

Letter n°1122 of Tuesday 9th September 2025

Unsettling shifts in the European Defence Fund

Nicolas-Jean Brehon - 09 Sep 2025

The European Defence Fund has brought military spending into the EU budget, with the ambition of building a genuine continent-wide defence industry. Initially providing new impetus, it has nevertheless experienced a number of setbacks: the decline of major projects, the rise of smaller programmes and the gradual disengagement of certain Member States. A discreet industrial restructuring is underway, driven by unexpected new stakeholders. It will be particularly interesting to see what place it will be given in the new multiannual financial framework for 2028-2034.



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■ **Front page! :**



Trump, Europe and its destiny: awakening or humiliation

'The European Commission prides itself on having negotiated the best possible deal in the face of Trump's dictates. By accepting a unilateral increase in customs duties on its products entering the United States, Europe will pay tribute to the empire and be seen as the soft underbelly of the West.' Europe is threatened with humiliating decline if it does not assert itself in the face of major powers such as the United States. The path proposed by Mario Draghi is the only one possible: the Union must act collectively as a state to defend its independence and regain its status as a respected power. [Read more](#)

■ Elections :



Will Andrej Babis, who is leading in the opinion polls, be able to form a government in the Czech Republic after the parliamentary elections on 3 and 4 October?

On 3 and 4 October, 8 million Czechs will go to the polls to elect the 200 members of the Chamber of Deputies. Twenty-five lists have been registered for this election, the lowest number since 1998, due to numerous electoral alliances. According to the latest poll published on 22 August, the Action of Dissatisfied Citizens (ANO) party is set to come out on top with 33% of the vote. It is due to be followed by the three parties (ODS, KDU-CSL, TOP 09) of the Spolu (Together) coalition with 22%; Mayors and Independents (STAN) with 12%; and the far-right coalition led by Tomio Okamura's Freedom and Direct Democracy (SPD) with 10%. [Read more](#)

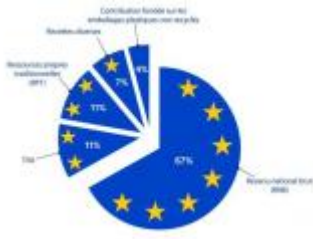
■ Foundation :



'Towards a new Europe?' The Schuman Report 2025 is now available!

The 'Schuman Report 2025' is available in bookshops and on the Foundation's website in French and in digital format in French and English. It addresses major issues affecting the European Union in this new geopolitical era, such as environmental and digital sovereignty, enlargement and the Union's trade defence instruments. As every year, this reference work brings together leading contributions, original maps and statistical studies with commentary. Order your copy now! [Read more](#)

■ Commission :



New proposals for the 2028-2034 budget

On 3 September, the Commission adopted new proposals, which complete the framework for the next EU budget for the period 2028-2034. They concern the programmes 'Single Market and Customs', 'Justice', Euratom research and training, the instrument for cooperation on nuclear safety and the decommissioning of nuclear facilities, the programme to assist with the decommissioning of the Ignalina nuclear power plant in Lithuania (Ignalina programme), the Overseas Association Decision, including Greenland, and the Pericles V programme. The next multiannual financial framework amounts to nearly €2 trillion (1.26% of the Union's gross national income). [Read more](#)



Customs agreement with the United States

On 27 July, European Commission President Ursula von der Leyen and US President Donald Trump met in Scotland to formalise an agreement on customs duties at a rate of 15%. At the same time, the US administration expects European companies to invest \$600 billion by 2028. On 21 August, the European Union and the United States issued a joint statement confirming the 27 July agreement and clarifying its content. Both parties committed to working to restore stability and predictability in trade and investment. However, certain strategic European sectors are exempt from the 15% rate. [Read more](#) - [Other link](#)



Agreements with Mercosur and Mexico

On 3 September, the European Commission adopted proposals for Council decisions on the signing and conclusion of two parallel legal instruments: the Mercosur Partnership Agreement (EMPA) and the Modernised Global Agreement with Mexico (MGA). These agreements are an essential part of the EU's strategy to diversify its trade relations and strengthen economic and political ties with like-minded partners around the world. [Read more](#)



