below the EDA's voluntary benchmark of 35 per cent. The EU has since expanded common-procurement instruments, including SAFE and the European Defence Industry Programme.*

I trace the origins of the European idea to the republican and democratic movements of the nineteenth century, often among nations without states, against empires and monarchies. I think of the Swiss, paradoxically outside the EU today, the Italians, the Poles, the Slovaks and Czechs, the Ukrainians and the Balkan nations.

The idea was: we are small democracies, or at least we want to be small democracies, small republics. The only way to protect ourselves against empires is to create a republic of republics.

Defence should therefore be at the core. Unfortunately, people tend to think of the EU as a single market and the absence of internal borders, rather than as a system of common defence with a strong external border.

What makes a guarantee credible

Kojala: *Europeans increasingly point to Article 42(7) of the EU treaty – the obligation to assist a member state that suffers armed aggression – as evidence that the EU already has a mutual-defence commitment of its own.*

Yermolenko: I am a philosopher, not a legal expert, and I can be wrong. But there is a legal framework, and there is reality. NATO's Article 5 has been invoked after the attacks of 11 September, but we have not seen it tested in the kind of war we are discussing today. The same question arises with the EU treaty: how will the commitment work in practice?

We Ukrainians had the Budapest Memorandum. It was not a major treaty, but it still did not work. Whether these commitments will be applied is something we will have to see.

Editor's note – *The 1994 Budapest Memorandum was signed by Ukrainian President Leonid Kuchma, Russian President Boris Yeltsin, U.S. President Bill Clinton and UK Prime Minister John Major. It entered into force upon signature and provided Ukraine with security assurances rather than a collective-defence guarantee. Ukraine gave up the nuclear arsenal left on its territory after the Soviet collapse – then the world's third largest – and joined the NPT as a non-nuclear-weapon state. In 1994, 50 per cent of Ukrainians surveyed by KIIS favoured becoming nuclear-free; in 2024, 73 per cent viewed restoring nuclear weapons favourably. Clinton, who helped persuade Ukraine to disarm, said in 2023 that he felt a "personal stake" because of his role in the decision, adding that Ukrainians he spoke to believed Russia would not have invaded had Ukraine kept its nuclear weapons.*

Even NATO Article 5 does not provide a clear action plan. You can say that an attack on one member is an attack on everybody. But what follows? We will react together – in what way? One country might provide money, another instructors. There is a whole range of questions about how you actually respond. Do you send troops? Do you apply sanctions? These are political questions. The legal framework does not dictate every decision. Politicians make those decisions with regard to their voters and public opinion.

It is good that the legal framework exists. How it will be put into practice is the big question. And Ukraine is already under attack. Nobody expects Ukrainian membership very soon. What does that give us today? We need things now.



The Ukraine–Nordic-Baltic Summit in Kyiv, with Lithuania represented by Defence Minister Robertas Kaunas. Office of the President of Ukraine

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Defence at different speeds

Kojala: *If EU-level defence remains too slow, where should practical integration begin? There is Nordic–Baltic cooperation, the Bucharest Nine, the Joint Expeditionary Force and older ideas of an Intermarium. Which model is most useful for countries willing to move faster?*

Yermolenko: Any framework should work alongside the EU, not conflict with it. The EU already allows countries to move at different speeds. Why not think about different speeds in defence?

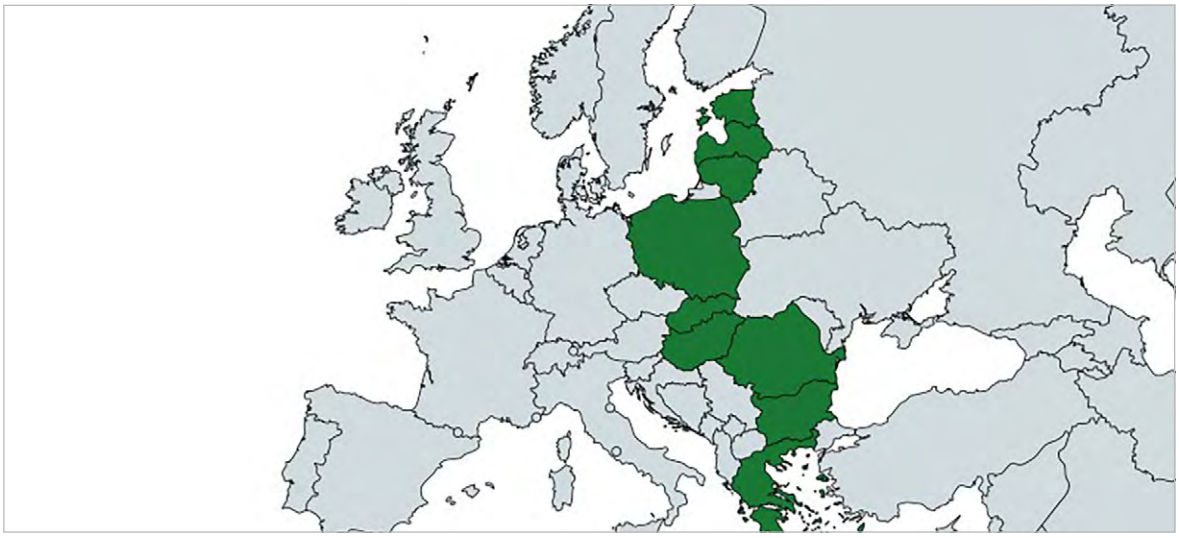
If we can have this in finance, with the euro, or in free movement, with Schengen, why not in defence? Schengen includes countries outside the EU. The euro is also used in some non-EU countries. Why can we not think in those terms?

This gives us flexibility. It is an advantage that the EU is not a nation-state but a more complicated structure. And I think that flexibility is needed.

Editor's note – *The comparison has practical precedents. The Schengen area comprises 29 countries, including four non-EU states – Iceland, Liechtenstein, Norway and Switzerland. Montenegro and Kosovo use the euro as their de facto domestic currency despite belonging to neither the EU nor the euro area.*

Historically, we understand the key geopolitical axis. Russia thinks in geopolitical terms. In Europe over recent decades, geopolitics became a bad word. People thought they had overcome it. But we live in geography. Unless we become disembodied AI agents, we have bodies, and those bodies exist in a particular geography.

In Eastern Europe, the key question is who controls the space between the Baltic and Black seas. Is that space



Map of the countries involved in the North–South Corridor. MapChart / RailFreight

organised in democratic and republican terms, around free nations, associations and cities? Or is it organised as an empire?

I think we should understand medieval Rus as a flexible conglomeration. It was feudal and medieval, but not tyrannical and imperial. In the Ukrainian tradition, there is a tendency to think of Rus as a federation. In the Russian tradition, it is understood as an empire.

Then there is the Grand Duchy of Lithuania. I know some Lithuanian authors describe it as an empire. I disagree, because I see it as a republic. It is important to distinguish between republic and empire. The Polish–Lithuanian Commonwealth also had imperial ambitions, but it was closer to a republic. Its tragedy, and the tragedy of Ukrainians within it, was the exclusion of the Ukrainian element. There was an attempt to add it as a third member through the Union of Hadiach, but it came very late and was unsuccessful.

From Peter I, and even earlier, Moscow sought to capture this space. Peter took Baltic territories from Sweden, and Catherine expanded towards the northern Black Sea coast. They organised this space as an imperial one. That imperial project continued into the Soviet period. After the Soviet Union collapsed, Russia wanted to re-establish it.

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I always tell Lithuanians, Estonians, Latvians and Finns: if Ukraine loses the Black Sea, you will have a war for the Baltic again. Ideologically, Russia calls itself a Eurasian empire, a continental empire. Logistically, it wants access to the European seas, including the Black Sea.

Belarus is also strategically important. We need to bring it back into this space. I hope Russia will fall, but I think Lukashenko's regime will fall first. If Belarus could become part of this cooperation, the situation would be much better for all of us.

Kojala: ***When you say Belarus should "come back", you mean the fall of Lukashenko's regime and a Belarus that reconnects politically with this regional space?***

Yermolenko: Yes. In a sense, a return to the connections of the Grand Duchy of Lithuania.

