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The European Union's Strategic Autonomy, Transatlantic Shifts and Ukraine

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Abstract | *The return of Donald Trump to the White House in 2025 fundamentally challenges the transatlantic relationship, forcing the European Union to urgently pursue strategic autonomy. As American security guarantees become uncertain and support for Ukraine wavers, the EU must develop independent defence capabilities and assume greater responsibility for regional security. This transformation requires strengthening the Franco-German partnership, overcoming internal divisions, and creating new institutional mechanisms for unified action. Ukraine's integration becomes central to Europe's geopolitical project, serving as both a test of EU strategic autonomy and a critical component of European security architecture in an increasingly multipolar world.*



In a rapidly changing geopolitical landscape, the European Union faces unprecedented challenges that require it to fundamentally rethink its role on the world stage. Donald Trump's return to the White House in 2025 and his administration's policies are bringing about significant shifts in the transatlantic relationship, which for decades has served as the foundation of the international order. Suggestions of a US withdrawal from NATO, demands to increase European defence spending, and consistent disregard for the values of the transatlantic partnership not only undermine established alliances, but also create a new reality for Ukraine, which finds itself in the focal point of geopolitical confrontation.

In this context, the EU's strategic autonomy ceases to be an abstract concept and instead becomes an

urgent necessity. Ukraine's future increasingly depends on Europe assuming the role of guarantor of security and stability in the region. The European Union is on the threshold of historical changes. The demise of the traditional transatlantic order, the need for strategic autonomy and the ongoing war in Ukraine create both serious challenges and new opportunities for the EU.

The disruption of the transatlantic order

Any actual retreat of the US from the role of guarantor of European security could create a strategic vacuum that the European Union will be required to fill. As French President Emmanuel Macron rightly pointed out in 2018 already, "Europe can no longer rely solely on the United States" [...]. Support for this position has grown among European leaders as an era of unconditional American protection seems to be approaching an end.

The transatlantic partnership which has served as the cornerstone of European security for decades is experiencing an unprecedented crisis. The Trump administration is moving away from the traditional US policy of supporting European allies, posing challenges to the established European security architecture. The US president has repeatedly expressed scepticism regarding NATO's value for American interests and has openly demanded a significant increase in defence spending from European countries as part of a deal to maintain US-American security guarantees. This rhetoric is accompanied by concrete actions, that indicate a reorientation of US foreign policy priorities and could raise doubts about the resilience of the transatlantic democratic alliance.

Trump's statements about a possible withdrawal from NATO reflect a profound transformation of US-American foreign policy, which continuing a trend from his first term, is increasingly oriented toward bilateral agreements and a transactional approach to international relations. Any actual retreat of the US from the role of guarantor of European security could create a strategic vacuum that the European Union will be required to fill. As French President Emmanuel Macron rightly pointed out in 2018 already, "Europe can no longer rely solely on the United States" while emphasizing the need to develop autonomous security mechanisms. Support for this position has grown among European leaders as an era of unconditional American protection seems to be approaching an end.

The transformation of transatlantic relations is particularly evident in the context of the war in Ukraine. Although its stance fluctuates, there has been evidence that Trump administration's support for Ukraine is waning. Demands for "normalization of relations" with Russia and pressure on Ukraine for territorial concessions indicate a fundamental rethinking of US interests in the region. This creates an atmosphere of uncertainty and anxiety in Kyiv, where US support has traditionally been seen as a key

factor in deterring Russian aggression. Under these conditions, European support becomes even more crucial for Ukrainian statehood and territorial integrity.

Geostrategic soft spots of the European Union

Internal fragmentation exacerbates the external challenges facing the EU. The rise of nationalist sentiments in some member states and the tendency of some governments to illiberal policies make it difficult to form a unified European position on key security and foreign policy issues. [...] Overcoming internal divisions becomes a prerequisite for an effective response to external challenges and strengthening the EU's international position.

