

Europe at a turning point

Lessons from **2025**.

Priorities for **2026**.



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2025 tested the EU
across security, economic,
technological and
diplomatic fronts.

**What did we
learn?**

Security and defence

EU defence investment rose but not enough.

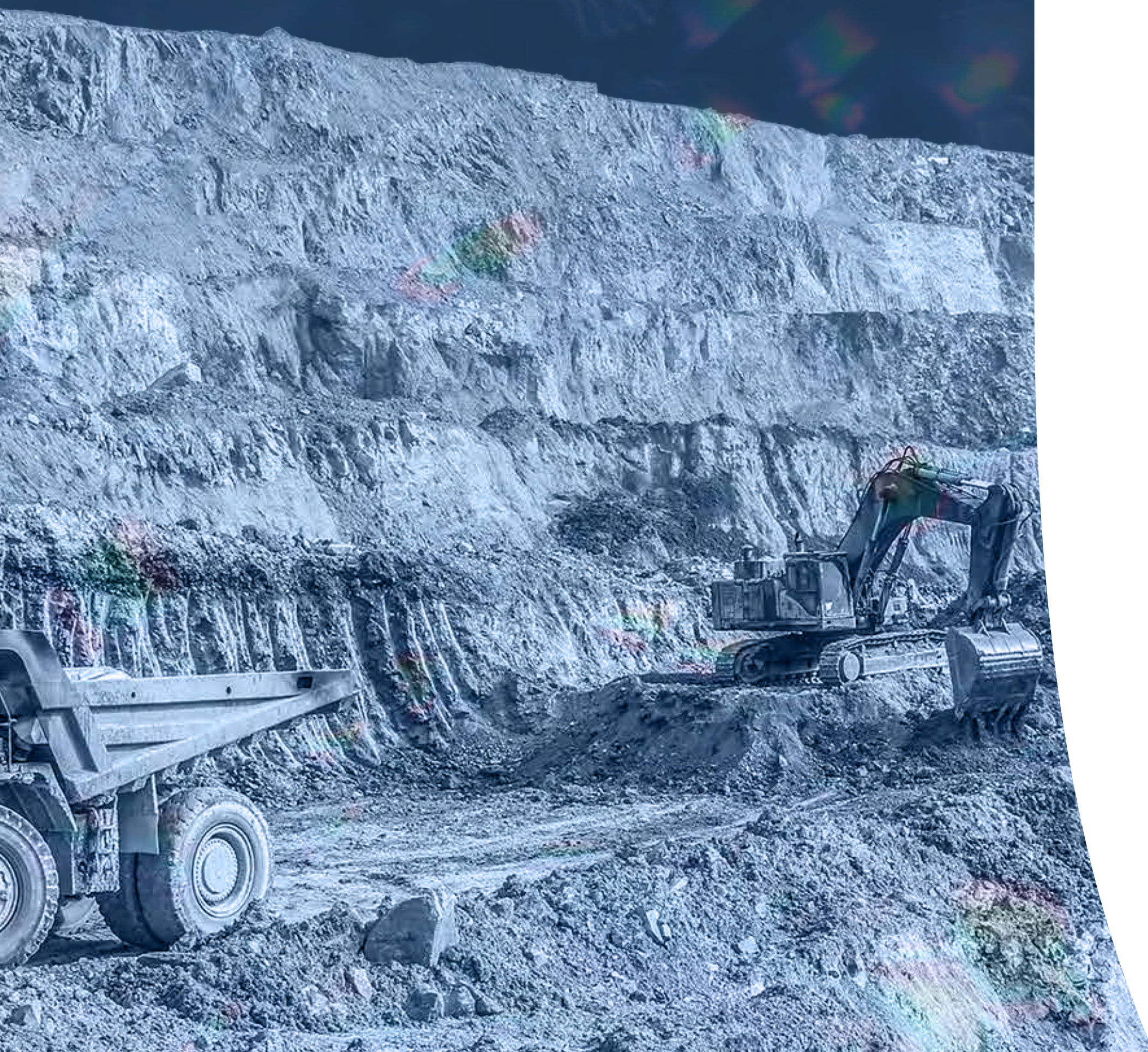
Speed, joint procurement & defence innovation remain weak points.



Weaponisation of dependencies accelerated.

EU responses remained **fragmented and under-resourced.**

Economic security




The EU is
**sidelined in
an AI race** led
by the US and
China.

**Capability
and
investment
gaps** weaken
EU regulatory
influence.

**AI and
digital**





The US shifted to
**fossil-fuel-led
re-industrialisation;**
COP delivered
limited results.

Political appetite for
ambitious climate
action is fading.

**Climate and
energy**

Power politics and coercion outweigh multilateralism.

Hedging and diversification dominate global strategies.

China courts leadership of the Global South.

**Diplomacy
and partners**



These lessons inform
the EU's strategic choices
for **2026**.

