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QI Panel:

Can Europe Rearm and Improve Relations with Russia at the Same Time?

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Zack Paikin

Friends, colleagues, good afternoon and Welcome to today's Quincy Institute webinar entitled, Can Europe rearm and improve relations with Russia at the same time? My name is Zach Paikin, and I'm a research fellow in the grand strategy program here at Qi. Before we begin, allow me to tell you a bit about our institute. We're a transpartisan think tank in Washington that is working to build a world where peace is the norm and war is the exception. In our research and writing and through our advocacy efforts, we're promoting ideas that move US foreign policy and national security policy away from global domination and military adventurism and toward a new strategy of diplomatic engagement and national defense based on the interests of the American people.

Two months ago, rather, two months into the Trump administration, transatlantic relations have been rocked by a series of events. Vice President JD Vance's speech at the Munich Security Conference openly questioned whether Americans and Europeans still share the same values. President Trump and Ukrainian president Volodymyr Zelensky had a very visible spat in the Oval Office, and now that the administration also has temporarily paused, and that's now resumed military assistance and intelligence sharing with Ukraine as a means of coaxing Kyiv to the negotiating table, these events have raised alarm bells across the continent, prompting Europeans to consider massive rearmament plans as a means of hedging against the perceived risks of abandonment by America and an imposed peace in Ukraine. But what are Europe's actual defense needs? How serious are European leaders about pursuing significant rearmament, and do the risks of a rush to re militarize the continent outweigh some of the potential benefits?

Here to help us unpack these and other related questions we have with us, four outstanding experts from America and Europe whom I'm thankful to call colleagues and friends. Jeremy Shapiro, welcome to the call. You are Research Director of the European Council on Foreign Relations in Washington, DC. Martin Quencez is managing director of geopolitical risk and strategy at the German Marshall Fund. Joining us from Paris, joining us from New England, Almut Rochowanski is a non resident Fellow at the Quincy Institute, as well as an independent activist, and last, but certainly not least, our very own Anatol Lieven is the director of the Eurasia program here at QI.

Jeremy, if you don't mind if I could begin with you and ask you to briefly recap for our audience the events that occurred in Brussels last week. Kaja Kallas, the EU's High Representative for

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Foreign and Security Policy had put forward a 40 billion euro military assistance package for Ukraine, and initial reports claimed that this had broad support among EU member states, but then the plan was watered down to a mere 5 billion for ammunition, and even that didn't make it across the finish line into the European Council conclusions agreed on Thursday, which themselves, of course, were only agreed among 26 member states minus Hungary. So what exactly happened and what can we expect?

Jeremy Shapiro 3:42

Well, I don't know exactly what happened. I think that broadly speaking there, you know, we have to face the fact that there isn't a consensus on, well, in the first instance, there is a consensus at 26 that the that Europe needs to support Ukraine, but there isn't a consensus even at 26 about what that support means and how much money and who gets, who has to spend it and and what the what the sort of modalities of that spending will be. In particular, what we're seeing is a bit of a rebellion from some of the Southern European countries, particularly Italy and Spain, where you saw, maybe, where the Prime Minister Spain, Pedro Sanchez, said, Well, really, what, you know? What? What does this have to do with us? Where we have the Pyrenees, we have, we have plenty of other buffers. We don't have to deal Russia isn't that kind of direct threat. And obviously Russia is a problem. We support dealing with it, but others have to pay for it fundamentally, and so they're not really interested in using common money. And they're noting, of course, that Germans, who seem to have a lot more money, are closer to Russia, and probably should spend the money.

So I think that that. Is, you know, that doesn't auger super well for the European capacity, especially in a very rapid fashion, to substitute for the Americans. If the if there is a an abandonment of Ukraine or of European security by the Trump administration, which seems like it's really a possibility at the same time, of course, there's a lot of other things going on in Europe, particularly in Germany, where there seems to have been a big shift, and there's been some generation of rather impressive amount of resources. So actually, I think the best way to look at what happened in Brussels is to say that the EU as a whole has a lot of problems responding to this, either at 26 or even at less of a number. But what we're seeing is this sort of evolution of various types of coalitions, of the of the willing Nordic Baltic, a expanded Weimar triangle, bringing back in the British in various formats, and that there is some creativity going on there. The EU would like to be able these. EU leadership would like to be able to provide some support, but is struggling with that, and is likely to struggle more.

Zack Paikin 6:14

Excellent. Thank you, Jeremy, and let me go to you next, and stick with Brussels for a second, because Ms. Kallas appears to own a fair share of the blame for last week's debacle irrespective of what Jeremy just said, she appears to be having difficulty transitioning in style and in substance from being an Estonian leader into what is in effect, a role in Brussels that normally privileges coordination and compromise. And now there's even talk that the EU may need to appoint a high profile Special Envoy for Ukraine over her head. So what does miss

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Kallas' selection, in your view, for the role of HR, VP tell you more broadly about the state of EU foreign and security policy today, and specifically about the ability of the EU to think strategically and make strategic choices and anticipate events, for example, such as the re election of Donald Trump, which should have been utterly predictable, or at least highly possible.

Almut Rochowanski 6:05

So what about Kallas? And then what about the EU capacity for thinking strategically so on call us in her appointment, I want to say that yes, she was the Pm of Estonia, but she left a very unpopular pm that is actually a classic move for people who move up from the national governments into the European Commission. Uzula von der Leyen, notoriously, was, you know, universally be hated and left a lot of broken china when she left German politics. And you sometimes almost feel like these people come with sort of built in compromise, like, yes, it just really they're often Yes, well, but I think more importantly, she was appointed out of, I don't know, like there's the system that, like every country, gets somebody right. So that already adds a lot of constraints in terms of the people that are available for these jobs, and that needs to be balanced and juggled.