The European Union faces a set of interrelated economic and defence challenges that require a systemic response. Europe is under extra financial pressure as it recognizes the need to increase defence spending while already falling behind the US and China economically. Still, according to the European Council, the EU countries managed to increase average defence spending to 1.9% of GDP in 2024, up from 1.6% in 2023, with the 2% threshold to be met in 2025. While Trump used military spending as a bargaining chip, NATO members have committed to spending 3.5% of GDP on military by 2035.

However, the EU's economic competitiveness is a growing concern in Brussels. Lagging behind the US and China in key sectors of the modern economy, including digital technology, artificial intelligence and green energy, threatens the long-term prospects for European prosperity. The war in Ukraine has also exposed Europe's geostrategic vulnerabilities. This situation calls for a comprehensive approach to ensuring the EU's economic security and technological independence.

Internal fragmentation exacerbates the external challenges facing the EU. The rise of nationalist sentiments in some member states and the tendency of some governments to illiberal policies make it difficult to form a unified European position on key security and foreign policy issues. This trend creates additional obstacles to the realization of ambitious plans to achieve strategic autonomy and strengthen the EU's geopolitical influence. Overcoming internal divisions becomes a prerequisite for an effective response to external challenges and strengthening the EU's international position.

Strategic autonomy: from concept to necessity

The notion of strategic autonomy has undergone significant evolution since its emergence in European political discourse. Initially considered primarily in the context of defence policy, it has gradually acquired a broader meaning, encompassing various aspects of international relations. In the 2016 EU Global Strategy document, strategic autonomy was presented as an ambitious goal, encompassing not

only the military dimension, but also the economy, technology and the EU's ability to act independently in the international arena. This approach reflected a growing realization of the need for a comprehensive approach to European security in a changing world.

The former EU High Representative for Foreign Affairs and Security Policy Josep Borrell defined strategic autonomy as “a process of political survival,” emphasizing the existential nature of this task for the future of the European Union. This statement reflects a fundamental rethinking of the EU's place in the contemporary system of international relations and a recognition of the need for a more active and autonomous foreign policy. In an increasingly unpredictable international environment, European leaders increasingly speak of the need to “learn to speak the language of power” and develop the ability to defend its interests without excessive dependence on external actors.

The economic dimension of strategic autonomy is becoming increasingly important in European strategic thinking. In January 2025, the European Commission presented the Competitiveness Compass, a new roadmap for restoring Europe's economic dynamism and fostering sustainable growth. This document reflects a growing awareness of the relationship between economic power and geopolitical influence, and the need to strengthen the economic base to ensure strategic autonomy. Mario Draghi, in his 2024 report on EU competitiveness, emphasized the need to overcome the fragmentation of the single market and the importance of a coherent industrial policy noting that “the EU must act decisively and quickly to keep up in the global technological race.”

However, the defence dimension remains a critical aspect of strategic autonomy. Despite the establishment of the €7.3 billion European Defence Fund, the EU continues to lag far behind the United States in the military-technological sphere. Overcoming this gap requires not only increased funding, but also qualitative improvements in coordination between national defence programs, the development of joint arms projects, and the creation of effective collective defence mechanisms. Striving for defence autonomy does not mean abandoning the transatlantic partnership, but implies the development of additional capabilities that will allow the EU to act independently when necessary.

Strengthening the Franco-German core

The Franco-German partnership has traditionally been seen as the engine of European integration. In the face of new geopolitical challenges, its importance is only growing. The new German government under the leadership of Friedrich Merz shows a potential willingness to play a more active role in European politics which, combined with France's traditional ambitions, creates an opportunity to strengthen the Franco-German core of the European Union. This trend could form the basis for a more decisive and coherent European foreign and defence policy that meets the demands of a changing international environment, although the domestic turbulence within France poses challenges.

France and Germany have already demonstrated their ability to act together in crisis situations. During the COVID-19 pandemic, they proposed an ambitious European economic recovery plan that formed

the basis of the NextGenerationEU program. This experience of joint crisis leadership sets an important precedent for future joint security and defence initiatives. The convergence of French and German positions on strategic autonomy could be a decisive factor in forging a pan-European consensus on this issue.