Europe joins the supercomputer league

On 5 September, the JUPITER supercomputer officially became the first European system to reach the exaflop threshold, i.e. to perform more than a quintillion operations per second, a level of computing power comparable to the combined computing capacity of a million modern smartphones. It was inaugurated at the Forschungszentrum in Jülich, Germany. Thanks to this progress, Europe has joined the global league of high-performance computing. The day before, the French Minister of the Armed Forces inaugurated the new Asgard defence supercomputer, located at the Mont Valérien fortress, which serves the Ministerial Agency for Defence Artificial Intelligence (AMIAD). The inauguration of this supercomputer marks an important milestone for France in the field of artificial intelligence. [Read more](#)



Full implementation of the European regulation on media independence

Since 8 August, the main provisions of the European Media Freedom Act (EMFA), which came into force on 7 May 2024, have been applied throughout the European Union. The EMFA strengthens transparency in media ownership and the allocation of state advertising, the independence of public media, and ensures robust protection for journalists and their sources. Since February 2025, a new independent European committee for media services has been operational. It is composed of representatives of national media authorities or bodies, and the secretariat will be provided by the European Commission. [Read more](#) - [Other link](#)



Consultation on the 28th regime

The 28th regime initiative – a single, harmonised set of rules for innovative companies in the EU – is open until 30 September. This public consultation by the European Commission is aimed at EU citizens, particularly representatives of business and sectoral associations, entrepreneurs, investors, legal practitioners, Member State authorities, commercial registers, trade unions and academia. The European Commission's objective is to provide innovative companies with a single set of rules enabling them to invest more easily and operate in the single market. [Read more](#)



Google fined nearly €3 billion

On 5 September, the Commission adopted a decision finding that Google had infringed European competition rules by abusing its dominant position in the display advertising technology (Adtech) industry, and imposed a fine of €2.95 billion. In addition, the CNIL (France) imposed a fine of €325 million for non-compliance with the rules on trackers (cookies). The Commission announced that Google had favoured its online advertising services to the detriment of its competitors, online advertisers and publishers. As a result, advertisers faced higher marketing costs, which they probably passed on to European consumers. [Read more](#) - [Other link](#)

■ Council :



Simplification of the Common Agricultural Policy

On 3 September, the Council approved its position on the simplification of the provisions relating to the Common Agricultural Policy (CAP). The aim is to increase the competitiveness of European agriculture by reducing administrative formalities, supporting farmers and encouraging innovation. This simplification could generate annual savings of up to €1.6 billion for farmers and more than €200 million for Member State administrations. The proposal is part of the 'Omnibus III' package, adopted by the Commission on 14 May 2025, with a view to simplifying European legislation in the field of agriculture. [Read more](#)

■ Diplomacy :



Iranian nuclear programme: Paris, Berlin and London activate the return of sanctions

On 28 August, France, Germany and the United Kingdom initiated a procedure with the UN to reimpose international economic sanctions against Iran within 30 days, in response to the continuing deadlock in nuclear negotiations. Provided for in the 2015 Vienna agreement, this 'snapback' mechanism allows for the automatic reimposition of all sanctions in the event of Tehran's failure to comply with its commitments. [Read more](#)



30th summit with Japan

On 23 July, the 30th EU-Japan Summit was held in Tokyo. In a joint statement, European and Japanese leaders reiterated their support for a rules-based international trading order. In this troubled trade environment, they plan to accelerate the implementation of the Economic Partnership Agreement (EPA) that has bound them since 2019. They launched the Competitiveness Alliance, which is based on three pillars: increasing bilateral trade, strengthening economic security, particularly in terms of cooperation on supply chains for essential raw materials, and collaborating in the areas of innovation and the green and digital transitions. Finally, as part of the security and defence partnership, they announced the establishment of an industrial dialogue on defence. [Read more](#) - [Other link](#)



25th summit with China

On 24 July, the European Union and China held their 25th summit in Beijing, marking the 50th anniversary of the establishment of diplomatic relations. At the end of the summit, a joint declaration was signed, containing a strengthening of bilateral cooperation in energy transition, methane emissions control, carbon markets and green technologies. Another step forward was the creation of a mechanism to facilitate European companies' access to rare earths, critical minerals over which China has a virtual monopoly. However, the European Union did not receive an immediate response on the priority issue of the €300 billion trade deficit with China. [Read more](#) - [Other link](#)

■ ECB :



Interest rates unchanged

On 24 July, the Governing Council decided to leave the ECB's three key interest rates unchanged, maintaining inflation at 2% in the medium term. Against the backdrop of trade tensions with the United States, the ECB is retaining room for manoeuvre so that it can lower its key rates if necessary, should the Fed decide to lower its own. [Read more](#)

■ European Agencies :