But there was also, I think far more importantly, there was this notion of foreign policy is essentially activism, right? And like, if you like activism, but in the sense of, like, being, you know, propaganda, like, if you're really good, like, on social media and propaganda, if you make these, like, snippy, short statements, you know, to the to the cameras, then then you're good at foreign policy. And like, obviously that is not the case. And and we're seeing, we're sort of being presented the bill for that choice. Now that was completely expected. Like everybody said, everybody was like, groaning when, well, a lot of us were groaning when we saw her appointed. And this is what happened now. And she's now being sort of in a very subtle and even not so subtle way, she's being undermined. Apparently, I read that at the council, when there's this talk coming about appointing a special envoy for Ukraine, she was like, Well, what am I? And even there for, like, you know, what am I supposed to do here?

And you can just imagine everybody's like, looking at the floor, and she said it because they, you know, there are a lot of people in the European Union, and I think who don't want her to be doing this, but they also don't want to stick out their neck and say it, because then you get punished, in public opinion for that. So whenever we see these things, like what we saw at the council, were like small coalitions like Spain, Italy, Portugal, or Spain, France, and, you know, with Slovakia and Hungary also sprinkled in, when they go out and say something you sort of hear like a collective sigh of relief from like five to 10 others who didn't have to say it right, but who actually prefer it that way.

So I think that's what does it say about the capacity of the EU to think strategically. So first of all, foreign and security policy is not a super national column of the EU right? This is actually an area in which we have it's a classic intergovernmental organization. So the principle, the organizing principle, is still that 27 member states come together, hammer it out by consensus, and only then can it proceed. And so So this isn't actually a failure of the institutions actually

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working the way that they were constructed. And there are, of course, people who would like to see that gone. They would like to see foreign and security policy turned into a super national capacity, meaning, then people in Brussels, like technocrats, Eurocrats, make these decisions.

And frankly, I'm glad they don't, because we need democratic oversight over critical issues of national security. I think it is a good you know, like, as an EU citizen, I'm not happy when they see this, like collective failure of the institutions to come up with anything. But I would, even I would be even more worried if a few unelected people appointed in processes we don't understand, who are not accountable to European citizens, make decisions about national security, about war and peace, about buying weapons, about taxpayer money, without this being reflected in any way in The treaties, without in this the member states and their citizens being able to hold them account, accountable in any way. So yes, it's kind of this has been a stress test for the institutions, and they didn't pass it. But you wouldn't want the current crew to pass such a stress test.

Zach Paikin 11:17

Thank you, Almut, let's go over to Martin, and let's pivot a little beyond Brussels and look at key member states, specifically your own. Earlier this month, your country's president Emmanuel Macron delivered a prime time address claiming that we were entering a new era and that it was imperative that Europe gets serious about its own defense and the Defense of Ukraine. But as anutist mentioned, France turned out to be one of the principal countries that stood in the way of an agreement last week in Brussels on providing Kyiv with increased military assistance. So is there not, in your view, a tension here between rhetoric and action, and does it not raise questions about how seriously France and other member states as well, how seriously they actually view the Russian threat?

Martin Quencez 12:00

Well, I think that what we've seen over the past few weeks is sort of clarification of the role of the EU on defense and security issues, something that we've struggled to clarify over the past few years. And now we have a chance to see that the EU can provide some mechanisms, some structures, to finance, to help violence, but the responsibility of security matters falls on the member states, and this is very much also what you find in the white paper on defense that has been published recently by the EU, that the EU can help individual member states do better on security and defense. But at the end of the day, this is for all kind of democratic but also financial reasons, the responsibility of every member state to make that policy fit with their own strategic priorities.

And I think this is, if it turns out right, this will be actually a positive outcome. In in clarification, I think that too much for too long, in Brussels and in capitals, you heard very ambitious and somehow disconnected narratives on what the EU could be replacement of NATO or some sort of a structure that that provides security to European cities. This is not what we're seeing right now. Now in the case of France, I think that there are two different two things happening at the

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same time. One is that Emmanuel Macron recognizes that the French population does not necessarily see right now the war in Ukraine as its own war, right that there is a disconnect between French security interests and the future of Ukraine as a sovereign country. For many French people, this is not a consensual issue. You will find in the in the different surveys, that the French population, in its great manner, majority, continues to support the Ukrainian effort in this war, and wants France to side with Ukraine. But the nature of the threat as it is presented by Macron is not necessarily understood and shared by everyone. That's one thing, and that is, I think, why this TV speech was quite important for him.

At the same time, France is in a situation where we do not have the financial backbone to support the new effort that Macron was called for in the same speech. He says, We will not raise taxes. We will make some reforms, but we don't really know what these reforms really mean. We cannot actually have a clear plan on how to increase our defense budget from 2% to 3% in the coming years. We do not have that in place. The European response right now is where a lot of French people hope can be. We can find the financing. If I were to, i. Anticipate or do some sort of production. I think that the risk is we will finance this effort by just buying more debt. And this is where, in the French case, it gets tricky, because obviously our economic situation is quite different from, say, the German one, and having more French debt doesn't make it for a very solid plan for defense.

Zach Paikin 15:20

Excellent. Thank you. Anatol, over to you, and let's get you to weigh in on the same issue, because we've heard from European governments for three years now that Russia's invasion of Ukraine poses a major threat to both the rules based international order and to Europe security writ large. And yet, time and time again, we see old political squabbles Among EU member states get in the way of decisive action, such as where to produce ammunition, for example, where should we actually be buying ammunition from? Which seems like it should be a secondary issue if we're dealing with such an existential threat here. So besides, Poland in the Baltics, is this a sign that Europe's leaders don't really believe what they say when it comes to Russia?

