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› Rethinking European Security When the American Anchor Slips*

- › Europe's security debate has collapsed onto Russia, but the structural variable that has changed is the role of America.
- › A credible European posture rests on three shifts: industrial capability, defence of the home front and faster political integration.
- › Transatlantic cooperation is realistic only where it needs no long-term American promise, or is locked into durable instruments.

Russia and the United States in Europe's security equation

The war in Ukraine has done two things to the European security debate. It has catapulted the continent back into a kinetic security environment the post-1945 order had only appeared to erase. And it has exposed a home front under gradual, constant pressure from strategic adversaries. Since both challenges originate, at least on the surface, from Russia, one side effect of the war has been to narrow the conversation at times to the point of identifying the Russian threat with the whole of European security.

This narrowing is understandable and partly political: Moscow is the one threat around which the northern and eastern members of NATO will cohere without reservation. Nor is Russian influence confined to Europe's eastern flank. Through military deployments, security partnerships and proxy networks, Moscow has extended its reach across North Africa, the Sahel and parts of Central Africa. Libya is the hinge of this southern projection: its position offers Russia a potential military and logistical platform on NATO's southern flank, a gateway to operations deeper into Africa and leverage over European interests in the Mediterranean. For some southern European allies, this has also created a way to make the southern flank more legible to partners whose strategic attention remains overwhelmingly focused on the east. They have at times framed instability in the Mediterranean and Africa through the prism of Russia's expanding presence, using the Russian dimension to attract attention to the southern flank.

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This reflex is natural but wrong as a starting point. The most consequential change is not the Russian threat itself, whose scale has undeniably grown since Russia's first invasion of Ukraine in 2014 as Moscow's posture has evolved while Europe's has remained comparatively static. The deeper structural change lies in the reliability of the American guarantee.

In spite of our insistence on a wishful narrative of weathering the storm and waiting for the sun to shine again on the Atlantic, the rational course of action is to plan for the scenario in which the transatlantic bargain built on shared values and long-term objectives does not return. That assumption by no means makes Russia less central; rather it compels Europe to recalculate its interests and recalibrate its posture in every theatre and on every issue, justifying each on its own terms rather than on those inherited from the Alliance. Given how profoundly European and US security interests have been fused in the post-World War II era, this will require European leadership to free itself of a "phantom limb" syndrome that will otherwise persist for years.

That dependence is not only strategic or psychological; it is embedded in Europe's military posture. The continent's response to the war in Ukraine has accelerated defence spending and procurement, but much of that effort has reinforced reliance on the United States rather than reduced it. According to the Stockholm International Peace Research Institute (SIPRI), European states more than tripled their arms imports between 2016-20 and 2021-25,¹ making Europe the world's largest arms-importing region. Among European NATO members, imports rose by 143 per cent, with the United States supplying 58 per cent of them; US arms exports to Europe increased by 217 per cent over the same period, although this year the trend has slowed down.² Europe is therefore spending more on its own defence, but unless that expenditure builds European productive capacity, it risks deepening the transatlantic dependence that greater strategic responsibility is supposed to overcome.³

The lesson from Ukraine

Russia's invasion of Ukraine is seemingly succeeding in refocusing Europe's attention on hard power, despite the continent's addiction to externally provided security and foreign-fuelled populist ideology. The first task is to rethink what military capability means in the 21st century. Ukraine has shown that advantage increasingly accrues to those who can field large quantities of low-cost, software-defined systems, coordinated by artificial intelligence (AI) and replaceable within days. By November 2025, Ukraine's DOT-Chain Defence system had delivered more than 100,000 first-person view (FPV) drones in under four months; units could choose among more than 180 models from

¹ SIPRI, *Global Arms Flows Jump Nearly 10 Per Cent as European Demand Soars*, 9 March 2026, <https://www.sipri.org/node/7687>.

² Ruitenberg, Rudy, "European NATO Nations Reduce Reliance on US Arms Imports: SIPRI Data", in *Defense News*, 9 March 2026, <https://www.defensenews.com/global/europe/2026/03/09/european-nato-nations-reduce-reliance-on-us-arms-imports-sipri-data>.

