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## Research Report

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SWP Comment, No. 21/2024

## Provided in Cooperation with:

Stiftung Wissenschaft und Politik (SWP), German Institute for International and Security Affairs, Berlin

*Suggested Citation:* Arnold, Sven; Major, Claudia (2024) : France's disruptive Zeitenwende: As a consequence of Russia's war against Ukraine, Paris and Berlin adapt their security and defence policy - and bilateral divergences are increasing, SWP Comment, No. 21/2024, Stiftung Wissenschaft und Politik (SWP), Berlin,  
<https://doi.org/10.18449/2024C21>

This Version is available at:

<https://hdl.handle.net/10419/297229>

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# SWP Comment

NO. 21 MAY 2024

## France's Disruptive *Zeitenwende*

As a Consequence of Russia's War against Ukraine, Paris and Berlin Adapt Their Security and Defence Policy – And Bilateral Divergences Are Increasing

*Sven Arnold and Claudia Major*

Russia's full-scale invasion of Ukraine since 24 February 2022 has not shaken France's security policy as fundamentally as it has Germany's. France sees its previous goals confirmed, particularly in terms of strengthening Europe's strategic sovereignty. Nevertheless, it has been adapting in many areas in order to continue pursuing its ambitions under changed external conditions. This led to a continuity in security policy objectives – with notable adjustments in the means and direction. These include France's now active support for the enlargement of the European Union (EU) and the North Atlantic Treaty Organization (NATO) as well as its increased commitment within NATO. This has also partly dispelled the irritation among European partners that President Emmanuel Macron caused in 2022 with his statements about the need to reach out to Russia. However, substantial differences between Germany and France remain and have intensified in some cases, making bilateral cooperation more complicated.

In his address to the Nation on 2 March 2022, President Macron described the Russian invasion of Ukraine as the “start of a new era”. However, despite this fundamental break, France sees its central strategic, budgetary and military approaches as having been confirmed.

### Continuity of goals: Strengthening European sovereignty

In its 2017 “Revue Stratégique” (similar to a national security strategy) and its 2021 and 2022 updates, Paris had already identified the need to prepare for high-intensity inter-

state conflicts. France has always maintained an investment in its nuclear deterrent, partly on the grounds that it must be able to deter a conflict with a major power.

Paris has also traditionally invested in the operational capabilities of its armed forces. It is true that cost-cutting pressures have led to shortfalls here, for example in air defence and ammunition. But overall, the condition and operational readiness of France's armed forces is better than that of most other armed forces in Europe, whose capabilities have been cut due to budgetary pressures and a lack of threat perception. Furthermore, France's forces are combat experienced, for example due to their deploy-



ments in Mali from 2013 to 2022 and in Iraq since 2014.

Russia's full-scale invasion of Ukraine in 2022 has not changed the goals of French security policy, but rather confirmed them: The leitmotif of European sovereignty, which Macron has been pursuing since taking office in 2017, has even gained urgency in his view. The aim is a Europe that defends its interests politically, technologically, economically and militarily in an assertive and autonomous manner and actively shapes its own environment (see SWP Research Paper 4/2021).

This makes France an exception in Europe, as for many Europeans the Russian invasion in 2022 underlined the central role of NATO (and the United States) in the continent's defence and confirmed the subordinate role of the EU. Paris recognises that the United States is indispensable for Europe's security in the short and medium term and is also increasing its commitment in NATO. However, unlike many of its partners, France is actively investing in EU structures and policies. In the long term, Paris sees an independent European defence as being all the more necessary. Firstly, Russia's war confirms French assumptions about the Europeans' limited ability to act, as it has highlighted their political and military dependence on the United States and their own deficits, from reconnaissance to logistics. Secondly, the war underlines the need for a Europe that is capable to act, precisely because the strategic environment is becoming more unstable and challenging. In his Sorbonne-Speech on 25 April 2024, Macron boldly stressed the need to "build a Europe which can show that it is never the vassal of the United States".