Lift off of Ariane 6 and Vega C

This summer, the Guiana Space Centre hosted the launch of two missions: VV27 and Ariane 6, two European launchers operated by Arianespace. On 25 July, the Vega-C launcher placed two satellites into orbit, CO3D and MicroCarb, the first French satellite entirely dedicated to measuring atmospheric carbon dioxide. On 12 August, Ariane-6 placed the Metop-SGA1 meteorological satellite into orbit, the first second-generation European satellite in polar orbit. [Read more](#) - [Other link](#)

■ Germany :



Germany strengthens and modernises its military service

At the cabinet meeting on 27 August, the German government adopted a bill allowing for the gradual reintroduction of military service. From 2026, all 18-year-old men and women will receive a form asking them if they wish to perform military service. German Chancellor Friedrich Merz hopes to recruit 30,000 new volunteers each year. He also added that if this target is not met, he will reintroduce compulsory military service in Germany. [Read more](#)

■ France :



25th Franco-German Ministerial Council

On 29 August, the 25th Franco-German Ministerial Council was held in Toulon with the aim of reviving the 'Franco-German engine'. To this end, French President Emmanuel Macron and German Chancellor Friedrich Merz reiterated their commitment to Ukraine and their determination to overcome historical disagreements in the fields of energy, trade, space and defence. Among other things, they discussed the Europeanisation of the Arte television channel and improved cross-border cooperation. [Read more](#)



Agreement with the European Commission on hydroelectricity

On 28 August, French Prime Minister François Bayrou announced that an agreement had been reached with the European Commission on the hydroelectric concession regime, ending a dispute that had lasted more than 10 years. With the transition from a concession regime to an authorisation regime, the conflict has been resolved and will allow for the restoration and arrival of new investments in France's hydroelectric facilities. [Read more](#)

■ Italy :



'Europe must regain its role as a world leader'

On 22 August, former ECB and Italian Prime Minister Mario Draghi gave a speech in Rimini on 'What future for Europe?'. He listed the European Union's weaknesses following the signing of the customs agreement with the United States: acceptance of new US customs duties, China's support for Russia's war effort, and the Union's hitherto marginal role in the peace negotiations in Ukraine. He called for a European wake-up call, i.e. adapting the European Union to the new world order, which means not relying on free trade, changing the political organisation to compensate for the slowness of Community processes, and securing the Union's supply chains for critical materials. Many of these recommendations are based on his report on competitiveness submitted on 9 September 2024. [Read more](#)

■ Lithuania :



Inga Ruginiene appointed as new Prime Minister

On 26 August, Lithuanian MPs officially appointed former Social Security Minister Inga Ruginiene as Prime Minister. This appointment follows the resignation of her predecessor, Gintautas Paluckas, who is under investigation for financial misconduct. The new Prime Minister has 15 days to submit her list of ministers and her government programme to parliament before officially taking office. [Read more](#) - [Other link](#)

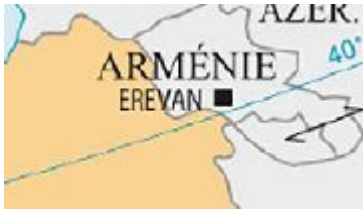
■ Poland :



Inauguration of President Karol Nawrocki

On 6 August, Karol Nawrocki, the winner of the Polish presidential election from the nationalist Law and Justice (PiS) party, was officially inaugurated as President of Poland. He has already announced his intention to play an active role, going well beyond a purely symbolic function. He plans to make greater use of his right to initiate legislation, particularly on economic issues, and does not rule out frequent use of his veto. He has already used it to block a bill to extend aid to Ukrainian refugees, signalling a difficult cohabitation with Prime Minister Donald Tusk's pro-European government. [Read more](#)

■ Armenia :



End of the conflict between Azerbaijan and Armenia

On 7 August, Azerbaijani President Ilham Aliyev and Armenian Prime Minister Nikol Pashinyan signed an agreement ending the conflict and providing for the reopening of diplomatic and trade relations between the two countries. According to the agreement, a 'Trump Way for Peace and International Prosperity' or 'Tripp' linking Azerbaijan to its exclave of Nakhchivan via the Zangezur corridor is to be created. However, the agreement does not address the issue of Nagorno-Karabakh. The Armenian head of government has announced his intention to hold a constitutional referendum in 2027, renouncing Armenia's territorial claims on the region. [Read more](#)

■ Bosnia-Herzegovina :