Anatol Lieven 16:02

Yes, I think that is true to a considerable extent. It's certainly true of European populations. And as has been noted, the further you get away from very naturally from Russia, the less threatening it seems. And of course, the Southern European states, and, of course, very significant parts of the population in North Europe as well see migration as a much greater threat to the integrity and unity of their societies. So I think I mean in part, what has happened is that, and this, of course, has been hugely accelerated by the Trump administration, there is a general recognition that Europe does need stronger defenses, that you know, it does need to rearm to an extent.

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But of course, once again, we've already heard that today, in present economic and budgetary conditions, that is very, very difficult, and so governments have resorted to two ways of appealing to the population. One is enormously to talk up the Russian threat, you know, with, I mean, often quite ridiculous statements like, you know, British Prime Minister Starmer talking about the Russians the army being a threat on our streets. You know, I've noticed them myself, but the the other. And I'm not saying this is insincere, but because there is a kind of strategy behind it, but particularly driven by, of course, Macron and France is to say that this will that massive new spending on armaments will drive re industrialization in Europe. The problem that the problem there is two things. Of course, this cannot be a short term project. It's very difficult to tie that directly to aid to Ukraine or an immediate Russian threat, if you're talking about a process that will take years and years.

And the second thing is that to be done with even, you know, a minimum of efficiency. And once again, this has been said over and over again, this, you know, this has to involve coordination and pooling between European states, actually. I mean in terms of just numbers and money. If you put all the European figures states together, they have more than enough spending already, more than enough arms to deter a Russian attack. But the problem is, of course, they are hopelessly badly coordinated, you know, endless multiplication of incompatible weapons systems. Now in the past, that hasn't mattered, really, because, of course, America was there, and America provided the coordination and the real, you know, central centralization and the real SHIELD. But if you're thinking seriously about, you know, European defense, you've got to pull the spending, and you've got to pull the weaponry. The problem there, of course, is that means that some people will produce certain weapons and others, other countries will not. If you're talking about having one European main battle tank, for example, well, it's going to be the leopard or the Leclerc. It's certainly not going to be the British tank. Now, maybe you can have Leopards made in France, but they will be designed in Germany, that's a tough sell for French industry and the French population of you know, and that goes across the across the whole board.

The other thing to be noted there is that the you know, if you're talking about the short term needs of Ukraine, and also, frankly, the real needs of actual defense for Europe, you may be talking much more about relatively low cost weapon systems, drones, land mines, I see that the poles and the balls have now opted out of the land mine treaty, handheld anti aircraft and anti tank weapons, all of which have been critical to the Ukrainians, stopping the Russians and slowing them down. But you're not going to run you're not going to generate a massive, you know, new industrialization of Europe on the strength of weapons like that. So there are multiple, multiple clashes and difficulties here. And the, I think the atmosphere of hysteria being generated over the Russian threat doesn't also doesn't. I mean, you know, while it's obviously seen as necessary for political reasons, it really doesn't contribute to, you know, calm and serious thought about these questions.

Zach Paikin 21:10

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Let's go back to Jeremy and dig a little bit deeper and precisely these questions, because we've recently seen moves that could potentially unlock a lot of capital for spending on European militaries, between Commission President von der Leyen's 800 billion euro rearm slash readiness plan, as they're now calling it, and Germany's lifting of its debt break for just for defense spending, the numbers we're talking about here might be quite significant. Do you, in your view, think that such large sums are warranted, given the scale of the challenge, and what would you counsel European leaders at this juncture in time before they take potentially momentous decisions?

Jeremy Shapiro 21:49

Okay, that's a very elevated question. Um, look, I on one level, I think that the sums are necessary, particularly in the German case, because there's been a sort of shocking lack of investment in not just in the German defense, but in kind of Germany, for the last decade or so. And it's vital, both from a European defense and an economic competitiveness standpoint, to turn that around. But I guess I would, I guess I would say, consistent with what Anatole was getting at that the essence of this problem isn't, isn't the money, it's, it's an important part. But I think the sort of massive sums that are being unleashed, they're semi fake, and they and they more serve to hide the political dispute.

So we've sort of, we've sort of heard this, right? I mean, the EU can't do this because it's illegitimate and because it doesn't have the right personnel, and because it was constructed to be incapable of working on foreign defense. So it seems to have been constructed effectively. And the member states can't do this, and even in the French case, because they don't have the resources. So so you but you actually do have a geopolitical problem, even if the even if the Russia, even if the Russian threat is a bit of hysteria. It is the idea that the Europeans are going to be left alone with this threat, without the Americans. And let's face it, these disputes which are perennial. We've been having this kind of dispute in European defense since long before I was born. Are they were really kind of, you know, not, they were kind of games, because the Americans were essentially there in the background, and whatever the Europeans failed to do they were gonna do. So now maybe they're not, and that kind of changes everything, right? Even, even if you are a little bit more sanguine about the Russian threat.

And it does mean that you can no longer grade European efforts on the basis of of the sort of, well, gee, the politics are hard, the institutions don't work that well. So you've done pretty well here. You've managed to mobilize 800 billion, even though almost all of it is fake, but that's, you know, good job, because I know it's really difficult, but no, I mean, you have to, you have to deal with it relative to the problem. I think that the problem that they need to be getting at is less mobilizing the money, although it's not irrelevant, than it is finding a working organization that can provide the type of coordination that Anatol was talking about this, this doesn't have to be the EU, for the reasons that element said it probably can't be the EU. It doesn't have to be all of all that institutionalized, although I think it would grow in institutionalization over time. Maybe it could be done even in the in a sort of, a de-Americanized NATO, perhaps, which is hard to

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imagine, but it's, it's something that people are talking about. But regardless, to me, that's the most important element.

