

THE BROOKINGS INSTITUTION

WEBINAR

IS EUROPE CAPABLE OF DEFENDING ITSELF?

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INTRODUCTION:

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PANEL DISCUSSION:

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**HILL:** Good morning, everybody. I'm Fiona Hill from the Brookings Institution. And just really delighted, for everyone joining us today, for a very special event. From our perspective, this is an event, to commemorate, our very dear and, much missed colleague, Clara Marina O'Donnell, who was a Fellow here at the Brookings Institution and, a permanent employee of the center for European, Reform in London. And very sadly, Clara passed away ten years ago. This is, again the commemoration, of, her her passing, this event, but also a commemoration of her work as well as, her life achievements. Clara was, frankly, an amazing person, as a human being, a great friend of, all of us who are gathered here, today, but also, an amazing researcher who, despite her young age, she was 30, when she passed away ten years ago, was very much at the top of her game. And a pioneer in research on the future of European security. She asked many of the questions that many of us have been pondering over the last several years since the outbreak of war in Ukraine after Russia's invasion in February 2022, about the future of European security and the prospects of Europe. European countries be the members of the European Union, all members of NATO, to defend themselves and to build up autonomous, defense capacity. If the United States happened to step back, from the trans-Atlantic partnership in some way. So in many respects, Clara prefigured, some of the great debates that we've been having, over the last couple of years and was very much to the forefront of thinking about the kinds of, defense capacities that Europe would have to build. The nature of partnerships, defense partnerships and military partnerships between, various countries and also the role that Europe played in the world in terms of services security provider and as a larger actor. We're going to be joined in a moment by Charles Grant. The head of the center for European, reform. Which obviously, since, Clara joined, has of undergone some changes. The, center's based in London, but as always, expand out to Europe since Brexit. Something that Clara would have been somewhat dismayed by, to be frank, because Clara was herself a true European in the sense of, melding together all kinds of different heritages and backgrounds. A long term resident of London. Growing up in Brussels. Her father, being Irish and her mother being Spanish, and somebody who also, was very much part of the transatlantic partnership. Through her deep ties and networks here in the United States. We miss Clara very much. We're delighted that as, a result of her time with us, we were able to set up, a wonderful fellowship program in her name, the Clara Marina O'Donnell fellowship. This, basically event today is the project of ten years of fellows, who have taken part in, this fellowship, spending time at the center for European Reform, in some cases becoming full time employees, as Clara was before, and spending some time here with us at Brookings. And, two of our speakers today are Sophia Besch and, Luigi Scazzieri. We're very early. Clara Marina O'Donnell. Fellows. Just as Clara, blazed a trail. They are two as younger scholars in this field, carrying on the the legacy of the work and taking it to new, depths and dimensions. Before I hand over to Charles, I also want to say a word. I think that, Clara's father, Anthony O'Donnell, is also joining us today. And just to say thanks, for, obviously, everything that he has done, to make this fellowship possible with all of us as well. So without any further ado, I'll hand over. I just want to say what an important person Carl was to me personally, a great inspiration. And, really, as I've said, a pioneer in all of this work. And it's wonderful that her legacy will continue. Charles, over to you.

**GRANT:** Thank you very much, Fiona. Yes, we we we, I remember the very first time I met Clara, she came for a job interview at the CEO. She spoke so fast and thoughts so fast that at the end of the interview, I said to my colleague who was doing the interview with me, I've never met anybody who's a quicker thinker, a quicker talker. We gave her the job because without any question, she was a wonderfully bright, sparky, highly intelligent young woman. And she specialized in to in many areas. But as Fiona rightly said, she was a big, big fan of a big, big, big fan of the European defense industry and the need to have defense industrial cooperation in the EU. She was a glass half full person, not a glass half empty person. She always, although she wanted much more, would have happened than was happening. She did recognize that the there was were very good examples of cross-border collaboration and cooperation within the European Union, which would be built on. So she she focused a lot on those issues, which of course, to come right back to the fore recently with the threat of from Russia and the worries about the American commitment to NATO, the need for Europe to do its own thing in defense, as good as that together is more pertinent than ever and of. Did that a long time ago. The second thing she was particularly focused on, which was again, extremely pertinent today, is that the plight of the Palestinians and the difficulties of achieving a two state solution and the peaceful settlement of the Middle East

quagmire. And she she wrote a lot with great passion about those particular problems and the plight of the Palestinian people, so that those issues are very much to the fore again today. I'm so glad that we've managed to establish this fellowship in her honor. She does live on, in a way, through the fellows. We've had ten fellows now in ten years. Each of them has been fantastic contributor to the CRC, and they work well with Brookings and our other partners at King's London and Cambridge University. And two of those fellows ended up on the see our staff. We have them with us today, but all the fellows that remain close friends of the see on the part of our family, all in the way, carrying on the unique and wonderful spirit of Clara. With that, I'll hand over to Constanza, who knew her well and concerns. Will chair this webinar. Over to you, Constanza.

