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Countdown to the NATO Summit in Ankara: priorities and expectations in 2026

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Introduction

Ahead of the second NATO Summit in Ankara next month, the European Policy Centre (EPC) brings together a collection of analyses on the alliance's priorities, expectations and strategic challenges at a decisive moment for Euro-Atlantic security.

Written by EPC in-house experts and external authors with long-standing expertise on NATO and transatlantic security, the contributions assess the political, military and institutional pressures shaping the alliance's agenda. They examine burden-sharing and the division of labour within NATO, US engagement and the future of transatlantic relations, the evolution of a European way of war, the Europeanisation of NATO, Russia's enduring threat, Black Sea security, lessons from NATO 2030 and the alliance's long-term strategic direction.

Taken together, these reflections offer a timely assessment of the challenges and opportunities that will shape the Ankara Summit – and a set of policy recommendations for strengthening NATO beyond it. This is the fourth edition of EPC's NATO Summit Compendium.

Previous editions:

- Countdown to the NATO Summit in The Hague: priorities and expectations in 2025
- Countdown to the Washington NATO Summit: Priorities and Expectations in 2024
- Countdown until the NATO Vilnius Summit: Priorities and expectations in 2023

Access the EPC NATO project website here.

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List of abbreviations

CAP	Comprehensive Assistance Package
CFE	Treaty on Conventional Armed Forces in Europe
ELSA	European Long-Range Strike Approach
FPV	First-Person View (drones)
INF	Intermediate-Range Nuclear Forces Treaty
ISR	Intelligence, Surveillance, and Reconnaissance
JATEC	NATO–Ukraine Joint Analysis, Training and Education Centre
JCPOA	Joint Comprehensive Plan of Action
NSATU	NATO Security Assistance and Training for Ukraine
NUC	NATO–Ukraine Council
PURL	Prioritised Ukraine Requirements List
RAAP	Rapid Adoption Action Plan
SMEs	Small and Medium-Sized Enterprises
START II	Strategic Arms Reduction Treaty II

Ankara summit – make or break?

Oana Lungescu, Distinguished Fellow, Royal United Services Institute (RUSI); Senior Adviser, European Policy Centre

The Ankara Summit is meant to mark NATO's transition from dependency to partnership. It may instead become a stress test for unity. European allies and Canada are under growing pressure to prove that they can take on more responsibility for their own deterrence and defence, while keeping the US engaged in NATO. As Pentagon policy chief Elbridge Colby put it, the aim is a NATO 3.0 based not on dependency but partnership. That ambition has become even more urgent amid unprecedented tensions triggered by President Trump's attempts to control Greenland, his questioning of NATO's value and his threats to punish allies reluctant to support the US-Israel war on Iran.

Visiting Washington to limit the damage, NATO Secretary General Mark Rutte said NATO was not "whistling past the graveyard" but entering "a period of profound change." While Europe and Canada have spent a record $547 billion on defence in 2025, Rutte wants to set "a clear and credible path" towards the 5% of GDP target agreed last year at The Hague. He will also report, for the first time, on allies' progress towards the 1.5% of GDP resilience and military mobility component of that commitment.

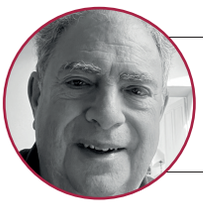
The summit will also look at ways to turn cash into capabilities at greater scale and speed. NATO is aggregating figures for the capabilities it needs, in order to send a stronger signal to industry. It is also considering how to speed up procurement, bring more small and medium-sized (SME) enterprises into defence production and repurpose civil sectors, such as car manufacturing, for defence. Coordination with the EU, co-production with Ukraine and cooperation with Japan, South Korea and other Indo-Pacific partners will play a key role at the NATO Defence Industry Forum in Ankara. Türkiye will also showcase its fast-growing defence industry amid aspirations for stronger EU ties.

Ukraine will be central to these discussions. As it shifts from a recipient of military aid to a hub of innovation, Rutte wants more allies to support Kyiv through the Prioritised Ukraine Requirements List (PURL). Last year, European allies and partners spent $4 billion to procure Patriot interceptors and other US equipment. But sustaining that pipeline will become increasingly harder as Washington delay weapons deliveries as stockpiles are depleted by the war in Iran.

NATO leaders cannot ignore the Middle East crisis, which is already affecting allied economies and transatlantic relations. NATO's Gulf partners – Bahrain, Kuwait, Qatar and the United Arab Emirates – will be invited to Ankara. That could give allies and partners a framework to discuss reopening the Strait of Hormuz, which could also salvage NATO unity.

NATO leaders cannot ignore the Middle East crisis, which is already affecting allied economies and transatlantic relations.

