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Dark storm rising for European security – but does Europe get it?

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Executive Summary

The combination of Russia's escalation against Ukraine and European NATO- and EU-members, America's increasing alignment with Russia's goals and interests, Ukraine's depleted stockpiles with which to defend itself and Europe's inadequate response amounts to the darkest hour for European security since February 2022. This dire situation has not yet translated into action to project Europe's unity, resolve and credibility. This can partly be explained by an unfulfilled European "Zeitenwende"; not grasping the nature of the Russian threat and failing to realise what's at stake. A coherent, resolute and sustainable European strategic signalling towards Moscow, to change the Kremlin's cost-benefit calculus, is needed - and feasible. However, the necessary operational conclusions are still missing. The cost of inaction will be high.

1. The current situation is worse than we think

European security is now facing its worst situation since February 2022. This is not fully understood or internalized by European leaders and voters and is not reflected in public debates.

Europe is confronted with a rising storm: Russia is escalating against Ukraine and Europe, Ukraine is being severely weakened, the US is effectively siding with Russia's interests and goals and Europe is not stepping up to the task.

The Kremlin thinks it holds the stronger hand and that the coming 6-9 months offer a window of opportunity to further wear down Ukrainian resilience and undermine European unity and resolve, ultimately the credibility of Article 5. Hence the escalation.

Much of this is due to the actions of the Trump administration; but it is also because Europe so far has not significantly increased its support to Ukraine or costs on Russia after its escalation in the last months.

2. How did Europe get here and what are many Europeans still getting wrong?

A secret longing for a return to the status quo ante (pre-February 2022) seems to prevail in many quarters. But no sustainable peace or stable equilibrium can be had with Putin's Russia. Its intentions and goals, not only towards Ukraine, but the rest of Europe and its future security arrangements, remain unabated. Putin's Russia is a long-term, structural and systemic challenge, that cannot be resolved but needs to be dealt with. Containment will not be enough. The Soviet Union was a status quo-power. Putin's Russia is a revisionist and revanchist power.

There is also the mistaken notion that a ceasefire or a 'deal' could lead to a new stability or even make normalization with Russia possible. Rewarding and appeasing Russia for aggression will be neither de-escalatory nor lead to a sustainable peace. It will facilitate further escalation and reinforce Putin's belief that his goals are achievable. Russia will use talks or 'negotiations' as a continuation of the war by other means. Its goals go far beyond Ukraine, as the Kremlin states plainly and frequently.

A corollary of this notion is that Europe can achieve stability and security by giving up Ukraine, that the Russian threat somehow could be contained withing Ukraine's borders without negative consequences for European security. In reality, either Europe succeeds in stabilizing the European project eastwards or it will be destabilized from the east. Europe cannot afford to lose Ukraine. Credible European defence and deterrence only possible with Ukraine.

Russian means and ends are often confused in discussions on Russia's hybrid warfare and its goals. The use of military force is an instrument to achieve political goals. It is Russia's very intentions that are problematic, and it will use all means opportunistically to win. Narva is not the target. Political decision-making in Brussels and other European capitals is. Russia's ideal end result is the Finlandization of the whole or large parts of Europe, not to invade and occupy its NATO and EU neighbours. The Russian threat is not a problem only for the frontline states, which many seem to believe.

Cognitive warfare (or more specifically reflexive control) is Russia's most effective weapon of Russia for shaping Western public discourses and political decision-making. It instrumentalizes fear: fear of escalation, fear of Russian collapse and fear of an invincible Russia. This, in turn, sows fatalism and defeatism.

There is also the risk of Europeans taking Ukraine's resilience for granted. After all, Ukraine has performed well so far. However, this is not just another tough winter for Ukraine: Russia is grinding down Ukraine's economic and humanitarian infrastructure at an unprecedented level. Neither is Europe prepared for a new influx of Ukrainian refugees to Europe and the ensuing consequences for domestic politics in e.g. Poland and Germany.

Russia is betting on Ukraine's inability to defend itself and Europe's unwillingness to take necessary action.

The inadequate European response can to a large degree be explained with an unfulfilled "Zeitenwende", not in the narrow German context of more German defence spending, but as shorthand for a [missing] broader European mental shift: an incomplete understanding of the Russian threat and lacking realization of what's at stake.

3. What to do?

The key is to change Russia's perception of its (over-estimated) strength and its belief that success is imminent - that the submission of Ukraine and Finlandization of Europe is within reach. Therefore, Europe needs unified, coherent, long-term and credible strategic signalling towards Moscow to change the cost-benefit analysis in the Kremlin (and thus its behaviour). This means providing more support to Ukraine and increasing pressure on Russia. Europe needs to execute cost-imposition on Russia proportionate to the harm Russia causes Europe, to enforce countermeasures (nationally, plurilaterally, and through the EU and NATO) that over time will build a credible hybrid deterrence posture.

This is not without cost, but the necessary resources are manageable. The costs of Ukraine failing and Russia succeeding will be exponentially higher. The cost of inaction is the biggest.

The key question remains whether Russia will be allowed to harvest the fruits of its aggression against Ukraine and increasingly against the rest of Europe. Everything else - the future of European security and of the European project as a whole - follows from that.



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