And there is, there is time on this. I mean, the there's maybe not time for Ukraine, but there's definitely time for European security. And I guess I I wish that the Europeans were a little bit less focused on divvying up who would pay for it, and instead finding the the right ad hoc coalitions that can, you know, take a take a strong view and and begin the process of institutionalizing a European defense culture from from some sort of New Year that can eventually be more than the sum of its parts, because if it persists where this can't be done anywhere, and if, in fact, the Americans are not actually going to be participating, then I think they have a really big geo strategic problem.

Zach Paikin 26:06

I'll come back to that in just a second, Martin, did you want to jump in?

Martin Quencez 26:15

No, I don't disagree. I just think that. I do think that the money is an issue in European defense debate. I think that you know, when you hear either European experts or European officials saying, all we need is political leadership and political courage, you know you're in trouble, because what you really need is the money to pay for what you're talking about. And I'm I am doubtful sometimes that what we're discussing is disconnected from our ability to fund any of these initiatives. And too many times, we have these promises that collapse, not by lack of leadership or courage, but simply because at some point, there's a sheet that is presented to some of the policy makers, and that sheet says that you can't pay for.

Jeremy Shapiro 27:06

Well, Martin, I mostly agree, but I just I think, is it inconceivable to think about how you can spend the money you already have better?

Martin Quencez 27:16

No, I think my main issue is that we've seen we can always do better with what we have. But if you look at the French political and defense debate, we need to do much more, and not only in Europe, but in the world. We still pretend to be a power that can influence militarily, some geopolitical developments in different continents, and so we have to have a very serious discussion with our population on how to fund this. And I get a bit frustrated because I think we cannot promise new things and say I'm not going to raise taxes and I'm not going to cut spending. Well then what do we do?

Zach Paikin 28:02

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This is a good opportunity, actually, for me, to bring Almut back into the discussion. And precisely on the theme that you two were just debating for years, Europeans were told to limit social spending and embrace fiscal probity, and this is a question of what everything costs, ultimately, but to many observers, at least, it now seems as though those same rules are not going to apply when it comes to defense spending, that we're making an exception to austerity when it comes to spending money on weapons. Now, European leaders may be claiming that their aim is to steel themselves against the Russian threat, but does the direction we're currently headed in not risk breeding some dissatisfaction among European populations regarding this double standard, or perceived double standard, and therefore, does it not, you know, pose to some extent an even greater threat to the EU's cohesion?

Almut Rochowanski 28:45

That's a it's a very big question. So I want to go step back a little bit to what Martin just said. We still want to be a power that can influence events around the world. And here's the thing. So I'm an Austrian citizen, and I don't want that for my country, and I don't think my country wants it. And I think most European countries don't actually want that, and don't think that way. And then there are a few that do, and for some odd reason, Lithuania and Estonia are among them. And all of a sudden, all of us have to be like that. And I think the real questions we talk a lot about strategic autonomy, but we never ask what is the actual strategy that we want to be autonomous about, like the grand strategy? What do we want to be in the world now that the US has apparently sort of detached itself from Europe one way or another, we can no longer be the junior partner in global primacy. Great. I love that because I don't think it was good for us, just as it wasn't good for the US.

So what do we want to be? And there are now people in Europe, like serious political leaders, saying Germany is now going to be the leader of the free world, and being the leader of the free world as we now know, which is why the Quincy Institute exists, was a ruinous proposition for the US, it's going to be many times worse for Europeans that harvest such delusions. So we haven't even talked about what we want as Europeans, as European citizens, we haven't even talked about what we need. What do we actually need to be secure, to be safe, like we talk about having a certain random, arbitrary level share of GDP spending on the military without ever asking, like, what does it actually buy us? Do we want? What it buys us? Could we achieve security better in other ways? Are we even looking at these other ways? Right now? We're clearly not, because, like, Europeans are not even talking to Russia, right?

So this is where we start, and then we get into the question of this trade off between social spending and so like for my sins, as I said, I'm Austrian, and so I inhabit the German speaking discourse, and I have to watch and read every day what goes on in Germany. And I have never witnessed a country in Europe that it's tearing itself apart over basic questions of democracy and trust between citizens and the government, the government, as I'm seeing in Germany right now, and that is very worrying. So Friedrich matters. Who's not even Chancellor yet? Before he's even been confirmed as chancellor, he has already gone back on all his electoral promises, he has engineered sort of an extra constitutional loophole to pass this unprecedented spending.

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And German citizens have been told for 15 years, so there's no money for anything, are now being told that there's literally unlimited funding, literally unlimited, like there's, they said, load of, sort of like a baseline of what they will spend, but then to the top, there's no cap on military spending, on defense spending, and I cannot overstate just how much Germans have been affected.

Like, you could start this with like the like neoliberal austerity policies of the 1990s you could go to Schroeder's policy of making Germany a low wage country, and like boasting about it, like what political leader boasts about, oh, look, we have such low wages here, right? But he did that. You could go to the 2008 financial crisis and the debt brake that was instituted after that, Germans have been told for a very long time that there's no money for them. Um, 60% of German pensions are 1200 euros a month, 30% of 750 euros a month. Some 20% of the German population lives in poverty. And not only has Merkel just engineered this extra constitutional sort of like coup to pass this new spending the very same day that was passed the public sector workers whose wages have stagnated since 2016 were told that there will be no pay raises for them. That's all public sector workers, right? And then the next day, and this is all happening like a few days ago, he said, Now, literally everything is on the chopping block, pensions, unemployment benefits, heating subsidies.