Are we on the road to a trainwreck or balanced burden-sharing?



Paul Taylor, Senior Visiting Fellow, Europe in the World Programme, European Policy Centre

NATO has embarked on the road to burden-shifting. But the transition could be derailed at any moment due to the unpredictability, strategic impatience and vindictiveness of President Donald Trump. The alliance is in a precarious state of simultaneous military rebalancing and political destruction.

In principle, the Ankara Summit should set new milestones in the gradual Europeanisation of conventional defence. The United States would continue to provide extended nuclear deterrence and key conventional enablers, as outlined by Pentagon policy chief Elbridge Colby in his "NATO 3.0" speech in February. European allies have also taken over much of the military and financial support for Ukraine since Trump ended most US assistance. In 2025, all European allies and Canada reached the old defence spending target of 2% of GDP for the first time. Poland and the Baltic states spent more than 4%, while Germany has pledged to build Europe's strongest conventional army on the back of a steeply rising defence budget. Europeans have also taken command of NATO's three regional Joint Forces Commands from US officers.

Yet this narrative of Europeans stepping up, spending more and building their defence industrial base – with help from EU loans and greater fiscal leeway for defence investment – tells only part of the story. A managed transition is constantly threatened by sudden unilateral jolts from Washington that are more shock than therapy.

Trump can claim credit for pushing allies towards a 5% defence target by 2035. But his relentless denigration of NATO as a "paper tiger" undermines the deterrence that higher spending is meant to strengthen. European governments live in trepidation that he will impose a humiliating "peace" on Ukraine, rewarding Russian aggression with territorial concessions and emboldening Putin to keep testing NATO's cohesion with intensified hybrid warfare and probing along the eastern flank.

Trump has criticised NATO allies for offering what he describes as too little support for his war on Iran despite not consulting them beforehand. In retribution for German criticism, he has decided to withdraw 5,000 troops from Germany and dropped plans to deploy conventional cruise missiles there – a system intended to plug a key deterrence gap while Europeans develop their own deep precision-strike capabilities. The Pentagon has also announced a permanent reduction in the number of Brigade Combat Teams assigned to Europe from four to three. This weakens NATO's ability to reinforce the Baltic states quickly in a crisis. Reductions in US combat aircraft, warships and submarines in Europe are expected to be announced before Ankara. If Putin seized a Baltic foothold, perhaps Trump might mimic the Europeans on Iran and declare "This is not my war".

Even if the allies avoid a confrontation in Ankara, NATO will remain only one Truth Social post away from disaster as long as Trump is in the White House.

The alliance is in a precarious state of simultaneous military rebalancing and political destruction.

Communicating defence and security: What priorities for Ankara?

Benedetta Berti, Secretary General, NATO Parliamentary Assembly; Senior Adviser on Strategic Planning, Security and Defence Policy, European Policy Centre

Over the past decade, NATO has been undergoing a significant reset of its strategy, plans and posture, driven by the need to rebuild credible deterrence and defence in a context where Europe is no longer at peace and allies "cannot discount the possibility of an attack against Allies' sovereignty and territorial integrity."

After the post-Cold War decades of low investment in defence and a strong focus on "out of area" expeditionary operations, the territorial defence of Europe now requires significant and sustained investment in Allied military power, as well as in the transatlantic defence and technological industrial base.

Recent NATO Summits have therefore focused on ensuring the Alliance has the resources, infrastructure, forces, capabilities and strategic enablers it needs to deter and defend against all threats.

When NATO allies meet in Ankara in July 2026, their focus will once again be on ensuring tangible progress towards this strategic objective. Concretely, this means demonstrating real increases in defence spending and a concrete trajectory across all NATO countries to meet the 2035 goal of allocating at least 5% of GDP to defence and security-related expenditure, as agreed in The Hague in 2025.

In addition to sustaining the defence spending momentum, the 2026 Summit will focus on strengthening allies' ability to deliver and field capabilities at scale and speed. Defence industrial readiness and resilience are essential to ensuring that increased financial commitments turn into real capabilities. This requires right sizing the transatlantic defence industrial base, reducing barriers to industrial cooperation, reforming procurement frameworks to be more agile and efficient and ensuring sustainable financing, including by better leveraging and mobilising private capital. NATO's second Defence Industry Forum, to be held on the margins of the Summit, will touch on many of these topics and bring together government officials, industry representatives and partner countries.

The Summit will also need to showcase that discussions on "burden-shifting" and enabling European allies and Canada to take a leading role in the conventional deterrence and defence of Europe within NATO are advancing. Looking ahead, discussions on how to operationalise, at both national and European levels, the metrics needed to achieve a "stronger Europe in a stronger NATO" will shape the alliance's future. Equally important will be reaching a shared understanding of how to meet this objective while reinforcing and future-proofing the transatlantic bond between Europe and North America.

