briefs

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Elio Calcagno

European Strategic Autonomy and Defence Cooperation: Not an Inevitable Outcome*

- The attainment of a higher degree of EU strategic autonomy in defence is largely inextricable from an increase in industrial and technological cooperation among member states.
- Cooperation to reduce fragmentation and optimise spending is often portrayed as the most logical outcome at a time of heightened insecurity in Europe and a fraying transatlantic relationship, member states keep favouring minilateral and bilateral cooperation frameworks.
- Throughout the last decade, the EU has become a much more relevant actor in defence industrial policy while introducing a variety of new initiatives aiming to incentivise cooperation. A more structured dialogue with member states might help such initiatives be more effective.

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While on the surface strategic autonomy may appear to be a simple and easily-defined concept, an analysis through a defence-focused lens exposes its practical and political shortcomings. At its core, strategic autonomy can be defined as the EU's capacity to "act autonomously [...] in strategically important policy areas".[1] While the concept has now expanded to many strategic fields, including supply chains and raw materials, energy security, and food and water security, it first appeared in official EU documentation as part of the European Council conclusions on EU common security and defence policy (CSDP) in 2013.[2]

The EU Global Strategy published in 2016 represented a watershed moment for the Union and primarily linked strategic autonomy to defence and security.[3] Crucially, like the 2013 Council conclusions, the Global Strategy stated that a "sustainable, innovative and competitive European defence industry" was

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1 Damen, Mario, "EU Strategic Autonomy 2013-2023: From Concept to Capacity", in *EPRS Briefings*, July 2022, p. 1, https://www.europarl.europa.eu/thinktank/en/document/EPRS_BRI(2022)733589.

2 Tocci, Nathalie, *European Strategic Autonomy: What It Is, Why We Need It, How to Achieve It*, Rome, IAI, 2021, p. 7, https://www.iai.it/en/node/12819.

3 European External Action Service (EEAS), *Shared Vision, Common Action: A Stronger Europe. A Global Strategy for the European Union's Foreign and Security Policy*, 28 June 2016, https://europa.eu/!Tr66qx.

Elio Calcagno is Senior Research Fellow in the "Defence, security and space" programme at IAI.

e.calcagno@iai.it

essential for strategic autonomy and a credible CSDP.[4]

The European defence industrial and technological base (EDTIB) is therefore a fundamental pillar of any attempt to build strategic autonomy, although the EU's ability to carry out military operations more independently from the United States has also been seen as another crucial aspect. The US withdrawal from Afghanistan in 2021, with European partners forced to follow suit due to the lack of necessary military capabilities to sustain the operation without US support, was seen a stark reminder of European strategic dependency on Washington.[5] The volume of high-end US weapons supplies to Ukraine after Russia's invasion in 2022, which European countries could not match, was another one.

» Strategic autonomy in matters of defence and security can be defined as a condition where EU member states have alleviated their chronic dependency on US arms imports

Amid a multitude of definitions and readings, strategic autonomy in matters of defence and security can be defined as a condition where EU member states have alleviated their chronic dependency on US arms imports and inability to carry our large-scale military operations on their own. A low degree of strategic autonomy could be classified as both industrial, meaning that member states lack certain know-how regarding advanced technologies or the capacity to produce them at scale, as well as operational, meaning that they have underinvested in certain critical capabilities that enable large scale operations. This brief will focus exclusively on the former.

The push to make the EU more strategically autonomous sheds light on how EU institutional initiatives and regulations can clash with national interests at the political, military and industrial levels. Defence is among the most sensitive national prerogatives and member states tend to only move toward common goals under the condition that they can better their initial position. Yet the EDTIB is not a homogeneous ecosystem made of a multitude of industrial actors roughly comparable in size and capabilities. Instead, it is dominated by a handful of large companies, also known as prime contractors, whose interests are often aligned with national governments and often shape member states' defence policies.

US imports: Quality over quantity

European reliance on US arms imports is often overstated, at least in terms of financial value.[6] Recent research shows how most large European countries rely on US products only for a relatively small share of their total procurement, with the exception of Poland.[7] Yet the most advanced technologies, with few (if any) EU-made alternatives, still make up a considerable share of these US exports to Europe. This is the case for instance for the F-35 fifth generation combat aircraft, air defence systems, and precision-guided rocket and ballistic missile systems.