³ Alcaro, Riccardo, "Running in Circles: How Europe's Quest for Autonomy Creates New Dependencies", in *Survival*, Vol. 68, No. 2 (April-May 2026), p. 85-116, <https://doi.org/10.1080/00396338.2026.2647641>.



» Europe needs an industrial ecosystem of aligned investors, start-ups and commercial firms crossing into the military domain

40 manufacturers, with an average delivery time of seven days.⁴ National champions remain indispensable for complex platforms, but no traditional prime is organised to produce at that tempo. Europe needs a second industrial base alongside the first: an ecosystem of aligned investors, start-ups and commercial firms crossing into the military domain.

The capital is beginning to move: European defence and resilience start-ups raised roughly 8.7 billion dollars in 2025, a 55 per cent year-on-year increase,⁵ with companies working on AI accounting for 44 per cent of total defence, security and resilience funding. Vehicles such as the NATO Innovation Fund are anchoring early rounds. This ecosystem can become a source of political leverage. A capability others lack converts into access, partnership and negotiating weight, even towards much larger allies. This is where comparative advantage should rule: rather than every state attempting the full spectrum, each should hold two or three domains of genuine edge and be recognised for them within a European division of labour.

Italy is demonstrating what this model can look like in the underwater domain. The National Hub for the Underwater Dimension (*Polo Nazionale della Dimensione Subacquea*) brings together public institutions, research centres and maritime industries within a shared framework for developing technologies and capabilities, turning an established industrial advantage into a national strategic asset.

Italy is now translating that advantage into a defined role within NATO. In January 2026, Italy and Greece signed the Operational Memorandum of Understanding establishing the Underwater Centre of Excellence in La Spezia,⁶ with Italy acting as Framework Nation and providing infrastructure, expertise and coordination. The Centre, whose NATO accreditation is expected in 2026, will draw on the Polo, the NATO Centre for Maritime Research and Experimentation and the Italian Navy's research infrastructure. Italy is therefore positioning itself not simply as a contributor, but as an allied hub for underwater capability.

This is precisely the model Europe should replicate: each country identifying a domain in which it can lead, aligning public authority with private capability and converting national specialisation into greater European capacity and political weight within the Alliance.

The home front

The second task is to redefine security in accordance with the nature of the threat. Russia's main line of effort against Europe is not kinetic but hybrid: an attempt to disaggregate our political and social model by turning our own freedoms into an attack surface. The evidence is now systematic rather than

⁴ Ukraine Ministry of Defence, *First 100,000 FPV Drones Delivered to Ukrainian military through the DOT-Chain Defence Procurement Platform*, 24 November 2025, <https://mod.gov.ua/en/news/first-100-000-fpv-drones-delivered-to-ukrainian-military-through-the-dot-chain-defence-procurement-platform>.

⁵ NATO Innovation Fund, *Dealroom and NATO Innovation Fund: European Defence, Security & Resilience Startups Smash Record with \$8.7B Raised in 2025*, 10 February 2026, <https://www.nif.fund/?p=1497>.

⁶ Italian Navy, *Italia e Grecia firmano l'Operational Memorandum of Understanding del Centro di Eccellenza Underwater*, 21 January 2026, <https://www.marina.difesa.it/media-cultura/Notiziario-online/Pagine/20260121-Operational-Memorandum-of-Understanding.aspx>.



>> Russia's appetite for risk increases and its actions move towards the more violent segment of the hybrid spectrum

episodic, and ever more visible as Russia's appetite for risk increases and its actions move towards the more violent segment of the hybrid spectrum.

