

# Welcome to to the First Issue of *W.A.R. on the Horizon*

(03 DECEMBER 2025)

## Understanding a World on the Brink: Why This Publication Exists

In moments of accelerating geopolitical turmoil, strategic uncertainty, and the steady erosion of long-held assumptions about European and global security, analysis cannot rely on intuition, inertia, or institutional memory alone. The **ontological basis** of W.A.R. on the Horizon rests on a simple but stark reality: the security environment is no longer cyclical or episodic — it is transformational. The very nature of deterrence, state power, and alliance cohesion is being reshaped in real time by technological disruption, industrial rearmament, hybrid conflict, and shifting political will across democracies and autocracies alike. To interpret this world as it is becoming — not merely as it has been — requires a more granular, systematic engagement with developments that portend strategic discontinuity.

We use W.A.R. as an acronym for Wider European Armed Resilience — a concept rooted in strengthening Europe's collective security posture to prevent conflict, not provoke it. Our commitment is to peace through resilience. We believe that robust defense and preparedness are essential pillars of sustainable peace.

Equally important is the **epistemological foundation** of this newsletter. Reliable knowledge in security affairs demands disciplined sourcing, structured skepticism, and a refusal to treat narratives as facts. Europe today faces a dense fog of information warfare, politically motivated analysis, and emotionally charged commentary. *W.A.R. on the Horizon* therefore embraces a methodological commitment to **triangulation** — grounding each assessment in the intersection of primary reporting, institutional analysis, and empirically observable capability shifts. In doing so, this publication aims not to speculate but to *illuminate*, giving readers a rigorous, coherent understanding of a rapidly evolving security landscape.

To all readers of this inaugural issue: **welcome**. Whether you work in policy, research, industry, or military affairs — or simply refuse to look away from the strategic storms gathering at Europe's borders — this publication is designed for you. The horizon is darkening, but clarity is still possible.

## **What Awaits You in This First Issue**

This debut edition of *W.A.R. on the Horizon* captures a week of extraordinary geopolitical density — a week that reveals the structural forces reshaping Europe’s defence environment.

### *Key Developments — A Strategic Whiplash Across Europe*

From Europe’s record-setting defence-industrial surge to unfolding diplomatic tensions surrounding Ukraine peace proposals, this section distills the most consequential developments of the week. Readers will find analysis of Russian drone incursions into Moldova and Romania, Poland’s strategic submarine acquisition from Sweden, EU manoeuvring over frozen Russian assets, a massive innovation surge through EDF 2025, as well as the IMF–Ukraine agreement. The edition also covers major strategic realignments in Canada, rising EU industrial consolidation, and France’s re-engagement with voluntary military service. Each item is not merely summarized — it is situated within its broader strategic significance.

### *Statistics of the Week — OPLAN DEU and the Return of Mass Mobilisation*

Using this week’s data visualisation, we unpack Germany’s 1,200-page OPLAN DEU — NATO’s largest reinforcement plan since the Cold War — explaining its logistics logic, mobilisation scale, and infrastructure overhaul. The numbers reveal a disquieting truth: deterrence now depends on industrial stamina and national infrastructure at least as much as on deployed forces.

### *Map of the Week — The Eastern Front Under Pressure*

Drawing on the ISW/Critical Threats operational map, the issue assesses the intensifying Russian push across Donetsk and Luhansk, the urban struggle for Pokrovsk, and Ukrainian counteractions along multiple axes. The section highlights not only frontline dynamics but also the significance of partisan activity deep in occupied zones.

### *Photo of the Week — NATO–Ukraine Defence Innovation Enters a New Phase*

The featured photograph captures the launch of **UNITE – Brave NATO**, the Alliance’s first joint defence-innovation programme with Ukraine. Beyond the symbolism, this marks a doctrinal shift: Ukraine is now a co-producer of NATO-relevant technology, not merely a recipient of aid.

### *Infographic of the Week — France Reimagines National Service*

This visual spotlight examines France’s return to a voluntary military service model — a hybrid force posture designed to expand manpower without reverting to conscription. Macron’s framing speaks volumes about how European societies are internalizing the long war.

### *Analysis — The SAFE Mechanism and Europe's Emerging Defence Cartography*

The concluding analysis offers a deep examination of the EU's €150B SAFE mechanism as a new geopolitical filter. Canada joins; the UK walks away; Türkiye misses the entry window. What emerges is a strategic landscape where defence-industrial integration increasingly defines political alignment — and exclusion carries real consequences.

This section synthesizes technical, industrial, and geopolitical dimensions into a single coherent evaluative framework.

### **Conclusion: A New Security Era Requires New Ways of Seeing**

*W.A.R. on the Horizon* is founded on the belief that Europe is entering a prolonged era of strategic contestation that must be understood with intellectual honesty, analytical discipline, and historical awareness. This first issue lays down the blueprint: multi-layered situational awareness, grounded in evidence, structured by themes, and always attentive to the horizon rather than the rear-view mirror.

Thank you for joining us at the outset. The weeks ahead will not grow calmer — but together, we can at least ensure they grow clearer.



## 1. KEY DEVELOPMENTS

### **Surge in Europe's Aerospace & Defence Output Signals Strategic Shift**

According to the latest report from ASD – Aerospace and Defence Industries Association of Europe, Europe's aerospace and defence industry saw a robust 10.1 % growth in turnover in 2024, reaching €325.7 billion (≈ USD 378 billion). Defence — the most dynamic segment — expanded by 13.8 % to €183.4 billion, fuelled primarily by increased military procurement following Russia's 2022 invasion of Ukraine. The broader aerospace (civil aircraft) and space segments also posted gains (6.0 % and 3.1 %, respectively), resulting in a record employment level of 1.1 million directly and around 4.2 million indirectly across Europe. Investments in research and development rose to €25.2 billion, underscoring a deeper structural repositioning rather than a temporary surge.

This surge reflects a more sustained and strategic turn: Europe appears to be laying the industrial groundwork for long-term strategic autonomy. However, even as this growth is impressive, the ASD itself cautioned that European aerospace and defence firms still lag behind global competitors in innovation capacity. If Europe fails to deepen coordination — for example through more EU-level procurement harmonization and innovation support — the current momentum risks being unsustainable. In sum: output and capacity are rising sharply, but whether this translates into long-term strategic resilience depends on how effectively industrial and policy coordination keeps pace.

### **U.S.-Backed Peace Plan for Ukraine Sparks Strategic Shockwaves in Europe**

The recently revealed 28-point peace plan, championed by the Donald J. Trump administration as a potential path to end the war in Ukraine, reportedly drew heavily on a “non-paper” from Moscow. According to sources cited by Reuters, the document — initially handed to U.S. officials following a Trump-Zelenskiy meeting in Washington — laid out terms long demanded by the Kremlin, including sweeping territorial concessions by Ukraine. The initial draft quickly provoked outrage across Ukraine, the United States and Europe. Even within the U.S. government, senior figures including Marco Rubio reportedly voiced deep skepticism that Kyiv would ever accept the plan's core demands.