**STELZENMULLER:** All right. Good morning, everyone, and thank you, Fiona and Charles, for those moving words about Clara. I indeed knew her. And in fact, I arrived at Brookings, I think just weeks after her death and was dismayed by the news. Found my colleagues at Brookings bereft. Sometimes, you know, deep, you know, deep, deep dismay. It's really very sad that such a brilliant young life was cut short. So me, two is also one of the nicest people I had met on the conference circuit. And that, I think, does really greatly matter in a field that occasionally, features the odd, you know, shall we say, toxic narcissist. And Clara was the opposite of that. I want to welcome now, to this panel, Sophia Besch of, Carnegie, under the largest category of, the center for European Reform. Leonard, should, our planned third panelist won't be joining us because he has fallen ill shortly after his arrival in Washington. We will make sure to check in on him. And he told us he's extremely sorry not to be able to join. I think he was really looking forward to this, but we have about half an hour to to discuss the question of whether Europe can defend itself. Sophia, Luigi, and I would say it has never been more pertinent. This is indeed and we've said this over and over again in different events. Of all four of us or five of us, I think, one of the most, if not the gloomiest phase of our working lives. Right. For those of us who are a little older. And that's, I think Charles and I are about the same age. We started our working lives. In, in the immediate postwar period. When it looked as though linear progress was dead and indeed being bestowed on us by a generous fate, not just increased prosperity and stability in Europe, but increased safety through the enlargement of EU and NATO, through the democratization not just of Eastern Europe, but democratic transformations around the world. It seems now, looking back on that 30 year trajectory, not just as though what what French historians, have called the French version of the virtuous wonder, the German economic miracle, the 20 years that the 20 years of of European security policy, where indeed the past 30 years. And they are drawing inexorably to a close. I hope that's not true, but one but I think one can be forgiven for for having that impression currently, what with, Russia's invasion of Ukraine continuing on unabated after its second anniversary, the war in between Israel and and the Palestinians, and general instability in the Middle East. Let me turn to let me turn to Sophia first, if I may. Sophia, it's good to see you online. Welcome back from maternity leave. And congratulations at again. I think we should start with the obvious. With with the with the question that is at the top of everybody's minds, given the quite extraordinarily hostile comments, the the, the presumptive candidate of the American GOP in the upcoming presidential elections has made about NATO. We've heard him say we've heard him say that, if a country doesn't pay its membership dues, he would tell the Russians they can do whatever the hell they want. And so the question whether Europe can defend itself is not an abstract one. It is very specific. And, it, I think is materializing right now even without the American election. But that is adding an additional sharpness to it. So over to you, Sophia. Can Europe defend itself?

**BESCH:** Thank you. Constance. I will, answer your question, but just very briefly at the outset. Thank you to you. Thank you to Charles and Fiona for bringing us together. Thank you also to Peter O'Donnell, Chris Patrick, for the generosity and kindness you've always shown me and the other fellows. I've never met Clara, but I've met many of her friends and colleagues. And I found that being a recipient of the fellowship is, like, forever carrying a key that unlocks stories about Clara from the many, many people who knew and loved her and who taught me about her kindness and her intelligence and her integrity. And I've always considered a huge privilege to be given access to these stories and to learn more about Clara. I've never met Clara, but I did read her research. And when I first started this year, 2015, that was the first thing that I did. And I found that Clara had written about the U.S. defense industrial policy at the time, but not many others paid attention. That research piqued my own interest. And so I started writing about it. And initially,

there were still that many people who paid attention. But now, of course, they they do. So that just shows how prescient, Clara's focus was. To your question comes answer, which is of course a big question. And I think the difficulty in doing a discussion like this and keeping our audience's attention is if I now go through all the capability gaps and, challenges that European security defense faces, and our audience doesn't lock off because it's something that they've heard for, for years and years because many of these challenges have stayed the same. But as you say, now we face a different situation where we don't know how big the shock will be after the next U.S. elections, that we have to at least entertain the scenario that the US will withdraw. I think the Ukraine war revealed the shortcomings of European defense quite starkly. We are facing hollowed out forces, equipment gaps, depleted ammunition stocks, and European governments have raised, the defense spending in response. And they've launched a range of short term, measures to address these challenges. I think we've now reached a moment where these short term emergency response measures are running out, and Europe has to address long term structural changes, and we're facing disagreements about how to do that. How much industrial policy should they be, how close they are open? Should the European defense market be? Should it be financed at the national or the European level? Arms production is rising fast, but European defense firms are still complaining that they're not getting enough ordnance to justify a long term ramp up of their production capacities. And of course, if Europe is looking to actually replace the functions that the US fulfills in European defense, not just, level out the burden but replace the function, and that goes beyond increase defense spending that the US beyond capability gaps. It also means that Europeans will have to revamp their military. They will have to fill the command and control functions that the US fulfills to a huge extent. Currently, and the variant NATO headquarters, the EU certainly does not currently have a military headquarter that could take over those functions. And there is also the issue, the big question of nuclear deterrence, of course, which the US currently upholds by Europe and which we are currently not in a situation where France and the UK, the Europe's nuclear powers, enjoy the credibility. I think that would be required, to expand their nuclear deterrence over the rest of Europe. This is very gloomy. But I could just say that I think there's a couple of reasons to be hopeful. One is that we are finally moving on in the conversation about money. I think this is the thing that I am most interested in currently. We have, for a long term time talked about how Europeans are not spending enough. We're still talking about that, but we are now talking about where the money should actually come from. And we're doing that at the national level and all member states, but also at the European level. And this is the conversation that I'm currently following the most, whether we can actually get to an EU level joint borrowing function to finance some of the industrial, bump up that we are going to have to do, to fulfill the European potential when it comes to defense and security.