This Baltic–Black Sea axis is the axis of Rus, of the Vikings and Byzantium. It has a history stretching back many centuries. It is also very present in Ukrainian geopolitical thought.

Ukrainian thinkers in the twentieth century argued that Ukraine was formed through an interaction between North

and South, rather than simply between East and West. That is something we should explain to Lithuanians, Swedes, Finns and Norwegians. This is also a struggle for the seas.

If Ukraine loses, those countries will have to face the Russian threat without us. The Black Sea and Baltic routes are important for Russian energy exports. Russia feels threatened and wants to recapture this space. That is how I see it.

Explaining this to the Portuguese or the Greeks is a different matter. My argument is that we are moving towards a world in which the great powers control everything, a world divided between China and the United States. Both are moving in a very imperial way.

If you want to survive in that world as Portugal, Greece or Ireland, you need to belong to a larger structure. The structure you have is the European Union. Without it, competing alone would be very difficult, even for Germany.

If Russia attacks an EU state, occupies even a small part of its territory, and the EU cannot protect it or respond, that would mean the end of the European Union. Every country would turn inward over defence and stop caring about the others.

We must prevent that. Ukraine needs to be the fortress that prevents Russia from attacking Lithuania, Estonia or Poland.

Disillusionment without a return to Russia

Kojala: *Ukrainian attitudes towards the West have changed profoundly since 2013. But perhaps the image of the West has changed too. Ukrainians now know from experience that wealthy European countries can also be slow or politically divided. As the idealised version of "the West" disappears, could support for the European course weaken even if returning to Russia is no longer an option?*

Ukraine needs to be the fortress that prevents Russia from attacking Lithuania, Estonia or Poland.

Yermolenko: There is no path back to Russia. It means prison and concentration camps for most Ukrainians. We no longer face a choice between Russia and the EU. That choice existed in 2010 or 2013. It does not exist now.

The choice is whether we become part of this republic of republics, this bigger family, or remain outside it. We might still have allies, but that would be a partnership rather than membership of a geopolitical family.

Ukrainians are becoming more Eurosceptic, and they will become more Eurosceptic. That does not mean they will become pro-Russian. They may become more nationalistic. We see this trend across Europe, in Germany, France and Britain as well.

Editor's note – *According to comparable Rating Group surveys of adult Ukrainians living in government-controlled territory, support for EU membership stood at 85 per cent in July 2023, fell to 64 per cent in April 2026, and recovered to 70 per cent in June 2026. Support for NATO membership followed a similar pattern – 83 per cent in July 2023, 54 per cent in April 2026, and 63 per cent in June 2026.*

Kojala: *What drives that Euroscepticism – frustration with the accession process, or disappointment with Europe's strategic performance?*

Yermolenko: It is not about being welcome. It is about the feeling that Europe is not decisive enough.

Europe has done a great deal and continues to do a great deal. Without it, we would collapse. Many people understand that, although perhaps not everyone.

But even in 2022, there was a utopian view that NATO was powerful, Europe was powerful, and stopping Russia was simply a matter of will. Now people like me understand that it is also a question of power, resources and capabilities.

Russia's economy is weaker than Europe's, but in military terms I see Russia as stronger. It is resilient under sanctions and has partners such as China. The West no longer controls the world.

The West no longer controls the world.

Around 2010, NATO was perceived as a very powerful organisation. For some Ukrainians, that was frightening: NATO might come here, change us, impose another culture or start a war with Russia. Our argument as pro-European people was that NATO was not what they imagined. It respected human rights and no longer had such big teeth.

For others, NATO's power was the attraction. If we joined, we would be secure; Russia would not wage war against us, and we would be protected.

I think both perceptions have gone, the negative and the positive. We see an organisation that is incapable of doing many things. That is where some of the scepticism comes from.

It does not mean that we will stop European integration. The attitude is: we will continue the process, implement what is required, and then see.

Talking to the European Commission is one thing. At any stage, a member state can appear and say: we block this, we block that, we need more here or there. Then there are the problems with Poland, Hungary and others.

Editor's note – *Ukraine formally opened EU accession negotiations in June 2024, but progress was subsequently blocked by Hungary. After Péter Magyar's new government lifted that veto in June 2026 following an agreement with Kyiv on minority rights, all 27 member states agreed to open the "Fundamentals" cluster on 15 June; the "External Relations" cluster followed on 14 July. Further progress still requires unanimity among EU member states.*

Europe needs Ukraine too

Kojala: *At the Ankara NATO summit, the Ukrainian delegation struck me as very different from the one that came to Vilnius in 2023. Ukraine still needed weapons, money and political backing, but the message was no longer simply "we need you". There was also: "you need us" – for technology, military experience and security – and "do not take us for granted". Does that change the traditional logic of accession, in which the EU sets the conditions and the candidate adapts?*

Yermolenko: I think there will be a clash sooner or later, and we do not yet know how to avoid it.

The EU says: you want to join us; we are not joining you. Therefore, you accept our rules. That was the path for everyone else. Accession negotiations are called negotiations, but they are not really negotiations in that sense. They are like an interview with someone who wants to join a club. There are conditions: fulfil them, and you join. The discussion is not about how the club should change because a new member is arriving.

Ukraine can be arrogant in this conversation, sometimes too arrogant. Not enough people understand how the EU works. But reality has changed, and Europe indeed needs Ukraine for several reasons.

The first is technology. Technological development is moving towards unmanned systems, towards things beyond the human: robotics in the material world and AI in the intellectual world. We see America competing with China, and China with America. Europe is practically absent.

Ukraine is saying: this war can be an incentive for you to change, because war changes technology. We are dying here. It is getting more and more difficult. But we are trying to adapt, and we are learning very fast.

For Europe, this is a chance to learn without paying the same tragic costs. Every war produces technological revolutions. The Napoleonic wars produced a bureaucratic revolution. The First World War brought an industrial and mechanical revolution, with cars and radio changing warfare and communications. The Second World War brought aviation, cybernetics.

This war is about changing logistics, because we might be entering a world where logistics will be done mostly by air, not by land or sea. That would change things completely.



Ukrainian soldiers prepare to launch a Vampire unmanned bomber octocopter. ArmyInform

And secondly, it is about this unmanned reality: robots and AI. We are telling Europe: look at us, work with us, and you may be able to catch this train that is going very, very fast.

Another thing is the skies, because you cannot really win a war without satellites. So where is Europe in this? It is also an incentive: guys, do not be dependent on Americans, on Musk or whoever. Develop your own satellite systems.

Editor's note – *The European Commission increasingly treats Ukraine's battlefield innovation – particularly in drones, AI-assisted targeting and rapid adaptation – as a source of lessons for European defence. Ukrainian firms are also gaining access to more EU defence programmes and procurement schemes. In space, the EU is developing IRIS², a constellation of 348 satellites designed to provide secure governmental communications, with initial services expected from 2030.*

Whether this message is heard in Europe is a question for Europeans. In Ukraine there were these images, slightly ironic,

Europe is prepared for the war of the past, and Ukrainians are saying: come to us and learn from us.

comparing a military parade in Poland, with tanks, and a Ukrainian parade with robots. Tanks are currently useless on the battlefield – maybe they will come back later – but now they are big targets, easy targets for drones. So Europe is prepared for the war of the past, and Ukrainians are saying: come to us and learn from us.

But then it comes back to the question of procedures. Can we afford such long procedures?

Ukraine tries to simplify some procedures. It is not ideal. There are still very difficult procedures and very long procedures. But we need to learn, because war is also about very fast changes.

There are technological cases where there is a demand for producers to make something, and by the time producers start supplying it, it is already useless. The money has been spent, but the technology has moved on. And that is in Ukraine, where things happen fast.

What about Europe, where military companies think in terms of multi-year contracts? You develop a technology for three years, then you spend another year signing a contract, then you produce this technology for the next three years. This is not the world in which we are living.

So yes, in this sense Europe also needs Ukraine – not only for security, but for technology, including peaceful technology.

