



Delhi Policy Group

Advancing India's Rise as a Leading Power



FOCUS EUROPE

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FOCUS EUROPE

This monthly publication analyses strategic developments in Europe and India's relations with the EU and major European powers and is authored by Amb. Ruchira Kamboj, Senior Fellow for International Security and Global Affairs. Your comments and feedback may be addressed to the author at ruchira@dpg.org.in. To subscribe, please [click here](#).

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Cover Images:

1. On May 26, 2026, Ursula von der Leyen, President of the European Commission, travelled to Vilnius, Lithuania, to reaffirm Europe's solidarity with Baltic countries in the face of the continuous Russian aggression and destabilisation attempts. Source: [European Commission](#)
2. The Foreign Affairs Council meeting of defence ministers, chaired by the EU High Representative for Foreign Affairs and Security Policy, Kaja Kalla, took place in Brussels on May 12, 2026: Source: [Minister of Defence of Cyprus](#)
3. EU High Representative for Foreign Affairs and Security Policy, Kaja Kalla delivering the press remarks following the Foreign Affairs Council meeting in Brussels on May 11, 2026. Source: [EU EEAS](#)

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Focus Europe:

EU Foreign and Defence Councils, May 2026: Strategic Implications for Europe and India

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EU Foreign and Defence Councils, May 2026: Strategic Implications for Europe and India

by

Ambassador Ruchira Kamboj

Introduction

The back-to-back EU Foreign Affairs Council (11 May) and Defence Ministers' Meeting (12 May 2026) reveal a continent in strategic transformation. Driven by the Ukraine war, West Asian instability, transatlantic uncertainty, and deepening geopolitical fragmentation, Europe's strategic mindset is shifting, rapidly and fundamentally.

The traditional frameworks - humanitarianism, economic integration, normative diplomacy - have not disappeared, but they are no longer the primary lens through which European institutions and member states interpret urgent needs. In their place, a harder vocabulary is taking hold: security, resilience, deterrence, strategic survival.

This is not merely a rhetorical shift. It signals a deeper recalibration of how Europe conceives of its interests, its vulnerabilities, and ultimately its role in an increasingly contested international order.

In many ways, this marks one of the most significant shifts in European strategic thinking since 1945, not in the sense of a sudden rupture, but of a slow, structural reckoning with the limits of the postwar liberal order playbook.

EU Ministers Convene in Brussels: Key Decisions from May 11

The Foreign Affairs Council meeting on May 11 was dominated by discussions on Ukraine, European security, sanctions coordination, and broader geopolitical instability. Ukraine remained the central issue throughout the discussions, with EU ministers reiterating continued military, political, and financial support for Kyiv.

A notable feature of the discussions was the language adopted by European leaders, especially EU foreign policy chief Kaja Kallas, who repeatedly emphasised that support for Ukraine was not merely an act of solidarity but was directly linked to Europe's own security future.

This marks a significant evolution in Europe's framing of the conflict. Clearly, its perspective on the conflict has shifted significantly. While early discourse centred on humanitarian and moral imperatives, the conflict is now increasingly framed as an existential threat to European security.

The ministers also discussed sanctions coordination against Russia, long-term support mechanisms for Ukraine, and Europe's broader strategic posture in an increasingly unstable international environment.

Alongside Ukraine, the Council addressed instability in the Middle East and the implications of the Iran crisis, particularly with regard to regional stability, maritime security, and freedom of navigation.

At the same time, the discussions reflected Europe's increasing emphasis on cultivating strategic partnerships beyond the traditional transatlantic framework. India, Africa, and Latin America increasingly feature within Europe's broader diversification strategy as the EU seeks to reduce vulnerabilities linked to over-dependence on individual actors, particularly China.

Meeting of EU Defence Ministers: Critical Decisions from May 12

The Defence Ministers meeting on May 12 further reinforced the strategic themes that emerged during the Foreign Affairs Council discussions. The meeting focused heavily on European defence readiness, military support to Ukraine, defence-industrial production, procurement coordination, and Europe's broader security preparedness. Ukraine's Defence Minister participated virtually, while NATO representatives also engaged in the discussions, underlining the close interconnection between EU security policy and NATO structures.