**STELZENMULLER:** All right. That is a long list of of issues you've laid out. Sophie. You've just written a piece, for Carnegie on the new EU defense Industrial strategy. Now. So since I've already made one reference to my age, I remember vividly a phase, where conversation about the relationship between the US and the EU was all about preventing duplication. And when Americans were extremely nervous indeed, about, Europeans developing capabilities that were not linked to their own or to NATO's. That of course, I think many people would say today, including many Americans, bred a sense of easy codependency. Right. Where where Americans were able to to sell us their weapons and we were able to to basically lean back and say, let them do it. We we don't need to invest here. My sense is that that has, completely disappeared. But tell me, do you think that this EU defense industrial strategy is actually going to work? The first critiques I've read were that it is remains underfunded.

**BESCH:** Right. The money is the big one when it comes to that strategy. It is, it's a very ambitious and bold strategy coming out of an empowered commission coming out of, Covid. The commission took a very a leading role in Europe and is now trying to apply some of the same mechanisms that it used in the Covid crisis to defense, which in and of itself makes sense to me. I think it's promising. I think we are in a crisis when it comes to defense and Europe, and we should respond with crisis measures. The measures of the strategy are, familiar, I think to many, the Commission wants the European member states to buy more and buy together and buy European. Right. And it wants to use, money to incentivize that, new institutions to incentivize that. It also wants to take on the procurement function itself. And it addresses a lot of the, shortfalls that we have talked about.

Right. This idea that European defense industries are hesitant to invest because they're not sure that the orders are going to keep coming. And the commission is in a position to help them make more sustainable, more sustainable investments if they are able to get the money. But yes, I mean, the funding in the commission's strategy currently has 1.5 billion. That is not nearly enough to do what they want to do. We have had, the proposal of the 100 billion fund that would be better and would still get to our problems, but it would be better. The issue is, do you want to do this through raising the, defense budget and the EU multiannual Financial framework? It's going to be very difficult. Budget negotiations are, infamously difficult. And there's parochial interests to member state interests. Member states who will argue that we are facing several crises. Currently, those member states who are looking at farmers protests on their streets might be hesitant to spend that money. That goes usually to the agricultural policy in Europe on defense. So there's a big question mark over whether we will get the money through the regular budgetary negotiations. So the commission, is really pushing, to have this joint borrowing instrument and there's pushback and you consensus from some of the more fiscally conservative member states like the Netherlands and certainly Germany, who are saying, you know, that this is not enough of a crisis, that these are structural issues and not crisis issues? There's other proposals, you know, raising, getting the money from the interest of frozen Russian assets, taxes. But none of that will be enough to actually fulfill the ambition of the strategy.

**STELZENMULLER:** Luigi, I'm coming to you in a moment, but I do want to raise one last issue, which is that we all know, of course, that there going to be European elections in, in June and that there is a risk of hard right parties across Europe making real inroads into the European Parliament and, and claiming, greater authority over the composition of the commission. Ursula von der Leyen, of course, is running again. And, there is some rumor of, a defense commissioner being installed for the first time, somebody who could, for example, be current, Polish Foreign Minister Rutte actually Kowski, who was a very would be a very plausible candidate for this. But we don't know yet because the polls right now are painting a picture in which that could be very difficult. And the reason that I'm detailing all this is not just for context and the background, but to slightly shift, what we're looking at here, which is that ultimately, defense spending and defense industrial production remains very much a province of the member states. Right. And and I have a question to both of you, really. I'll start with Sophie and then and then go to, one of you is German and the other is Italian. One lives here, the other lives in London. What? Why has it been so difficult after two years of this Russian invasion? That is clearly enduring. There was an enormous resilience in Russia, in the Russian economy. The Ukrainians are faltering. Why? Why is it so hard for governments to convince companies that the demand is there and will remain there? And are we would you are you inclined to say the 40s with the companies for hanging back and wanting government guarantees, or are the governments not pushing hard enough? I really like to hear from both of you in. So, yeah, you start and then maybe Luigi.

**BESCH:** It's an excellent question. So the defense market is a very specific market. It's very unique in the sense that governments are the only customers. Right. And so defense industries rely on government guarantees. They do rely on governments, creating a time horizon that allows them to invest. They don't invest on their own, a court because, they might never be able to, get rid of their products if they can't rely on governments buying them. I think there's still, you know, European defense in the end, often comes down to politics. And I'm glad that so far we've talked not just about politics. We've actually talked about the, hard security challenges that Europeans are facing. But it does come down to politics in the end. And it comes down to a question of trust. And we are lacking trust at all levels. We're lacking the trust of, defense firms in their governments that the focus on defense is going to remain. We're lacking trust between European governments that they might actually want to pull all of this on to the European level, and to create a longer term funding time horizon at the European level, which what makes sense to fill this, this lack of trust. But, you know, that would require governments to, trust in each other that they're actually going to make those make those provisions long term. And so it does come down to this sort of maturity question of trust. I think, what's really important to note is that the commission, in its strategy, you know, it has measures that, include, for instance, creating ever warm factories in Europe, which would make a lot of sense, preparing for the next crisis, and addressing exactly the issues that you've raised concerns of, which is, issues of war fatigue issues, a political backlash against the

effort that Europe is currently putting into, supporting Ukraine. So I do think that we need to do this at the European level.