The negotiations are a trickier question because, of course, Europe will not change everything. Europe says: here is a list of things that you should do. Ukraine understands that we are joining the club and should fulfil these criteria. I do not think there is a discussion in Ukraine saying: no, we do not want to do this or that.

But there is an imbalance between the negotiations themselves and the political decisions made by individual member states in response to their own public opinion. That makes things very unpredictable.

And therefore Europeans themselves are now developing Plan Bs. Some suggest integrating Ukraine into the single market without full membership, because you would not need a referendum or ratification process for the single market. There are other alternative ideas as well.

If we are developing all these alternative ideas, it means that people do not really believe in the main idea. And that, of course, worries me.

What can small states do?

Kojala: *If your argument is that Europe itself has to change, what can a relatively small country such as Lithuania actually do? The Baltic states have limited economic weight, even together, but they have often had an influence on how Europe understands Russia and Ukraine.*

Yermolenko: You are playing a huge role in EU institutions now – the Baltics, with Kaja Kallas [the EU's High Representative for Foreign Affairs and Security Policy and Vice-President of the European Commission], and Andrius Kubilius [European Commissioner for Defence and Space].

I think the smaller countries are important in the EU because they understand more quickly and faster the challenge for everybody. This challenge is not really felt, maybe, in Germany or France.

The French and Germans see the EU as a product of their reconciliation: two big post-imperial, or still imperial, countries that decided to go together.

But I would say again: the idea of the EU is a product of the smaller nations, the non-state nations, which said we want a continent of nations and not of monarchies. Central Europeans played a very big role in this.

And I think you should go and persuade all the other smaller nations that, look, we will not survive in the twenty-first century without each other. And Ukraine is a key element of this. And, of course, so is this Baltic–Black Sea space.

We will not survive in the twenty-first century without each other.

Ole Andreas Lindeman: Much Is to Be Said for Boring Diplomacy

On the NB8 as a middle power, a wider "New North," support for Ukraine, and why resilience begins where people live

Interview by Linas Kojala, Editor-in-Chief
of the Lithuanian Foreign Policy Review

Nordic-Baltic cooperation has become one of Europe's most important regional partnerships. Ole Andreas Lindeman argues that its strength comes not from creating new institutions, but from decades of practical cooperation, trust and a growing sense that the eight countries belong together.

He sees the Nordic and Baltic states as a middle power in their own right – economically significant, politically cohesive and increasingly willing to act together on security and Ukraine. But security, in his view, is about more than defence spending. It also depends on resilient municipalities, civil preparedness, social trust and control over the digital information space. The next step, he argues, is deeper integration within the NB8, combined with a wider "New North" around it.



Ole Andreas Lindeman, Director of the Nordic Council of Ministers Office in Lithuania.
norden.lt

Ole Andreas Lindeman is Director of the Nordic Council of Ministers Office in Lithuania, a post he took up in 2025. A career Norwegian diplomat, he has served as an ambassador and headed diplomatic missions across Europe, Africa and Asia. His background includes political science, Russian studies and naval service.

A community, not a coalition

Linas Kojala: *Nordic and Baltic leaders increasingly speak of the NB8 as a single strategic community. Thirty-five years into institutionalised Nordic-Baltic cooperation, what still separates the two parts of the region – and what now holds them together?*

Ole Andreas Lindeman: Nordic cooperation has come a long way. In 2027, we celebrate 75 years. Nordic-Baltic cooperation is only half the age, yet already a mature 35-year-old with the future in front of her.

Between the Nordics we say that we do not cultivate our small differences but build on the big commonalities. This goes for Nordic-Baltic cooperation too. I think we now, 35 years on, are in a crucial phase for our region. Cultural exchange, the common labour market, cross-border mobility, civil society and people-to-people networks are success stories that bring us together as a strategic and socially resilient community. This gives us a solid foundation to stand on. But if we don't move with the times, we may lose ground.

These are testing times. The threat from Russia is a case in point. But if Russia were the only thing that holds us together, we would only be a coalition against an external threat. Our community stands for more than that. Our cooperation runs much deeper. While being confronted by several crises, we continue the painstaking cooperation on both small and big tasks that in sum are the building blocks of the Nordic-Baltic community.

I will insist that the strongest integrating force comes from within. We share a strong sense of belonging together, and that we achieve more when we stand by each other – making our voice heard as one in NATO, EU, the UN. Our resolve to support Ukraine unites us further.

NB8 is about policy coordination. It is quick and flexible because it rests on years of practical cooperation, a shared world outlook, a sense of common destiny, identity and mutual understanding. A strong feeling of trust and solidarity binds us to each other.

And this brings me to a core observation; more than being a strategic community in the security sense, we are a community of values. Values define us as a region. Shared values strengthen our resolve to withstand external pressure and threats.

Editor's note – *The Nordic Council was founded in 1952 and turns 75 in 2027. The Nordic Council of Ministers opened offices in the Baltic capitals in 1991, marking the start of institutionalised Nordic-Baltic cooperation. A 2026 survey found that 79–85 per cent of respondents in Denmark, Finland, Norway and Sweden said Nordic cooperation made them feel more confident about the future.*



If Russia were the only thing that holds us together, we would only be a coalition against an external threat. Our community stands for more than that.

No new institutions

Linas Kojala: *You have argued that the region already has the institutions it needs. The NB8 remains deliberately informal. Is informality still an advantage – and where does deeper integration matter most now?*

Ole Andreas Lindeman: Many perceive the NB8 as the sum of all Nordic and Baltic cooperation, and in many ways it is. But strictly speaking, NB8 is for foreign policy and security coordination. Nordic-Baltic cooperation under the auspices of the Nordic Council of Ministers deals with soft security in its many aspects.

Societal resilience and civil preparedness and security are particular priorities now. We seek to mobilise across the whole region, including by engaging civil society, and we have developed programmes and funding opportunities for this purpose. This is in my view an area that calls for deeper integration and where we could aim higher.

Hard security is dealt with by more resourceful institutions and alliances, where we are all members anyway. I would argue, though, that we work with both soft and hard issues. Equality and inclusion are



Lithuanian Foreign Minister Kęstutis Budrys and Karen Ellemann, Secretary General of the Nordic Council of Ministers, discuss Nordic–Baltic cooperation. Ministry of Foreign Affairs of Lithuania

making our societies more resilient, while food security, energy security and health security are areas closer to the "sharp end" of the spectrum. In fact, we deliver invaluable contributions to the common Nordic security cooperation. All of this is well aligned with the mandate and the spirit of the Helsinki Treaty.

We have the institutions we need, we adapt and develop, and are able to respond to the needs of the day. Moreover, we have a Nordic-Baltic political geography that today stands out distinctly as a region. In this sense, the distance between Arctic and Baltic becomes shorter, both politically and strategically.

In my view, the Arctic experience is of value to the Baltic states and the other way around. An element of this, but not the only, is the present U.S. Administration's repeatedly expressed desire to possess, somehow, and control Greenland. To meet this, the NB8 has been instrumental in voicing solidarity and political support to Denmark and Greenland.

At the same time, our regional reach is getting longer. We are top supporters of Ukraine. This will define us as a region in ways we probably do not fully foresee. Lithuania stands out by taking on a role and responsibility for Ukraine's integration in the EU similar to the Nordics for the Baltics with regard to NATO and the EU.

On 24 February I held an appeal for Ukraine at the Cathedral Square in Vilnius, while all Nordic and Baltic Prime Ministers or Presidents were in Kyiv. Now, on the Ukrainian Day of the National Flag they were there again. Solidarity reinforces itself. Here we stand the test.

Editor's note – *Kiel Institute data show that the eight NB8 countries provided 33 per cent of Europe's military aid to Ukraine in 2025, despite accounting for only 8 per cent of European donor GDP. NB8 leaders said in*

February 2026 that their countries had provided more than €42 billion in military, financial and humanitarian support since 2022, with almost €12.5 billion in military aid planned for 2026.