The ministers examined ways to accelerate weapons production, improve interoperability between European militaries, and strengthen Europe's overall defence-industrial base.

A recurring concern throughout the meeting was that although European states are increasing defence spending and political commitments, industrial production and operational readiness are still lagging behind strategic ambitions. Kaja Kallas openly expressed frustration regarding the slow pace of European defence production, despite the scale of the security challenges confronting the continent.

The ministers also discussed the broader implications of the Iran conflict and instability in West Asia for European security. While Europe continues to avoid direct military involvement, the discussions highlighted growing concern regarding energy security, freedom of navigation, and the risks of regional escalation affecting European economic and strategic interests.

What the Meetings Signal

Europe is Undergoing a Fundamental Strategic Transformation

The clearest takeaway is that Europe is undergoing one of its most significant strategic transformations since the end of the Second World War. For decades, Europe's post-war identity was built around welfare systems, economic integration, multilateralism, and the deliberate de-prioritisation of hard military power.

That calculus has shifted. Europe's existential challenge is now increasingly perceived in terms of survival and security. The Ukraine war has fundamentally altered European strategic thinking: Europe is no longer behaving purely as a post-war peace project, it is increasingly acting as a geopolitical and security actor.

This shift is visible not only in rising defence expenditures, but in a broader psychological transformation within Europe itself. Security and deterrence have become central political priorities.

Kaja Kallas, speaking at the Development Council on 18 May, put it plainly : "If Europe wants to be a geopolitical actor, we need to be more strategic in our external action...we will discuss how Europe can better align aid, trade, security, and defence partnerships with both the development needs of our partners and our own strategic interests."

Strategic Autonomy is Moving from Rhetoric to Practice

The May EU meetings also demonstrate that Europe's concept of "strategic autonomy" is gradually evolving from a declaratory ambition into a more operational project.

Before the war in Ukraine, strategic autonomy was largely discussed in economic and technological terms, focusing on supply chains, trade resilience, and reducing external dependencies.

This was particularly visible in areas such as semiconductor supply chains, digital regulation, energy diversification, and technological sovereignty.

For example, the EU increasingly emphasised reducing strategic dependencies on China and diversifying supply chains in critical sectors such as rare earths, batteries, and semiconductors. Initiatives such as the European Chips Act reflected Europe's efforts to strengthen domestic semiconductor production and reduce external vulnerabilities in advanced technologies. Similarly, Europe's regulatory frameworks in areas such as data protection, digital markets, and artificial intelligence demonstrated its ambition to shape global technological standards while maintaining strategic influence over emerging technologies.

Since the outbreak of the Ukraine war, however, the concept of European security has expanded significantly, from its traditional economic and normative foundations into the harder terrain of defence, military readiness, industrial production, procurement coordination, and collective preparedness.

Concrete examples include the European Union's efforts to jointly procure ammunition for Ukraine, increased defence spending commitments by multiple member states, and initiatives aimed at strengthening Europe's defence industrial base. Germany's major defence spending shift following the war, alongside broader EU discussions on defence production capacity and military interoperability, reflect a significant shift from a predominantly economic understanding of strategic autonomy toward a more security-and defence-oriented conception of European resilience.

The direction of travel is unmistakable. European Commission President Ursula von der Leyen's visit to Vilnius on 26 May, in direct response to drone incursions into Baltic airspace, captured the mood precisely: "Europe stands in full solidarity and unity with Estonia, Latvia and Lithuania. When the Baltic States are being tested, Europe as a whole is being tested." The commitments that followed were concrete: EUR 12 billion through SAFE, investments in anti-drone capabilities, advanced air defence, critical infrastructure protection, and 16 new projects under the European Readiness Flagships. Her conclusion cut to the core: "Europe can't rely on others for its own security and must stand more firmly on its own feet."

Yet the meetings also revealed the limits of Europe's autonomy. NATO remains central to Europe's defence architecture, and the United States continues to provide critical military, logistics, intelligence, and deterrence capabilities. Europe is clearly becoming more strategically autonomous, but it is not yet strategically independent.

The Transatlantic Alliance appears more fragile

Another major implication emerging from these discussions is the growing uncertainty surrounding the future of the transatlantic alliance. Statements from U.S. President Donald Trump questioning NATO burden-sharing, and urging Europeans to "look after themselves", have had a profound psychological impact on European policymakers.