**STELZENMULLER:** All right. Let me bring in Luigi. Luigi, what do you think? Is it, who is at fault here? Is it the governments or the companies? And is there really is there a plausible European remedy?

**SCAZZIERI:** Thank you very much. Constance and Sophie. And first of all, just let me add my own word to thank Brookings for, for the initiative in organizing the webinar, really a wonderful event to mark Clarence legacy and her work. I also never, never met her. I did read, quite a bit of her work even before applying to join the to join CR and, actually occasionally find myself reading parts of it, parts of it. Again, it happens that I deal with the same two topics, broadly speaking. So, European defense and also the Middle East. I find myself covering the same areas, but really it was a privilege to be a fellow. And I think it's a fellowship is going to remain a very, very important, avenue to get young researchers into, into foreign policy. It's a very rare opportunity for anyone to work at CR and also spend some time at, at Brookings. So, you know, broadly speaking, I agree with. Pretty much everything out of what Sophia said. I think the reason, you know, companies in Europe are mostly privately owned. So they need, the certainty that they're not just going to waste money, and they need to believe that the demand is going to be there in the long term. I think it's a big indictment, actually, of governments, of the concreteness of government spending plans, that that certainty simply isn't there. And I think the reality is that many of the spending increases that we've seen since, Russias war on Ukraine look significantly less impressive when you start to take into account, for example, the fact that, inflation has been very high, that the cost of labor is growing at the cost of many raw materials, has gone up at the cost of all these inputs has gone up. Secondly, the fact that in many cases, they are pledges to spend a certain amount by a certain date, but there isn't necessarily a huge amount of cash in it. For example, it's the aims to reach, 2% by, by the late 2020s. You know, we couldn't discuss Germany's, funding difficulties, but having a one off budget fund as a means to to reach the target isn't, I guess, the most efficient way of giving industry that that certainty when you then also have the issue of, of, off the shelf purchases from, from third countries, which aren't necessarily an issue per se. I mean, you get a capability much more, more quickly than if you were to and to invest in building up a European one. But it does actually mean that, you know, say, X billion spent on buying F-35s from the states is a one off. So much of, Germany's, very impressive fund, for example, is spent on one of purchases. And the same is true of Poland's increases, of a large budget, outlay to buy South Korean equipment. But that is not something that, that necessarily. Industry and benefits industry in Europe, and not one that we can be certain is that is going to last. And I think here politics as Sophia hinted, that is also extremely important. I mean, the voters, of course, if you ask them, see, defense is a priority. But I think the real question is where is the fence ranked in the hierarchy of, of priorities? And I think as soon as you start asking about distributional conflicts, who's going to pay more? Where is the money going to come from? Who is going to actually get less? All this becomes very, very difficult. And that's before we even get into the, different threat perceptions across Europe, which I think emerge quite neatly from, from some of the polling that's often done comparatively across countries where it's very clear that Russia is seen as a as an existential threat in most of Eastern Europe, not all.

**STELZENMULLER:** And.

**SCAZZIERI:** Indeed, indeed, and in the, in the Scandinavian countries. But there are countries even in the east, such as Hungary, where, where that's not, not the case in, in the east of the, of the alliance. And then the case, the believability, the credibility of Russia really posing a direct threat to Europe lessens. I think the further west you go, the more you ask publics in the, in the South and, and Western Europe. So I personally, you know, understand industries skepticism or caution about really ramping up investment so massively and putting their own money at risk when governments have been quite slow to sign off orders that they had, you know, technically agreed on. And and when the trajectory of dispense, spending is quite unclear, what the EU can do in this context is try to offer a degree of, of clarity and incentives. So, you know, both both to try to incentivize member states to do more together. And that's what part of what the EU has been

doing, but also to. To give money directly to industry, which is, in terms of ammunition, what the EU has done to set up a few new factories and then to make sure that they can, produce no matter what happens. So as long as the EU is providing free money, as it were, then, I think most current member states can get on board. Although there again, you have distributional conflicts. But the problem is when the EU gets into the business of. More controversial proposals that member states see may restrict their revenue.