In response, European leaders — notably the E3 trio of United Kingdom, France and Germany — drafted a counter-proposal. Their version retains the basic U.S. framework but strips out or substantially reworks the most Moscow-friendly clauses. As of late November 2025, U.S. and Ukrainian negotiators reportedly agreed a revised 19-point version could serve as the basis for further talks — though the thorny issues of territorial sovereignty, troop limitations, NATO membership, and security guarantees remain unresolved.

## **Moldova summons Moscow's Ambassador after Russian drone incursions**

On 26 November 2025, Moldova's Foreign Ministry publicly condemned a wave of drone incursions by Russian Federation, summoning Moscow's ambassador to issue a formal protest. According to government reports, six drones penetrated Moldovan airspace, one crashing onto a rooftop in the village of Florești near the Ukrainian border — another reportedly flew through Moldova toward Romania. The Ministry described the episode as an “unacceptable intrusion” and a “serious violation of Moldova's sovereignty,” warning it constituted a direct threat to both national and regional security.

Moscow's envoy, however, rejected the claims — calling them a possible “false-flag operation” intended to further strain already deteriorated Moldova-Russia relations. In parallel, NATO air forces scrambled jets when Russian drones breached Romanian airspace on the same day, underscoring the broader pattern of aerial violations spanning across front-line and neighbouring states. The incident intensifies concerns that the war next door is increasingly spilling over into neighbouring non-combatant states, fueling fears of destabilization beyond the immediate conflict zone.

## **Poland Picks Sweden's A-26 Submarines — A Turning Point for Baltic Security**

On 26 November 2025, Poland formally selected Saab — Sweden's leading defence firm — to deliver three of its advanced A-26 (Blekinge-class) submarines under Warsaw's “Orka” programme, in a deal valued at roughly 10 billion zlotys (≈ USD 2.73 billion). The A-26 was judged the best fit among multiple contenders — including firms from Germany, Italy, France, Spain, and South Korea — due to its optimal design for shallow Baltic-Sea conditions, delivery timeline, and operational capabilities tailored to seabed warfare. The agreement also includes a “gap-filler” training submarine to be provided to Poland ahead of the full delivery, with the first units expected by 2030 and the contract to be finalized by the second quarter of 2026.

The decision marks a significant shift in naval balance and collective defence posture in the Baltic region. The A-26 submarines — non-nuclear, quietly powered by Stirling engines, and equipped with a multi-mission dive lock for unmanned systems or special operations — are specifically designed for undersea surveillance, infrastructure protection, and anti-access/area denial missions in shallow waters. The Polish-Swedish deal signals a deepening of defence-industrial cooperation between EU and NATO Baltic states and reinforces Warsaw's readiness to counter potential maritime threats from the east — an unmistakable response to heightened security concerns in the wake of Russia's 2022 invasion of Ukraine.

## **European Union Ramps Up Push to Use Frozen Russian Assets for Ukraine Aid**

The EU — under pressure from Kyiv’s deepening financial needs — is racing to finalize a plan to redirect roughly €140–210 billion in frozen Russian sovereign assets into a “reparations loan” for Ukraine covering 2026-2027. Under the proposal, these assets would not be confiscated outright, but instead lent to Ukraine; repayment would only come when reparations from Russia materialize. The EU’s executive branch, European Commission, is reportedly preparing legal text — intended to resolve lingering concerns over liability and precedent — in hopes of persuading skeptical member states, notably Belgium, which currently hosts the bulk of the frozen funds.

This move reflects a strategic attempt by Europe to assert greater leverage over the conflict’s financial aftermath — including reconstruction and reparations — while minimizing long-term legal and financial risks for member states. If successful, the loan would relieve the pressure on European public budgets at a time when many governments face competing fiscal constraints. However, the initiative remains fragile: Belgium’s insistence on guarantees against future litigation and the requirement of unanimous consensus among all EU states (including those increasingly sympathetic to Russia) pose significant obstacles.

## **European Defence Fund (EDF) 2025 — Record Response Underscores Surge in European Defence Innovation**

The 2025 funding round of the EDF has generated an unprecedented wave of interest: a total of 410 project proposals were submitted for the €1.065 billion envelope, marking roughly a 38% increase compared to the previous year. This surge reflects growing engagement from both established defence-industry players and emerging innovators across Europe, signaling that the Fund is becoming increasingly central to the continent’s drive for collaborative defence research and capability development.

The breadth of proposals — reportedly spanning advanced sensors and radars, AI-enabled command and control systems, underwater- and naval-warfare technologies, space-based ISR, integrated soldier systems, and more — suggests that European defence actors are aligning closely with the evolving security environment. If even a portion of these initiatives enter implementation, the EDF 2025 call could mark a significant inflection point: accelerating Europe’s modernization of defence industrial capabilities, enhancing interoperability among member states, and laying groundwork for deeper strategic autonomy.



## **Leak of Yuri Ushakov–Steve Witkoff Call — Kremlin Accuses Unknown Actors of Hybrid Warfare**

The leak of an October 14 phone call between Russian presidential aide Yuri Ushakov and U.S. envoy Steve Witkoff — in which Witkoff reportedly coached how Moscow should present its Ukraine peace proposal to U.S. leadership — has triggered an immediate and forceful reaction from Moscow. Russian officials characterised the leak as an "unacceptable intrusion" and a form of "hybrid warfare" aimed at derailing ongoing Russia–U.S. peace discussions. Ushakov condemned the publication of what he insisted were private, partly encrypted conversations and vowed to raise the matter directly with Witkoff.

The incident adds a new layer of distrust not just between Russia and the West — but potentially within the structures handling diplomacy. The leak undermines the confidentiality critical for high-stakes negotiations involving nuclear powers and may stall or complicate further contacts. Given the ongoing war in Ukraine and the sensitivity of any proposed truce or territorial agreement, the exposure of behind-the-scenes dialogues could weaken incentives for compromise and deepen scepticism among Kyiv's European allies about the legitimacy and neutrality of U.S.-backed diplomatic channels.

## **International Monetary Fund (IMF) Agrees Four-Year, ~US\$8.2 B Programme for Ukraine**

The IMF and Ukrainian authorities reached a staff-level agreement on 26 November 2025 for a new 48-month funding package under the Extended Fund Facility (EFF), offering up to US\$8.1–8.2 billion to Kyiv. The deal comes against the backdrop of a prolonged war with Russia, severe pressure on public finances, and a looming financing gap estimated at US\$136.5 billion for 2026–2029, including about US\$63 billion needed in 2026–27 alone. The programme aims to anchor macroeconomic stability, restore debt sustainability, and ensure Ukraine's external viability — while pushing through structural reforms addressing corruption, governance deficits, and informality in the economy.