Strengthening the Franco-German tandem is also of particular importance in the context of support for Ukraine. Both countries play a key role in shaping European policy toward the Ukrainian war, and their joint leadership can ensure the consistency and effectiveness of this policy. German Defence Minister Boris Pistorius stressed the need for European participation in negotiations relating to Ukraine, warning that the exclusion of European states from the process could be a “turning point” for transatlantic relations. This position reflects the growing desire of European leaders for greater autonomy on regional security issues.

Consolidation of European unity

The idea of strategic autonomy, long controversial among EU member states, is now gaining support in European capitals. This shift in perception creates favourable conditions for strengthening European unity and improving security and defence coordination. Particularly notable changes are taking place in the position of Eastern European countries, which have traditionally favoured close cooperation with the United States and NATO. In the face of the uncertainty of US policy these states are becoming more favourable to the idea of reinforcing European defence, signalling the emergence of a new consensus on strategic autonomy.

Ursula von der Leyen, President of the European Commission, in her 2023 State of the Union address, emphasized the need to form a “geopolitical Commission” and to elevate the EU's role on the world stage. This rhetoric reflects the growing awareness of geopolitical challenges and the need for a more active and independent EU foreign policy. Support for this position by key European leaders provides the basis for a more coherent approach to security and defence issues, which is a prerequisite for realizing the concept of strategic autonomy.

The consolidation of European unity is also manifested in the growing realization of the need to “speak with one voice” in the international arena. The formation of a unified European position on key international issues is becoming a necessary condition for increasing the EU's global influence and protecting its strategic interests.

Global Ambitions, Institutional Limits

Despite growing ambitions and a notable shift toward geopolitical thinking, the European Union still lacks the institutional capacity to conduct a fully autonomous and centralized foreign and security policy. Over the past five years, the EU has significantly expanded its strategic vocabulary and instruments. The European Commission has taken a more visible role in security and defence policy

through mechanisms such as the European Defence Fund (EDF), Permanent Structured Cooperation (PESCO), the Military Mobility Action Plan, and the White Paper for European Defence – Readiness 2030. These initiatives have streamlined capability development, enhanced cross-border military logistics, and incentivized joint research and development. However, they remain constrained by the limited legal competencies of EU institutions in defence and security. The Commission cannot direct national defence strategies, while the EU High Representative for Foreign Affairs still lacks executive authority to act independently of the member states.

As a result, the EU's geopolitical posture remains fragmented and dependent on intergovernmental consensus. Decisions on military deployments, arms transfers, and foreign policy stances continue to require unanimity or qualified majority voting in the European Council, often leading to delays or diluted outcomes. This institutional reality stands in tension with the growing expectations placed upon the EU as a geopolitical actor. While the ambition for strategic autonomy is now widely accepted, the means to realize it remain underdeveloped. In particular, the lack of a unified command structure and the absence of a permanent political-military crisis coordination mechanism severely limit the EU's ability to act decisively in fast-moving international crises.

Germany's Strategic Role

Germany's choice is not whether to lead, but how. The new geopolitical reality no longer permits hesitation or half-measures. As Chancellor Merz has noted, "the world will not wait for us". If Europe is to meet the challenges of this era, it must do so with Germany at the helm – not as a hesitant partner, but as a confident and responsible leader of a renewed European project.

The success of Europe's shift toward strategic autonomy will depend heavily on the role Germany is willing and able to play. As Europe's largest economy and most influential political actor, Germany bears a special responsibility in navigating the continent through this historic transformation. The *Zeitenwende*, originally proclaimed by Chancellor Olaf Scholz, signalled a rhetorical commitment to this shift, but under the new leadership of Friedrich Merz, Germany is beginning to adopt a more assertive position.

The logic is clear: Europe cannot achieve autonomy without Germany, and Germany cannot safeguard its interests without leading a cohesive and credible European response to the shifting global order. As highlighted in recent developments, Germany is already taking steps toward deeper engagement. The removal of constitutional debt limits on defence spending, the initiation of trilateral formats with France and Poland, and proposals for European nuclear coordination demonstrate that Berlin is beginning to understand the scale and urgency of the moment.