France also has a tradition of pointing to challenges that lie beyond Russia. For Paris, the US focus on its systemic competition with China is a long-term trend. The 2024 US elections could bring to power a less transatlantic-oriented, more selective and more transactional US administration that contributes less to European security or positions itself against European goals. From the French perspective, the aim is not

to replace NATO. Rather, European contributions to the alliance should increase (which would be in line with the burden-sharing demanded by Washington) and lead to Europe's greater ability to act. Paris hopes that Russia's war will convince other Europeans of this urgent necessity. However, even if many EU states share this goal in principle, its concrete implementation often seems to have low priority (Germany's National Security Strategy also remains vague in this regard). Another issue is conflicting objectives, for example when it comes to either closing capability gaps quickly with non-European equipment or investing in European companies over the long term, and thus strengthening the EU's own industrial sovereignty.

As a result, the topic of strategic sovereignty dominates France's EU policy. This was evident, for example, during the French Presidency of the Council of the European Union in 2022, when the EU states, following a French proposal, mandated the Commission and the European Defence Agency to develop initiatives to strengthen European defence capabilities (as part of the "Versailles Agenda"). The resulting instruments are intended to promote Europe's Defence Technological and Industrial Base (EDTIB), defragment the European market, develop synergies between EU states and improve production capacities.

From this perspective, it is understandable that France has criticised the fact that many EU members have covered the increased needs of their armed forces since Russia's invasion with non-European procurements instead of buying from European companies or investing in European projects. This was the case, for example, with Poland's decision to purchase Korean land and air equipment, as well as Germany's procurement of American and Israeli air defence systems (Patriot, Arrow 3). Most member states disapproved of France's EU focus as being dogmatic and counterproductive. They underlined that some weapon systems were simply not available in Europe and preferred to temporarily set aside the goal of "European sovereignty" when pur-

chasing ammunition, for example. In view of the dramatic situation in Ukraine, the French position became more flexible at the beginning of 2024. Paris now supports initiatives whereby states procure ammunition from outside Europe and accepts that joint debt should be taken on in the EU in order to sustainably support Kyiv.

## Political adjustments

Although France maintained its previous goals, it changed course in order to be able to continue pursuing them under the new conditions. These adjustments were largely routine but were often not coordinated with its partners.

## A new Russia policy

France traditionally pursued a cooperative and pragmatic policy towards Russia. Unlike the German “modernisation partnership” with Moscow, France’s policy was guided less by hopes of reform than by the realpolitik conviction that Europe needed to maintain a stable relationship with the nuclear power in its neighbourhood. However, from the point of view of many partners, such as Poland, France had turned a blind eye to the developments in Russia for too long. There was therefore great irritation when Macron received President Vladimir Putin at his summer residence in the south of France in August 2019, announced to resume the bilateral dialog and spoke of building a new “architecture of security and trust between the EU and Russia”. In June 2021, when the Kremlin was already massing troops on the border with Ukraine, Paris (together with Berlin) was calling for the creation of “spaces for dialog with Moscow”. After the invasion in February 2022, Macron shocked many partners when he called for negotiations with Russia without elaborating on his announcement.

France now recognises that its Russia policy has failed. The speech Macron gave in Bratislava at the end of May 2023 forms

the basis for this new course. Here, he apologised for his earlier misjudgements and ruled out a quick normalisation of relations with Russia. Since the start of the war in 2022, his rhetoric has shifted from “Russia must not be humiliated” (June 2022) to “Russia must not win” (February 2023) to “Russia’s defeat is essential” (February 2024). Macron evolved from a brakeman to a driver. At the beginning of 2024, he called for a “strategic jolt” in Europe out of concern about a Russian victory. For him, support for Ukraine must be stepped up, and both Moscow and Kyiv must be given the same signal that this support is enduring and reliable.