4 Ibid., p. 4.

5 Mejino-López, Juan and Guntram B. Wolff, "Europe's Dependence on US Foreign Military Sales and What to Do About It", in *Bruegel Policy Briefs*, No. 27/25 (October 2025), https://www.bruegel.org/node/11382; Young, Michael, "Autonomy Minus a Strategy", in *Diwan*, 7 September 2021, https://carnegieendowment.org/middle-east/diwan/2021/09/autonomy-minus-a-strategy.

6 Mejino-López, Juan and Guntram B. Wolff, "What Role Do Imports Play in European Defence?", in *Bruegel Working Papers*, No. 21/2024 (4 July 2024), https://www.bruegel.org/node/10131.

7 Mejino-López, Juan and Guntram B. Wolff, "Europe's Dependence on US Foreign Military Sales", cit.

» Most advanced technologies, with few (if any) EU-made alternatives, still make up a considerable share of US arms exports to Europe

Given the size of the EU's economy and its manufacturing base, a comparison of research and development spending (R&D) between EU member states as a whole and the United States explains the mismatch in high-end system production. While EU member states collectively spent 13 billion euros on R&D in 2024, the United States spent over 130 billion.[8] Although the EU has introduced joint R&D incentives through the European Defence Fund (EDF), the total budget of 7.3 billion euros spread over the 2021-2027 period[9] is too small to significantly change the trajectory of EU defence innovation without much bigger efforts from individual member states and their industrial bases.

To be sure, any additional funding for R&D should be perceived as a valuable injection; yet EU grants cannot on their own help member states and their respective defence technological and industrial bases (DTIBs) put national interests and (in some cases) mistrust aside in order to jointly work on critical technological innovation. Many industrial actors remain competitors: *vis-à-vis* not only companies from other EU countries, but often *vis-à-vis* other firms from the same member state. As a flagship R&D effort, the EDF cannot be judged solely on its first five years of activity but anecdotal evidence suggests that military and industrial stakeholders are often reluctant to fully commit to the most critical projects. Ultimately, when it comes to industrial capabilities, EU member states can replace some critical US systems with European alternatives only through much larger private and public investment.

A preference for bilateral and mini-lateral cooperation

Important and in some respects groundbreaking EU documents such as the 2022 Strategic Compass, the 2024 European Defence Industrial Strategy (EDIS) and the 2025 White Paper on Defence Readiness all point to defence industrial cooperation and collaborative investments among member states as key enablers for a safer and more autonomous EU.[10] However, despite efforts under the EDF and projects developed under the Permanent Structured Cooperation (PESCO) framework, some critical future systems and platforms and related technologies are being pursued outside the scope of EU initiatives.

A large number of EU air forces rely on US-made F-35[11] as their most modern combat aircraft. In the last decades only France and its industry have been able to a develop and produce a fighter largely made of national components – the Rafale.[12] At the same time, no European country has developed or

8 European Defence Agency (EDA), *Defence Data 2024-2025*, 2025, p. 14, https://eda.europa.eu/docs/default-source/brochures/2025-eda_defencedata_web.pdf.

9 European Commission DG for Defence Industry and Space website: *EDF*, https://defence-industry-space.ec.europa.eu/node/159_en.

10 Council of the EU, *A Strategic Compass for Security and Defence*, 14 March 2022, https://www.eeas.europa.eu/node/410976_en; European Commission, *A New European Defence Industrial Strategy: Achieving EU Readiness through a Responsive and Resilient European Defence Industry* (JOIN/2024/10), 5 March 2024, https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex:52024JC0010; European Commission, *Joint White Paper for European Defence Readiness 2030* (JOIN/2025/120), 19 March 2025, https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex:52025JC0120.