A Nordic-Baltic middle power

Linas Kojala: *"Middle power" returned to prominence at Davos in 2026 when Canadian Prime Minister Mark Carney argued that "middle powers must act together" in a world of intensifying great-power rivalry. If the NB8 is a middle power, what gives it that status – scale, shared values, or the ability to turn coordination into outcomes?*

Ole Andreas Lindeman: It is in the small state mindset to seek alliances. Great powers too see the value of alliances but expect to have a big say or a dominant role, commensurate with their economic and political power. Nordic-Baltic cooperation differs. We stand together on an equal footing, and as I see it, this only makes us stronger.

When you add us up, we are that middle power and have been so since long before the term was given new relevance at Davos in 2026. Middle powers have the capacity, and with it a responsibility, to stand firmly on human rights, sustainable development, solidarity, and a rules-based international order. This aligns with a kind of Nordic-minded value-based realism, which fits well with the Baltic mindset and strategic orientation; meaning that we remain committed to the liberal democratic order and rule of law, while being pragmatic in our ways, and realistic about results.

We may not be very used to regarding ourselves as a geopolitical factor, but I believe we are. We represent more than 30 million people, eight countries in the UN and NATO, and six in the EU. Our economies continue to grow and deliver prosperity, we are the 10th largest economy worldwide and the 5th in Europe. We are at the front in education and research, leaders in digitalisation. As mentioned, we are top contributors to Ukraine. We may speak softly but can also carry a big stick, to paraphrase a different U.S. President.

Editor's note – *The NB8 countries have around 33 million people. All eight belong to NATO and the UN, while six are EU members. Taken together, their economies amount to around $2.4 trillion in nominal GDP in 2026 – enough to rank the Nordic-Baltic region roughly tenth in the world.*

But more than anything, we are something that cannot be measured in numbers and figures; we are a community of shared identity and values, cultural belonging and togetherness.

Yes, we are closely connected as people. But bear in mind that the Nordic–Baltic region is also one of the most energy-interconnected and integrated electricity markets in the world, with Nord Pool as the world's first multinational power exchange.

Yet, in all honesty, I fear that Nordic cooperation, seen from the outside, may be a bit elusive and difficult to grasp. Nice to have, but not necessarily fit for purpose when it comes to the more pressing issues of the day. Maybe our role in societal security will change this perception?

What we have is slow diplomacy, seemingly boring even, which builds momentum over time. We move incrementally, silently, yet decisively, towards stronger integration. Predictability and reliability are key features. I don't think we are self-centred or self-contented. We are governments and people who are outward-looking, practical and result-oriented. Much is to be said for steadfast and boring diplomacy these days, if you ask me.



Much is to be said for steadfast and boring diplomacy these days.

The Nordic Vision 2030 is a good example of how cooperation is shaping up to meet the pressing challenges before us: the green transition, competitiveness, productivity, digital integration, AI and digital sovereignty, social sustainability, inclusive and resilient societies.

Liberal and equal rights and opportunities, decent work and social redistribution are the hallmarks of a Nordic model that has long since become the Baltic model too. It is time to work on an updated and new Vision, for the next 5–10-year period. The upcoming Norwegian 2027 Presidency of the Nordic Council of Ministers and the NB8 are starting to look into this. I hope to see a more clearly defined Nordic and Baltic Vision to guide us further.

Security without silos

Linas Kojala: *Finland and Sweden's accession to NATO removed the last institutional divide in hard security: all eight Nordic-Baltic countries are now NATO allies. What does that change beyond symbolism – and how should military defence connect to civil preparedness?*

Ole Andreas Lindeman: Finland's and Sweden's NATO accession obviously opens many doors for deepening regional security and defence cooperation. Notwithstanding this, let me come back to a point I make again and again: terms like hard or soft security, and high or low politics do not make full sense if we regard them as separate, and of unequal importance.

This becomes clearer if you look at the 5% of GDP NATO defence investment pledge by 2035. Lithuania and Estonia will exceed the pledge already in 2026, with Latvia, Denmark and Norway just behind, and Finland and Sweden following. The NB8 scoreboard is equally impressive and more telling when broken down to defence investment per capita. Actual values may vary, and the final figures for 2026 are still estimates – but my point can easily be made: NB8 taxpayers are top contributors, making us a leading defence investment region in NATO.

Editor's note – *At the 2025 Hague Summit, NATO allies agreed to invest 5 per cent of GDP annually in defence and security by 2035: at least 3.5 per cent for core defence and up to 1.5 per cent for wider security and resilience. NATO's 2026 estimates for core defence spending put Lithuania at 5.33 per cent of GDP, Estonia at 5.10, Latvia at 4.92, Denmark at 3.49, Sweden at 3.22, Norway at 3.17 and Finland at 2.65. Iceland has no standing armed forces.*

Broad political coalitions are necessary to reconcile higher defence spending with relentless demands for public social spending. Those who paint us as hawks are wrong. Rather there is a broad understanding that we are a special security region. We are constantly reminded that we share borders with Russia. In fact, NATO's border with Russia doubled when Finland joined.

This brings me to the NORDEFCO and Haga cooperation formats. Whereas NORDEFCO aims to strengthen Nordic civil-military coordination of plans and draw on similar long-standing coordination within NATO, Haga aims at civil protection and capacity-building in prevention and preparedness. The two formats are interconnected and overlap on civil protection and emergency preparedness across the Nordic region.

Most importantly, this provides an architecture for the Nordic Council of Ministers' efforts in the field of societal resilience. We have recently concluded a pilot on civil security and preparedness, and local resilience-building in six municipalities across Lithuania. We did this with the ministries of the Interior and of Defence, and the aim was to make use of the competence and resources of Lithuanian civil society and humanitarian organisations in emergency response. We hope to roll out a new and expanded phase of the programme in 2027.

Strategic patience on Ukraine

Linas Kojala: *The Nordic and Baltic countries remain among Ukraine's strongest supporters. The harder question is how to sustain that commitment as the war becomes prolonged and reconstruction competes with domestic priorities. How do you prevent fatigue?*

Ole Andreas Lindeman: One should not underestimate how history speaks to us today. Russian expansionism and exceptionalism are not new to us, it was inherent in both Czarist and Soviet Russia, and the Putin regime actively draws



"The Nordic Council of Ministers opened its office in Vilnius even before embassies. For a young nation, this early support was significant," said former Lithuanian President Dalia Grybauskaitė at a conference marking the office's 35th anniversary. norden.lt

on such sentiments to explain and justify a war of aggression against Ukraine which is in every sense both illegal and unjustifiable.

We are driven by a strong sense of solidarity with Ukraine; we provide military and civil support and give refuge to more Ukrainians than to any other groups seeking refuge from war and terror in our countries. The arrival of Ukrainian citizens in the Baltic and Nordic states has a considerable, positive effect in our societies. Yet, as the war drags on, we should get out of our temporary state of mind. Dilemmas between short and long term may arise and must be dealt with.

Hopefully there will be an end to the war soon, and peace on terms that the Ukrainian people can agree to. After that, another critical phase starts that will last longer. We must remain solidary and unwavering in our support, and continue the effort for reconstruction, development and fiscal support, including in the energy sector, humanitarian assistance, human rights, governance and civil society, private sector and business development, to mention but a few of the prioritized areas that we will be working on with the Ukrainian people and authorities at all levels.

Ukraine has continuously shown that it is serious about peace. Russia could stop the war any day, but so far it has chosen not to. We should not be naïve about Russia's broader, strategic and political intentions. Russian aggression against our region, in different shapes and forms, is a pinprick strategy of long duration and needs to be met with equally consistent and determined measures.

Take for instance the recent warnings about Russia's preparations for staging large-scale provocations in the Baltic region and maybe targeting Nordic countries too. I think it is worth noting that such provocations are indeed directed at the NATO Alliance more than against any individual state. In this regard we consider our Baltic-Nordic region as "one" when we aim to prepare, prevent and respond. Moscow's game is to gnaw away at our resolve, raise anxiety in our societies, and make us hesitant about supporting Ukraine. As Moscow seeks to divide, we must stand firmly together. And we do – I am convinced

that we have more strategic patience and resolve than the Kremlin currently believes.

As to Belarus, we support the independent media in exile. Again, we must think and act for the long term. There was a time when all, except some strong-willed, convinced and dedicated few, thought that the Soviet Union would last forever. Suddenly it was gone. We support and encourage civil society and democratic forces of Belarus who fight for a new and democratic Belarus one fine day.