While modest relative to Ukraine's full financing needs, the IMF deal is critical as a stabilizing anchor and a signal to other international donors and institutions. By conditioning the support on reforms — such as strengthening fiscal revenue, tightening public procurement, and reforming state-owned enterprises — the agreement nudges Kyiv toward alignment with broader governance and transparency norms. The IMF also emphasized that the programme will be "recalibrated as needed at each review depending on progress towards a resolution of the war," underlining how closely Ukraine's financial trajectory remains tethered to political and military developments.

## **Canada Unveils Major Defence-Industry Push — Breaking Ties With the U.S. Reliance**

On 4 November 2025, the government of Canada announced a sweeping C\$64 billion defence spending package — with plans to inject another C\$81 billion over the next five years — aimed explicitly at rebuilding and reshaping its domestic defence-industrial base and reducing dependence on United States suppliers. Under the new plan, a newly created Defence Investment Agency (DIA) and a broader “Defence Industrial Strategy” will prioritize Canadian procurement: domestic production of equipment, munitions, guided-missile destroyers, increased ammunition and vehicle manufacturing, and investments in dual-use technologies such as AI, cyber and space launch capabilities. This shift reflects growing unease in Ottawa over the volatility and unpredictability of U.S. policy under the current administration.

Canada's shift signals a strategic realignment with profound implications for European and transatlantic security dynamics. By building sovereign defence-production capacity and diversifying suppliers, Ottawa aims to reduce its vulnerability to U.S. policy swings — a move likely to resonate in Western alliances already under strain from shifting U.S. priorities. The emphasis on dual-use and advanced technologies suggests Canada may evolve into a more capable and autonomous security partner — one less tethered to U.S. supply chains, more able to coordinate with European defense industries, and potentially more willing to share its capacities in NATO or Arctic-Northern missions.

## **Commission Pushes for Rapid Defence Industrial Consolidation — European Commission Speech Signals New Momentum**

In a plenary address before the European Parliament on 24 November 2025, Andrius Kubilius — the Commissioner responsible for defence industry and space — laid out a renewed commitment to accelerate Europe’s transformation into a resilient defence-industrial bloc. The speech accompanied the unveiling of the Union’s 2025 defence policy push under the umbrella of Readiness 2030. Kubilius emphasized that what once was considered exceptional — heavy defence investment, coordinated procurement, rapid deployment capacity and shared production — has now become Europe's baseline. He argued that only by consolidating procurement logic, harmonizing defence-market rules, and leveraging EU-level instruments can member states achieve the scale and speed necessary to counter persistent threats on their eastern borders.

The address also underscored a marked shift in the role of EU institutions vis-à-vis national capitals: the Commission aims to redress fragmentation in European defence supply chains and ensure interoperability across member states. Kubilius called for full use of the new defence financing frameworks (for instance, the European Defence Industrial Programme — EDIP, and the Security Action for Europe — SAFE), stressing that the Union must now behave like a cohesive strategic actor rather than a collection of individual states.



## **UNITE – Brave NATO: NATO-Ukraine Launches First Joint Defence Innovation Programme**

On 25–26 November 2025, NATO and Ukraine officially unveiled UNITE – Brave NATO — the first-ever joint NATO-Ukraine initiative aimed at rapidly scaling battlefield-ready defence technologies. The programme seeks to harness both Ukrainian and Allied innovation capacities by funding collaborative projects between Ukrainian defence-tech firms and NATO-member companies. Under the pilot round, slated for early 2026, a total of €10 million (split equally between NATO and Ukraine) will be made available. The call for joint applications opens in February 2026, with awards expected in spring at the next NATO-Ukraine Defence Innovators Forum.

Although the initial tranche is modest, UNITE – Brave NATO carries strategic importance beyond its headline budget. It signals a shift in how NATO views Ukraine — not just as a recipient of aid, but as an innovation partner. The focus areas of the first competition — counter-unmanned aerial systems (c-UAS), air-defence enhancements, and secure battlefield communications — reflect urgent operational needs identified on the front lines. If the pilot succeeds, the partners have already committed to scaling the programme to €50 million in 2026. According to NATO officials, this framework allows the Alliance to acquire real-time lessons from ongoing combat experience while helping Ukraine build a sustainable defence-industrial base.

## **France Restores Military Service — Says “Voluntary” Is the New Reality**

On 27 November 2025, Emmanuel Macron announced that France would reintroduce a voluntary military service, to begin by mid-2026, as part of a wider response to mounting geopolitical dangers. The new programme targets 18- and 19-year-olds and spans 10 months of service restricted to French territory. Launching with an expected 3,000 volunteers in 2026, Paris aims to scale the scheme to 10,000 per year by 2030 and potentially 50,000 annually by 2035, at a cumulative cost of approximately €2 billion. Macron emphasized this is not a return to universal conscription abolished in the late 1990s — rather, a “hybrid army model,” combining a professional core, reservists, and voluntary national service.

The decision reflects growing anxiety in Paris — and across Europe — about a deteriorating security environment, driven largely by Russia’s aggressive posture and doubts over long-term U.S. security commitments. The programme aims to expand France’s military manpower pool and build a robust reserve capability: according to official projections, the plan could boost the number of reservists — currently around 47,000 — toward a target of 80,000 by 2030. By institutionalizing this voluntary service, France aligns with a growing trend among European states to reinforce national defence through citizen-militia models rather than relying solely on professional standing forces — a shift that may reshape burdensharing and readiness across NATO and the EU.

## **Romania Seals €626 M Mistral Deal — Reinforcing Eastern-Flank Air Defence**

On 27 November 2025, Romania signed an agreement with France to acquire 231 Mistral MANPADS and 934 missiles — part of a broader joint-EU procurement initiative — at a cost exceeding €626 million. The contract also includes training, simulator systems, ammunition, documentation, and logistical support. Initially approved by Romanian lawmakers in 2022, the procurement reflects Bucharest's pressing need to bolster short-range air-defence capabilities amid repeated drone intrusions and the spillover of the war in Ukraine across its borders.

The acquisition marks a significant strengthening of NATO's eastern flank, especially for a country sharing a 650 km border with Ukraine. The Mistral system — developed by MBDA — uses an advanced infrared-seeker missile with a range of up to 8 km, capable of engaging low-flying aircraft, helicopters, cruise missiles, and increasingly common threats such as drones. By integrating Mistral MANPADS with existing assets — such as F-16s, Patriot batteries, HIMARS, short-range surface-to-air missiles and Gepard anti-aircraft systems — Romania aims to build a layered, mobile air-defence architecture better suited for asymmetric threats.