**STELZENMULLER:** It does seem to me that this raises one, one function of the United States as a as a European power that we like to talk about least. Right? Which is that it's not just the provider of a nuclear umbrella, and a very significant conventional capabilities, but it also has provided over the past two decades political glue, or to put it even more provocatively, and I suspect that we both of you will agree with me on this. It has provided a buffer against the fear of smaller and newer states of a of the preponderance of France and Germany. Right. And and it is that that role of, of the United States that might also fall away with, with the next American elections. So but that brings us back really to the question. It seems to me that that I think has shown through in, in both of your answers to my questions, which is that at a time of competing, as it were, guns and butter interests, defense against agriculture. Defense, defense against, social payments, defense against, infrastructure reforms. It is very hard for European leaders to make the case, particularly on the center left side of of the European political spectrum. But the defense investments are worth. Worth the political cost that they might the the the, these governments might incur for them in the short term. Ordinary. This is when newspaper columnists call for political leadership, right? I always find that a little bit, shall we say, cheap? Do we? But I think the choice is between trying to depoliticize this and push it up to the European level, or to keep it as a national prerogative, and then ask us national governments to get on with it. Right. That, it seems to me, is the choice before us. Do you think it is possible to conceive of a political bargain within Europe? That takes care that, as it were, would motivate the the reluctant southern and southwestern countries of Europe to take concerns of the North and East more seriously and vice versa. Let me start with you and then move to Sophia. And that's just part of your field of the Middle East and, and the, and the tensions there.

**SCAZZIERI:** Yeah. Absolutely. Well, look on the United States being the political glue. Yes. Very much agree. And, I would argue that we actually saw that, for example, you know, during parts of, of Trump's presidency and how the way Europe was dealing with this, crisis in its neighborhood, I'm thinking here specifically of Libya, where then the lack of a particularly strong United States policy, namely U.S. disengagement, led European countries to pursue, slightly different policies without really, Italy and France in particular, without there being a coherent European, policy. I think that's sort of, you know, the bargain that you sketch and the broader question of uploading defense to such a degree, to the to the European level, I see, is very, very challenging, I think, to the challenge, the. The security challenges that we face, we will have to address primarily through increases in national defense budgets and cooperation in smaller groups that come together because of high degree of trust, a high degree of shared interest and cooperate, say, in buying a specific capability or indeed cooperate in terms of integrating their armed forces more. And that's happening, for example, within the Scandinavian context. It's happening, for example, between the Belgian, Belgian and Dutch Navy. It's happening between the German and Dutch, land forces. So I think actually that is probably, in an operational sense where the future of, of European security lies in more and more of that happening, which also allows in a much more flexible way for the integration of non EU, NATO members, like indeed the UK, which through the Joint Expeditionary Force, for example, also plays an important role in the Baltic. The EU I think plays a role essentially as an enabler. And when it comes to the money in theory and so, you know, not one, there's a disjointed conversation between, I think finance ministers on one hand, for example, and the issue of EU spending rules, fiscal rules and the degree to which defense may or may not be excluded from that. But to me it shows that ultimately these national. You could call them hang ups, but they get in the way of reality. If it's true that we face such an existential threat, then it should also be the case that we're much more willing to treat defense spending differently and talk about the discussion on joint depth. But it. The. Yeah, which feeds into what Sophia said earlier about doing the borrowing. I mean, it's going to be very, very difficult, but I agree it would probably be the way ahead, largely because it would avoid some of those distributional conflicts about we need to cut

to, cut social spending rather than invest in defense, because in a sense, you you throw the can down the road and you can think about it, you can think about it later.

**BESCH:** I mean, how would you answer that challenge? Yeah, I think it's very tempting. The traditional bargain is obviously the bargain between France and Germany and the leadership between Paris and Berlin. Ever since I've worked on these topics, this leadership has not delivered, and that bargain has not delivered. And so, it's delivering very little right now. That. Right. And certainly delivering very little right now. But even in previous, French presidencies of German chancellor, I think that we've often been disappointed when we were really hoping for leadership on defense, because those countries fundamentally disagree about how they want to structure European defense. I think there is some hope, with the new Polish, government, that we can maybe revive, a sort of why am I triangle? But again, never worked in the time that I've been looking at these things, which is why I think I agree that the politicization option, also because a lot of the things that governments need to do on defense are very unsexy things that, don't really lend themselves to this idea of a grand strategic bargain. So you need to invest in spare parts. You need to invest in ammunition. That's not really something that countries love announcing, I think big government meetings. I think, I mean, there's no issue that the, defense infrastructure in Europe, the environment is going to look quite, messy. It's not as tidy as this idea of a Franco-German bargain or even a European pillar within NATO. I think there's going to be lots of regional, formations the Baltics, the Nordics, seven European states that work together. But the money needs to come from a centralized place.

**STELZENMULLER:** Right? Well, I think this is going to confuse all of even, you know, our friends and others such, such as what we're meant to us. Because that and it's probably going to confuse even us. But but jokes aside, the thing that I do think I'm seeing, I was very much struck by that in Munich and my conversations that I had in Northern Europe just before that. And my sense is there is something qualitatively different about these Franco-German spats that we're seeing right now. They've they frankly seem to be nastier. Right. And both of them seem to be motivated by, I think, a real sense of panic. In in light of the polling surges of the hard right, both in France and Germany. The drop in polling of the governing governing parties. Right. That that is a very clear factor here. And so what I thought I was hearing, and I'd like to hear your response to that in, in the conversation that I had in Munich and elsewhere, is that European countries, rather than, as you suggest, sort of form regional or mini lateral coalition of the willing to solve certain practical problems. Which I think would be, you know, would be helpful, but, but but only really as a kind of I think what I'm saying instead is countries planning to bilaterals their relationships with the United States. Right. Especially in the case of a GOP win in these upcoming upcoming elections. And that, it seems to me, would be potentially really quite dangerous for European cohesion. Luigi, what do you think about that? And let me just bang on another question on on top of that, because I really do want to get you to do your particular field of expertise, which was, as you say, also Claros, which is the Middle East. That is the concern of most of the European, southern countries. And, and there is a concern not just about instability in the Middle East and in the Mediterranean, but also about an uptick of terrorism within the European Union. Right. So both both of those. So there's two questions. Should you do one, the risk of bilateral lateralization of relationships with the US. And secondly, how do we address the, the, the challenge of Europe's, the threat to European security from the Middle East?