This change in Paris is based above all on the realisation that Russia is acting in a systematically revisionist manner, not only calling Ukraine’s sovereignty into question, but also threatening the European security order, the nuclear order and the international rule of law. Finally, despite repeated attempts by Macron and others, Moscow has shown no interest in ending this war, either before or after the 2022 renewed invasion. On the contrary, Russia is escalating, repeating nuclear threats, insisting on its military victory and rejecting compromises. In Macron’s view, the Kremlin has developed into a “methodical actor of destabilisation” that threatens European interests, for example through disinformation and cyber attacks. The war against Ukraine – the outcome of which is, in Paris’ view, “existential” for Europe – can therefore not be stopped in the short term, but must be won.

France has therefore gradually changed its approach. Initially, it sought to weaken Russia primarily through sanctions and energy decoupling and to support Ukraine politically (including through EU and NATO accession), economically and militarily. Now Paris is going further because it no longer considers the previous approach to be sufficient in view of the dramatic war situation. France not only wants to increase its support, but also to change it in terms of both substance and nature. At the Paris-Ukraine Conference in February 2024,

27 countries agreed to provide more extensive support to Ukraine. Firstly, they want to transfer activities that have so far been carried out in NATO countries to Ukraine, such as training and weapons production; secondly, tasks such as mine clearance could be taken over by Western states so that the Ukrainian armed forces can concentrate on their core (combat) mission. Macron also did not rule out the deployment of Western ground troops. Such deployments would focus on providing assistance, and not involve combat missions – at least initially – even if these should not be excluded a priori. While some countries, above all Germany, rejected the idea, many others supported it, such as Poland, the Baltic states, Finland, Norway and the Netherlands. At the same time, Paris stressed that Europe would have to work together again with a reformed Russia in the long term, particularly in the area of nuclear arms control.

### **Approval of EU enlargement**

Another adjustment is that Paris is no longer blocking EU enlargement, but is now pushing it forward. France has traditionally been reluctant to do so. As recently as 2019, it halted accession negotiations with Albania and North Macedonia and demanded that EU reforms be implemented first – out of concern that an enlarged Union would otherwise be unable to act.

The change began in 2022, when – under the French EU Presidency – Ukraine and Moldova were given the prospect of accession. In his 2023 Bratislava speech, Macron called for an EU accession by all candidates “as quickly as possible”. This seemed geopolitically necessary in view of Russia’s full-scale invasion, its attack on the European order, and Moscow’s (and other actors’) further attempts to destabilise and control Europe’s neighbourhood. From a French perspective, EU enlargement appeared to be an effective means of stabilising the Western Balkans, Ukraine, Moldova and Georgia, thus strengthening Europe. The candidates and EU partners initially greeted Macron’s

change of course with suspicion. The credibility of France’s new position also suffered from its unilateral initiative to establish a “European Political Community” (EPG) outside of the EU. Many expressed little support for the format because they saw it more as a waiting room for the candidates than a geopolitical cooperation instrument.

### **Support for Ukraine’s accession to NATO**

France’s support for Ukraine joining NATO is also new. In 2008, Paris and Berlin were still blocking the admission of Kyiv. This change of direction follows the same logic as France’s support for EU enlargement. From Paris’ point of view, a sovereign and secure Ukraine is crucial for Europe’s security and stability. In addition, France believes that Ukraine’s internal development is inextricably linked to its external security: without it, reconstruction and domestic reform processes risk to fail, which would make Ukraine a source of instability. In the same way, EU and NATO accession are sequentially linked. EU membership would grant Ukraine protection under Article 42.7 of the EU Treaty. However, the Europeans are not yet able to guarantee this protection; only NATO, thanks to the US, is currently in a position to do so. EU accession can therefore only take place once Ukraine is covered by NATO’s collective defence clause or once the Europeans are in a position to defend themselves without the help of the US.

Paris recognises that Ukraine’s accession to NATO would entail costs and risks. For France, however, the strategic advantages outweigh the risks. At the 2023 NATO summit, it therefore supported other allies who were calling for Ukraine to be invited to join the alliance, thus distancing itself from the United States and Germany. This approach was also reflected in the Paris-Kyiv bilateral security agreement, which was concluded in February 2024 and is valid for 10 years or until the country joins NATO.