Conviction of Milorad Dodik

On 6 August, the president of the Republika Srpska entity in Bosnia and Herzegovina, Milorad Dodik, was formally removed from office after being fined and banned from holding office for six years for failing to comply with the decisions of the international high representative, Christian Schmidt. An early election to choose a new leader for Republika Srpska will be held on 23 November. However, Milorad Dodik, who is supported by Serbia, Hungary and Russia, has announced that he will not accept this decision and has approved the organisation of a referendum on 25 October in a bid to gain the support of the population. [Read more](#)

■ Moldova :



Joint visit by Emmanuel Macron, Friedrich Merz and Donald Tusk

On 27 August, the leaders of the Weimar format – French President Emmanuel Macron, German Chancellor Friedrich Merz and Polish Prime Minister Donald Tusk – visited Chisinau to reiterate their support for Moldova and its President, Maia Sandu, in the face of attempts at interference by Russia.

This visit took place against the backdrop of the war in Ukraine and the struggle for influence between the European Union and Moscow in the region. The issue of Moldova's accession to the European Union and the preservation of its sovereignty were at the heart of the discussions. [Read more](#)

■ Norway :



Agreement between Norway and the United Kingdom

On 4 September, Norwegian Defence Minister Tore O. Sandvik and British Defence Minister John Healey signed an agreement strengthening the strategic partnership between the two countries. The agreement includes Norway's purchase of at least five British T26 frigates for an estimated £10 billion. The aim is to strengthen interoperability between the two national navies in order to create a joint fleet capable of better countering Russia on NATO's northern maritime border. This agreement is expected to create at least 4,000 jobs in the United Kingdom, including 2,000 in Scotland. [Read more](#) - [Other link](#)

■ UK :



Government reshuffle

Following the resignation of Deputy Prime Minister Angela Rayner, British Prime Minister Keir Starmer reshuffled his government on 5 September. Struggling in the polls, Keir Starmer appointed David Lammy as Deputy Prime Minister and Minister of Justice, Yvette Cooper as Minister of Foreign Affairs, and Shabana Mahmood as Minister of the Interior, among others. [Read more](#) - [Other link](#)

■ Ukraine :



"Coalition of the willing": discussing security guarantees for Ukraine

On 4 September, French President Emmanuel Macron co-chaired a meeting of the "coalition of the willing" alongside British Prime Minister Keir Starmer, attended by 35 leaders. On this occasion, they reaffirmed their commitment to providing the security guarantees demanded by Ukraine, a prerequisite for any prospect of a peace agreement. Of the countries represented, 26 declared their readiness to participate in a military mission once a ceasefire was established. It was also agreed, following a telephone conversation with Donald Trump, that the United States would soon present its own guarantees to Ukraine and coordinate with it on a new regime of sanctions against Russia if the latter continued to reject any negotiated solution. [Read more](#)



Volodymyr Zelensky and European leaders in the United States

On 18 August, US President Donald Trump welcomed his Ukrainian counterpart Volodymyr Zelensky to the White House, in the presence of several European leaders, including French President Emmanuel Macron, Finnish President Alexander Stubb, Italian Prime Minister Giorgia Meloni, British Prime Minister Keir Starmer, German Chancellor Friedrich Merz, European Commission President Ursula von der Leyen and NATO Secretary General Mark Rutte. The meeting aimed to lay the foundations for lasting peace in Ukraine. The European representatives insisted on the need for a ceasefire prior to any peace negotiations with Russia - a position categorically rejected by Vladimir Putin during his meeting with Donald Trump on 15 August in Alaska. [Read more](#) - [Other link](#)



Further European financial assistance

On the occasion of Ukraine's 34th anniversary of independence on 24 August, the European Union sent a strong signal of support to the country by disbursing €4.05 billion in its favour. Of this amount, €3.05 billion comes from the Ukraine Facility and €1 billion from macro-financial assistance (MFA). Since the start of Russia's large-scale invasion in February 2022, the EU and its Member States have mobilised €168.9 billion in humanitarian, financial and military aid for Ukraine and its people. [Read more](#)



Visit by the NATO Secretary General

On 22 August, during his meeting with President Volodymyr Zelensky in Ukraine, NATO Secretary General Mark Rutte reiterated the support of the transatlantic alliance for the preservation of the country's sovereignty and independence. This is part of efforts to strengthen relations with Ukraine, notably through the PURL initiative, which has enabled more than \$1.5 billion worth of equipment to be sent in less than a month, and through the NSATU command centre in Germany, which is responsible for planning, coordinating and organising military assistance (weapons, equipment) and training for Ukraine. [Read more](#)