**SCAZZIERI:** Very interesting. Questions. I mean, I, I agree that, you know, especially if, if we have a Trump scenario, then bilateral ization will be a necessity for many countries. But you could argue that it already happens to some degree. But but it would it happen much, much more. And I think it's a stretch. It would have to be a strategy of survival. Having said that, I don't think that it would be limited to, that it would exclude the role of those smaller groups. So if you, the Baltic states, yes, you will be trying to reinforce your relationship with the US. You're trying to and you'll be trying to reinforce your relationships with the Scandinavian countries, with the UK, essentially with whoever it seems most willing to commit to your to your defense. And that would be happening, presumably in a scenario where the NATO organization per se would then have to be European. And so these tracks would be parallel. But, coming to your question on the Middle East, I mean, yes, of course, I think one of the challenges, as we've mentioned, is that so many Europeans perceived, just as

intense threats, stemming from the Middle East, then, then from the, the East, I think, you know, looking and thinking about what Klara, was writing about the Middle East, I think she would recognize, to be honest, much of today's picture, in the sense of the diagnosis of the problem, in the sense that Europe continues to be, unable to, exercise a particular influence in the Middle East. That's partly due to a lack of unity, which I think shows that I think much of the narrative about a geopolitical awakening and the aftermath of Russia's invasion was perhaps more narrative indeed, than reality, and that divisions remain, very deep when it comes to dealing with, with issues in the Middle East, most of all the Israeli-Palestinian conflict. That's partly, I think, because. Despite what publics in many southern European countries perceives, the stakes seem lower. Yes, terrorism is a risk. But there is not a state, that is about to, threaten potentially, other European member states that risks, creating a major conflict. I mean, Iran poses that challenge to a degree, but not to the same degree as Russia, arguably. And then another, I think cause of European difficulty is that.

**SCAZZIERI:** Well.

**SCAZZIERI:** Often there. There isn't really a clean, neat. Partner to work with. This is maybe the case in Ukraine. So, you know, not to oversimplify, but Europe had a very willing partner in Ukraine, and it was essentially a matter of giving as much funding as possible. And to the degree that we face issues, this because that we don't really have enough money or weapon production capacity, to give in the Middle East, often it's about separating, parties to a conflict without, however, being able to or willing to do. Right.

**STELZENMULLER:** Right. It may, it may I sort of interrupt you here and, and, sort of add at a domestic angle, which is that half of Europe's countries have significant Muslim population groups, many of whom are citizens, as a result of decolonization processes. That's true for Italy. It's true for France, it's true for Spain, it's true for Belgium, the Netherlands, Great Britain, and the the relationship, the numerical relationship of Jewish fellow citizens to Muslim fellow citizens, never mind migrants, is about 1 to 10, right? There is, a new American, intelligence community threat assessment out yesterday that I have to confess. I've only glanced over, but that speaks of a generational threat, of of terrorism. And and, as a result of the current conflict, and it, it's true that we had a great deal of domestic terrorism in Europe after 911. That seemed to have subsided for a variety of reasons. Are you concerned that the current tension in the Middle East would lead to a return of this phenomenon, and would we be capable of dealing with it? And would we be capable of protecting both our Jewish citizens and Muslim citizens against them? And of course, the entirety of the population? But there are I mean, there is a potential for significant social and political conflict here.

**SCAZZIERI:** I agree. I mean, the current conflict is making everything worse in terms of fostering antisemitism and also fostering far right anti-Muslim sentiment. The question is, yeah, clearly foreign policy is the cause of that. The question is, is it a foreign policy problem or is it a domestic issue? And because the two dimensions are also in the minds of policymakers are and linked, I think ultimately, you know. It affects the way Europe approaches, these conflicts. But I see terrorism and especially radicalization as an issue that that's more about domestic politics. We're not faced with the situation which we were in, say, 2013, 1415, in Syria, where you had the emergence of jihadi groups that were a direct threat to Europe, where they could plan attacks, they could have safe havens. We're not in a situation, as was the case in Libya at that point. So, you know, while I see that, the huge challenges that the conflict in Gaza creates for our societies. I'm not so sure that I would define it as a terrorism problem to the same extent as what we've had in the past, and so far, we haven't actually seen that degree of threat materialize in terms of radicalism.

