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Over the coming months, a chain of interconnected events could radically reshape Europe's political fortunes.

On the external front, a summit involving U.S. President Donald Trump, Chinese President Xi Jinping, and Russian President Vladimir Putin could take place by the end of 2026. In different ways and to varying degrees, the three leaders embody the forces driving the disruption of the international order within which the European integration model has developed.

With his aggression against Ukraine, President Putin has violated the principle of respect for the internationally recognized borders of neighboring states. By failing to pursue a rebalancing of China's consumption and savings patterns, President Xi has contributed to the disruption of global trade, which had provided a platform for sharing prosperity among countries. President Trump, meanwhile, has undermined the system of alliances and weakened confidence in the rules-based international order and in respect for international law.

A summit between these three leaders would symbolize the demise of the old order and the ascendancy of the logic that "might makes right." Against this backdrop, Europe would find itself in a position of extreme weakness.

On the internal front, a possible electoral victory for Marine Le Pen in France's presidential election in mid-April 2027 could coincide with Giorgia Meloni's coalition remaining in power in Italy's general elections, sustained by a new neo-fascist party. The two leaders, both committed to strengthening the nation-state at the expense of European institutions, would make the prospect of Alice Weidel, leader of Alternative für Deutschland, becoming Germany's next chancellor considerably less unthinkable. AfD is already well ahead in the polls, despite the party's deeply troubling ambiguities over Germany's Nazi past.

If this were simply a matter of calculating probabilities of independent events, based on opinion polls, the chances of this unusual trio of nationalist women leaders coming together would be relatively slim. But politics is driven by tectonic shifts beneath the surface, as well as by chains of action and reaction—particularly in a community of countries as deeply interdependent as those of Europe. Sovereignism in France is likely to encourage sovereignism in Germany; the latter would make a more radical version of Italian sovereignism more likely. Eventually, Europe could conceivably lurch so far to the right as to put the European project itself at risk.

Weidel, Meloni, and Le Pen could reinforce one another in their opposition to the European institutions. Under certain circumstances, all it might take for the European project to begin unraveling would be a widespread loss of faith in it. A weakening of political commitment and solidarity around the euro, for instance, could prompt the financial markets to bet on the breakup of the monetary union. The Schengen agreement, which

underpins the free movement of people and the management of Europe's external borders, could abruptly be hollowed out. EU trade agreements would become useless if national governments were to return to bilateral negotiations with third countries, such as the US or China.

But a development that could prove truly existential for Europe would combine the challenges on the external and the internal fronts. It would be caused by a shift in foreign policy—above all, in Europe's stance toward Russia. Both Le Pen and Weidel are well known for their sympathy toward Vladimir Putin's positions, their opposition to sanctions against Russia, and their resistance to European financial support for Ukraine. Meloni, who has so far publicly backed Ukraine's defense, could be tempted to change course if her only chance of remaining in power depended on an alliance with the new far-right party Futuro Nazionale, led by a nostalgic former general who once served as military attaché in Moscow and is an unequivocal supporter of Putin.

A change of course by the three largest EU countries would mean the end of European support for Ukraine, a victory for Putin and, in effect, the brazen extension of Russia's sphere of influence on the very doorstep of a Europe coming apart at the seams.

Paradoxically, such a scenario would be the product of national political choices running counter to the preferences of their citizens. European citizens feel that their continent is in danger, squeezed between powers like China, the United States, and Russia, which display aggressive or expansionist intentions. In this context, Eurobarometer surveys show that three out of four European citizens want the European Union to be stronger and have greater resources to face these challenges. Yet Europe seems unable to heed this alarm from its citizens and respond to it with its own analytical capacity, its own readiness to act and, above all, its own political leadership.

In the midst of a historic emergency, amid Russian military threats on the eastern borders, economic and territorial blackmail from the United States, and Chinese commercial pressure, Europe's political inertia remains an enigma wrapped in the power balances between the 27 nation-states and the European common institutions.

Faced with the firm reaction of Canadian Prime Minister Mark Carney to the pressures of President Trump, and the clear warnings from Mario Draghi about the risk of a decline in European society, it is hard to understand why European leaders – both from the common institutions and from national governments – fail to speak and act together. Public support would not be lacking: three out of four Europeans see the EU as an oasis of stability in a world marked by conflict and believe their country's EU membership is an advantage. Two out of three want a more effective Europe in the future when it comes to protecting citizens from global crises and security risks, and an even larger share wants the European Union to have more resources to address global challenges. Surveys need to be taken with a pinch of salt, but it is nonetheless striking that policymakers' commitment to Europe's role in the world remains so vague. There seem to be unresolved questions separating the citizens, the governments, and the European institutions, to which only the nationalists seem to address their clear but destructive response.