Finally, ensuring sustained support for Ukraine will be a key component of discussions in Ankara. Maintaining military assistance, ensuring equitable burden-sharing and strengthening European leadership will be essential. Expanding defence industrial cooperation – including co-production and co-development with Ukraine – also remains critical. Such cooperation strengthens Ukraine's defence capabilities while helping address structural shortcomings in the Europe's defence industrial ecosystem, making it critical to the long-term reinforcement of the European defense industrial base.

In sum, the Ankara Summit will focus on tangible outcomes: delivering on defence spending commitments, strengthening industrial capacity, advancing burden-shifting and sustaining support for Ukraine. Together, these objectives further NATO's strategic adaptation and move the alliance in the right direction. Ultimately, however, success in Ankara will depend on Allies taking concrete steps to translate ambition into credible, sustained capability.

The metrics needed to achieve a "stronger Europe in a stronger NATO" will shape the alliance's future.

The views expressed in this article are those of the author and do not necessarily reflect the views of the NATO Parliamentary Assembly or any affiliated institution.

European security governance

Almut Möller, Director for European and Global Affairs and Head of the Europe in the World Programme, European Policy Centre

Even more than in 2025, the 2026 NATO Summit will underscore how politically and strategically awkward security cooperation with the US has become in NATO. Europe's leaders face a dilemma the US President is undermining the alliance's ability to deter, while Europe is not yet able to compensate for a reduced American role. Meanwhile, public opinion is shifting. As US policy moves further out of sync with European interests, Europe's reliance on NATO as its primary security provider will likely become more contested, even if the alliance becomes more Europeanised over time. A recent study by Bertelsmann Stiftung suggests that more than 70% of Europeans believe that Europe should "go–it–alone" after decades of cooperation with the US.

European leaders understand this dilemma. Over the past year, they have continued to take important steps individually, bilaterally and collectively to strengthen European defence, albeit with differing levels of urgency and ambition. They have become better at drawing on resources from various corners. New bilateral defence agreements are multiplying between European countries and with the EU. Cooperation with Ukraine, both at EU and national levels, has become a driver of European defence innovation. The Coalition of the Willing in support of Ukraine, led by France and the UK, has also demonstrated political determination and global convening power.

The EU is playing a growing political role. Heads of state and government have discussed Russia's war at every European Council meeting since 2022. These discussions increasingly serve as high-level political coordination to exchange and align positions on key security and defence issues. These include military assistance to Ukraine, sanctions policies and broader European security priorities, including NATO-relevant matters. There are nascent discussions on how to make the mutual assistance clause of the EU treaties work as a collective defence mechanism. Meanwhile, the European Commission has taken steps to extend the single market to defence procurement and grant eurozone members greater fiscal flexibility. Weaving Ukraine into EU instruments, including enlargement policy, also contributes to European security and cohesion. EU-UK cooperation has also seen a rapprochement. Overall, the EU framework helps limit political fragmentation in Europe on a matter of utmost importance: keeping Europeans safe.

These steps suggest that Europeans are already assembling the building blocks of a Europeanised security order. Does this mean NATO is no longer the only relevant game in town? For now, the answer is clearly no, but there is a wider picture that increasingly matters for the future of European security.

The Ankara Summit will follow as much as possible a pre-crafted script – with a US President who still might go intensely off-script and an ambitious Turkish President hosting, the summit may be one of surprises. Europeans certainly won't be contributing to them.

Yet domestic pressures in Europe and external factors might soon push Europe's leaders to articulate a collective vision for a cooperative European security order beyond what they have so far branded as a "Europeanisation of NATO" – and give a name to what is already under way for citizens to rally behind. The draft European Defence Community that was meant to constitute the European pillar within NATO might well offer inspiration.

The EU framework helps limit political fragmentation in Europe on a matter of utmost importance: keeping Europeans safe.

Europe needs a plan B for NATO

Christian Mölling, Director of the think tank EDINA (European Defence in a New Age) and Senior Adviser, European Policy Centre

Torben Schütz, Research Director at EDINA (European Defence in a New Age)

Can Europe still count on the United States? Since no lasting answer can be expected from this administration, Europeans have a duty to organise Europe's defence more independently.

Yet Europeans continue to behave as though they still hold the key to US security guarantees. Anyone who raises the idea of a more European NATO is quickly warned not to scare off the Americans or create a self-fulfilling prophecy. But these are mostly conversations Europeans are having with themselves.

In reality, the Europeanisation of NATO is already under way. From 2027 onwards, the United States is expected to provide only around half of NATO's military combat power – or even less after recent US announcements. The question is therefore no longer whether NATO will become more European. It is by which path, and by when.