**STELZENMULLER:** I just wanted to raise it for, for for the sake of raising it, frankly. I it is something that I do worry about and as as you say it, of course it's the domestic problem because so many of us have, you know, an unresolved conflict with our own politics of memory. Right. And and, unresolved, you know. Identity issues arising out of these painful traumas of decolonization. Right? That is something we've tried to address. But but clearly not not fully successfully. But let me move. Since we are 15 minutes out from the end of a program, and I do actually have a lot of

quite good, questions from, audience who have been listening carefully, and some of them, in fact, sent questions in advance. Thank you very much to everybody who did that. There is one from a colleague that was from one of our military fellows at Brookings. The polls are asking, are saying everybody should move to 3% of, deferred defense spending. Very quick answer from both of you. Do you think that that is a desirable. Be likely. Sophia, stop. I'll start with you.

**BESCH:** Quick answer. Desirable? Yes. Likely. You defined the time horizon, right? I think we're working really hard at the 2% right now, but we have to. I mean, we all know that the 2% became this golden goose ticket to keep the US in. If we're talking about a US that withdraws 2%, just not enough. If we are now if we all reach 2%, then we're nearing, the US contributions. We would have to double that if we wanted to replace the US.

**STELZENMULLER:** Exactly. Luigi, you.

**SCAZZIERI:** Yeah, I agree, I think something like that would be necessary to make up for the underinvestment of the past decades. But I see that this constant pushing the target higher, as unlinked from, from the political realities of the moment in terms of what citizens, are prepared to accept. And now, of course, this is when, you know, journalists go for political leadership, as you say, but it's just going to be an extremely different, difficult discussion. So if we get to 2%, I think that would already be a lot. And just to pick up on something you said earlier, you know, relating to the left wing, center left politicians and the difficulties that they have. I think a major communication challenge is that in particular in countries like Germany, in Italy, there is a very strong strand of pacifism, and it is very difficult to say that to sell to such publics the notion that higher defense spending is actually a way to keep peace, because there is a it just triggers a reflex whereby it's seen as, oh, but no, then you're getting in an arms race, then that's actually how you end up in a war. So a specific challenge I would highlight from left wing governments center that yeah.

**STELZENMULLER:** Well there is an additional challenge now. And that said, centralist governments are being praised by both by the hard right and the hard left. For, for this, this, this pitch, depicting themselves as the party or the chancellor of peace. That's the kind of friend you don't really want to have. Sorry. Let me move to another question. And I'll read it to you, but I will slightly rephrase it. In which conditions would France expand its nuclear umbrella? Would an attack on a Baltic state trigger it? I don't think it's helpful to talk about the circumstances under which, we, the West, would respond to the use of nuclear weapons. Right? I think that leads us down a rabbit hole, but it is really notable. That a debate that used in Germany only to happen in August when, you know, every other subject had run out for daily newspapers. Has now become a subject of almost weekly discussion. Right? Should. And it's, there's two levels. Should there be, an arrangement in case America were to withdraw after the elections, the protection of its nuclear brella in one way or another? Should there be a debate with, with France over the conditions under which that nuclear umbrella from France could be extended? And secondly, and even more frankly, provocatively, should e.g. Germany develop its own national nuclear deterrent? Sophia, let me start with you. What what do you think of this debate? How realistic is it and under what circumstances?

**BESCH:** Yeah, I agree that we've, rescued the nuclear debate, the European nuclear debate from the August August headlines. I think. Listen. So in 2020, I think that President Biden calls it, that he wanted to have a strategic dialog with European allies on, and European nuclear umbrella. And when you talk to people in Paris, this is what they tell you. They say there is an outstretched hand and nobody has taken it. We have to, of course, ask the question why nobody has taken that outstretched hand. Partly it is because of what you outlined earlier, this, wanting to bilateral relations with the US and believing in the US umbrella more so than in the French one. But there are, of course, steps that European allies and France could now take to increase the credibility of a European nuclear protection. That could be an invitation of European partners to participate in nuclear operations. There could even, fans could even base a few months out somewhere else in Germany, for instance, we could create a common nuclear planning mechanism in Germany. The conversation, to my knowledge, is still not as concrete as that. Why isn't it as combined? Because there still isn't the believing in friends willing to risk French cities for Baltic cities. The belief that we

have in the US, or that we had for a long time that the U.S. would be willing to incur that risk. The belief that is essential at the heart of deterrence, theory. France, under my call, I think, in the last half year or so, has really tried to rehabilitate some of its credibility in the East. I don't think we're not there yet, but I think it's an important, it's an important step because this vision of European defense only works if the East and the North, but the East buys it. And I think that Paris has recognized that.

**SCAZZIERI:** Yeah.

**STELZENMULLER:** Well, that aspect certainly of outreach to the East, I think has been gratefully received in, in, in Eastern European capitals and central, eastern, European capitals, especially Warsaw. But as, as you say, the. The scenario under which the French nuclear deterrent is extended is still very, very notional. And hence and hence these, these these national debates, which I think a year or two ago would have been completely unthinkable. Now, would you let me bring you in on the question of the relationship between the UK and the EU, which, post-Brexit, you know, especially on the security defense front? So a very quick downturn, which is all the more notable because about 15 years ago, the Brits, in fact, were instrumental in pushing the European Union to a stronger defense posture. The famous 2010 headline goals, right? And the Franco British Agreement. In sum, I know now arguably those headline goals, were unrealistic, right? They were were very, very large and they were directed at stabilization ops of the kind we had had been doing in, in the Balkans and I think arguably are no longer doing, at least in the current moment, and aren't envisaging, in the near future. But, but there is, I think, a quite notable attempt now, for, outreach from, the security community in Great Britain and also from labor. Would you mind talking a little bit about that and, assessing how useful that would be for focusing European defense? And I don't think London is going to be the new offshore balancer, but but, they certainly have very important capabilities to bring.