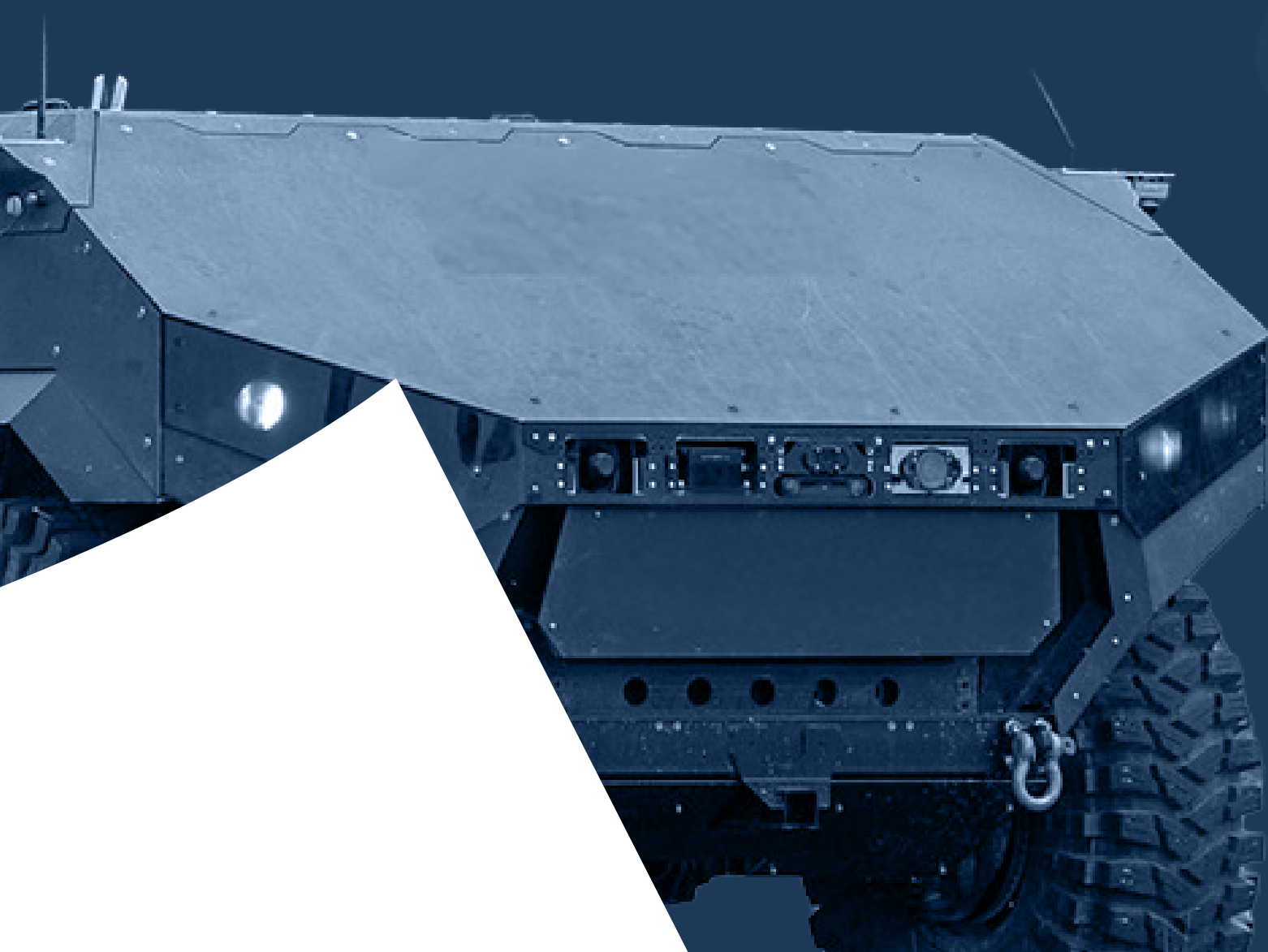
**Key priorities
are emerging.**

Security and defence

Spend more,
better and **more**
European.

Show EU added
value through
flagships and
results.

Integrate
lessons-learned
from Ukraine
war and invest in
making societies
crisis resilient.