And I can tell you, like, sort of the sense of disgust and betrayal that you're hearing from from Germans these days. So in like these quick polls that they do in Germany all the time, 75% of the population feels that Merkel has betrayed the population because of what he promised before the election and what he actually did. 44% of them are his own voters. I think, like I think it's pretty clear where this is headed, right.

Zach Paikin 33:25

Let me bring Anatol back into the conversation, precisely on this same topic. If European governments as AI Muttu suggesting here do choose guns over butter, more and more, we could see the continued strengthening of populist parties across the continent. Now continental elites, in turn, may interpret that development as increasing Europe's exposure to Russian hybrid threats, which means that they'll likely respond by doubling down on rhetoric that further ratchets up tensions with Russia. So one gets the sense that the situation is existential for these elites, because it's precisely about their ability to preserve their current status as elites and to stay in government. But this does look like a vicious cycle. So how can we break such a vicious cycle? And how can Anglo Saxon powers, like like your country and like the United States?

Anatol Lieven 34:11

Well, I mean, Britain is heading in the same direction. I mean, the only reason why, you know Britain is not in the same condition, say, as Germany today, in terms of the fragmentation of politics, is like America the first past the post system, because which leads to these bizarre results, you know, whereby labor got one of its lowest votes ever, a third of the elect of the voters, but got a huge majority of seats because our equivalent of a populist right wing party

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reform split the conservative vote. Labor didn't win, the Conservatives lost. But you see already I mean star. As government is in serious trouble because so many labour MPs, I mean, even though they are, you know, they've been ruthlessly pruned by Starmer for loyalty, they and their voters just cannot stomach the kind of, you know, yes, austerity policies that the government is putting in place while hugely raising military spending.

However, on the other hand, the populist parties are all suffering because of the popular European backlash against Trump. I mean, Trump is obviously a personally, deeply unpopular figure in Europe. And so this also this rhetoric, which much of which is really terrible. I mean, in McCarthyite, in its accusations of treason and treachery and collaboration, about the Trump Putin axis, alleged is, well, I mean, it's, it's damaging. And intent, of course, it's intended to be damaging for the populist right and the populist left. It's also, of course, terribly damaging for European political culture and public discourse. And yes, I mean, I can see things getting worse and worse from from that point of view.

But as Almut has said, I mean, if you had in France, say, you know, a truly goalist government, that's to say a government that followed, you know, what the general actually did and wanted, you would see an attempt to escape from this, of course, by I mean, yes, I mean increasing military spending to a degree in a measured way, but, but combining this with a sense of strategy. I mean, it's become a cliché to say that, you know, Europe is now operating in a world of of great, you know, great powers again, and even you know, the US great power is, in some ways, not only potentially, but, I mean, if you're a Dane or a Canadian, actively hostile, but that doesn't, you know, operating in such a world doesn't just require having adequate defenses. It, you know, actually requires having a sensible and realistic strategy. And I, you know, I wonder whether the European Union is actually capable of that.

I mean, I think part of what has happened is we're sort of alluding to the tremendous influence now of the boards and the poles in Europe, well, certainly in Brussels, thinking I was talking to an EU official who said, look, you've got 27 people around a Table, 22 or 23 don't really know what they want and maybe actually prioritize just consensus, you know, agreeing over everything else. And you've got four or five people who know exactly what they want and are determined to get it, and do not give a damn for consensus or anything else they just want. Well, who's going to win? And of course, the poll when it comes to Russia, the poles and Balt and Swedes, to an extent, for reasons I've never fully understood, I think it has something to do with the Battle of Poltava. You know, are determined to get what they want. And, well, once again, at the rhetorical level, have got it. But then, as we've been saying so far, when it comes to actually paying for it, you know, in Germany, to Armen Michel, the ordinary German citizen, and begins to back this up. And most unfortunately for the European security elites. And they really do they can visibly regret it deeply, deeply sorry. You know that we do have elections. You know, live in democracies in which ultimately the the voter does have a say.

Zach Paikin 39:12

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Thanks, Anatol, and for those of our audience who don't know the reference, the Battle of Poltava was fought in the early 18th century in the Great Northern War poltavas The Graveyard of the Swedish empire. So these, these memories are long in Europe, shall we say.

Anatol Lieven 39:26

Defeated by, defeated by Russia, in the middle of Ukraine

Zach Paikin 39:31

Indeed, and in fact, behind me, right over here. We've got an ancestor of mine who is from not too far from Poltava, actually. So Martin, I know you have to go relatively soon, so let me bring you back in one last time, if that's all right. And let's shift gears just a little bit and tell us a bit about what's behind the French thinking concerning the so called coalition of the willing, which appears to be going through several iterations right now. On the one hand, this initiative offers Macron a further opportunity. Opportunity to repair France's relationship with Central and Eastern Europe, which had been damaged during his first term in office. And it sounds like Macron is trying to be responsive to the concerns of countries like Poland, which have made clear that they only have the resources to defend their own territory, and not Ukraine. But at the same time, not just Hungary and Slovakia, but also major Eurozone economies such as Italy and Spain have raised concerns about this coalition of the willing and the trend towards re militarization more generally. So, although coalitions of the willing aim to get us to move beyond the lowest common denominator, do they also risk, to some extent, fracturing the EU and in that sense, could a coalition of the willing bring unintended negative consequences for transatlantic relations more generally, if the EU remains an important instrument, as it were, for managing the transatlantic relationship?