11 Some F-35 delivered to European countries are assembled in Italy, though with the same, largely US-made components.

12 Daolio, Andrea, "Dassault Rafale", in *The Aviationist*, 28 November 2024, https://theaviationist.com/?p=93004.

produced fifth generation combat aircraft, which are characterised by cutting-edge capabilities such as low sensor observability, resilient networked communications, a high degree of digitalisation, data fusion and electronic warfare capabilities.[13] The ongoing leap to the sixth generation of combat aircraft, which will further enhance all the aforementioned characteristics and add a much higher degree of system integration across crewed and uncrewed platforms on different domains,[14] is already subject to significant fragmentation among two separate programmes involving European countries. On one side, Italy and the United Kingdom are cooperating with Japan on the Global Combat Air Programme (GCAP), whereas France, Germany and Spain are working on the Future Combat Air Programme (FCAS). Berlin's continued participation in FCAS is increasingly doubtful due to longstanding disagreements with Paris, mostly relating to workshare distribution and German reluctance to play a subordinate role to France after Berlin's defence spending experienced a huge boost after 2022.[15] GCAP has not been immune to problems of its own, with the UK government struggling to allocate funding to the project – as of early June 2026 – at the same pace as Italy and Japan have done.[16]

» As FCAS' woes eloquently attest, a joint effort involving all major European aerospace industries is highly unlikely

As FCAS' woes eloquently attest, a joint effort involving all major European aerospace industries is highly unlikely. The countries involved in any sixth generation programme will have to spend huge sums to ensure acceptable industrial workshare returns, with Italy estimating to spend nearly 20 billion euros for its share of GCAP, which is divided equally among the three partners.[17]

The co-existence of two competing programmes in Europe that are meant to fulfil similar requirements even in the face of such high development costs, and possibly a considerable degree of R&D duplication, speaks to the fact that defence industrial cooperation is not an inevitable outcome for Europe's DTIBs. Indeed, where it is deemed possible to work independently, long-standing cooperation configurations have given way to independent efforts. This is the case in the field of conventionally-powered submarines, where fragmentation has increased substantially even as the EU has called for more cooperation among member states on defence R&D and procurement. For instance, while Spain had since the 1970s relied on French designs built domestically under licence, Madrid has recently determined that enough know-how had been acquired to develop a national design even if at much greater cost.[18] Meanwhile Italy, which had partnered with Germany to develop the U212A submarines – of which four were procured and delivered to the Italian Navy – has decided to develop its own national submarine in the U212 Near Future

13 Harrigian, Jeff and Max Marosko, "Fifth-Generation Air Combat. Maintaining the Joint Force Advantage", in JAPCC Journal, No. 24 (Autumn/Winter 2017), p. 54-61, https://www.japcc.org/?p=11772.

14 Marrone, Alessandro (ed.), "The New Partnership among Italy, Japan and the UK on the Global Combat Air Programme (GCAP)", in *Documenti IAI*, No. 25|03 (March 2025), https://www.iai.it/en/node/19737.

15 Bergs, Cristoph and Linus Terhorst, "FCAS: France and Germany's Fight for a Future Fighter", in *RUSI Commentaries*, 30 April 2026, https://www.rusi.org/explore-our-research/publications/commentary/fcas-france-and-germanys-fight-future-fighter.

16 Carli, Andrea, "Sixth-generation Fighter, over 4,000 Engineers Risk Being Moved to Other Projects", in *Il Sole 24 Ore*, 27 May 2026, https://en.ilsole24ore.com/art/sixth-generation-hunting-over-4000-engineers-risk-being-displaced-other-projects-AIFYQdID.

17 Kington, Tom, "Italy Faces GCAP Warplane Price Tag Topping $21 Billion", in *Defense News*, 20 January 2026, https://www.defensenews.com/global/europe/2026/01/20/italy-faces-gcap-warplane-price-tag-topping-21-billion.

18 Ibid.

Submarine (NFS).[19]

In the field of main battle tanks (MBTs), the Franco-German Main Ground Combat System (MGCS), plagued by delays and shifting priorities like FCAS, has so far closed the door to other partners (including Italy).[20] After seemingly opting for Leopard 2A8+ MBTs in order to replace its aging and neglected fleet of nationally-designed and -built Ariete tanks, Rome – through government-controlled defence company Leonardo – has struck a deal with the German company Rheinmetall in order to modify the KF51 Panther platform and integrate it with Italian systems and components.[21] The Italian decision was mostly motivated by the interest in adding as much Italian componentry to the army's next MBT as possible,[22] even if that meant not acquiring the Leopard – the most widely utilised tank across Europe – and missing out on the tangible benefits in terms of economy of scale, interoperability and spare part availability.