Europe increasingly recognises that American strategic commitments can no longer be taken for granted. This has accelerated efforts to strengthen its own defence capabilities and reduce strategic vulnerabilities. In an unintended way, Trump's rhetoric may have done more to galvanise European defence than years of internal debate ever did.

In a post on X, Kallas was direct: “We agree that we must work together on strengthening Europe’s contribution to NATO. A more European NATO is long overdue.”

Ukraine Has Become Europe’s Defining Security Issue

The May EU meetings further confirmed that Ukraine is no longer viewed in Europe merely as a humanitarian concern or a regional conflict. It is increasingly seen as central to Europe’s own security, stability, and strategic future. European leaders now perceive the outcome of the war as directly tied to the credibility of Europe’s security architecture itself.

This evolving mindset was reinforced soon after the meetings by European Commission President Ursula von der Leyen in Vilnius, where she spoke of integrating Ukraine into Europe’s broader defence-industrial strategy. She noted that Ukraine’s battlefield experience was already shaping Europe’s own defence adaptation and stressed the strategic importance of deeper cooperation in next-generation defence technologies so that “Europe and Ukraine together can build the industrial capacity to out-innovate our adversaries.”

The significance of this shift should not be underestimated. It marks a clear departure from Europe’s earlier instinct to approach crises primarily through normative, economic, or diplomatic frameworks. Europe is now thinking in far more geopolitical, strategic, and hard-security terms.

Technology, Innovation, and Energy Security as Strategic Priorities

Alongside defence and security, technology and energy resilience have emerged as central pillars of Europe’s evolving strategic autonomy agenda. The Ukraine war and broader geopolitical tensions exposed Europe’s vulnerabilities in areas such as energy dependence, critical technologies, and industrial supply chains.

In response, Europe has accelerated efforts to strengthen technological sovereignty through initiatives focused on semiconductor production, artificial intelligence regulation, green technologies, and digital infrastructure. It increasingly seeks to reduce strategic dependence on both China and the United States in sensitive technological sectors while simultaneously positioning itself as a global regulatory power in areas such as AI governance and digital standards.

Energy security has become equally central. Europe’s earlier dependence on Russian gas created significant vulnerabilities during the Ukraine conflict, prompting a major diversification effort. This has included expanding LNG imports, investing in renewable energy transitions, and strengthening energy partnerships with regions such as Africa and the Middle East. Italy’s Mattei Plan reflects a broader European effort to diversify energy sources, deepen engagement with African partners, and

enhance long-term energy resilience in the wake of Europe's reduced reliance on Russian energy.

Europe is Diversifying Its Global Partnerships

Alongside its internal transformation, Europe is also recalibrating its external partnerships. The EU is actively deepening engagement with India, Africa, and Latin America, including through renewed momentum on the EU-MERCOSUR agreement and closer ties with Mexico, while simultaneously seeking to reduce over-dependence on China in critical sectors and supply chains.

This diversification strategy reflects Europe's broader effort to build resilience in supply chains, technology, energy security, and trade. Europe increasingly recognises the need for trusted and stable partners within a fragmented global environment.

Continuity Between the March, April, and May EU Meetings

While the May meetings revisited many of the same themes discussed during the March and April European Council meetings, particularly Ukraine, defence readiness, energy security, trade diversification, and strategic resilience, there was also evidence of gradual operational progression rather than mere repetition.

The March and April meetings largely established the political direction of Europe's evolving strategic posture. By May, however, discussions had become more implementation-oriented. There was greater emphasis on defence industrial production, procurement coordination, military readiness, sanctions implementation, and practical questions concerning Europe's long-term security preparedness.

Similarly, energy security discussions evolved from general concerns about dependence and diversification toward more concrete efforts to build alternative partnerships and strengthen long-term resilience. In this sense, the May meetings reflected a Europe increasingly attempting to translate strategic ambition, though not without internal constraints, into institutional and operational capability.

The evolution from the March and April meetings to the May meetings, therefore, suggests that Europe is gradually moving from strategic diagnosis toward strategic implementation.