**SCAZZIERI:** Yeah. No. Very good question. And I think what happened in the aftermath of Brexit was that the UK had to invest much more in those bilateral relationships in Europe to deepen them. And of course, not only as a byproduct of leaving the EU, but also as a byproduct of the much more threatening circumstances. So you have a deepening of the relationship with Germany in particular, which still has a lot of potential to go in, which remained undeveloped. The one with France has been affected quite substantially by the Brexit, tensions and by the fact that the UK, when it comes to capability development, is investing so much in its relationships with the US and with Australia, which seems to deprioritized the European relationships from an operational point of view, of course, in terms of contribution to Baltic security. The UK is very much in the lead. Look, where there have been many, the main source of friction and the main source of that. They've been issues as being the, the development of EU defense, industrial policy and the fact that it is excludes, third countries de facto, it makes cooperation with the UK very difficult. So far the UK reaction has been one of, hoping, that these tools aren't going to amount to much. Occasionally there have been fears that, you know, in case they do amount to, a deepening of EU defense cooperation, the UK would then be locked out and the new, presumptive, labor government, is, is talking about a defense pact with the EU. I suspect that would be, you know, fairly straightforward elements of that which would relate to political dialog and possible UK reentry into some CSDp missions where they're not yet interested in doing so, as indeed in Bosnia. And then there would be a much harder discussion about the degree to which the UK can access EU defense tools. But. The improvement in sort of political. The political atmosphere, I think could help quite a bit.

**STELZENMULLER:** Okay, well that is at least semi encouraging. We are now four minutes out. So I'm going to ask you, each of you a very, very brief question. And then conclude, and apologies to everybody online whose questions I haven't managed to discuss. Obviously, obviously there's a great deal of material in this topic. And both of you, less than a minute, if possible. What happens to Europe, Sophia, if, if Donald Trump wins the US election.

**STELZENMULLER:** Really glad that you asked that question. Because, I didn't really respond to you by the translation prompt earlier. What happened? All bets are off. Honestly, and I think this is the most important message that reform D.C. can send to European governments that even

another a second Trump administration would not necessarily be like the first Trump administration, that the hope in bilateral relationships might not actually carry you very far with the second Trump administration. And that Trump might undermine the deterrence structure of NATO altogether if he keeps making comments like the one from a few weeks ago. And so we're going to have to have a European response.

**STELZENMULLER:** And and I think it's important to say here that the a Trump administration, especially a second one, would not be isolationist, as is occasionally said in Europe, but ruthlessly transactional list. And that would be could potentially be extremely painful, even for those governments hoping for bilateral ization. Luigi, what happens if Russia wins? And in Ukraine. What does that mean for European security?

**SCAZZIERI:** Well, there's a obviously very, very worrying scenario where that just leads to Russia's appetite growing. And then in particular, in combination with Trump being in charge and with the sort of weakening of security guarantees that Sophia has just laid out, that that leads to a catastrophic miscalculation on part of Putin and then to a direct clash. And I think a lot of European leaders have attracted attention to this possibility recently, and lots of military leaders as well. And I very much hope that Europeans take their security much more seriously in coming years. Whoever wins the US election so that outcome becomes impossible.

**STELZENMULLER:** Right. Thank you very much. Especially for those brief but very succinct and trenchant answers at the end. It falls to me to thank both of you for what I thought was a really interesting, and wide ranging, in-depth conversation. Thank you for taking the time. Thank you to Fiona and Charles for reminding us of, the woman who brought so many of us together. Clara Marina O'Donnell. A special thanks to her father, Peter O'Donnell, and her family, who I think may be listening online. And and as I think Sophia said earlier, it is very rare, unfortunately, in our field, that we find a way of of nurturing young researchers. Clara, fellowship is one of those rare instances. I can speak from personal experience, just how difficult it is to find ways of of broadening access, avenues of access for young and gifted researchers. But I promise the O'Donnell family and you all that I'm going to be my damnedest be doing my job is for as long as I can to do that. Because you too. Clara, proof of how important that is. And a new generation is, is there, to to take over when people like me will be stepping away? So thank you, all of you, for this very discussion. And maybe Clara can name Clara Marina O'Donnell's memory. Live long. Goodbye. Thank you.

**GRANT:** Thanks, everybody. That was great. You did a very good summing up concerns. Well done.

**STELZENMULLER:** Thank yu.

**SCAZZIERI:** Thank you.

**STELZENMULLER:** Thank you. Very good to hear you raise your cup as a. And, Sophia, I hope I'll see you sometime soon. It's a bit of a crazy season. Yeah. Ian, thanks for being willing to jump in.

**AUDIENCE QUESTION:** Yes. Thank you for, enabling me.