» *Industrial interests are often too great and EDF grants too small to truly change single member state's calculations on cooperation*

While all aforementioned systems and platforms may indeed be developed and built independently from the United States, the issue of duplication and equipment fragmentation will keep besetting EU defence. While incentives for cooperation, such as the EDF, rely on funds coming out of the Union's budget, industrial interests are often too great and these grants too small to truly change single member state's calculations on cooperation, at least regarding the most strategic programmes and from the perspective of the EU's largest national DTIBs: France, Germany and Italy. Furthermore, the general rise in defence budgets since 2022[23] has offered a number of economically viable alternatives to EU-wide cooperation frameworks. Poland's post-2022 acquisitions spree has been a glaring example, with most of the new resources spent on off-the-shelf purchases from non-European companies, including from the United States and South Korea.[24]

EU investment in common efforts are especially enticing to industrial players and end users from smaller countries who lack the military, political and economic capital to gain significant shares of the work in the face of much larger counterparts in Germany, France, Italy, Sweden and Spain. This does not mean that the EU's main DTIBs are not interested in the EDF or other initiatives, but it does make the sums of money involved less appealing to the traditional drivers of defence innovation among EU member states.

19 Organisation for Joint Armament Cooperation (OCCAR) website: *U212 NFS*, https://www.occar.int/our-work/programmes/u212-nfs.

20 Marrone, Alessandro and Ester Sabatino (eds), "Main Battle Tanks, Europe and the Implications for Italy", in *Documenti IAI*, No. 20|07 (April 2020), https://www.iai.it/en/node/11536; Alipour, Nick, "Polish Defence Minister Hints at Joining Franco-German Fighter Jet, Tank Projects", in *Euractiv*, last updated 1 October 2024, https://www.euractiv.com/news/polish-defence-minister-hints-at-joining-franco-german-fighter-jet-tank-projects.

21 Thomas, Richard, "Leonardo Points to Billion-Euro Upside in Italian MBT and IFV Plan", in *Army Technology*, 13 March 2024, https://www.army-technology.com/?p=311205.

22 Kington, Tom, "KNDS-Leonardo Rupture Could Nix Italian Leopard 2 Tank Buy", in *Defense News*, 11 June 2024, https://www.defensenews.com/global/europe/2024/06/11/knds-leonardo-rupture-could-nix-italian-leopard-2-tank-buy.

23 Ravazzolo, Gaia and Alessandro Marrone, "EU Defence Industrial Initiatives: A Quantum Leap Needed?", in *IAI Commentaries*, No. 24|79 (December 2024), https://www.iai.it/en/node/19309.

24 Dee, Stuart and Kiran Suman-Chauan, "Missiles, Markets, and Mutual Interests: Poland and South Korea's Evolving Defence-Industrial Cooperation", in *RAND Commentaries*, 4 September 2025, https://www.rand.org/pubs/commentary/2025/09/missiles-markets-and-mutual-interests-poland-and-south.html.

» Bilateral and minilateral frameworks have proven to be the most inviting alternative to larger and more sluggish cooperation arrangements

On numerous occasions bilateral and minilateral frameworks have proven to be the most inviting alternative to larger and more sluggish cooperation arrangements.[25] Indeed, successful defence industrial cooperation is usually a bottom-up process driven by industry and/or end users, while top-down efforts dictated by political interests alone can only be as strong as the support they receive from other defence stakeholders. Such a reality has been under the spotlight with the frictions exposed by Franco-German cooperation under FCAS and MGCS – which are on the brink of failure even if they resulted from a political agreement between Germany's then-Chancellor Angela Merkel and French President Emmanuel Macron.[26] Cooperation may need political support in order to succeed, but political will alone can hardly see cooperative programmes through to a successful outcome. Arguably, the EU can play a twofold role if it is to strengthen strategic autonomy. Firstly, it can use the tools at its disposal to help member states and the defence industry converge on common capability gaps and work jointly to fill them. The Coordinated Annual Review on Defence (CARD), designed to increase mutual awareness of capabilities development and indirectly facilitate reduction of redundancy through joint efforts, should be an essential component in this process, and yet it has been somewhat underutilised by a number of member states. The EDF's potential has also been underexploited, even though its limited funding has proved an effective instrument to foster cooperation where there was none before, also by including an increasing number of small and medium enterprises (SMEs).[27]