Martin Quencez 40:48

Well, you know, it's there's really nothing new here. I think that France has always been very pragmatic in the way they use EU institution when it serves interest, and the way it is very, very happy to have this ad hoc formats of cooperation in other other issues, France and French officials would be the first ones to point out that the EU already functions at different speed, right? Some are part of the Eurozone. Some are not, and so it's perfectly fine to define different ambitious ambitions on defense and security depending on your own interests and priorities. That's really nothing new. I think what is interesting over the past few weeks or months is that France is also looking beyond the EU, with probably the UK as the main partner on redefining European defense and security order, maybe next we could see more on French Turkish relations being developed around this idea that the future of the European security order without the US, or with much reduced US presence, will require more cooperation with Ankara France has pushed for the idea of European political community. That's something that is distinct from the EU, distinct from NATO, but another format of cooperation and dialog on security and economic issues.

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So Paris has always looked for different ways to do things. Now what I think is true is that you mentioned the fact that France is looking at Central and Eastern European countries and wants to sort of get more credit there. It's, it's true. That's part of the Macron strategy since the Bratislava speech in 2023 now I think it's on the other hand, we shouldn't oversell this strategy as engagement with Central and Eastern European partners. It basically it comes from French strategic understanding of what the war in Ukraine means for European security, and what the potential withdrawal of the US from European Affairs means for France and the concern that the European security order as we know it could very quickly collapse.

Now, we don't have much leverage on the negotiations that are taking place between the US Russians and Ukrainians, but we may be able to build options for what comes next. And I think what was very interesting to me in Macron's TV speech was that he said that whatever we decide to do with regards to Ukraine, even sending troops on the ground, it will come after a ceasefire is breached, meaning that we're not in a trip wire kind of situation. We are not in parallel to what is happening in Riyadh or in other venues for these negotiation This is about what France and others can do to solidify an order that is potentially collapsing after those negotiations.

Zach Paikin 43:53

Excellent. Thank you so much Martin for joining us today. Jeremy. Back to you. Part of the reason we're seeing European leaders open the door to higher defense spending is because there's this growing sense that the United States is no longer a reliable partner. And we've touched on that already, and you have in particular, but at the same time, if the Europeans want to keep the Americans engaged in upholding European security, perhaps the worst thing that the Europeans could do is to play the role of spoiler when it comes to the negotiations between Russia and Ukraine, given how important the success of those talks is to the Trump administration. So the European leaders, at least as their own worldview is concerned, appear to be stuck between a rock and a hard place here. So how do they navigate that tight rope?

Jeremy Shapiro 44:34

Boy, Zach, I feel like you told me the questions were going to be easier than this. Look, I don't think that the Europeans should be playing the spoiler in Russia, Ukraine talks under any circumstances, because, you know, the ending of the war, there is, you know, fundamentally, an issue between. Work Russia and Ukraine and in the second place it would be a good thing because fewer people would die. And I think that's sort of something to keep your your your eyes on. And the idea that the Europeans would be a spoiler in a peace process is not really consistent with the European peace project. I think there's a lot of worry in Ukraine and elsewhere that the that the Europeans see Ukraine as their as their sort of defense against Russia, and they're willing to fight that defense to the last Ukrainian, and that's not a good look, and they should not be reinforcing that regardless of the Trump administration.

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But I also think that the other reason that they don't really need to be worrying about that is because I think that the writing is pretty much on the wall with the Trump administration in terms of European security, more broadly, they are getting out. There's a lot of different modalities for how they will get out. The first step is obviously Ukraine, but I think they are quite focused on getting out of the European security business more generally, which, you know, hopefully and possibly will be a slow process, but, but could be a quite rapid one. But regardless, it's it's something that Europeans should be preparing for and the instinct to figure out a way to keep the Americans in, which is, really, I was just in Europe last couple of weeks, and it's, it's still very, very present.

What can we do for Donald Trump? What do we need to, can we name a fort after him? Does he need a parade? What can we do to keep Donald Trump in and to keep the Americans in Europe? Is really the wrong way to look at the problem, particularly in the long term, because in the first instance, because I think the Americans are fundamentally leaving. I mean, I think there's, you know, that doesn't mean the alliance has to end, but it does mean that the burden has to not just be shared, but has to shift to Europeans, and they should welcome that at the end of the day, despite all of the political problems, very real political problems that we've talked about here, they are always going they can be better off working with each other on their own defense and security than relying on this distance and unreliable power, and I do, even though I definitely subscribe to a lot of the things that that the others were saying about the political impediments to that within Europe, and the disagreements and lack of strategy and the General europeanness of it all, I do think that the force of events will make a difference. It already has, and once the American security blanket is removed, it'll get kind of cold, particularly if there's a chill wind blowing in from the east.

So I do think that that will have an effect on European politics, and that that will encourage some of the things that we've already seen that in greater degree, which is a more responsibility for their own security. Of course, that will mean they'll have to actually work out what they actually want, and I think that's quite difficult in the world. It's clear that there is a lot of differences. But you know, if the Russians are as obnoxious as the Balts and the poles seem to think they will. They may solve that problem for the Europeans.

Zach Paikin 48:27

Anatol, you had a two finger.

Anatol Lieven 48:37

I just wanted to say that something that worries me very much is that in this effort to woo Trump and keep Trump on side, you know, it won't be a question of, you know, like the Georgians naming a mountain after him in Europe, it will be a question of going along with Trump in the Middle East. You know, essentially, at the very least, you know keeping quiet about acquiescing in what Israel is doing, God forbid. I mean, you know, backing an attack on Iran, and then, of course, with regard to China, perhaps also, you know, at least symbolically, backing a harder

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line, which will then, you know, exacerbate that whole relationship, which will make a reasonable pushback against Chinese, you know, unfair trading practices and so forth, even more difficult. But you know, if we are really so terrified about losing this American umbrella, that's the kind of thing that, you know, the Europeans will be tempted to do. And of course, in terms of the the internal unity of our societies, as I think we're already seeing in Europe, um, becoming closer and closer to Israel is a disastrous way to proceed.