Moscow's game is to gnaw away at our resolve, raise anxiety in our societies, and make us hesitant about supporting Ukraine.

A New North

Linas Kojala: *At the Vilnius conference, there was discussion of the Arctic and Baltic becoming part of the same strategic space, with the NB8 at the core and countries such as Poland, Germany, the United Kingdom and Canada around it. How far can that wider "New North" go without weakening the NB8 itself?*

Ole Andreas Lindeman: It was not for nothing that we chose Shared Values, Shared Security: The Nordic-Baltic Partnership at 35 and the Path Forward when we wanted to brand the 35th anniversary of Nordic-Baltic cooperation in April in 2026.



Nordic Prime Ministers meet Ukrainian President Volodymyr Zelenskyy as he arrives for the Nordic Council Session in Reykjavík, Iceland, October 2024. Magnus Fröderberg / norden.org

Shared democratic values and prosperous societies have helped us forge a strong sense of identity and purpose as a region. An entire generation has grown up with Nordic-Baltic cooperation as a normal part of the political landscape.

Nordic cooperation with the Baltic states started as an act of solidarity but was also premised on a realistic view about the necessity to act and to use the opportunity of the restored independence of the Baltic States. The building of a broader security region was initiated by visionary politicians and supported by popular sentiment on both sides. Focus was on pragmatic, practical cooperation within almost every public sector inspired by "the Nordic Model"; on the success story of how the Nordic states had grown strong from within, as resilient societies and robust, well-functioning democracies.

Experts at the conference confirmed that Nordic-Baltic cooperation remains strong, while the regional environment has changed fundamentally. The challenge is not to build new institutions, but to ensure that existing structures evolve and deliver in response to new geopolitical, technological and regional developments. For the Nordic Council of Ministers, this means continued deepening of structural integration, and more practical cooperation by keeping existing frameworks relevant, responsive and forward-looking.

I ask myself at times if we provide sufficient speed and drive to Nordic–Baltic cooperation. Yet this has to come from the Baltic side as much as the Nordic. Stronger Nordic-Baltic integration requires closer inter-Baltic integration too, in my view. Much has been achieved over the last 35 years. If this history is going to stand as an undisputed success, integration must not stop here. It must be brought further, guided by the same political leadership, creativity, courage and determination as then.

Nordic and Baltic states are responding and play a significant role at a time when the world needs this. This goes far in explaining the interest from other like-minded countries, like Poland, Germany and the United Kingdom. Canada is an Arctic country and shares much of our Nordic political mindset, so there are some obvious connections there. There is already considerable bilateral cooperation. Using the NB8 as an informal coordination format to structure and frame such contacts within a Northern regional outline seems logical to me. I see only upsides if we get it right, also for the underlying Nordic-Baltic cooperation.

I could personally imagine a New North developing in concentric circles. At its core, the NB8 should remain a cohesive, high-trust group whose internal integration continues to deepen. Around it, a wider strategic community could bring in Poland, Germany, the United Kingdom and Canada through flexible partnerships, depending on the issue.

This would allow us to combine two things that are often in tension: the cohesion and trust of a relatively small group, and the geopolitical weight that comes with greater scale. Expansion and integration do not mean the same thing. The NB8 can integrate more deeply while the wider North expands more broadly. In that sense, the NB8 could become the core of a wider New North, rather than become the wider North itself.



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Trust as security

Linas Kojala: ***You have called trust "Nordic gold" and argued that social cohesion matters for security. What can the Baltic states learn from Nordic preparedness, and what can the Nordics learn from the Baltic experience of Russian disinformation and hybrid pressure?***

Ole Andreas Lindeman: You are right, we have been able to shape cohesive societies in which we trust each other – and, indeed, we like to speak of it as the Nordic "gold". To be a security asset, trust has to be translated into institutions, behaviour, norms and responsibilities.

Finland's whole-of-society security model is perhaps the best example: authorities, municipalities, business, civil society and citizens prepare

and train together, and know their roles before a crisis erupts. We all have much to learn from Finland in this respect.

The Baltics bring extensive practical experience of operating under persistent Russian pressure; the Nordics bring more mature comprehensive preparedness systems and models of institutionalised interaction between state and society. Combining the two would give the Nordic-Baltic region a particularly strong resilience model.

Key threats to resilience are social polarisation, misinformation, inequality and extreme wealth gaps. Unchecked algorithms and social media are open gates for those who want to hurt us by undermining trust, and foment dissatisfaction and resentment. The expressions of rage, hatred, intolerance – you may ask where it comes from, when Nordic and Baltic countries year after year figure at the top of the happiness index. Regulation is necessary.

Editor's note – *The 2026 World Happiness Report ranked Finland first, Iceland second, Denmark third, Sweden fifth and Norway sixth. Lithuania ranked 28th overall, Estonia 46th and Latvia 48th. Among people under 25, however, Lithuania ranked 11th in the world – even ahead of Sweden, Norway and Estonia. The rankings are based on Gallup World Poll life evaluations collected in 2023–25.*

And then we have hostile hacking. How do you know with certainty that your most intimate health data are safe, for instance, what about trust in public vaccination programmes? In August a pro-Russian hacking group calling themselves Server Killers claimed responsibility for a large-scale attack on Norway's government digital services. The group declared cyberwar, they said, as a reaction to Norway's support for Ukraine.

What can the Nordic Council of Ministers do about this? One is to support inclusion and DEI, defend liberal democracy and human rights, fight exclusion throughout, from kindergarten to elderhood. The Nordic Welfare Center provides programmes, competence, and institutional resources to bolster social sustainability across the Nordics and Baltics.

The other is to address digital sovereignty and strategic autonomy. We need to own the AI-powered information ecosystem before it owns us. In Stockholm, we established a Nordic-Baltic AI Center in 2026. A crucial aspect of digital sovereignty is to design AI language models for our small languages so we may preserve local linguistic diversity.

There is plenty of ground for mutual learning. In Lithuania's case no one believes that malign campaigns and hybrid pressure out of Belarus are not okayed by Moscow. As you have yourself pointed out in a recent op-ed in the Guardian, the people of the Baltic states understand better than most that we cannot afford to pretend that Russia's aggressions happen somewhere else and do not affect us.

Herein, I believe, lies a lesson for the Nordic side. Now that we share the sense of urgency, a remaining challenge is coordination of societal resilience, preventive measures and civic preparedness. Here we can still do better. What we learn from Ukraine is that while the front line is on the military battleground, the first line of defence runs across municipalities – where people live.

While the front line is on the military battleground, the first line of defence runs across municipalities – where people live.

Another lesson we draw from our own history: in 1991 we were in a situation of regional reorientation and of finding each other. Today we know that we belong together and who we are as a region. We are in a much stronger position now than then. ●

Edward Lucas: Russia Is Frightened of Its Own History

On the Kremlin's imperial myths and the West's "post-Soviet" habits

Interview by Linas Kojala,
Editor-in-Chief of the Lithuanian Foreign Policy Review

Russia's war against Ukraine has been accompanied by an attempt to deny that Ukraine has a legitimate history – or even a right to exist as a sovereign state. Similar claims have long been directed at the Baltic states and are now increasingly aimed at Finland. Edward Lucas discusses what these narratives reveal about Russia itself, why "post-Soviet" thinking remains so persistent in the West, and how the Baltic states should approach both their historic achievements and the darker chapters of their past. He also warns that a weakened or post-Putin government could once again secure Western support by presenting itself as the only alternative to chaos.

Edward Lucas has covered Central and Eastern Europe since 1986 and was formerly a senior editor at The Economist. He writes regularly for The Times and is the founder and director of the Baltic International Security Centre (BISC). His relationship with Lithuania reaches back to before the restoration of independence: he first came to Vilnius in January 1990. After entering Lithuania in defiance of Soviet border controls on 28 March 1990, he received Lithuanian visa no. 0001 – a deliberate assertion of the restored state's sovereignty. He was deported from the Soviet Union by the KGB and put on a train to West Berlin. Lithuania later awarded him the Knight's Cross of the Order of the Lithuanian Grand Duke Gediminas and the Foreign Ministry's Star of Lithuania's Millennium. His books include The New Cold War and Deception.