The second role the EU can play is channelling investment toward those technologies where the EDTIB is severely lagging behind but are absolutely critical to make member states less dependent on foreign imports and components. These include light disposable drones, long-range strike capabilities,[28] the semiconductors which underpin all advanced modern weaponry,[29] high performance and cloud computing.[30] Crucially, there are no industrial giants in the EU focusing primarily on any of these technologies, meaning that no one country is likely to defend its leadership by only accepting to cooperate on the condition of absolute leadership. Furthermore, these are dual-use technologies that could greatly benefit from a strong contribution from industrial players not traditionally contributing to the defence market. In

25 Scazzieri, Luigi, "The Power of the Few: How Clusters Can Strengthen European Defence", in *EUISS Briefs*, No. 3 (February 2026), https://www.iss.europa.eu/node/3753.

26 Alipour, Nick, "Germany and France Announce 'Breakthrough' for Joint Tank Project Plus Defence Production in Ukraine", in *Euractiv*, last updated 30 September 2024, https://www.euractiv.com/news/germany-and-france-announce-breakthrough-for-joint-tank-project-plus-defence-production-in-ukraine; Barone, Marco Giulio, "FCAS, epitaffio di un caccia mai nato", in *Portale Difesa*, 10 February 2026, https://www.rid.it/shownews/7854/fcas-epitaffio-di-un-caccia-mai-nato.

27 European Commission, *The European Defence Fund: Supporting the Development of the Defence Capabilities of Tomorrow. Interim Evaluation of the European Defence Fund* (COM/2025/299), 17 June 2025, https://eur-lex.europa.eu/legal-content/en/TXT/?uri=celex:52025DC0299.

28 Franke, Ulrike, "Drones in Ukraine: Four Lessons for the West", in *ECFR Articles*, 10 January 2025, https://ecfr.eu/?p=131404; Scazzieri, Luigi, "Closing the Deep-Strike Gap: Why Europe Needs Useful Systems Now", in *EUISS Commentaries*, 22 May 2026, https://www.iss.europa.eu/node/3855.

29 Cytera, Christopher, "Europe Doubles Down on Semiconductor Strengths", in *CEPA Articles*, 18 February 2026, https://cepa.org/?p=47606.

30 Segler, Stephan, "Europe's AI Gambit: An In-depth Analysis of the EuroHPC AI Factories and the Quest for Digital Sovereignty", in *Segler Articles*, 22 June 2025, https://www.seglerconsulting.com/europes-ai-gambit-an-in-depth-analysis-of-the-eurohpc-ai-factories-and-the-quest-for-digital-sovereignty; Gineikyte-Kanclere, Vaida et al., "European Software and Cyber Dependencies", in *European Parliament Studies*, December 2025, https://www.europarl.europa.eu/thinktank/en/document/ECTI_STU(2025)778576.

this respect, the EU could take on a hugely important role as a bridge between military- and civilian-driven investment in R&D.

