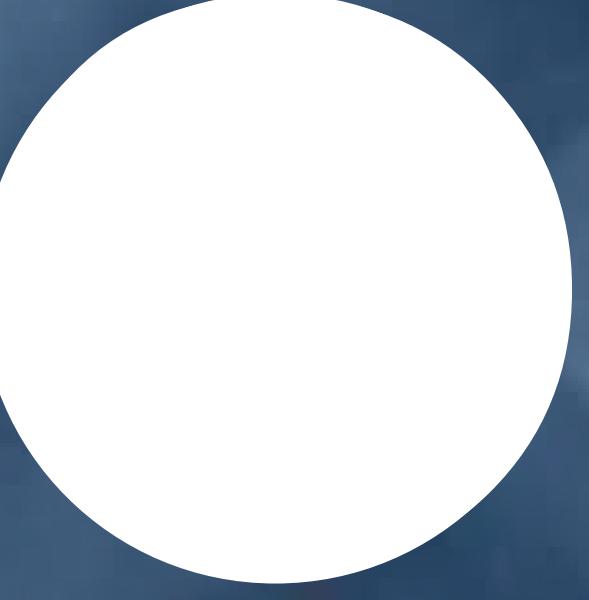


Europe at a turning point

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.



A large, open-pit quarry is shown under a dark, cloudy sky. In the foreground, a large dump truck is positioned on the left, facing right. Behind it, an excavator with a bucket is working on the rocky terrain. The quarry walls are steep and show signs of extensive mining. The overall scene is industrial and rugged.

Weaponisation of
dependencies
accelerated.

EU responses
remained
fragmented and
under-resourced.

Economic
security

AI and digital

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

Capability and investment gaps weaken EU regulatory influence.





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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