A Center for Strategic and International Studies (CSIS) dataset recorded three Russian attacks in Europe in 2022, twelve in 2023 and 34 in 2024; 21 per cent of the incidents recorded through March 2025 targeted critical infrastructure.⁷ Suspected sabotage against European critical infrastructure has risen sharply since 2024, with repeated incidents against undersea cables in the Baltic and a persistent campaign of arson, jamming and interference documented across several member states. By February 2026, the cumulative number of known Russian hybrid incidents in Europe since the full-scale invasion had reached 151;⁸ a series of more recent cases, increasingly concentrated toward the more kinetic end of the hybrid spectrum, points to a further intensification of Russian activity. In the Baltic alone, at least eleven undersea cables were damaged between October 2023 and January 2025. The scale of the exposure is considerable: NATO estimates that more than 95 per cent of internet traffic travels through undersea cables and that 1.3 million kilometres of cables support roughly 10 trillion dollars in financial transactions each day.⁹

The physical campaign sits alongside sustained pressure on Europe's digital infrastructure: the EU Agency for Cybersecurity (ENISA) analysed 4,875 cyber incidents between July 2024 and June 2025,¹⁰ with 53.7 per cent affecting entities classified as essential under the EU's network and information security (NIS2) framework. Read separately, each episode invites a policing response. Read together, they are components of a single strategic effort to win the war not by defeating NATO countries militarily but by dividing them internally.

Germany's response to the attempted drone attack at Leipzig/Halle airport in August 2026¹¹ marked an important shift towards this systemic view. European governments had long been reluctant to attribute cyberattacks and sabotage publicly to Russia, partly because of technical uncertainty but above all for fear that attribution would create pressure to escalate. Berlin set that caution aside: after attributing the operation to Russia, it treated the incident as a national-security matter and responded with state-level countermeasures, closing the Russian consulate in Bonn and raising the national threat assessment, rather than leaving the matter within a purely criminal framework.

Since hybrid operations are designed to remain below the threshold that would trigger retaliation, Germany's decision effectively lowered both the threshold for attribution and the threshold for response. The support expressed by partner countries, Italy among them, suggests that this was not an isolated German decision, but part of a broader European recognition that deterrence requires denying Russia the protection previously afforded by ambiguity and restraint.

⁷ Jones, Seth G., "Russia's Shadow War Against the West", in *CSIS Briefs*, March 2025, <https://www.csis.org/node/115220>.

⁸ Rekawek, Kacper and Julian Lanchès, Update of Russia's Crime-Terror Nexus: Criminality as a Tool of Hybrid Warfare, in *GLOBSEC Reports*, 24 February 2026, <https://www.globsec.org/node/2983>.

⁹ Maciata, Klaudia, "Fortifying the Baltic Sea: NATO's Defence and Deterrence Strategy for Hybrid Threats", in *NATO Review*, 5 May 2025, <https://archives.nato.int/nato-review-fortifying-the-baltic-sea-nato-s-defence-and-deterrence-strategy-for-hybrid-threats>.

¹⁰ ENISA, *EU Consistently Targeted by Diverse Yet Convergent Threat Groups*, 1 October 2025, <https://www.enisa.europa.eu/node/19314>.

¹¹ Burke, Kieran and Matt Ford, "Germany Blames Russia for Attempted Airport Drone Attack", in *Deutsche Welle*, 2 September 2026, <https://p.dw.com/p/5JjRN>.



»» **National rearmament does not automatically produce collective security**

Reading the home front as a whole is also the precondition for calibrating Europe's posture towards more patient adversaries. Russia compels attention because its methods are visible. By contrast, China presents a different challenge. Its growing influence in Europe is to some extent less the product of discrete hostile acts than the cumulative effect of a broader expansion of Chinese economic, technological and diplomatic reach. As Beijing's external projection grows, European actors are gradually drawn into networks of dependence, access and influence whose strategic significance becomes apparent only over time.

China's principal vectors sit at the less tangible end of the diplomatic, information, military, economic, financial, intelligence and law enforcement (DIMEFIL) spectrum, and they work on the timescale of years rather than news cycles. Acquisitions, port concessions, research partnerships, standard-setting and procurement dependence do not present themselves as security events, and no single one of them justifies a national-security response. A state that can only recognise interference when it detonates will not recognise them at all. The architecture that makes sabotage legible is the same one that makes gradual positioning legible, which is why the home front has to be governed as one problem and not as a sequence of incidents.