In recent years, even in its current configuration, Europe has managed to respond to some emergencies. In 2020, after the outbreak of the Covid pandemic, it avoided economic collapse by pooling financial resources, despite major differences between member states' budgets. In 2022, it showed unity in support of Ukraine, holding its position despite energy and military costs. In 2025, it maintained a common line in trade relations with the United States, resisting the temptation to negotiate bilaterally with Washington, and it also responded as one when Trump threatened to take Greenland from Denmark. The European position has largely been coordinated also concerning the crises in the Middle East.

However, in none of these crises has the European Union – despite having an institutional role and binding treaties – been able to forcefully assert its political, economic and demographic weight. It has not, in other words, shown the leadership that European citizens themselves seem to be asking for. It has not been able to draw on analytical capacity strong enough to anticipate the risks that later fell on citizens. It has therefore not been able to prepare for the threats that were looming and that then materialized. Finally, it has not been able to uphold, including on behalf of the rest of the world, the values of peace, democracy and open economies that Europeans identify with.

Looking at the relationship between citizens, national governments and European institutions helps explain why the situation is at a deadlock: a perverse but coherent mechanism has taken hold, one that pits the function of social protection against risks facing citizens at the national level – old age, unemployment, illness, and others – and against protection from the global risks that have emerged especially in recent decades. The protection provided by national governments allows national leaders – especially nationalist ones like Le Pen, Meloni and Weidel – to appear close to their voters, mainly through public spending, while Europe ends up looking like a constraint on spending – and therefore on protection – even as it calls for new resources to be allocated to non-national risks. This contradiction needs to be resolved.

Between Skepticism Toward European Integration and the Powerlessness of States

This paralysis has strengthened the position of those like Weidel-Meloni-Le Pen, who are skeptical of European integration and who identify with "sovereignism." According to them, the impasse simply reflects a historical reality in which national sovereignty – not European sovereignty – remains, in the public consciousness, the primary foundation of authority, both because the nation-state is the first provider of public services, and because for centuries it represented the primary, at times exclusive, framework for protecting citizens from existential risks.

The strength of this argument cannot be denied. The nation-state is historically the level of government most directly tied to citizenship. National parliaments and governments are the primary points of reference through which the popular will of each country is expressed and realized. Moreover, at the national level there is direct accountability for political decisions, which can be subjected to public judgment at elections or through other forms of citizen scrutiny.

The state also has the fiscal and administrative tools to redistribute resources and protect citizens from social risks. As mentioned, unemployment, illness, old age, and poverty are addressed above all through national welfare and social assistance systems. The existence of a shared tax system and of consolidated institutions makes the state particularly effective at guaranteeing these services because it embodies a form of solidarity largely grounded in a sense of community among individuals who share traditions, culture, and historical experience.

However, if we think of the state as the primary actor in protecting citizens from risk, we must recognize that reality has changed profoundly in recent decades. The risks facing European citizens have taken on a scale far larger than that of nation-states. One need only trace the events of the first quarter of the 21st century to see this.

Starting in 2001, terrorism carried out by religiously inspired, politically driven non-state actors such as Al Qaeda and ISIS changed daily life in Western cities in ways no single state could counter on its own. In 2008, the Western economic system was overwhelmed by a global financial crisis that supranational oversight

bodies had failed to prevent, and that found only a very provisional response through intergovernmental coordination via the G-20. In 2015, the phenomenon of continent-wide migration flows reached its peak, requiring forms of coordination between states that proved only partially effective. Finally, in 2020, the entire planet was struck by the Covid pandemic. None of the risks that have emerged in this millennium seem to operate on a national scale. The dangers linked to new disruptive technologies, the growing recourse to armed conflict, the weaponization of the arteries of global economic flows, the uncontrolled development of pathogens and more, all suggest that also in the foreseeable future threats to European citizens will not originate in their own states.

National vs Global Risks

Faced with each of the global crises of the last 25 years, nation-states have been called upon to provide at least financial protection for their citizens. And it is precisely in that context that a conflict has arisen, in terms of available resources, between protection from global risks and conventional protection from national risks. When the financial crisis broke out, spending rose sharply to reduce its impact on citizens and to rescue national financial systems. Absorbing the powerful waves of migration likewise drove up both national and European public spending. The pandemic caused an economic collapse that governments had to respond to by supporting businesses and households, although in this case some countries received part of that financial assistance through shared, rather than national, funds. Overall, it is estimated that the pandemic's impact alone on the national public debt of EU countries was equivalent to a 6 percentage-point increase in the debt-to-GDP ratio between 2019 and 2023.