## **Fierce Battle for Pokrovsk — Strategic Node Under Siege in Eastern Ukraine**

On 27 November 2025, Russian Armed Forces claimed they have surrounded Pokrovsk — a key city in eastern Ukraine's Donetsk oblast — and asserted control over roughly 70 % of its territory. According to Russian official statements, their assault units advanced into the northern sectors of the city and have reportedly taken surrounding villages, putting heavy pressure on the defenders and increasing the risk of encirclement.

Yet, the Ukrainian Armed Forces rejected Russian claims of a full takeover. Kyiv's command insisted fighting remains intense in the city centre, with active Ukrainian resistance preventing the complete capture of Pokrovsk. Independent analysts describe the situation as a grinding urban battle rather than a definitive Russian victory — with both sides suffering heavy losses.

## **Pope Leo XIV in Türkiye — A Global Call for Peace Amid Turmoil**

On his first overseas trip as pope, Pope Leo chose Türkiye — a predominantly Muslim country with historic ties to both Christianity and Islam — as his first port of call, in part to mark the 1,700th anniversary of First Council of Nicaea. At a high-profile meeting in Ankara with President Recep Tayyip Erdoğan and other Turkish leaders, Leo warned that the world is witnessing a “heightened level of conflict ... fuelled by prevailing strategies of economic and military power.” He went so far as to describe the current global turmoil — spanning Gaza, Ukraine, Syria, and others — as a “Third World War ... being fought piecemeal,” with humanity’s future hanging in the balance.

Beyond rhetoric, the papal visit signals a strategic repositioning of the Vatican as a moral — and potentially diplomatic — voice in global security affairs. By arriving in Türkiye, engaging with Muslim-majority leadership, and emphasizing universal themes of justice and peace, Pope Leo is staking out a posture that transcends narrow sectarian or regional alignments. His intervention comes at a time of deep fractures across Europe, the Middle East, and beyond: it may not alter power balances on its own — but it raises the moral and ethical stakes in ongoing conflicts, and underscores the risk that a patchwork of local wars could morph into a systemic global crisis.

## **Europe Contemplates “Unthinkable” — Retaliation Against Russia’s Hybrid Warfare Gains Traction**

According to a recent report by POLITICO Europe, several EU and NATO capitals have moved from rhetorical condemnation of Moscow’s hybrid-war campaign to seriously considering offensive — rather than purely defensive — responses. Diplomats and senior officials are reportedly discussing options such as joint offensive cyber-operations targeting Russian military or industrial infrastructure, faster and collective attribution of hybrid attacks, and surprise NATO military exercises near Russia’s borders. This marks a striking shift: what was seen in prior years as politically taboo — planning active retaliation against a nuclear-armed state — is now being framed by some as necessary to deter what they view as an escalating campaign of sabotage, drone incursions, cyber-attacks, and other “gray-zone” tactics across Europe.

If this shift crystallizes into policy, the implications for European security doctrine and deterrence theory could be profound. A move toward offensive cyber or limited kinetic retaliation — even short of open war — would signal that NATO and the EU are prepared to treat hybrid attacks as first-class security threats deserving responses proportional to conventional military aggression. This could deter future operations by Moscow, but also risks significantly escalating the conflict — especially given the challenges of attribution, escalation control, and avoiding unintended civilian or infrastructural damage. The debate therefore reflects a broader existential reckoning: whether Europe is willing to cross the Rubicon from passive defense and sanctions to proactive and possibly escalatory deterrence.

## **Vladimir Putin Warns Europe: Seizing Russian Assets Would Trigger Retaliation**

In a blunt message to Brussels and EU capitals, Russian President Vladimir Putin warned that any move to repurpose frozen Russian sovereign assets — currently held in European financial depositories — would be considered theft, and would provoke retaliatory measures from Moscow. According to reporting by POLITICO Europe, the Kremlin frames such plans as a violation of property rights and has threatened “appropriate and forceful responses,” including legal action or seizure of foreign assets, should the EU go ahead.

The warning underscores a broader gamble by Moscow: the Kremlin is betting that the legal and financial risks of retaliation — including potential cross-border asset seizures, protracted litigation, and damage to investor confidence in European financial markets — may deter the EU from moving forward with the proposal. If enforced, Russia’s reaction could escalate economic and diplomatic tensions and create a precedent with profound implications for sovereign asset freezes and post-war reparations frameworks.

## **OPLAN DEU — Germany’s Secret Blueprint for Massive NATO Mobilisation**

According to recent reporting in The Wall Street Journal, a classified 1,200-page military-logistics document known as OPLAN DEU outlines how Germany would become the central transit hub for a rapid deployment of up to 800,000 NATO troops — including forces from the United States and other allies — to the eastern front in the event of hostilities with Russia. The plan maps out in detail the routes troops and materiel would take — via ports, railways, roads and rivers — and anticipates extensive cooperation between military, civilian infrastructure actors, private firms, and governmental agencies.

Germany’s decision to draft OPLAN DEU marks a clear structural shift — from reactive defence budgeting toward a Cold War-style “whole-of-society” mobilisation posture. The plan acknowledges significant challenges, including decades of underinvestment in transport and logistics infrastructure, the ongoing depletion of standing forces, and the unprecedented logistical burden of facilitating mass troop movement while maintaining civilian stability. If implemented, OPLAN DEU would make Germany more than a frontline contributor — it would become the backbone of NATO’s reinforcement corridor toward Eastern Europe.

## **Marco Rubio Will Skip Key NATO Meeting — Raises Questions Over U.S. Commitment to Ukraine**

U.S. Secretary of State Marco Rubio plans to miss the December 3, 2025 NATO foreign ministers meeting in Brussels — a highly unusual absence at what many regard as the most consequential transatlantic diplomatic gathering this year. Instead, Deputy Secretary Christopher Landau will represent Washington. The decision comes at a delicate moment: Europe and NATO allies are still grappling with fallout from leaked U.S.-draft peace proposals for Ukraine, which have stirred concern about U.S. intentions and the future of alliance cohesion.

Rubio's no-show risks deepening unease among European allies at a time when demonstrable U.S. leadership is critical. Many view attendance by Washington's top diplomat as a signal of commitment; his absence — even if delegation continues — may reinforce perceptions that the U.S. is deprioritizing transatlantic coordination, especially over Ukraine. With major decisions on military, financial, and strategic support for Kyiv looming, the optics of U.S. disengagement could weaken trust within NATO and embolden Moscow.

## **UK Withdraws from Security Action for Europe (SAFE) — Talks Collapse Over Cost Dispute**

On 28 November 2025, the government in London announced that negotiations to allow the UK to formally join the European Union's €150 billion defence fund SAFE have collapsed. The breakdown came just two days before the deadline for concluding the deal. The UK's EU-relations minister affirmed that Britain will not sign any agreement that fails to meet the criteria of national interest and provides "value for money."