Zach Paikin 49:59

Yeah, interesting point. Thank you, Anatol. We've only got 10 minutes left, and so I'd like to just spend that time Alma first, you wanted to jump in quickly with a short remark. Go ahead.

Almut Rochowanski 50:08

Yeah, really short remarks, since Anatol brought up Iran when you listen. So the absurd thing is like, and this is also why I think that actually European leaders are not really afraid of Russia. There's something else going on. Because so McCombs says, If we cannot defeat Russia, then Europe will have zero credibility. And I wonder credibility for what for the next time they want to take on a nuclear armed great power? And Kelley said, Well, if we can't, you know, deal with Russia, then how, what are we going to do with China? Right? And then in the same crowd, you hear them mentioning Iran, and sort of in one breath, all just all the same time, too. And so this is kind of like Europe is like the Nepo baby of the Unipolar Moment, and wants to sort of extend its playground to the whole world. Now this is just, it's really quite, first of all, it's delusional, but it's also quite dangerous.

And so I think I don't know if they want to do this just to keep Trump sweet, because I feel the mood of some of them is more like they want to, almost like, get ahead of him on some things, like, potentially. And so it's really, I don't know, like, I don't know. You don't I don't know if it's about a security blanket, so much as it is, like it wasn't about protection or about freedom. So like, years ago, you know, during the Afghanistan occupation, this is famous saying by a German leader, like, we are defending German freedom on the Hindu Kush. And when they say freedom, and when they say protection or security. What they really mean is power and dominance, right? So like I felt, this is important to keep in mind.

Zach Paikin 51:48

Okay, thank you. We've only got a short amount of time, about eight minutes left, and I want to go around the horn one last time and to look ahead at the peace process and its intersection with the question of defense spending, because presumably, one way not to have to spend so much on defense is to lower attentions on the continent and engage in Confidence Building Measures. So Europeans have been excluded thus far from the peace process that is being led by the United States right now and in which the Ukrainians and the Russians are participating. But there's no question that the Europeans will be needed at a later stage in this process, whether it has to do with the enlargement agenda, the question of sanctions relief, various kinds

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of assistance to Ukraine, what to do with Russia's sovereign assets, et cetera, et cetera. My question is, if the EU is going to be an integral part of this deal at some point, and making sure that a deal is going to be successful, and that such a deal at the end of the day, will help to lower tensions to some significant extent and begin a process of Congress. Process of confidence building on the European continent. Is the EU capable of making these big decisions, given the vast divergences of threat perceptions and interests among the 27 these are enormous issues at the end of the day that are going to have to be addressed. So Anatol, you first, then almost, and I'll give Jeremy the last word,

Anatol Lieven 53:00

Well, when it comes to the peace settlement itself. You know, the Europeans can, for example, do a deal over the the suspended Russian assets. This could go into a common pool for the for the rebuilding of Ukraine unless, of course, in the meantime, they've spent it on arming Ukraine, which, in my view, would be a disastrous mistake in the longer term. Of course. The thing is that to get the Ukrainians to agree to what will be, undoubtedly, in the very best case, a very painful peace settlement, some kind of reasonably firm path towards membership of the European Union is absolutely critical. And of course, Russia has publicly said that's fine by us. We accept Ukraine's sovereign right to do that. But of course, I mean, this will be the when it comes to enlargement. I mean bringing Ukraine will be, you know, a challenge vastly, vastly greater than anything it's faced before. You know, equivalent in terms of of poverty, you know, reconstruction of the sums involved, above all, well, of course, corruption, politics, but also, perhaps above all, of agriculture.

You know, as I'm sure you know Zach. I mean, there are many people in France in private who think this is just will not be possible, that the French farmers will will block it, and that no French government will dare to take them on. Now, of course, one can imagine, as it's been suggested, that perhaps you could have Ukrainian agriculture kept out of any agreement for a period of 10 or 20 years. But I think French farmers are quite capable of looking 10 or 20 years ahead and saying no under no circumstances, not just the French, of course, as we've seen, Poland supposedly Ukraine's biggest backup, but colossal opposition in Poland to bring under this. In society to bringing Ukraine into the EU so this, I mean that I think, is may actually be more even than, you know, than defense spending and so forth, the critical challenge facing the European Union in the context of Ukraine in the years to come.

Zach Paikin 55:24

Thank you so much. Almut, a couple minutes to you and two minutes to Jeremy.

Almut Rochowanski 55:27

So I think about the peace process, I think it's really important that some of you have here have said the word spoiler, because that is my impression too. Like the behavior of the EU where, like Trump says, Okay, I'm going to make peace with Russia, and the EU says you know you won't,

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because you will keep arming Ukraine, so you can not enter into this peace process and keep fighting. That is sort of classic textbook spoiler behavior, and it's really, it's really quite something to see the EU collectively do such a thing. I also think that so when you talking about the EU, who is that even is it that Special Envoy that's going to make everything even more confusing and messier, right? That could be a very competent person, but then who's going to listen to that competent person? Right? Is it going to be fond of lion? From the lion wants a lot of portfolios all the time that she shouldn't even have, right at the commission. Is it going to be colors like she's already being sidelined, as we see. So is it going to be the Polish Council presidency now or then the next one, the Danish one, was also unworkable, so it's not even clear.