History as a weapon

Linas Kojala: *Russia's campaigns against Ukraine, Lithuania and, increasingly, Finland follow a familiar pattern. The neighbouring country is portrayed as artificial, historically fascist and hostile to Russia. What does this tell us about Russia's own identity and intentions? And how effective are these campaigns?*

Edward Lucas: This goes back years. In the pre-Orbán era, I remember a Russian propaganda piece claiming that "the three Finno-Ugric countries – Estonia, Finland and Hungary – were all Nazi allies." Claims



Edward Lucas at a side event hosted by GSSC during the 2026 NATO Summit in Ankara. GSSC

that Lithuanians, Latvians and Estonians are "fascists" go back to the Soviet period, when the NKVD fought people it called "bourgeois-nationalist bandits."

Since 1991, Russia has retreated from the Soviet Union's acknowledgement of the Molotov–Ribbentrop Pact. It largely depicts the Baltic states as "former Soviet republics" whose independence was an act of goodwill by the Kremlin, and therefore conditional.

Part of this is a neurotic reaction to Russia's own failures. Russia has a serious problem with right-wing extremism. It has no real allies. Its partnerships with China, North Korea, Iran and Belarus are all highly transactional relationships, governed by a "who dominates whom?" logic. Russia therefore envies countries that have real friends, grounded in shared history and shared principles. Russia is also, in some respects, an "artificial" state, shaped by the chance events of the Soviet Union's collapse.

These campaigns are effective chiefly inside Russia, where they reinforce resentment against the "wicked West." They also resonate among alienated parts of the population in countries such as Germany, although narratives such as "Ukrainians are Nazis" are also more important there.

Editor's note – *On 24 December 1989, the Soviet Congress of People's Deputies condemned the secret protocols of the Molotov–Ribbentrop Pact and declared them invalid from the moment they were signed. Under Putin, Moscow returned to a defence of the pact and the Soviet annexation of the Baltic states. In 2019, Putin presented the pact as a response to the actions of other European powers. In 2020, he falsely wrote that Estonia, Latvia and Lithuania had joined the Soviet Union "on a contractual basis, with the consent of the elected authorities," and claimed that the process complied with international and domestic law at the time.*



On 23 August 1989, approximately two million people in Lithuania, Latvia and Estonia joined hands to form the Baltic Way, a 600-kilometre human chain from Vilnius through Riga to Tallinn. It became an international symbol of successful non-violent resistance.
Saulius Gruodis / Lithuanian Central State Archives

Western orientalism

Kojala: *Some of these narratives continue to find an audience in the West. Russia's full-scale invasion of Ukraine should have broken the habit, yet terms such as "post-Soviet" and "Russia's backyard" remain common. Why has this way of thinking proved so persistent?*

Lucas: Western orientalism had fifty years to take root, from 1940 to 1990. Two generations grew up thinking of Eastern Europe as "not like us."

It is also natural to create categories to make sense of a confusing world: "the Stans," "the Balkans," "the Western Balkans," "the post-Soviet space." Then there is the belief that big countries matter more than small ones. It seems easier to make one deal with Russia than to distinguish between Moldova, Mordovia and Moravia, or Slovenia, Slovakia and Slavonia. Western opinion-formers are busy, ignorant and lazy.

Baltic memory and confidence

Kojala: *Some of the Baltic states' resilience comes from histories of national struggle and memories of occupation. How can they preserve that strength in the twenty-first century, when historical knowledge competes with short videos and algorithmic feeds? How do you pass complex memory to a new generation?*

Lucas: That is a question for the Baltic states themselves. My advice as an outsider is to balance memories of distant glories – the Grand Duchy and the Polish–Lithuanian Commonwealth – and more recent glories – the struggle to regain independence – with contemporary achievements that can be a genuine source of pride. Lithuania has the happiest young people in the world. Estonia and Lithuania are among the ten best places to relocate to.

Editor's note – *The 2024 World Happiness Report ranked Lithuania first in the world among people under 30. The 2026 Rumavi Global Relocation Index, a commercial index covering 192 countries across 24 measures, placed Estonia first and Lithuania sixth.*

Kojala: *The Baltic states also have difficult histories of their own, including arguments over wartime collaboration, the Holocaust and accommodation with Soviet rule. How can these questions be examined honestly without allowing Russia to dictate the debate? Are there any successful examples from which we can learn?*

Lucas: All countries have to balance pride and shame. For me, being honest about the black spots in my own country's past makes me more confident in taking pleasure in the good parts.

It is important not to build your sense of self on such rigid historical foundations that you cannot adapt or think freely because a new conclusion might disturb the whole edifice. The greatest respect we can show our ancestors is to treat them as people, not as historical symbols.

Refusing manufactured conflicts

Kojala: *Historical pressure does not come only from books or*

official Russian statements. Even a crude slogan such as "Vilnius is ours," written on a wall, can provoke a political argument and force officials to respond. How should governments and societies find the right balance in such situations?

Lucas: Everyone has a choice about what they get angry about, for how long and to what extent.

Russia is trying to wind Lithuania up over the "Litvinist" threat, hoping to drive a wedge between Lithuanians and Belarusians, who should be on the same side. A similar dynamic is visible in the artificial row between Ukraine and Poland. I recommend Timothy Snyder's *The Reconstruction of Nations* on this subject.

Editor's note – *"Litvinism" is a broad and contested label for Belarusian narratives presenting the Grand Duchy of Lithuania as primarily or exclusively Belarusian; radical versions include territorial claims to Vilnius. In 2023, Lithuania's State Security Department assessed that its adherents did not pose a real threat to Lithuanian sovereignty or territorial integrity, but warned that the dispute could inflame inter-ethnic tensions. In April 2025, the service said Russian and Belarusian intelligence agencies were exploiting such divisions in an operation intended to turn Lithuanians against the Belarusian diaspora.*

The post-Putin trap

Kojala: *Many Western governments treated the Soviet collapse as the end of the Russian imperial question. If Putin's system begins to weaken, how can they avoid making the same mistake again? Is there a danger that the search for stability in Moscow would once more take precedence over the sovereignty and security of Russia's neighbours?*

Lucas: Western governments are almost always wrong about what is happening in Russia – and before that, the Soviet Union. They will be wrong in the future too.

Their great fear is *Smuta* – disorder, or a new Time of Troubles – and Russia knows this. It will say to the West: "Help us, the post-Putin reformist government, or you will get something really nasty." It will be a major test of European and transatlantic cohesion. I am not optimistic.

Editor's note – *Russia's "Time of Troubles" (Smuta) was a period of dynastic crisis, famine and civil war between 1598 and 1613, following the end of the Rurik dynasty. Rival claimants contested the throne as the Polish–Lithuanian Commonwealth and Sweden became involved in the conflict. In Russian political memory, the Smuta remains associated with weak government, internal disorder and foreign intervention. The Kremlin has invoked it to argue that political division and a weak central state place Russia itself in danger.*

Kojala: *However difficult, can you imagine a future reconciliation between Russia and the democratic countries of Europe over their conflicting accounts of the past? What would first have to change inside Russia?*

Lucas: Russia would have to change so much that I do not see it happening in my lifetime. Even at the height of "democracy" in the 1990s, it was clear that the Russian state and Russian society remained deeply imperial in their outlook. They have now had more than twenty-five years of Putinist propaganda to entrench those views.

The best thing we can do is to be clear in our own minds about what happened in the last century and why it matters. That at least sets an example for other countries. But we struggle even to do that, partly because this is an ahistorical age and partly because of self-interest. ●

Arvid Bell: Simulation Intelligence Expands the Pre-Crisis Window

On wargaming, AI hallucinations, geopolitical blind spots, and what a simulated Article 5 crisis in Lithuania revealed

Interview by Linas Kojala, Editor-in-Chief
of the Lithuanian Foreign Policy Review

War games are meant to test assumptions before reality does. In one Harvard exercise held shortly before Russia's full-scale invasion of Ukraine, the Russia team developed a scenario Bell considered too extreme. A few months later, events proved otherwise.