Under current rules, while UK defence firms can still participate under "third-country" status, their contribution to any project is capped: non-EU sourcing cannot exceed 35 % of total component value. This status significantly limits British industry's access compared with what full membership would have allowed, undermining ambitions for deeper integration of UK defence capabilities with EU rearmament efforts. The collapse is widely regarded as a serious blow to the post-Brexit "reset" of UK-EU security cooperation — just months after London and Brussels heralded a new defence and trade partnership.

## **Former NATO Officer Sounds Alarm — Calls for Total Societal and Economic Overhaul to Meet Threats**

A senior former NATO officer has publicly warned that Europe must radically transform not only its defence posture, but the very structure of its societies and economies to cope with mounting global threats. The warning underscores that persistent reliance on pre-war assumptions — limited defence budgets, fragmented supply chains, and underdeveloped resilience — is no longer tenable. According to his assessment, only a comprehensive “all-of-society” realignment — involving defence industrial scaling, civil-infrastructure preparedness, economic diversification and social mobilization — can provide the resilience necessary to deter or absorb aggression from states willing to combine military, hybrid and economic coercion.

This call reflects a growing recognition among senior security practitioners that conventional force buildups and military alliances may be insufficient in the face of evolving threats like cyber-warfare, drone incursions, supply-chain sabotage, and hybrid influence campaigns. The proposed overhaul — if heeded — could mark a paradigm shift in European defence strategy: from periodic rearmament spurts toward permanent integration of security into economic policy, industrial planning, infrastructure resilience and citizen mobilization. That would entail a long-term commitment, potentially redefining what “national security” means for European societies in the wake of an increasingly unstable geopolitical environment.

## **Türkiye Misses SAFE Deadline — Slack on Joining EU Defence Scheme Raises Strategic Questions**

Türkiye failed to meet the 30 November 2025 deadline to be formally included in the Security Action for Europe (SAFE) — the European Union’s €150 billion defence-fund mechanism — after its application remained under evaluation past the cutoff date. The European Commission confirmed that Ankara’s request, along with a similar submission from South Korea, would not be processed in time. As a result, Türkiye is excluded from accessing SAFE’s low-interest loans and joint procurement framework in this first round.

The exclusion marks a significant setback for both Ankara and Brussels at a moment when security cooperation and defence industrial coordination across NATO and the EU are increasing. Notably, key voices in Europe — especially from Germany — had urged the EU to open SAFE to Türkiye, underscoring Ankara’s strategic value as a long-standing NATO ally with substantial military capabilities. With Türkiye sidelined for now, the SAFE fund risks deeper division between EU-only participants and external NATO partners, complicating broader efforts to build a cohesive European defence base resilient to hybrid threats and supply-chain disruptions.



## **Ukraine Strikes at Russia's Shadow Fleet — New Maritime Escalation in the Black Sea**

On 29 November 2025, the Ukrainian Navy reportedly used naval drones to strike two oil tankers — Kairos and Virat — belonging to the so-called Russian shadow fleet in the Black Sea. Both vessels, which had long been flagged and sanctioned for participating in Russia's oil-export evasion scheme, were critically damaged in the attacks: Kairos caught fire and was disabled, while Virat was struck near its engine room and rendered inoperable. Ukrainian officials say the tankers were empty at the time, en route to load oil at Russia's Novorossiysk port, and that the operation aimed to disrupt Moscow's ability to monetise hydrocarbon exports under Western sanctions.

The strikes mark a significant escalation in the maritime dimension of the war. By directly targeting the shadow-fleet — a network of tankers that have long enabled Russia to bypass sanctions — Kyiv may be entering a new phase: one in which naval drones and unmanned surface vessels are weaponised not just against military targets, but against economic lifelines. If sustained, this strategy could deepen Russia's export bottlenecks, push up global oil-transport risk premiums, and trigger broader ripple effects on global energy markets. At the same time, the fact that the strikes occurred in or near Turkish-controlled waters raises risks of regional spill-over, complicating neutrality equations for Black Sea states and potentially drawing in third-party maritime security concerns.

## **Russian Drones Sow Fear Across Moldova and Romania — Airspace Violations Trigger Closure, Alarm**

Over the weekend of November 25–29, 2025, multiple drones launched by Russian forces during a massive strike on Ukraine penetrated the airspace of Moldova and Romania. In Moldova alone, authorities recorded six drone intrusions, one of which crashed onto the roof of a building in Cuhureștii de Jos, prompting Chișinău to summon the Russian ambassador and lodge a formal protest. In response to repeated incursions deemed a “direct threat to aviation safety,” Moldova's civil aviation authority temporarily closed national airspace for over an hour.

Meanwhile in Romania — a NATO member — national air-defence jets from both Germany and Romania scrambled after two Russian drones crossed its border, marking one of the deepest daytime incursions since Russia's full-scale invasion began. One drone reportedly crashed near the village of Puiești after fuel depletion, while another escaped back into Ukrainian air. The repeated airspace breaches highlight a growing spill-over effect in which front-line hostilities directly impact neighbouring countries — illustrating how the war's kinetic and hybrid dimensions are now generating a broader regional security crisis.

## **NATO Prepares for Stand-Alone Confrontation — Europe Braces for Reduced U.S. Support**

Recent reporting from NATO indicates the alliance is now actively preparing for a potential confrontation with Russia under conditions of diminished support from the United States. According to a recent wargame cited by analysts, planned U.S. troop withdrawals and a shift in Washington's strategic focus toward the Indo-Pacific have left NATO questioning the reliability and scale of future American reinforcements on Europe's eastern flank. As a result, recent exercises — including drills in Romania — have tested whether European members can independently manage key defence tasks such as logistics, air defence, intelligence and long-range strikes. The findings reportedly exposed significant deficiencies in European capabilities when operating without robust U.S. backing.

This development marks a potential structural shift in European defence strategy: NATO is preparing for scenarios in which Europe must bear the lion's share of deterrence and defence — perhaps for the first time in decades. The move significantly increases pressure on EU and NATO members to rapidly accelerate military modernisation, increase defence spending, and enhance logistic and industrial readiness. It also raises questions about the sustainability of alliance deterrence doctrine under U.S. retrenchment, and whether Europe's defense-industrial and strategic infrastructure can be reconfigured fast enough to prevent a growing capability gap.