Treating European security as a whole-of-society problem means rethinking the relationship between public and private, hardening electoral and information systems and protecting critical infrastructure and industry from espionage and sabotage. It also means confronting an uncomfortable trade-off: reconciling the freedoms and dispersion of power that are the foundation of our societies with the fact that an adversary has identified those same freedoms and fault lines as our principal vulnerability, and our impotence in the face of gradualism as our inherent weakness.

The integration imperative

Neither task is achievable at the current European tempo. Both require an acceleration of cohesion and a change of method, including the pooling of sovereignty in areas where EU member states have so far preferred to guard their individual interests. Under present decision rules, Europe cannot move at the speed of the threats it faces. Money is already moving faster than integration: EU defence expenditure reached 418 billion euro in 2025,¹² 20 per cent more than in 2024, yet collaborative procurement accounted for only 24 per cent of equipment spending, still below the European Defence Agency's 35 per cent benchmark.¹³

This imbalance matters because national rearmament does not automatically produce collective security. Without a common political and industrial framework, it can instead deepen competition over military power, supply chains and influence, leaving Europe better armed but no more capable of acting together. The conclusion is that faster integration is not a preference

¹² European Defence Agency, *EU Defence Spending: €418 Billion in 2025, Projected to €454 Billion in 2026*, 16 July 2026, <https://www.eda.europa.eu/news-and-events/news/2026/07/16/eu-defence-spending---418-billion-in-2025--projected-to-454-billion-in-2026>.

¹³ Ibid.



but an existential precondition for the first two objectives.

If comprehensive treaty reform remains politically unrealistic, Europe will need to move beyond the choice between unanimity at 27 and inaction. Enhanced cooperation, restricted formats and coalitions of willing states can provide alternative routes, but only if they cease to be improvised responses to individual crises and become stable structures with their own governance, common funding and binding instruments.

This means building a core group willing to share real sovereignty in defence, industrial policy and critical technologies, acting through qualified-majority decisions even where this requires arrangements beyond the existing treaties. Differentiated integration would not represent a departure from the European project, but the method through which many of its most consequential advances have occurred. The Eurozone, Schengen and the post-pandemic recovery instrument all began as political accelerations before they became pillars of the Union. Their lesson is that Europe does not always need to move together in order to move forward, but those willing to advance must be able to turn political intent into durable institutions.

The limits and the uses of transatlantic cooperation

This is where the analysis meets its hardest problem: how the transatlantic bargain can be rearticulated once these premises are accepted. The obstacles are of three kinds. The first is the familiar divergence of interests over trade and technology, real but negotiable. The second is a divergence of time horizons: the mechanisms that once let the United States think in decades have been weakened, and a partner that cannot hold a course beyond an electoral cycle cannot underwrite long-term European planning. The third is the deepest, and the least comfortable to state: a divergence over the very definition of the threat. If the principal danger is hybrid and directed at the home front, it falls precisely in the domain where American capacity has been most reduced. To mention just one symptom among many, the US State Department's Global Engagement Center,¹⁴ whose mandate was to coordinate federal efforts to recognise, expose and counter foreign propaganda and disinformation, closed on 23 December 2024 because the incoming Trump Administration traced disinformation-focused bodies to censure and unwarranted judicial prosecution. The central pillar of European security is therefore the area where transatlantic convergence is currently weakest.

That diagnosis yields a clear criterion for policy, rather than a wish-list. Cooperation is realistic where it does not require Washington to issue long-term promises, and where it does, it should be embedded in instruments that survive political turnover: industrial contracts, co-production, supplier qualification and technical standards bodies, not declarations or dialogue forums.

Three areas pass this test. The defence industrial base is the strongest: Washington has long asked Europe to produce more, and Europe needs scale

»» Transatlantic cooperation is realistic where it should be embedded in instruments that survive political turnover

¹⁴ US Department of State website: *About Us – Global Engagement Center*, <https://2021-2025.state.gov/about-us-global-engagement-center-2>.



>> Europe's strongest negotiating position lies where it controls capabilities or supply chains that the United States cannot readily replace

and capital, an alignment that requires no shared values to hold.