## Support for Ukraine

As strong as France's rhetorical commitments are, they are at odds with its low level of practical support for Ukraine compared to other European countries. According to the Kiel Institute for the World Economy, France is far behind the United States, Germany and the United Kingdom in terms of military, financial and humanitarian aid. In 2024, military support from Paris will amount to 3 billion euros, less than half as much as Germany's 7.5 billion euros. Paris cites three main reasons for this. Firstly, it refers to its commitments in other regions, such as Africa and the Indo-Pacific (where France has overseas territories). France must therefore remain operational and not risk creating any major shortfalls in its equipment. Secondly, this also applies to Europe's defence, especially since other countries are already making cuts in this area. Thirdly, France has few heavy weapon systems in significant quantities because its focus to date has been on fighting terrorism in the Sahel region. Ultimately, the government decided not to risk incurring any further shortfalls in its own equipment. However, this decision is also highly controversial in Paris. France emphasises, on the other hand, that it is supplying high-quality systems to Ukraine, including SCALP-EG cruise missiles, which allow for conducting deep strikes within enemy territory. Paris is also leading both the "artillery" capability coalition for Ukraine (together with the United States) and the "air defence" coalition (with Germany), and has announced a "coalition for deep strike capabilities". France is also participating in the European Union Military Assistance Mission (EUMAM) and providing bilateral training.

In order to support Ukraine in the long term (and promote its own defence sector), Paris wants to overcome the principle of simply transferring its material and rather link the Ukrainian armed forces directly to the French defence industry. In September 2023, French and Ukrainian companies signed 16 contracts. The bilateral security agreement of 2024 also includes industrial

cooperation. Nevertheless, the low level of support provided to date weakens the credibility of France's rhetoric.

## Rethinking deterrence

The war in Ukraine has confirmed the importance of nuclear deterrence for Paris, but it has also led to increased reflection about its future. France sees two challenges here. Firstly, Russia is attempting to change the nuclear order. It is threatening to use nuclear weapons in order to secure the illegal annexation of Ukrainian territories. Moscow is therefore no longer only using its nuclear weapons to maintain the existing order, but it is seeking to use them to change borders and the security order in Europe. Secondly, from Paris' perspective, there is a risk that the United States will no longer be willing to maintain the deterrence they are currently providing in NATO in the long term, for example if a president who is potentially less interested in Europe moves into the White House at the beginning of 2025.

Paris is therefore giving urgent consideration to what adjustments are needed to preserve Europe's sovereignty and what role French nuclear weapons can play in this. Hence, France has intensified its discussions with partners about nuclear issues. This concerns both Europe's necessary response to the changing nuclear order and France's contribution to Europe's deterrence. Macron has repeated several times that France's vital interests (which are to be protected by its nuclear weapons) have a European dimension, but without explaining the latter. Paris has also made it clear that it does not want to replace the US nuclear umbrella, will not share its decision-making authority and does not expect funding from partners. It is therefore not a question of building an extended deterrent based on the US model. Yet, the aim of the talks initiated by France remains vague.

## Military adaptations

There have also been adjustments in the military sector. Paris has strengthened its NATO commitment and set new priorities in the defence budget.

### A stronger NATO commitment

France already intensified its activities within the alliance following Russia's annexation of Crimea in 2014. Since then, Paris has made major contributions, for example as part of the "enhanced Forward Presence" (eFP) in the Baltic region. From the perspective of many allies, these efforts were initially not very credible, as Paris pursued a Russia policy that was perceived as naïve and accommodating and promoted European sovereignty, which is often (mis)understood as a rejection of the United States.

France began to increase its contributions once again starting in February 2022. Immediately after the full-scale Russian invasion, it expanded its own presence on the NATO border. It extended its troop deployment to Estonia (with around 300 soldiers), conducted multiple turns of quick reaction alert in the framework of the "Baltic Air Policing" rotating mission and led the NATO Very High Readiness Joint Task Force (VJTF) to Romania at the end of February 2022. France deployed soldiers and heavy weapon systems such as Leclerc main battle tanks and the Mamba air defence system there and took over the leadership of the new multinational battlegroup with around 1,500 soldiers. The unit should be able to grow to brigade level quickly if necessary. The challenges of this long-term mission are considerable. The soldiers are no longer preparing for operations in areas such as the Sahel, but for missions in Eastern Europe, which requires different region-specific training and equipment. The substantial increase in NATO's contributions, which now constitute France's biggest missions, goes hand in hand with a drastic reduction of the country's presence in Africa. As a result, NATO is becoming the structuring element for policies, operations and training.