## **NATO Mulls More Aggressive Posture — From Reactive Defence to Pre-Emptive Options**

According to reporting by Financial Times and corroborated by senior officials of NATO, the alliance is seriously considering a shift away from purely reactive responses to hybrid-warfare threats from Russia — including sabotage, cyber-attacks, and drone incursions — toward a more “proactive” and potentially pre-emptive posture. Giuseppe Cavo Dragone, chair of NATO's Military Committee, signalled that in certain circumstances, strikes or counter-actions against Russian infrastructure or assets might be considered a legitimate defensive response. This marks a clear doctrinal shift: NATO appears to be recalibrating deterrence strategy to treat hybrid attacks as first-class threats demanding first-mover options — an evolution driven by the growing frequency and intensity of non-traditional threats across the alliance's eastern flank.

Moscow responded immediately and harshly. The Russian government condemned the remarks as “escalatory” and “irresponsible,” warning that they undermine any possibility of de-escalation and carry grave risks — potentially for NATO members themselves. The public rebuke underscores how dangerously close NATO-Russia relations may be to crossing a threshold where indirect hybrid conflict blurs into outright confrontation. With hybrid threats already destabilising parts of Eastern Europe, the development — if NATO follows through — could mark a turning point.

## **European and Russian Arms Industries Surge Despite Supply-Chain Risks — Dual Boom in Defence Production**

The latest Stockholm International Peace Research Institute (SIPRI) data reveal that the world's 100 largest arms-producing and military-services firms saw revenues hit a record US\$679 billion in 2024, up 5.9 % year-on-year. Within that total, European (non-Russian) companies — the 27 firms from the continent in SIPRI's top-100 ranking — recorded a robust 13 % increase, raising their combined arms revenue to around US\$151 billion. This performance comes despite widespread concerns over supply chain disruptions, materials bottlenecks, inflation, and resource constraints — underscoring the sharp acceleration of defence demand across Europe and beyond.

At the same time, major defence producers in Russia have also seen their bottom-lines climb — by 23 % according to SIPRI — propelled by relentless domestic demand even under Western sanctions. This dichotomy reveals two parallel but distinct dynamics: Europe, mobilizing its defence-industrial capacity in response to the war in Ukraine and regional insecurity; and Russia, sustaining and scaling its war-time production through internal demand, state support, and sanction-evasion efforts. As such, the global arms market remains deeply tied into the broader geopolitical conflict, with supply-chain fear giving way to record output — a structural shift that may lock in a high-tempo arms production cycle for years to come.

## **Canada Joins Security Action for Europe (SAFE) — First Non-European Member Breaks into EU Defence Bloc**

On 1 December 2025, Canada formally clinched an agreement to join the SAFE programme, the €150 billion defence-financing initiative launched under Readiness 2030 to boost Europe's military-industrial capacity. Under the arrangement, Canadian defence firms will now gain access to joint procurement tenders and EU-backed loans — a first for any non-EU country. Ottawa and Brussels presented this as a milestone in transatlantic security cooperation, with Canadian Prime Minister Mark Carney calling it evidence that Canada is deepening its strategic partnership with Europe amid a volatile global security environment.

The move marks a substantial shift in both Canadian and European defence policy. For Canada, joining SAFE aligns with its broader effort to wean itself off near total dependence on U.S. military suppliers — a trend underscored earlier this year by a major national defence-industry overhaul. For the EU, the inclusion of a G7 non-European power substantially enhances the credibility and ambition of SAFE, underlining that the fund — and European strategic autonomy more broadly — is not limited to EU borders but may become a broader transatlantic defence architecture. If Ottawa's entry is successful, it could pave the way for further third-country participation, expanding Europe's defence-industrial base and signalling a more inclusive approach to collective security.

## **EU–Ukraine Defence Coordination Deepens as Brussels Pushes Multi-Year Support Framework**

A high-level meeting in Brussels brought together EU foreign and defence ministers with Ukraine’s Defence Minister Denys Shmyhal, marking a decisive push to reinforce Ukraine’s military resilience and embed its defence industry within Europe’s broader security architecture. Shmyhal highlighted Ukraine’s immediate priorities—above all, reinforced air-defence capacity—and invited partners to expand joint production under the Build with Ukraine initiative. Ministers underscored that EDIP enables Ukrainian firms to integrate more fully into the European defence market, while new instruments such as the €300 million Ukraine Support Instrument, along with the forthcoming SAFE mechanism, will significantly expand available financing.

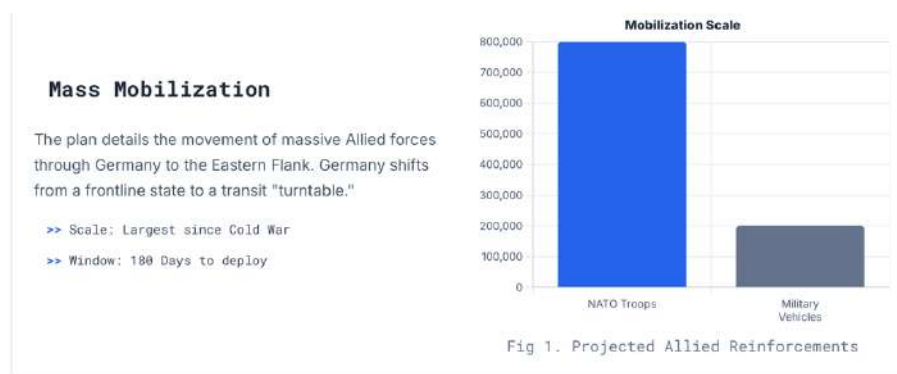
EU leadership emphasized that this week represents a pivotal moment for diplomacy, with the Foreign Affairs Council discussing urgent funding options, long-term security guarantees, and how to counter Russia’s shadow-fleet operations. High Representative Kaja Kallas called for a multi-year financing framework, arguing that predictable, long-horizon support would dramatically strengthen Ukraine’s defence posture and accelerate an end to Russia’s aggression. Ministers also reviewed Europe’s own readiness under the Defence Readiness Roadmap 2030, stressing that troop mobility, capability coalitions, and accelerated defence-industrial expansion are essential both for supporting Ukraine and for Europe’s ability to deter future threats.

## 2. STATISTICS OF THE WEEK

### OPLAN DEU Explained

OPLAN DEU lays out NATO's largest reinforcement plan since the Cold War, enabling the rapid deployment of 800,000 Allied troops and roughly 180,000 military vehicles through Germany within a 180-day window. The strategy reframes Germany from a potential frontline defender to a continental logistics turntable, responsible for receiving, staging, and forwarding vast Allied formations to the Eastern Flank. This mobilization scale is the core of Berlin's deterrence logic: demonstrating that NATO can surge overwhelming force faster than Russia could exploit any advantage.