Nonetheless, Germany's transition from a reluctant power to a strategic leader remains incomplete. Delays in weapons deliveries to Ukraine, persistent bureaucratic inertia, and public ambivalence toward hard power continue to hinder its ability to lead effectively. For the EU's strategic autonomy to move from aspiration to reality, Germany must overcome these internal constraints and institutionalize a new strategic culture.

This means investing not only in military capabilities, but also in political leadership. Germany should take the lead in establishing permanent EU-level defence coordination bodies, support joint planning and procurement, and articulate a long-term vision for Europe's role in the global order. A National Security Council – integrating foreign, economic, and defence policy – could provide the institutional foundation for a more coherent German strategy.

Critically, Berlin must align its approach with that of other key actors. Cooperation with France, the UK, and Poland – especially in the context of Ukraine – can provide the critical mass needed to translate political will into coordinated action.

The integration of Ukraine into the European security framework will also be a test of German leadership. If Germany can spearhead a bold and coherent EU strategy toward Ukraine – combining defence support, economic integration, and institutional accession – It will not only strengthen the EU's eastern frontier but also prove that Europe is capable of autonomous action.

In the end, Germany's choice is not whether to lead, but how. The new geopolitical reality no longer permits hesitation or half-measures. As Chancellor Merz has noted, “the world will not wait for us”. If Europe is to meet the challenges of this era, it must do so with Germany at the helm – not as a hesitant partner, but as a confident and responsible leader of a renewed European project.

Ukraine: new challenges, new opportunities

Ukraine has found itself at the epicenter of geopolitical transformations shaped by changes in American foreign policy. The Trump administration's statements about withdrawal of support for Ukraine and calls for territorial concessions and suspicious deals fail to establish the conditions for a just peace. In his speech at the Munich Security Conference, Ukrainian President Volodymyr Zelensky emphasized the need for continued international support and warned against “dangerous compromises” that could undermine Ukrainian statehood. In these circumstances, Ukraine's future increasingly depends on the willingness of the European Union to take a leading role in supporting Ukrainian independence and territorial integrity. The EU should pursue a three-pronged strategy encompassing flexible coalitions, accelerated integration, and enhanced security guarantees:

1. Coalition of the Willing

The European Union still needs to develop a comprehensive strategy towards Ukraine taking into account both new geopolitical realities and the long-term interests of European security. A key element

of this strategy should be the creation of a “coalition of the willing” ready to actively support Ukraine regardless of the possible risks and costs. Despite the evident tendency towards EU consolidation, turning Brussels into a real supranational decision-making centre remains a long-term and fraught process. But geopolitical events in the world and Ukraine require an immediate response. This format will make it possible to overcome the limitations associated with the need to achieve unanimity on sensitive issues and provide a more flexible and effective mechanism for coordinating European assistance.

2. War-time accession paradigm

Ukraine's economic support and integration also require a new approach that takes into account both immediate reconstruction needs and long-term development goals. The EU should accelerate Ukraine's economic integration. It can do so by improving access of Ukrainian producers to the European market and increasing investment in key sectors of the Ukrainian economy. Particular attention should be paid to the distinction of economic and political transformations, which could be developed in parallel rather than sequentially. This approach would accelerate the process of compliance and create a stronger basis for long-term cooperation, while taking into account the complexity and multifaceted nature of the integration process.

Economic support for Ukraine should include not only traditional financial assistance, but also more innovative strategies. One of them could involve the use of frozen Russian assets to finance the reconstruction of the Ukrainian economy. This measure would not only provide additional resources for recovery but would also set an important precedent for future instances of aggression, emphasizing the economic cost of an aggressive foreign policy.

3. Fast-track and security guarantees

Undoubtedly, military support for Ukraine is becoming one priority of European policy. Equally important are investments in the Ukrainian defence industry, which will allow the country to increase its long-term defence self-sufficiency. However, accelerating Ukraine's integration into European structures should become a strategic priority for the EU. Providing Ukraine with clear strategic security guarantees will strengthen Ukraine's position and create a basis for long-term stability in the region.