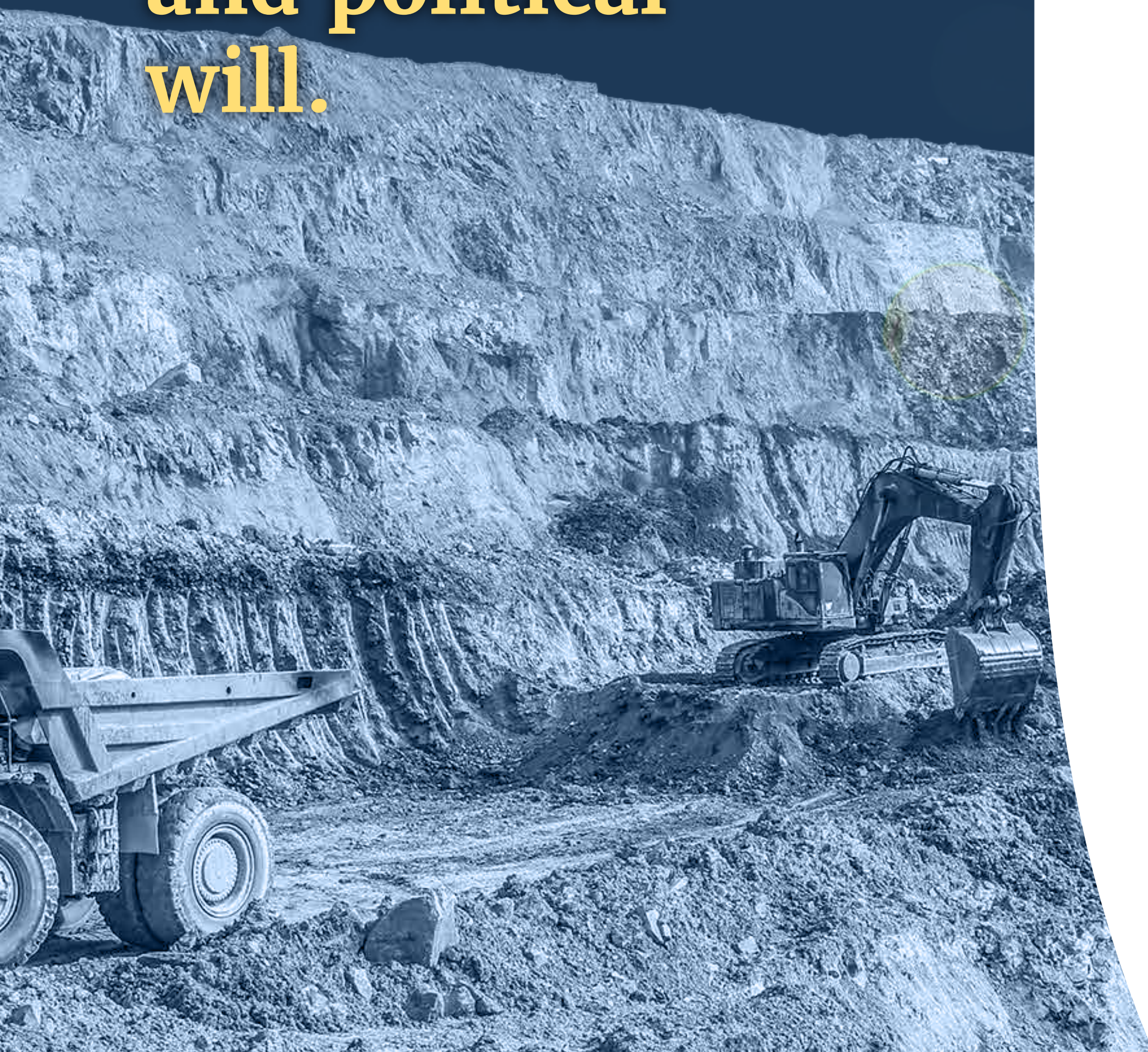


Get serious on
de-risking.

Leverage EU
strengths and
**reverse
dependencies.**

Back initiatives
with **resources
and political
will.**

**Economic
security**



**Defend the
EU approach**
amid US and
Chinese
pressure.

**Enforce
existing rules**
while
boosting
investment
and
innovation.

**AI and
digital**



Stay the course on
cutting out all
Russian oil & gas
imports.

Ramp up
renewables while
reducing
China-related
dependencies.

**Climate and
energy**



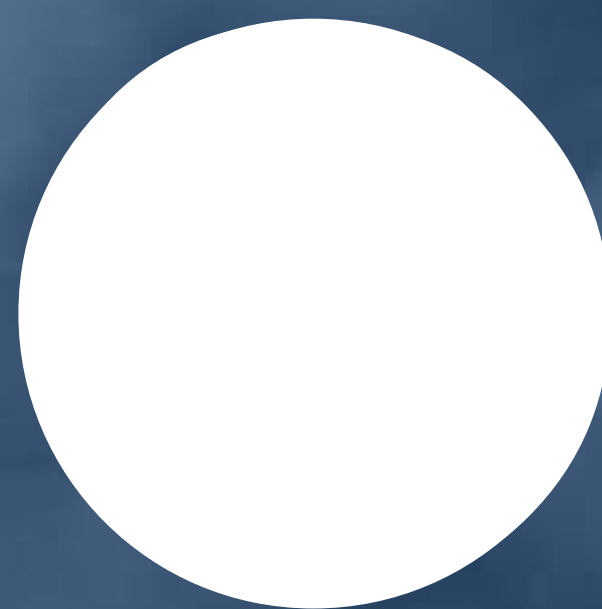
Overcome the
**‘psychology of
weakness’**: be more
assertive and put
resources behind EU
strategies.

Engage both
**like-minded
partners** and the
‘Global South’.

**Diplomacy
and partners**



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