The Road Ahead: Emerging Trends and India's Strategic Role

Looking ahead, Europe is likely to continue deepening defence integration and expanding its security capabilities. The enhanced activism of the European Defence Agency is itself testimony to this shift. Defence spending across Europe is expected to

remain elevated, while debates around collective preparedness, defence production, military mobility, and operational coordination are likely to intensify further.

Future meetings of the European Council are also expected to remain heavily focused on Ukraine, defence-industrial readiness, sanctions coordination, and broader questions of strategic resilience. Article 42(7) of the Treaty on European Union, often described as the EU's internal mutual defence clause, may receive growing political attention as Europe seeks to strengthen its own collective security frameworks alongside NATO.

The political mood in Europe is becoming increasingly explicit on questions of collective security. This was reflected recently when Ursula von der Leyen, responding to public threats directed at the Baltic states by Russia, declared: "Let there be no doubt. A threat against one Member State is a threat against our entire Union."

That language itself is telling. Europe is no longer speaking only in the vocabulary of economic integration and normative power. It is increasingly speaking the language of deterrence, resilience, and strategic security.

What Does This Mean for India?

For India, Europe's transformation presents significant strategic as well as economic opportunities. As Europe looks for reliable democratic partners and seeks to reduce excessive dependence on China, India's importance within European strategic thinking is steadily rising.

Recent diplomatic engagement reflects this growing convergence. Prime Minister Narendra Modi's recent four-nation European tour, together with increasingly warm and strategic messaging from European leaders including Ursula von der Leyen, suggests that India-EU relations are entering a more substantive and strategic phase. Likewise, the engagement between India and the EU at the recently concluded Gymnich meeting of EU Foreign Ministers in Cyprus is equally indicative of this broader trend.

The proposed India-EU Free Trade Agreement is also gaining renewed momentum within this broader geopolitical context. While the legal vetting and ratification remain, there is increasing optimism on both sides that the agreement could be concluded by the end of this year or in the early part of next year.

Europe increasingly sees India not merely as a market but as a long-term strategic partner, across trade and supply chains, digital and technological cooperation, clean energy, connectivity, maritime security, and Indo-Pacific stability.

There is also a broader convergence of outlook. India's doctrine of strategic autonomy and Europe's evolving search for strategic flexibility reflect a shared instinct: the desire for diversified partnerships within a multipolar world, without binding alignment to any single power.

However, India is also likely to remain conscious of the limits of Europe's strategic autonomy, particularly in hard-security and military matters where American influence and the centrality of NATO continue to remain significant. Europe's ambitions for greater strategic independence are real, but their full operationalisation is still evolving and remains uneven across the continent.

As a result, India's engagement with Europe is likely to be marked by both growing strategic cooperation and a clear-eyed pragmatism. New Delhi will deepen partnerships where interests converge: in trade, technology, connectivity, maritime security, clean energy, and resilient supply chains, while remaining mindful of Europe's internal divisions, transatlantic compulsions, and continuing security dependence on the United States.

Conclusion

Collectively, the EU meetings of May 11-12 reveal a Europe that is adapting rapidly to an increasingly unstable global environment. Europe is becoming more security-oriented, more strategically conscious, and more willing to invest in defence, resilience, and preparedness than at any point in recent decades.

At the same time, this transformation remains incomplete. Europe's strategic autonomy is strongest in the economic, regulatory, and technological domains, and is becoming increasingly visible in defence planning and industrial coordination. However, substantial dependence on NATO and the United States continues in critical hard-security areas, particularly in deterrence, intelligence, logistics, and extended military capabilities. That reality is unlikely to change quickly, even as Europe seeks greater strategic capacity of its own.

For India, Europe's transformation opens important avenues for deeper strategic and economic engagement. As Europe diversifies its partnerships and seeks trusted democratic actors in an increasingly fragmented global order, India is well-positioned to emerge as one of Europe's key long-term partners. In this context, the relevance of the India-EU Joint Comprehensive Strategic Agenda to 2030 assumes particular significance.

Several developments will be important to watch as this partnership deepens further, including progress on trade, investment, technology cooperation, and the

implementation of recently concluded agreements. Together, these developments point to a relationship that is steadily acquiring greater geopolitical and strategic weight in an increasingly fragmented international order.



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