To make such flows possible, Berlin is committing €166 billion in infrastructure upgrades by 2029, with the bulk earmarked for "dual-use" rail networks, supported by additional spending on road and bridge reinforcement. Key projects include reactivating the Iron Rhine corridor, upgrading the A44 Autobahn for emergency landings, and strengthening bridges to handle heavy armor such as the Leopard 2. The 1,200-page OPLAN DEU embeds civilian agencies, private logistics firms, and national industry directly into NATO's war-time architecture — a whole-of-society shift designed to ensure that Germany can sustain the continuous movement of forces at scale, and thereby underpin credible deterrence across the Alliance.



<https://behorizon.org/operation-plan-germany/>

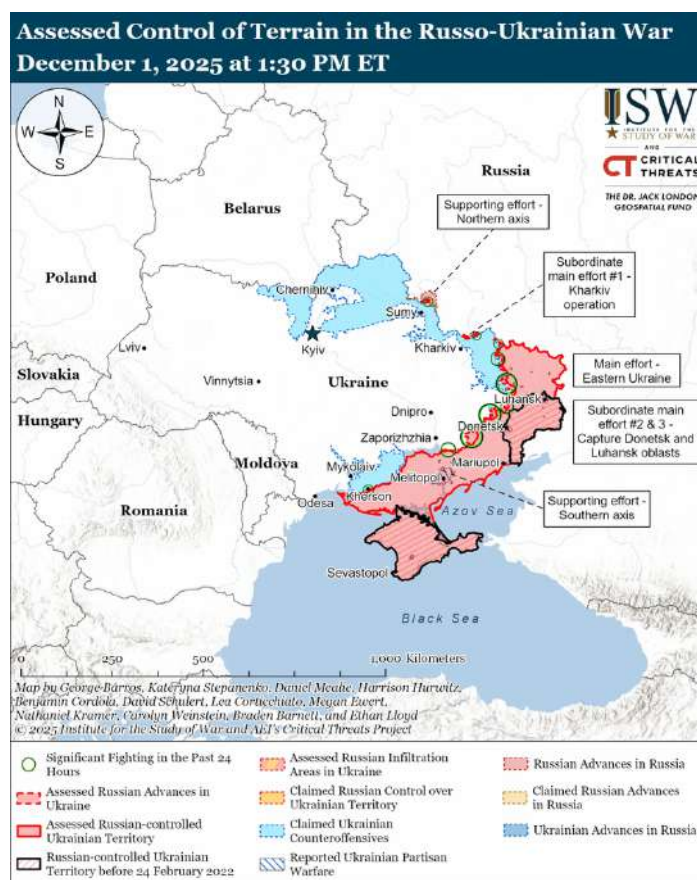


### 3. MAP OF THE WEEK

#### Eastern Ukraine Under Intensifying Pressure

This week's ISW/Critical Threats assessment highlights a further consolidation of Russian territorial gains across the eastern axis, with the main Russian effort concentrated in Donetsk and Luhansk oblasts. Russian forces continue pushing westward from the established front, particularly around Pokrovsk, while sustaining simultaneous subordinate offensives near Kharkiv and along the southern Azov corridor. The map indicates fresh Russian advances (red arrows and shaded regions) tightening the pressure around key Ukrainian defensive nodes, while infiltration zones suggest continued attempts to probe Ukrainian lines for operational gaps.

Ukrainian forces, meanwhile, maintain active counteroffensive operations (blue arrows) aimed at stabilising the front around Kharkiv, Donetsk City's western approaches, and the southern Zaporizhzhia–Azov axis. Notably, the map records significant fighting within the last 24 hours at multiple points along the eastern arc, underscoring the high tempo of engagements. Despite Russian momentum, Ukrainian partisan activity deep behind the front — marked in dark yellow — continues to disrupt Russian logistics in occupied territories. Overall, the week's map reflects a grinding but strategically consequential Russian push, met by persistent Ukrainian resistance across a multi-axis battlespace.



<https://understandingwar.org/research/russia-ukraine/russian-offensive-campaign-assessment-december-1-2025/>

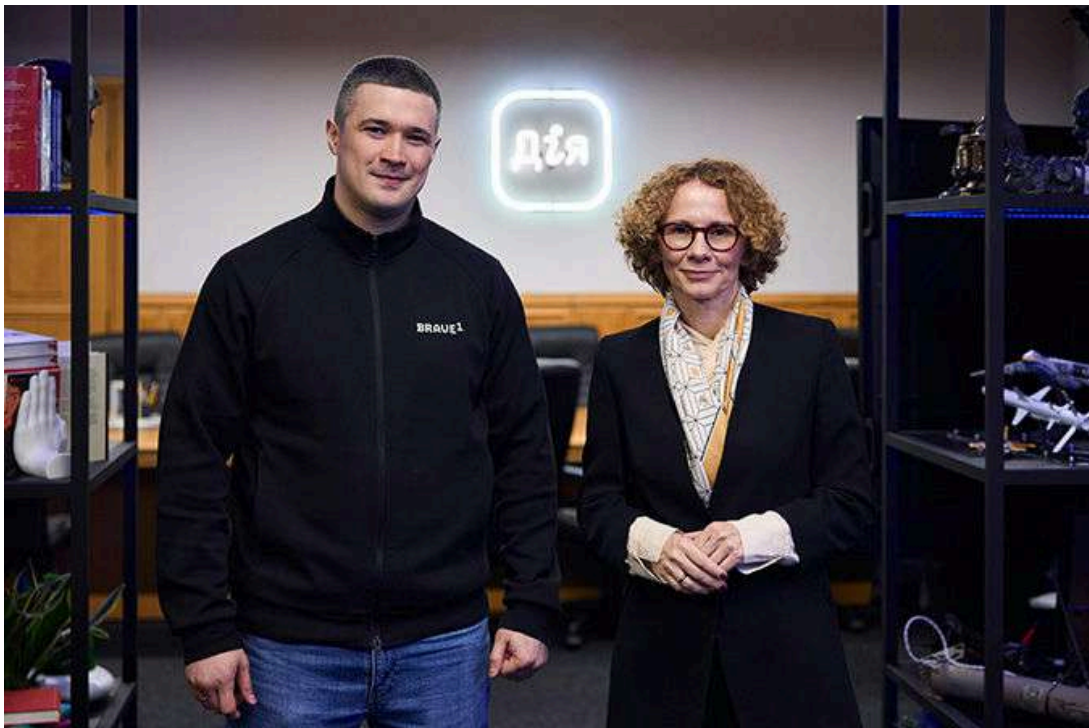


## 4. PHOTO OF THE WEEK

### Launching UNITE – Brave NATO

This week's photo captures a symbolic moment in Kyiv between a senior NATO official and Ukraine's Minister of Digital Transformation, reflecting the launch of UNITE – Brave NATO, the first joint NATO–Ukraine programme dedicated to accelerating defence innovation. The initiative, unveiled on 25 November 2025, signals a decisive shift: Ukraine is no longer merely a recipient of support but an active co-developer of cutting-edge military technologies. With Ukraine's defence-tech cluster Brave1 coordinating from the Ukrainian side, and NATO's Communications and Information Agency (NCIA) leading execution, the programme institutionalises deep technological cooperation at a time when battlefield innovation is shaping the war's trajectory.