I think the most interesting thing would be if the Trump administration started peeling off certain European governments one by one. And I don't mean that the usual suspect deplorables, you know, like Hungary and Slovakia, who are also not very like they may have different ideas, but they're very not constructive. It's always just a flash in the pan with them. So like, why not talk to Spain? For example, the one of the reasons why Spain is sees things differently is not just geography, but he's also electoral politics, which are very positioned very differently than in the rest of Europe, and then about the firm path to the EU. So the way I understand it is that for the EU to accept Ukraine, it would actually have to fundamentally reform itself, like it would have read, to renegotiate all the algorithms according to which the funding is redistributed. Treaty changes may be required. There will be changes necessary in the way that, like, the numbers of votes are distributed between member states and Ukraine. For the EU to do such a thing, they would now have to put it on the agenda that they plan to start this process. And I'm not seeing that anywhere.

And so I think, like for the first few years of the war in Ukraine, there was this enormous enthusiasm and pressure from Brussels to accept the EU Ukraine quickly into the EU, but that and so much so that the Commission literally broke its own laws and, like lied to its own seditions and and published false information. But I don't see or hear much of anything of that anymore now. And like you could, you could see a pathway towards that if we were headed that way, and we're not seeing that path at all. And then means to me that nobody actually wants that. And frankly, Ukraine, as it looks right now, is already a completely different proposition from Ukraine in 2022 which was already problematic, how the European Union could integrate as a member state, a country that now has probably, I don't know, like a 15th of the average GDP per capita of The EU or something like this, and it has depopulated by 30% and soon maybe more refugee Exodus. That actually increased again last year, compared to 2023 there is no framework in the EU to do that. It can't do that.

Zach Paikin 58:58

Yeah and I believe, if I call correctly, from reading the European Council conclusions from last week that the initial exchanges on the MFF have just begun on the multi annual financial framework. And so this peace process is happening at a somewhat inconvenient time for the EU, as it were, given all the uncertainty that this is causing. And these, you know, enormous institutional changes, and you know budgetary discussions are happening and need to happen

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at the same time, especially if enlargement is going to occur in the timeline of the next the next budget.

Almut Rochowanski 59:23

I mean, even under the best his scenario would be 10-15, years, right? But for that, you would already now not not to think about the budget, but you'd have to think about treaty changes and algorithm changes, those are on a higher level order than just the budget. And we would be seeing that like, before they went and did the Lisbon Treaty, like there was a long that was a long time coming, we knew it was coming, right? We're not seeing anything like that planned yet. And also, because there's always a sense like, you don't want to reform or carry your integration forward, at a time when everybody is sort of disillusioned and things are sort of cracking at the seams, right? Because you could actually end up with with a weaker construct. And so this is typically not a moment when projects of integration want to push forward. So I don't know, I just don't see it.

Zach Paikin 1:00:11

We're at the top of the hour. Jeremy, if you have any final brief thoughts.

Jeremy Shapiro 1:00:16

I guess so. Yeah, I guess I don't think that the Europeans can really participate independently in the Ukraine settlement, their their their role in that was always conditioned by American the American desire to have them as part of it, which was more of a norm than a necessity, and that that norm is gone. Their state of dependence on the United States, particularly for defense, but more generally, means that they actually can't resist the US approach to that problem, no matter what it ends up being. Ukrainians have some more capacity to do that, but as we've talked about, there won't be the Europeans. Europeans can pretend that they're going to spoil they shouldn't even want to, but doesn't matter, because they won't be able to. The U of EU sanctions will fall apart 10 minutes after the American sanctions are released. The there isn't going to be a European peacekeeping force without American support in Ukraine. It's not logistically possible there, there won't be, there won't be EU membership, for all the reasons that have been talked about for Ukraine, there won't even be a credible prospect of it. So all of the talk about how the Europeans are going to substitute for the Americans, or spoil or conduct a separate negotiation, or continue the war. This, this is, this is not realistic stuff.

And if, by some miracle, the Trump administration manages to conclude an agreement, any agreement, then, then the Europeans will have no choice but to accept it. They might be, they might complain, but they won't actively undermine it, for better or for worse. Frankly, you can have a different view on that, but it doesn't matter, because that's that's how it rules out. I would hope that from that experience, which could end up being quite humiliating and for in the minds of many Europeans, quite damaging to European security and the world order and all sorts of

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other things that they care about that they would take some lessons about how to create greater freedom of action.

One of the key lessons to notice for the future is that it's not that Europeans don't have assets. It is that they have they don't have the capacity to deploy those assets in a negotiation in a way which is strategic, because they lack the structures and they lack the agreement, and they lack the independence from the United States to be able to use the assets that they have. And until they do that, they will be a geopolitical irrelevance. And you know, maybe, if you're Austria, you're happy with that. I think that in a more geopolitical age, that's a very dangerous game to play, because, as is so often said, if you are not at the table, you are on the menu.

Zach Paikin 1:03:13

Well, on that very happy and optimistic note, thank you very much, Jeremy and Anatol and Almut and Martin, who's no longer with us for a very rich discussion. I'm sure we could continue to discuss this for several more hours. I wish we could. But for now, we have to say goodbye and thank you to all of you as well in our audience who are participating today. A reminder that you can subscribe to the Quincy Institute's mailing list from our home page, which is quincyinst.org which will allow you to receive invitations to all of our events and to follow our work. Thank you again for participating today and for joining in our efforts to promote ideas that move US foreign policy away from endless war toward military restraint and diplomacy in the pursuit of international peace. Thanks so much. Merci. Bucha. Thank you.