That experience shaped his interest in using simulation technology to explore a wider range of possible outcomes before a crisis begins. In this interview, Bell discusses what simulations can and cannot tell decision-makers, why human judgment still matters, and what a Geopolitics and Security Studies Center scenario exercise involving a hybrid incursion near Šalčininkai – a town close to Lithuania's border with Belarus – revealed about the uncertainty surrounding a possible NATO response.



Arvid Bell, co-founder and CEO of Anadyr Horizon Anadyr Horizon.

Arvid Bell is co-founder and CEO of Anadyr Horizon, a venture-backed simulation intelligence company, and chair of the executive board of the Arms Control Negotiation Academy (ACONA). He founded the Negotiation Task Force at Harvard's Davis Center and previously served as a Lecturer on Government at Harvard University's Faculty of Arts and Sciences. His work focuses on negotiation strategy, crisis management, international security, and simulation design.

From conflict mediation to simulation intelligence

Linas Kojala: *You started with conflict mediation and later moved into war games and simulations. How did you get from that work to the idea of doing some of it through software?*

Arvid Bell: I have always been interested in how people make decisions, negotiate and cooperate, especially under pressure. Earlier in my career, I worked in conflict zones in the Middle East, Central Asia and elsewhere, helping people negotiate and de-escalate. I later taught international relations at Harvard and led a simulation lab conducting large-scale war games for senior members of the U.S. government, military and intelligence community.

That experience planted the seeds for Anadyr Horizon. In one Harvard exercise, Red Horizon, the Russia team developed a plan for a full-scale invasion of Ukraine broadly along the trajectory that later unfolded. I thought it was too unrealistic to focus on. When the invasion happened about two and a half months later, I stood corrected.

That left me with a question: could technology run these sophisticated war games at scale and identify risks, black swans and blind spots without requiring huge amounts of time, people and resources?

That is what we do at Anadyr Horizon. We are a simulation intelligence technology company. In simple terms, our software simulates geopolitical decision-making at scale – interactions among countries, governments, and political and military leaders – to support early warning and decision-making. The advantage is not simply running more scenarios, but modeling how actors respond to one another across repeated futures and identifying recurring pathways and branching points.

Linas Kojala: *Governments often assume that the real analytical advantage lies inside the system, because they have classified information, institutional experience and established processes. Where does simulation intelligence add value for institutions that already have strong analysts and senior decision-makers?*

Arvid Bell: We see the technology as something that supercharges experts – from analysts to senior decision-makers who are already well versed in geopolitics – by giving them a new capability to augment their judgment.

For example, the software can simulate likely crisis trajectories: what might Russia do next around Moldova? How might Moldova react? What could NATO do in response? But the software does not decide for humans. It is still up to the user to decide what to do with that information. It augments human judgment and decision-making rather than replacing it.

The second point is scale. Even the most capable people in a room face basic limits. In a traditional war game or crisis-scenario workshop, humans simply cannot run a thousand scenarios in a day. Software can run hundreds or thousands overnight and explore possibilities at a scale that human teams cannot reproduce.

That technology has to be used responsibly. The human should remain in the loop and double-check the judgments. At the same time, the power of open-source intelligence is growing in the age of AI.

That technology has to be used responsibly. The human should remain in the loop and double-check the judgments. At the same time, the power of open-source intelligence is growing in the age of AI. Classified information will remain important, but the gap between OSINT-driven analysis and analysis based on classified sources is likely to shrink.

Organizations also need to recognize that strategic competitors are developing similar capabilities. China, for example, already has experience with automated wargaming. Countries that do not keep pace risk being left behind.

Editor's note – *Chinese military research into AI-assisted wargaming is well established. RAND has documented PLA*

investment in computerised wargaming, synthetic environments and AI-powered agents; Chinese military-linked competitions have tested AI systems against human players since the late 2010s.

More generally, simulation can help avoid harm and save lives. Instead of stumbling into a crisis and making mistakes because you have not thought through the consequences, you can anticipate some of them in advance. It gives leaders another check on what they are about to do and can help identify blind spots before they become costly.

More generally, simulation can help avoid harm and save lives. Instead of stumbling into a crisis and making mistakes because you have not thought through the consequences, you can anticipate some of them in advance. It gives leaders another check on what they are about to do and can help identify blind spots before they become costly.

Where AI can fail

Linas Kojala: *How do you test whether the model is actually useful? If it is running thousands of scenarios, how do you know it is identifying real patterns rather than simply repeating the same bad assumptions at scale?*

Arvid Bell: There are several safeguards, because hallucination is a problem for any technology company that uses AI. The first is that we are more simulation-native than AI-native. We deliberately call our work simulation intelligence. We have built a simulation engine. Our proprietary technology – Agentic Systems Intelligence, or ASI – combines principles from Monte Carlo simulation in physics with cognitive modeling from political science and agentic actor models, or decision profiles of individual decision-makers.

Editor's note – *Monte Carlo simulation uses repeated random sampling to model ranges of possible outcomes and their probabilities. Developed in the 1940s, the method is now widely used in physics, finance and risk analysis.*

Think of it as an automated wargaming engine with its own algorithms, weights and parameters. We also use AI to move faster and, for example, to tag data, but internally it is much less of a black box than a system such as ChatGPT. It is primarily a simulation engine rather than simply an AI model looking at a problem.

Second, we use our own proprietary datasets. This draws on the legacy of our simulation work at Harvard, where we spent years refining how to gather the right information about political, military and financial decision-making at the strategic level, and how to turn that into datasets for scientific research and now simulation modeling. That work also gave us a body of peer-reviewed research and rigorous testing of our data-collection methods.

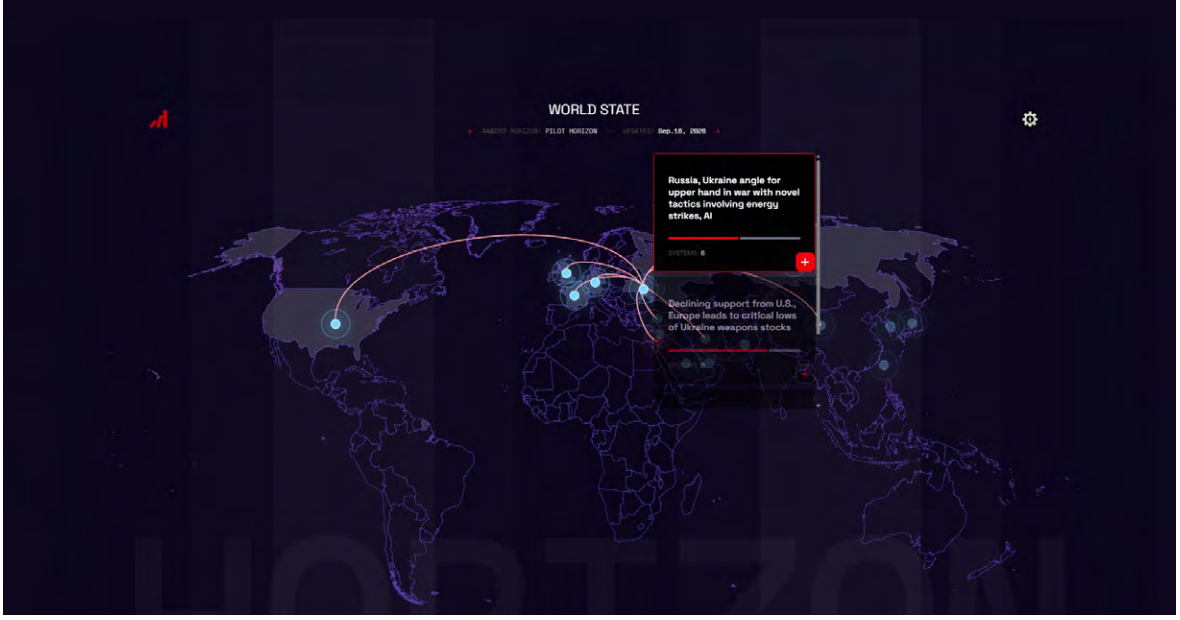
Third, clients can add their own data. Depending on the classification level, that is handled in different ways, but if a client has specific information it wants to use to augment the simulation models, that can be incorporated under the relevant data-security policies.