UNITE – Brave NATO will run its pilot competition in early 2026 with a €10 million joint grant pool, funding Allied–Ukrainian teams developing new capabilities to counter drones, reinforce air defence, and secure frontline communications. If successful, the programme will expand dramatically to €50 million in 2026, financed jointly through NATO's Comprehensive Assistance Package and Ukraine's Ministry of Digital Transformation. Against the backdrop of this week's photo, the message is clear: the future of European security will be built not only through conventional arms, but through the rapid co-development of interoperable, battle-proven technology — and Kyiv is now a full partner in that endeavour.



<https://www.nato.int/en/news-and-events/articles/news/2025/11/26/nato-and-ukraine-announce-new-joint-initiative-to-accelerate-defence-innovation-unite-brave-nato>

## 5. INFOGRAPHIC OF THE WEEK

### France Launches Voluntary Military Service

This week's infographic spotlights France's unveiling of a new voluntary military service, a 10-month paid programme targeting primarily 18–19-year-olds, with a smaller intake of skilled applicants up to age 25. The service is strictly limited to French territory — including overseas departments — and represents the largest re-engagement of French society in national defence since conscription ended in the 1990s. President Emmanuel Macron frames the initiative as part of a modernised “hybrid” army model, combining volunteers, reservists, and professional troops to better match the demands of an increasingly unstable security environment.



<https://x.com/BehorizonOrg/status/1994379389036024284?s=20>

## 7. ANALYSIS

### **The SAFE Mechanism and the Emerging Geography of European Defence Integration**

The EU's Security Action for Europe (SAFE) mechanism—its flagship €150 billion defence-financing instrument under the Readiness 2030 agenda—has rapidly become the crucible for Europe's evolving security order. Conceived to fill decades-long industrial gaps, support joint procurement, and bolster strategic autonomy, SAFE is the Union's most ambitious attempt yet to knit together the defence economies of its members and trusted partners. The past week's developments—Canada's successful accession, the UK's withdrawal, and Türkiye's missed entry window—offer a revealing snapshot of the political, strategic, and institutional tensions shaping Europe's defence future. SAFE is no longer only a financial tool; it is an emerging geopolitical filter, determining who aligns with Europe's new defence core and under what conditions.

#### **Canada's Entry: A Turning Point for Transatlantic Defence Industrialism**

Canada's accession on 1 December 2025 marks the first time a non-European G7 country has been integrated into an EU defence-financing architecture. This represents a strategic milestone for three reasons:

First, it expands SAFE beyond Europe's borders, signalling that the EU's pursuit of strategic autonomy is not synonymous with isolationism. Instead, Brussels is constructing a coalition model built around industrial interoperability, shared procurement, and common technology standards.

Second, for Ottawa, SAFE offers a pathway to reduce overreliance on U.S. defence suppliers, diversify industrial partnerships, and embed Canadian firms in Europe's rapidly expanding defence market.

Third, Canada's entry enhances SAFE's political credibility. A transatlantic partner joining voluntarily suggests that the EU's model is becoming not just an internal project but an emerging centre of gravity for democratic defence economies.

If Canada's participation is successfully implemented, it will set a precedent for other like-minded states—Japan, Australia, and South Korea among them—seeking deeper defence-industrial integration with Europe.

#### **The UK Withdrawal: A Missed Opportunity and a Revealing Fault Line**

By contrast, the UK's abrupt withdrawal from negotiations on 28 November exposes persistent fractures in post-Brexit defence cooperation. Despite early optimism surrounding the UK–EU defence reset, talks collapsed over disputes around financial

obligations, governance structures, and “value for money.” Three core issues stand out:

*Structural Limits on Third-Country Participation:*

Under SAFE rules, non-EU partners face a 35% cap on non-EU components in any funded project, limiting UK industrial involvement and undermining London’s ambitions for full integration.

*Industrial Divergence:*

British firms remain globally competitive but risk being sidelined as the EU accelerates joint procurement and supply-chain consolidation. Withdrawal means London will watch, rather than shape, the largest European defence-industrial restructuring in decades.

*Strategic Signalling:*

The collapse is perceived across Europe as a political setback—particularly given London’s simultaneous push to reinforce NATO leadership. Choosing distance from SAFE risks reinforcing a narrative of British self-exclusion at a moment when European defence is tightening.

In practice, UK firms retain limited access, but the political consequence is clear: London now sits outside the EU’s main defence-industrial transformation at a time when Washington is signalling strategic retrenchment.

## **Türkiye’s Missed Deadline: Strategic Ambiguity at a Sensitive Moment**

Türkiye’s failure to meet the SAFE application deadline reflects deeper tensions in EU–Turkey relations. Although German and Baltic officials urged Ankara’s inclusion—citing Türkiye’s substantial NATO military capability—the Commission maintained a meticulous procedural approach, leaving Turkey’s request unprocessed past the cutoff.

This outcome carries significant implications:

*Strategic Exclusion at a Critical Time:*

At a moment when NATO is emphasising eastern-flank resilience and greater burden-sharing, Türkiye’s absence from SAFE risks widening the gap between EU and NATO defence structures.

*Industrial Consequences:*

Turkish defence firms—leaders in drones, armour, and naval design—lose early access to low-interest loans and joint EU procurement pipelines, slowing potential alignment with European production standards.

### *Political Tension Within the Alliance:*

Türkiye's exclusion reinforces divisions between EU-only and NATO-only actors. For Brussels, the decision preserves procedural consistency; for Ankara, it signals that the EU's defence-industrial architecture remains a politically gated space.

Türkiye may yet join in a later round, but the missed entry window highlights an increasingly rigid distinction between Europe's political alignment and defence-industrial integration.

### **Conclusion**

SAFE is rapidly evolving from a technical funding mechanism into the **primary architect of Europe's emerging defence-industrial bloc**. Canada's entry broadens its geopolitical horizon, the UK's withdrawal narrows its immediate transatlantic reach, and Türkiye's exclusion highlights unresolved tensions between NATO's strategic geography and the EU's political boundaries.

Three trends are crystallising:

1. **SAFE is becoming the institutional core of Europe's long-term defence strategy.**
2. **Membership is now a strong indicator of political alignment as much as industrial capacity.**
3. **Europe's defence future will be shaped not only by who joins—but also by who is left out.**

In this sense, SAFE is more than a fund: it is the first draft of Europe's new defence ecosystem, one that will determine how production, procurement, and partnerships are organised for the next decade. The developments of this week show the mechanism's growing gravitational pull—and the strategic consequences for those within and outside its orbit.