## Investment in the armed forces

Russia's war has reconfirmed the rise in defence spending in France, which has been steadily increasing since the mid-2010s — as a result of the terrorist attacks in France at the time and to support its operations in the Sahel. The 2019–2025 military programming law (LPM) was intended to rebuild the armed forces and consolidate spending at around 2 per cent of gross domestic product.

The new LPM, which Paris has brought forward from 2024 to 2023, is intended to provide additional funding for investments, modernisation and equipment in particular. The law provides for a total of 413 billion euros for the period from 2024 to 2030. The new LPM differs from the previous one in two respects. Firstly, expenditure will increase by around 40 per cent. Secondly, the focus is shifting towards more investment in the areas of new technologies and innovation, cyber and space. Whereas the focus was previously on overseas missions and counter-terrorism, it is now directed towards protecting sovereignty, particularly through nuclear deterrence, missile defence, drone capabilities and special forces. Paris also wants to speed up decision-making and production processes in the defence industry so that it can react faster and address shortfalls more quickly. Paris is also planning to increase the number of reservists — from 40,000 today to 80,000 (2030) and 105,000 (2035).

### Consequences for Franco-German relations

France has therefore made extensive policy changes to position itself in this new geopolitical setting while maintaining overall continuity in terms of objectives. So far, this has mostly gone smoothly. However, there is growing domestic criticism of Macron's increasingly tough stance vis-à-vis Russia — from which he is nevertheless unlikely to deviate.

## Increased tensions

The tension between France's rapid adaptation and Germany's "*Zeitenwende*" is leading to new conflicts between Paris and Berlin. Not only do the well-known structural differences between the two countries persist, such as those concerning their political systems and international ambitions, the respective models of their defence industries and the different parliamentary competences in both countries. There are also new obstacles to cooperation. International and defence policy issues are traditionally a "domaine réservé" of the president in Paris, but this concentration of power has increased further since Macron took office in 2017. Unlike their German counterparts, the foreign and defence ministers (currently Stéphane Séjourné and Sébastien Lecornu) have little room for manoeuvre. The central decisions are made by the Office of the President, which makes cooperation at the ministerial level more difficult. Due to the hyper-presidentialisation in Paris, the relationship between the President and the Chancellor (who also aims at a directive role) strongly influences the bilateral ties. If this relationship does not function well, institutional relations can hardly compensate for this.

From Berlin's perspective, France often appears to be a difficult partner, unwilling to coordinate and hardly predictable. Its positions often differ from Germany's, for example with regard to Ukraine's accession to NATO. French initiatives – such as the EPG – are irritating as unilateral and disruptive actions. Macron considers such an approach to be necessary in order to facilitate solutions, but it drives away potential partners. His uncoordinated statement in February 2024 that he would not rule out sending Western ground troops to Ukraine has divided Europe more than it has united it. Paris often seems to stick to fundamental positions – such as strategic sovereignty – and is less interested in pragmatic problem-solving.

However, cooperation is also difficult from the French perspective. Paris expressly

welcomed it when the Chancellor proclaimed the *Zeitenwende* in the Bundestag, especially as he promoted Europe's strategic sovereignty in his speech at the time. However, there was soon criticism that Germany had not sufficiently recognised the urgency of the geopolitical situation and was acting too slowly. For Paris, the implementation of the German *Zeitenwende* has so far been primarily driven by national and transatlantic considerations rather than by Franco-German and European visions. Berlin has made key decisions in consultation with the United States – for example in January 2023 on the delivery of battle tanks to Ukraine – and in part against the positions of the majority of the other Europeans, for example the cautious position of Washington and Berlin on Ukraine's accession to NATO. European initiatives, on the other hand, are lacking. In the industrial sector, Paris criticises the approach of Berlin's 2023 Defence Policy Guidelines (VPR) to rely on quickly available, often non-European off the shelf products for procurement instead of investing in new European systems, and thus in the EDTIB. For Paris, this is a short-sighted strategy that sacrifices Europe's long-term goals of strengthening the EDTIB and reducing its own dependencies. The sometimes fierce differences within the government coalition in Berlin also complicate cooperation from Paris' point of view.