■ Studies/Reports :



Defence spending reaches unprecedented levels

On 2 September, the European Defence Agency (EDA) published its annual report on defence data for 2024-2025, detailing the defence spending of the 27 Member States. In 2024, expenditure reached €343 billion. This increase is largely due to massive equipment purchases and greater investment in research and development. This situation reflects the determination of Member States to strengthen Europe's military capabilities in response to the changing security environment. [Read more](#) - [Other link](#)



Asylum applications down 23% in the first half of 2025

On 8 September, the European Union Agency for Asylum published its half-yearly report on trends in asylum applications in Europe. According to the report, Member States received 399,000 asylum applications in the first half of 2025, a 23% decrease compared to the same period in 2024. The report also provides an analysis of the main nationalities of applicants and the European countries most affected. [Read more](#)



WTO Annual Report

On 7 August, the WTO published its Annual Report, which reviews the major events of the year. Several topics are covered, such as the 13th WTO Ministerial Conference, which confirmed members' commitment to a reform agenda focused on the future of the organisation, the conclusion of negotiations on the Plurilateral Agreement on Investment Facilitation for Development, and the Aid for Trade initiative. In the context of the trade war initiated by US President Donald Trump, WTO Director-General Ngozi Okonjo-Iweala warns: 'While the volume of trade in goods and services increased by 2.9% and 6.8% respectively in 2024 [...], the outlook for 2025 is very different.' [Read more](#)

■ Prizes :



Apply for the European Prize for Civic Engagement, Security and Defence!

The European Prize for Civic Engagement, Security and Defence, which rewards particularly outstanding actions promoting European civic engagement and European security and defence awareness, is open until 26 September. The competition is open to all citizens of Council of Europe member countries who wish to promote actions in support of European values, the promotion of a stronger BITD in Europe, and the strengthening of the Union's resilience in the face of threats. Entries, written in English or French, may include in an appendix any press articles, photographs, films or other media highlighting the action or actions carried out. [Read more](#)

■ Culture :



Berlin Art Week

From 10 to 14 September, Berlin Art Week will be taking place. For five days, Berlin will be celebrating contemporary art with a network of over a hundred museums, exhibitions, galleries and collections. The programme includes exhibitions of several public and private collections, meetings with artists and guided tours. [Read more](#)



Art Safari exhibitions in Bucharest

Until 14 December, the latest edition of Art Safari in Bucharest is offering a variety of art exhibitions. Highlights include the 'Paris Pallady' exhibition, featuring more than 70 works by Theodor Pallady and pieces by Henri Matisse, in collaboration with Parisian museums, as well as 'Enescu si Minotaurul,' which celebrates the 70th anniversary of the death of composer George Enescu. [Read more](#)



Olga Boznańska in Warsaw

Until 5 July 2026, to mark the 160th anniversary of the birth and 85th anniversary of the death of Olga Boznańska (1865–1940), the National Museum in Warsaw is dedicating a special exhibition to this major figure in European painting. Nearly thirty of the artist's iconic works from the museum's collections are on display. [Read more](#)



Musée Jacquemart-André

Georges de la Tour in Paris

Until 25 January 2026, the Jacquemart-André Museum in Paris is hosting more than 30 masterpieces by Georges de la Tour. Best known for his intimate scenes and intense chiaroscuro, this exhibition is the first French retrospective dedicated to the 17th-century French painter since 1997. [Read more](#)

THE
NATIONAL
GALLERY

Neo-Impressionism in London

Until 8 February 2026, the National Gallery in London is hosting the exhibition 'Radical Harmony', featuring the personal collection of Helene Kröller-Müller, the first female patron of the arts in the 20th century. Her collection of Neo-Impressionist artists includes paintings by Seurat, Van Gogh, Signac and Pissarro. These works, collected with the aim of making them accessible to all, have been loaned by the Kröller-Müller Museum, which she herself founded in the Netherlands. [Read more](#)

MUSEO NACIONAL
DEL PRADO

Antonio Muñoz Degrain in Madrid

Until 11 January 2026, the Prado Museum in Madrid is hosting an exhibition dedicated to the 19th-century Spanish painter Antonio Muñoz Degrain. A dozen paintings are on display, including five that have been recently restored. They showcase the thematic variety, technical mastery and aesthetic vision of the Valencian painter. [Read more](#)

■ Agenda :



8-11th September 2025

Plenary Session of the European Parliament (Strasbourg)



10-11th September 2025

ECB Governors' Council (Frankfurt/Main)



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