Those are three examples of mechanisms that give us confidence that we are not falling victim to typical AI hallucinations. But this remains a constant engineering challenge. You have to return to the models, measure their performance, review them and improve them.

What technology cannot replace

Linas Kojala: *What are the limits of simulation? Which parts of traditional wargaming can software realistically replace, and where does human interaction remain indispensable?*

Arvid Bell: I think it replaces some aspects, but not the whole thing. Once simulation intelligence becomes more common, some forms of scenario workshops and wargaming will probably become less common – especially exercises focused on big-



North Star simulation visuals. Anadyr Horizon

With the right models, data, human instructions and oversight, you can do it much faster and generate more decision-grade insights. In that sense, it is a little like the computer replacing the typewriter.

picture scenario generation, anticipating the moves of other countries and going back and forth around a table or whiteboard.

A lot of that can probably be done with technology. With the right models, data, human instructions and oversight, you can do it much faster and generate more decision-grade insights. In that sense, it is a little like the computer replacing the typewriter.

But another aspect of scenario planning and wargaming is much harder to replace: training and real-time human decision support. Diplomats and military officers need to learn how to make decisions, negotiate and manage conflict in high-stakes, high-pressure situations. Wargaming is not only about extracting information such as what Russia might do next. It is also about preparing your own people.

That will probably continue to rely on sophisticated physical exercises that bring people together, because you enter the territory of human emotions and biases. You cannot simply outsource that to software. Organizations will have to decide where they need technological support and where they should keep an exercise in the physical realm. Decision-making and negotiation are ultimately deeply human endeavors.

The geopolitical hotspots

Linas Kojala: *Where are you seeing the most demand for this? In the Baltics, the obvious concern is Russia – whether the war spills over or Moscow eventually tests NATO. Is that where most of the interest is?*

Arvid Bell: Right now, we see the strongest interest in three major geopolitical theaters. One

Right now, we see the strongest interest in three major geopolitical theaters. One is indeed Eastern Europe – spillover effects from the war in Ukraine and a potential next phase of the conflict. That includes escalatory and de-escalatory scenarios. For Lithuania, the existential question is whether the conflict could somehow spill onto its territory and, if so, how. But there is also the question of the chances for some form of diplomatic solution or a freeze of the frontline.

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territory and, if so, how. But there is also the question of the chances for some form of diplomatic solution or a freeze of the frontline.

The second is the Middle East and the implications of the Iran war. Let me give one example of how technology can identify blind spots. While the first round of negotiations in Pakistan between Iran and the United States was still under way, our model flagged an American maritime interdiction regime over the Strait of Hormuz as one of the three most likely scenarios. At the time, this was not widely discussed. Shortly afterwards, President Trump said the United States would impose a blockade.

The point is not deterministic prediction. Nobody has a crystal ball and nobody can truly predict the future – there are too many variables. The value lies in being aware of specific blind spots. If you can anticipate a tactic or contingency before it happens, a government can ask what it would do about it. That is the essence of blind-spot detection and contingency planning.

The third theater rising in relevance is Asia, especially the South China Sea, Taiwan and related hotspots. Those are the areas where we currently see the strongest interest, although the platform can already simulate developments in many other regions, from Central Asia and Latin America to sub-Saharan Africa.

Testing an Article 5 crisis

Linas Kojala: *In the GSSC pilot, we looked at a hybrid incursion into Lithuania that escalated into a NATO Article 5 crisis. How did you set up the scenario, and did the simulation show anything we might not have picked up through a more traditional exercise?*

Arvid Bell: This was a very meaningful project for our team, and I am glad it has expanded into a broader collaboration. We wanted to test a predefined scenario involving a hybrid incursion. A professionally trained, unidentified armed group without insignia crosses the Belarus–Lithuania border and seizes facilities in Šalčininkai. The human-generated scenario assumes that Lithuania declares a state of emergency, mobilizes rapid-reaction forces and invokes NATO's Article 5, attributing the attack to Russian hybrid-warfare tactics.

It is important to understand how the process works. The initial scenario – which is much more detailed than this short description – was created by the GSSC expert team in collaboration with Anadyr Horizon. There is therefore a human-generated initial condition that is fed into the engine. Based on this initial scenario, or inject, the software then generates a range of possible futures, including likely and unlikely crisis trajectories. For complex scenarios, computation can take hours, even up to a day, as the engine explores possible futures and models – for example – Russian reactions, U.S. responses and allied responses.

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Editor's note – *The figure above is an output of this specific simulation under its stated assumptions. It should not be read as a real-world probability of how NATO would respond to any future crisis.*

At the same time, a more concerning finding was that the U.S. response, at high probability, focused much more on deterrence, reinforcement and crisis management than on restoring Lithuanian territory. There is a meaningful difference between an Article 5 response centered on rhetoric and reinforcements and one centered on immediately pushing the forces that entered allied territory back out.

The model also flagged ways in which Russia could exploit gaps between U.S. and allied responses, particularly if there were no coordinated effort to reverse the territorial incursion. Some more granular findings about individual actors and decision-making have not been released publicly.

Linas Kojala: *What should Lithuania take from those findings?*

Arvid Bell: One implication is that the gap between how people imagine Article 5 unfolding and what might actually happen could be greater than we think. Article 5 does not compel every member state to send a specified number of soldiers, and in a particular crisis that ambiguity could work to Lithuania's disadvantage.

So it is prudent to expect U.S. and NATO reinforcement, but not to assume that territorial rollback would be immediate. Lithuania should be prepared for a crisis in which the allied response could be delayed.

A second implication is the importance of stronger early warning and shorter decision timelines. If you wait for all allies to reach a position, you may already have lost considerable momentum. That raises the question of smaller constellations of allies and whether support arrangements could be agreed in advance and activated under specified circumstances.

A third major finding concerns information warfare. In this hypothetical crisis, actors might disagree even about the basic facts on the ground – how serious the incident is, who is responsible and what exactly has happened. That points to the importance of strategic communications, NATO–EU messaging frameworks and media resilience in the Baltic states.

I should emphasize that these policy implications are the product of human analysis by the GSSC and Anadyr Horizon teams. The platform itself is agnostic about policy recommendations. It can flag likely U.S. and NATO responses and model how Russia might respond, but governments still have to decide what to do with that information.

The technology expands the pre-crisis window – giving you a better idea of what could go wrong and allowing you to close gaps before the crisis begins.

The result is a more detailed and data-driven picture of a hypothetical crisis than you would get simply by bringing smart people into a room and asking what might happen. Most importantly, you have already played out the scenario once. If the model flags delays or blind spots that could hand the initiative to the actor behind an incursion into eastern Lithuania, there is no reason not to prepare for them now. The technology expands the pre-crisis window – giving you a better idea of what could go wrong and allowing you to close gaps before the crisis begins.

From niche capability to standard practice

Linas Kojala: *Do you expect simulation intelligence to become a standard part of high-stakes decision-making – something governments and companies use routinely before moving troops, capital or operations?*

Arvid Bell: Yes, I think we are moving in that direction. When we first launched the company and approached American venture-capital firms, many people asked: what exactly are you doing? Simulating decisions? Why would you do that? It was unfamiliar because it did not fit an established category.

Now more companies are starting to use these kinds of technologies. Our view is that, in the not-too-distant future, institutions making high-stakes decisions will routinely use sophisticated simulation tools. Eventually, it may seem strange that people once deployed troops, made strategic investments or shifted operations without first stress-testing those decisions through simulation intelligence.

Our team has worked in this field for a long time – from physical simulations and war games to Monte Carlo simulations and cognitive profiles – and we have brought those strands together in one company.

I also think this shows how technology and AI can be used for good. If you identify blind spots or black swans early, you can hopefully prevent the worst outcomes. If that means soldiers never have to be sent into the next war, that is far better than fighting it in the first place.

Notes