EU support for Ukraine is particularly important in the context of growing uncertainty in US policy. French Minister Delegate for European Affairs Benjamin Haddad emphasized that withholding support for Ukraine would be a historic mistake and would be detrimental to international security. This statement reflects the growing realization in European capitals of Ukraine's strategic importance for the future of European security. The formation of a new European security architecture based on the principles of strategic autonomy should consider the interests and needs of Ukraine as an important regional partner of the EU.

As the European Union rethinks its role in ensuring regional security, Ukraine could become a key EU

partner in Eastern Europe. The pursuit of strategic autonomy requires the EU to become more actively involved in ensuring stability in neighbouring regions, and support for Ukraine could become an important element of this strategy. Successful integration of Ukraine into European structures will not only strengthen the EU's position, but also demonstrate the EU's ability to pursue an effective foreign policy and ensure security in its immediate neighbourhood.

Integrating Ukraine, Securing Europe

From a strategic autonomy perspective, Ukraine is not a peripheral issue: It is the litmus test. The EU's ability to act independently of the United States will be judged in large part by its capacity to guarantee security and foster integration in its immediate neighbourhood. If Europe cannot lead on Ukraine, its claim to strategic autonomy will remain rhetorical.

The transformation of the European Union into a global geopolitical actor is impossible without the full integration of Ukraine. Ukraine is not merely a country in need of support – it is a critical link in Europe's ambition to emerge as a credible power capable of shaping the regional order. As long as Ukraine remains outside the core structures of the EU and NATO, the European project will continue to face questions about its reach, cohesion, and strategic seriousness.

In many respects, Ukraine represents the geopolitical frontier of Europe. Its successful resistance to Russian aggression has already demonstrated its strategic value and its alignment with European democratic norms. But beyond symbolic solidarity, Ukraine offers tangible benefits for the EU's global standing.

By integrating Ukraine, the EU not only secures its eastern flank but also demonstrates its capacity to expand the European model of security and prosperity. Without Ukraine, any future European security architecture will remain incomplete and vulnerable to revisionist threats. Moreover, a failure to provide Ukraine with a viable path to full membership would severely damage the EU's credibility as a normative and strategic power.

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Thus, supporting Ukraine's integration is not an act of charity or solidarity alone; it is a central pillar of Europe's own geopolitical project. Ukraine's membership in the EU must be seen not as a burden, but as a necessary investment in Europe's strategic depth, economic vitality, and normative leadership.

Conclusion

The Trump administration's actions pose substantial challenges to the EU and Ukraine. At the same time, though, they provide a chance to redefine the EU's role in regional security. Strategic autonomy is no longer an abstract concept and is becoming an urgent necessity in a changing world where the security guarantees and stability promised by traditional alliances are called into question. Strengthening the Franco-German core of the EU, consolidating European unity and developing a comprehensive strategy to support Ukraine may become key elements of a new European policy aimed at overcoming the strains of the transforming geopolitical landscape.

For Ukraine, shifts in transatlantic relations give rise to significant threats, but also present opportunities for closer integration with the European Union. Ukraine can become a key EU partner in Eastern Europe and an important element of a new European security architecture based on the principles of strategic autonomy. Realizing this potential requires Ukraine to continue reforms and adapt to European standards, with the EU being prepared to assume a new level of responsibility for ensuring regional stability. The resilience of European security hinges on the EU's capacity to adapt to the demands of a rapidly shifting global landscape and to construct a strategic framework that safeguards the interests of the EU and its allies.

The road to strategic autonomy will be difficult and will require political will, considerable effort and resources and strategic vision. However, the alternative – passivity and reactivity – could marginalize the EU in world politics and undermine its fundamental values and interests. The EU's strategic autonomy is not just a political concept, but a necessary response to fundamental changes in the international environment. It is not only a matter of political survival, but also an opportunity for Europe to redefine its role in the emerging global reality. Ultimately, the EU's success in responding to the new realities will depend on its ability to overcome internal divisions, mobilize resources and show leadership in addressing key global challenges. This is the only way for the EU to both sustain and bolster its status as a major force in global affairs.

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