Every crisis drives up national public debt. Since the causes of hardship are not national in origin, the state of necessity that forces spending breaks the link between a state's debt and that state's own political choices. Debt rises because of exogenous causes that make state spending, tax increases, or offsetting cuts to other social spending necessary. This inevitable dynamic may partly explain why the debt-to-GDP ratio has risen in almost all democratic systems without citizens having chosen it or having found any incremental benefit in it. This may also explain why European governments are subject to constant punishment at the ballot box. Because of exogenous events – that is, events outside national political choice – governments must deal with the national consequences of global crises. To protect citizens from those consequences, national governments are almost always forced to worsen the state's economic and financial condition, and therefore that of their own voters.

Because the causes of this dynamic are global risks, the cost of compensatory national responses comes to be understood as the "cost of globalization," and this produces a view of the nation as a victim of external contingencies or interests – and ultimately a narrative that justifies the "coherence" of nationalism. This rhetoric feeds on antagonism toward the European Union, whose primary mission, ever since the Single Market Treaty, was to open borders between countries – and as such it did not appear as a system of protection for citizens, but rather as a mechanism for lowering protectionist barriers. The problem is that even when national compensation is offered, and even when it is wrapped in an antagonistic narrative critical of the EU, global risks are not thereby resolved – indeed, they persist. Politics loses its capacity to respond, and democracy itself sees its credibility eroded.

The Relationship Between Risk and Financial Resources is a Big Part of the Problem

The relationship between geopolitical choices, public debt, and European finances lies at the heart of the dilemma: a) global risks emerge with no European prevention in place; b) nation-states must compensate citizens for the consequences; c) finally, the European Union limits the room for national governments' fiscal indiscipline to preserve the area's financial stability.

Within this inefficient dynamic, the responses provided at the national level are often opportunistic. Italian Prime Minister Giorgia Meloni, for example, through her vigorous nationalist rhetoric, draws on global crises to feed the victim narrative of the Italian nation. Military spending called for by the European Union gets redirected to civilian spending – the Strait of Messina Bridge being the textbook example – as a way of exploiting the fiscal leeway granted by the EU for domestic electoral gain. The result is that Meloni has become the longest-serving leader of an Italian government, all while obscuring the European financial benefits that have kept the economy afloat during her years in power.

German chancellors Olaf Scholz and Friedrich Merz have used global crises to project a global role onto Germany – not onto Europe – with the explicit reasoning that, thanks to more favorable starting fiscal conditions than those of partner countries, the German government can mobilize more resources than other countries to rearm, thereby automatically gaining a leadership role in Europe – while staying silent on the fact that it is precisely German opposition to issuing common European debt that makes Germany's financial advantage possible in the first place.

The French position is harder to pin down, since it represents every possible shade along the sovereignist-Europeanist spectrum, without the major parties sharing even a common platform: the inconsistency is resolved through a tacit consensus in favor of increased public spending, both national and European, with the result that French public debt keeps growing, undermining France's own calls for cooperation in Europe.

Faced with such inconsistency, it is necessary to rethink the framework within which nation-states operate because national isolation is by now unrealistic, as the mechanisms producing environmental, social and fiscal imbalances increasingly transcend national borders. In this sense, the idea of the "general will of the people" has become almost purely symbolic, stripped of real political force. The traditional triad symbolizing state authority – the sword, the currency and justice – is now confronted with the fact that the foundations of national sovereignty are all being called into question. This is true of military defense capacity; it has long been true of monetary autonomy; justice is increasingly a matter of coordination, even while retaining a significant degree of local autonomy; and the boundaries of legislative autonomy are increasingly flexible. And yet, for sovereignists, the European Union remains foreign to a notion of sovereignty defined by unity, indivisibility, permanence and the other defining traits of the national political tradition. It is this idea that keeps certain key domains of national sovereignty under the exclusive control of member states: law enforcement, justice, military affairs, foreign policy and taxation. Unless this conventional notion of sovereignty is overcome in the face of global risks, Europe will not be able to act with the scale and speed that the vast majority of its citizens are demanding.

The Case of the Russo-Ukrainian War

The case of the Russo-Ukrainian War shows the limited scope remaining to the common institutions in a foreign policy and military crisis.

Because Article 41(2) of the Treaty on European Union (TEU)¹ legally prohibits using the standard EU budget for military operations or lethal equipment, the EU cannot act as a truly supranational military command. Instead, supranational bodies (like the European Commission) use financial, legislative, and industrial levers to empower, finance, and legally shield traditional intergovernmental cooperation, which is based on the sovereign military decisions of member states.

Formally established through the *White Paper for European Defence* and its operational *Defence Readiness Roadmap 2030*, the EU response to the military challenge represents an institutional hybrid that combines supranational decision with intergovernmental implementation.² This model recalls the “intergovernmental empowerment” envisaged almost three decades ago by American scholars of European institutions.