Comparative advantage is the second: a capability others lack is the most durable guarantee of American engagement, because it makes Europe indispensable rather than merely persuasive. This logic extends beyond defence. A February 2026 study by the German think tank *Dezernat Zukunft* found that European suppliers provide approximately 80 per cent of US imports of low-enriched uranium, while Siemens Energy dominates the undersupplied market for medium-sized gas turbines needed to power American data centres.¹⁵ These industrial chokepoints do not reverse the broader imbalance of power, but they demonstrate that transatlantic dependence is not entirely one-sided. Europe's strongest negotiating position lies where it controls capabilities or supply chains that the United States cannot readily replace.

Technical standards are the third: the American retreat from multilateral bodies has ceded procedural ground to China, and here Europe can hold the line at almost no political cost to Washington. In January 2026, the White House directed the United States to withdraw from 66 international organisations and UN entities following a government-wide review of US participation in multilateral bodies.¹⁶

On hybrid threats, the realistic path is technical and agency-level cooperation where it exists, while Europe builds its own capacity and keeps the channels open for when American capacity is rebuilt. The transatlantic economy still accounts for close to 43 per cent of global GDP; EU-US trade in goods and services reached 1.8 trillion euros in 2025,¹⁷ while mutual investment stood at 4.9 trillion euros in 2024; the relationship is worth the effort. But it will be rebuilt through what Europe can offer that others cannot, not through nostalgia for a bargain that may not return.

What Europe chooses to be

Europe is finally waking up to a diagnosis it has itself made, repeatedly and in public, for years: Russia is the immediate alarm on the hard side of the ledger, and China the long-term competitor. The answer has been to spend more while deciding less. The gap is therefore between the clarity of the diagnosis and the incisiveness of the response, and it is political. It is held open by forces that profit from fragmentation, some of them fuelled from outside, and by governments unwilling to sacrifice sovereignty for unity. Everything hinges on a single test: whether Europe can defeat its populism and pool, and ultimately integrate, at a speed compatible with the speed of our competitors. They are certainly not waiting for that argument to be settled.

¹⁵ Sigl-Glöckner, Philippa et al., "Europe's Trump Cards: Why the Continent Has More Leverage Than It Thinks", in *Dezernat Zukunft Policy Papers*, 12 February 2026, p. 18, <https://dezernatzukunft.org/en/publications/europes-trump-cards>.

¹⁶ White House, *Fact Sheet: President Donald J. Trump Withdraws the United States from International Organizations that Are Contrary to the Interests of the United States*, 7 January 2026, <https://www.whitehouse.gov/fact-sheets/2026/01/fact-sheet-president-donald-j-trump-withdraws-the-united-states-from-international-organizations-that-are-contrary-to-the-interests-of-the-united-states>.

¹⁷ European Commission DG for Trade website: *EU-US Trade Relationship: One Year after the EU-US Deal on Tariffs and Trade*, https://policy.trade.ec.europa.eu/node/2170_en.

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26 50	Beniamino Irdi, <i>Rethinking European Security When the American Anchor Slips</i>
26 49	Stefan Ristovski, <i>Between Geopolitics and Enlargement: Reconfiguring Pre-Accession Assistance in the Next EU Budget</i>
26 48	Federica Marconi, <i>Breaking the "Walled Garden": The Challenge of Interoperability under the EU's Digital Markets Act</i>
26 47	Matteo Bursi and Ettore Greco, <i>The Digital Euro at a Critical Juncture</i>
26 46	Ayşe Betül Çelik, <i>Women Negotiators' Strategies to Overcome Gender Inequality at the Table</i>
26 45	Anton Peez, <i>The Growing Transatlantic Sanctions Divide</i>
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26 43	Eva Ziedan, <i>Negotiating Heritage: Local Mediation and the Reconstruction of Social Space in Today's Syria</i>
26 42	Nazanine Moshiri, <i>From Recognition to Alignment: The Next Challenge for European Climate, Peace and Security Policy</i>
26 41	Eulalia Rubio and Cinzia Alcidi, <i>Merging Cohesion Policy and CAP: What Does It Take for National and Regional Partnership Plans to Deliver?</i>