The increasingly complexity of EU defence policy governance and initiatives

The EU's governance in terms of defence industrial concerns remains rather fragmented, with the European Defence Agency (EDA) and the Commission's Directorate General for Defence Industry and Space (DG DEFIS) both having key interests and responsibilities. The EDA's main role is to support "the development of defence capabilities and military cooperation" among member states, stimulate the early stages of R&D and represent member states' ministries of defence in shaping EU defence policies.[31] Meanwhile, DG DEFIS and the relatively new position of European Commissioner for Defence and Space (established in 2020 and 2024 respectively) represent the EU's true centre of gravity in terms of defence-oriented initiative and policies. While the EDA, as an intergovernmental entity, should play a pivotal role in dictating a member states-approved line, its involvement in Commission-driven initiatives has been limited in recent times, including in the drafting of the White Paper on Defence Readiness.[32] The Commission has become the most powerful actor in EU defence industrial policy and may become the leading driver of EU defence policy in general, especially in the absence of a more structured dialogue with member states. This trend may help the Commission move forward at a faster pace and bypassing, when necessary, member states' objections and disputes, but it also points to a longstanding difficulty in getting some member states to actively take part in and endorse EDA activities.

» The Commission has become the most powerful actor in EU defence industrial policy

A new European Security Strategy (ESS) is set to replace the 2016 Global Strategy by the end of 2026 and the Commission appears to have taken a leading role in the process even though the European External Action Service (EEAS) had led the drafting of the Global Strategy.[33] To be sure, the wide scope of a new ESS, given the multiple challenges currently facing the EU beyond just defence, somewhat justifies a strong Commission role, although there are legitimate questions over the legality of a leadership position in the drafting process.[34] Nevertheless, the inclusion of member states – also through dialogue with the EDA – will be key in producing an ambitious but at the same time actionable strategy.

The establishment of the EDF and its precursor programmes has marked a paradigm shift for EU involvement in defence policy. Since then, the EU has adopted a defence industrial strategy through EDIS and the European Defence Industry Programme (EDIP). EDIS acts primarily as a long-term planning instrument to strengthen the EDTB by enhancing its security of supply

31 EDF website: *Mission and Functions*, https://www.eda.europa.eu/who-we-are/Missionandfunctions.

32 Elio Calcagno, "Il White Paper per la difesa europea tra narrazione e concretezza", in *AffarInternazionali*, 21 March 2025, https://www.affarinternazionali.it/?p=112112.

33 Biscop, Sven, "Summits and Sanctions, War and Peace: Is the EU Still in the Game?", in *Egmont Security Policy Briefs*, No. 385, August 2025, https://egmontinstitute.be/?p=52020.

34 Nacho Sánchez, Amor et al., "The Content of the New European Security Strategy and Related Competences", in *Parliamentary Question for Written Answer*, No. E-001299/2026 (27 March 2026), https://www.europarl.europa.eu/doceo/document/E-10-2026-001299_EN.html.

and reducing fragmentation. The document represents a largely positive development toward a more mature and effective EU defence policy, yet some critics fear it may concede little space for member states' ministries of defence to define demand and instead empowers the relationship between defence industry actors and the Commission itself.[35] EDIP was adopted in December 2025 as a new EU regulation to implement EDIS, of which it is a central pillar, along with a 1.5 billion euro budget for the 2025-2027 period.[36] EDIP's regulation and current funding aims to encourage and facilitate common procurement, ramp up production and launch joint defence industrial projects. While the budget is too low to drive a significant shift in a market with a turnover of over 70 billion euros,[37] it nevertheless provides a useful legal framework to allow member states to better cooperate toward common objectives.[38]

35 Ravazzolo, Gaia and Alessandro Marrone, "EU Defence Industrial Initiatives: A Quantum Leap Is Needed", in *IAI Commentaries*, No. 24|79 (May 2024), https://www.iai.it/en/node/19309.

36 Murgia, Nicolò and Alessandro Marrone, "The European Defence Industry Programme: The Last Piece of the EU Defence Puzzle?", in *IAI Commentaries*, No, 26|02 (February 2026), https://www.iai.it/en/node/21481.

37 Wolff, Guthram, "The European Defence Industrial Strategy: Important, but Raising Many Questions", in *Bruegel Analyses*, No. 8/2024 (19 March 2024), https://www.bruegel.org/node/9820.

38 Clapp, Sebastian, "European Defence Industrial Programme (EDIP)", in *EPRS Briefings*, January 2024, https://www.europarl.europa.eu/thinktank/en/document/EPRS_BRI(2024)762320.

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Via dei Montecatini, 17
I-00186 Rome, Italy
T +39 06 6976831
www.iai.it

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