The EU has underestimated the issue concerning its governance because it has long been a peace project in a global order in which the United States willingly assumed the dominant role of military protection and political superiority. Against this backdrop, the EU has often avoided the vertical conception of power ingrained in the military priorities. In fact, the EU has chosen a post-modern exercise of power in which rules and norms constrain politics. This model has characterized the first phase of the Russo-Ukrainian War, in which military support was guaranteed by NATO under President Biden’s leadership. After the commencement of President Trump’s second term, things changed very dramatically for Europe, which still has to carve out a convincing governance for sharing new existential challenges. Given the described challenges on the external and internal fronts, calls for a new federal structure in the European Union may not be timely enough.

A Possible, Though Dangerous, Solution Through a State of Emergency

Like every democracy, also European democracy rests on a duality: on the one hand, the principle of majority rule and popular sovereignty; on the other, the protection of rights through laws and constitutional guarantees.

¹ <https://verfassungsblog.de/the-white-paper-readiness-2030/>

² The blueprint effectively mobilizes up to €800 billion for security through this hybrid architecture, functioning along several core pillars:

1. Supranational Fiscal Flexibility (The Escape Clause)

Instead of centralizing tax-and-spend military power in Brussels, the Commission alters its macro-economic rules to let individual capitals spend their own funds through the mechanism of the [National Escape Clause \(NEC\)](#) granting to sovereign states a 4-year temporary exemption from standard debt rules, creating up to €650 billion in domestic fiscal space (up to 1.5% of GDP per country) to build their own workforces and arsenals.

2. Supranational Debt for Intergovernmental Buying

The EU uses its top-tier credit rating to borrow money centrally, but distributes it to fuel state-to-state procurement coalitions. In this case, the mechanism is the [Security Action for Europe \(SAFE\) regulation](#), which provides a €150 billion loan fund backed by the central EU budget. To unlock these ultra-long-term, low-interest loans, member states must form collaborative procurement groupings involving at least two countries. The supranational carrot directly incentivizes intergovernmental synergy.

3. Binding Industrial Targets over Sovereign Silos

While nations maintain command over their armies, the Commission forces their industrial policies to converge by setting strict regulatory criteria.

- EU-First Sourcing: SAFE loans require equipment to feature a minimum of 65% EU/EEA/Ukraine origin components.
- Aggregated Demands: The Roadmap drives member states toward an aggregated joint procurement target of 35% to 40% by 2027–2030, intentionally tackling the historical issue of fragmented European defense markets.

4. Cross-Border Flagship Platforms

Supranational planning maps the gaps, but intergovernmental “Capability Coalitions” build the actual walls. The [European External Action Service \(EEAS\)](#) and Commission orchestrate four critical multi-national flagships: [\[1, 2, 3\]](#)

- European Air Shield & European Space Shield
- European Drone Defence Initiative
- Eastern Flank Watch / Eastern Border Shield

If Europe is to be entrusted with the task of protecting citizens from supranational or global risks, it is necessary to establish a constitutional mechanism that transfers political powers to a body operating by majority rule.

Such a mechanism could be the "red button" – that is, a request, in the event of a grave potential risk or an emergency, to transfer political competences from the national to the supranational level under the majority principle: a majority of the countries endorsing the declaration of emergency could bind the Union to decide by majority vote on the emergency and to jointly raise the necessary resources. Declaring a "European state of emergency," rather than reducing democratic guarantees, as tends to happen under national law, would instead increase them through recourse to majority voting – and the related preliminary discussion – in the European Council.

The principle of emergency within the European Union is normally invoked for the opposite reasons. If there is a migration emergency, free movement under the Schengen Treaty can be suspended – that is, national prerogatives are strengthened; if there are conditions of financial or economic emergency, fiscal discipline rules can be suspended. Almost always the goal is to shift the compensatory burden of an emergency from the national to the European level, without this translating into any shared decision-making capacity. Recently, during the State of the European Union address, EU Commission President Ursula von der Leyen hinted at an "Emergency Protocol" that will need to be designed.

In fact, the emergency principle needs to be reversed: if a potential military threat, or a condition of health, environmental or other danger were to arise, a member state could initiate a request to share political choices, aiming to secure a majority of member states and citizens. This decision would transfer to the Council the authority to choose by majority vote which measures are necessary to protect Europeans. In this context, decisions on funding such policies would follow naturally, rather than serving as grounds for exceptions to national public spending rules. Greater rigor on national spending would be matched by a path toward building common fiscal capacity: it would become justified and important to have resources available to counter shared risks, following a principle of redistributing benefits according to need.

Finally, the power to declare a state of emergency would spur productive competition among member states – and between them and the European Commission – in developing the capacity to foresee common dangers; it would drive the creation of the preventive analytical capacity Europe currently lacks; and it would fuel public debate over the ideas and tools with which Europe can face the future.