However, there is a certain inconsistency in the fact that Paris is calling for more German involvement, but at the same time perceives this as competition. Paris also sees Germany's ambition to build the strongest conventional army in Europe as an implicit challenge to its own claim to leadership. In the meantime, Germany's *Zeitenwende* is causing more scepticism in Paris than it is motivating cooperation. Both sides see the war in Ukraine as a confirmation of their diverging traditional assumptions. From a German perspective, it has confirmed that the United States – even more than NATO – is the central actor for Europe's and Germany's security, and that the EU only "makes complementary contributions" (VPR). For France, on the other hand, it be-





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ISSN (Print) 1861-1761  
ISSN (Online) 2747-5107  
DOI: 10.18449/2024C21

(Updated English version of SWP-Aktuell 23/2024)

came even more obvious that Europe must quickly become more autonomous. Rhetorically, both countries are committed to the sovereignty of the continent. However, whereas Paris is trying to realise this goal through EU initiatives and policies (such as the European Defence Industrial Strategy), Germany has remained vague on this issue since 2022 (e.g. in the VPR). Conceptually, Berlin sees itself anchored in NATO.

Moreover, there seems to be a lack of mutual understanding, bilateral reflexes and the willingness to compromise in Germany and France. Consultations on Russia's war of aggression rarely lead to joint action, as national decisions on arms deliveries show. Initiatives are launched without consultation and sometimes irritate partners, whether it is about the EPG, the European Sky Shield Initiative or the issue of ground troops. In practice, cooperation often seems to be reduced to symbolic acts, such as the deployment of the Franco-German brigade on the eastern flank. There is no lack of gestures or structures, but there is a lack of an overarching political vision and tangible ambitions. These problems also have an impact on Europe, because if Paris and Berlin do not agree, little progress can be made at the EU level. Instead, there is the risk that political fragmentation will weaken Europe.

### A new start

Macron's planned state visit to Germany at the end of May 2024 could create a positive dynamic that helps shape the upcoming reform processes, particularly in the EU and NATO. Paris and Berlin should involve their partners from Central and Eastern Europe earlier and work with them more closely, as they did at the meeting of foreign ministers in February and of the heads of state and government in mid-March, both in the Weimar format.

The decisive factor in reviving a cooperation reflex is the willingness to work on bilateral problems. This includes an under-

standing of the partner's goals, guidelines for action and procedures. Too often, Paris and Berlin view each other without taking into account their conceptual, constitutional and industrial characteristics, which leads to misunderstandings and anger. The aim should be to avoid stereotypes and to find a way of working together more efficiently.

Based on the successful Franco-German expert group on EU reform one option would be to commission a team to revise cooperation structures (such as the Franco-German Defence and Security Council) and common guiding principles. Institutional improvements alone will not create a positive dynamic, but they can help overcome the current – and potential future – personalisation of relations.

In terms of security policy, Paris and Berlin should focus on further developing European sovereignty in the area of defence. Specifically, they could draw up options for action in the event that the United States scales down its role in Europe. Three goals would be central to this: firstly, the development of conventional capabilities in the European pillar of NATO, guided by future conflict scenarios and lessons learned from the battlefield in Ukraine.

Secondly, both countries should invest in a better common understanding on the future of nuclear deterrence in Europe and France's role in it.

Thirdly, given that the defence industry is a key component of Europe's sovereignty, strategic resilience and deterrence, Paris and Berlin should develop a vision of what the European defence industrial landscape should look like in 2030 and how it can be achieved.

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