No one is trying to push the US out of NATO. But Europe must insure itself against the possibility that American support may be limited, delayed or politically blocked. Europe must be able to defend itself if necessary, including in worst-case scenarios requiring immediate military readiness.

The challenge is not only military but deeply political. Europe still lacks clear structures for political and military leadership in crises: who would make escalation decisions, coordinate operations or manage deterrence? Nuclear deterrence illustrates the dilemma clearly. As long as Europe depends on US guarantees, Washington will retain decisive influence over broader military strategy.

At the same time, a more European NATO will expose internal differences within Europe. Eastern European countries tend to prioritise deterrence against Russia more urgently than their Western European counterparts. Northern Europe has become more strategically integrated following Finland and Sweden's NATO accession, whereas southern Europe remains more focused on instability in the Mediterranean and Middle East. Managing these diverging threat perceptions will become essential.

What follows from this?

First, Europe urgently needs an inventory of scenarios involving limited or no American support. The good news is that Europe can defend itself without the US – but it will be less comfortable and initially riskier.

Second, Europeans must organise political and military leadership within NATO instead of waiting for parallel structures.

Third, European allies need a protected political space in which governments, militaries and security policy elites can informally discuss Europeanising NATO.

Fourth, Europe will remain politically and militarily heterogeneous for the foreseeable future. It must organise that heterogeneity better and turn it into a strength. The immediate priority should be to make European armed forces interoperable at speed, especially their digital systems. That includes intelligence, command, communications, logistics, targeting, maintenance and industrial staying power.

A debate about a more European NATO is not an attack on the alliance. It is a prerequisite for avoiding a deterrence gap. The most dangerous illusion would be to believe this discussion can be postponed to spare transatlantic sensitivities or avoid losing control over planning assumptions. NATO will become more European, whether Europe prepares or not. That is precisely why Europe must plan now.

Europe still lacks clear structures for political and military leadership in crises: who would make escalation decisions, coordinate operations or manage deterrence?

In Ankara, allies must confront hard truths

Jennifer Kavanagh, Senior Fellow and Director of Military Analysis, Defence Priorities

Heading into the Ankara Summit, there will be a temptation to set-aside the strains the alliance experienced over the past year in favour of a narrative of unity. While understandable, this would be a mistake. Member states should use Ankara to confront emerging fractures in the alliance, identify what common interests remain and realistically discuss NATO's future.

At the root of tensions within NATO is a simple reality. The United States and Europe have fundamentally different attitudes towards what has traditionally been the alliance's main adversary: Russia. While Europe perceives a severe and even existential threat from Moscow, the United States no longer sees Russia as a conventional military challenge and is increasingly unwilling to commit military resources to underwrite Europe's defence.

President Donald Trump is not the cause of these changes in U.S. attitudes toward Europe and Russia, but rather a symptom of trends that have been underway for almost two decades. Future US presidents may depart from Trump's approach, but none is likely to adopt Europe's view of Russia or fully reverse the process of US retrenchment from its deep involvement in European security. Reductions in the US commitment to Europe are, in other words, likely to be permanent—especially if future U.S. leaders adopt the Trump administration's view that NATO is most useful as a platform for US power projection, rather than an alliance focused on European security.

Efforts to avoid serious discussion of this new reality may preserve the appearance of allied cohesion but will ultimately do the alliance a disservice by deepening the disconnect between rhetoric and reality. Member states could make better use of the Summit by beginning a dialogue about what a truly European-led and European-owned NATO will look like and require.

This dialogue must begin with an honest admission that the shared worldview that has grounded the alliance for decades no longer exists. In Ankara, NATO members must grapple with how the rupture between Washington and European capitals over the "Russia threat," and even the purpose of NATO, will affect military planning. They must also define concretely what shifting institutional and operational responsibility from the United States to Europe would mean in practice.

Rather than offering vague promises under the banner of "NATO 3.0," Washington should set out how its increasingly benign view of Russia affects its willingness to allocate forces to European contingencies and to keep soldiers in Europe beyond the near term. The Trump administration already moved in this direction telling allies in May 2026 that it would reduce the capabilities available in a future crisis. It should make these planned changes more explicit and offer a timeline to guide European expectations. Meanwhile, European leaders should be clear about what they must do to build an independent defence, including shifting investment towards their own defence industrial base and away from US weapons purchases.

With more limited US involvement, questions about the alliance's durability will emerge. Members states should use the Ankara Summit to identify the common interests NATO allies still share. Safeguarding access to sea lanes in the North Atlantic and Mediterranean regions would be one example, but there are likely others. NATO members should consider what a future alliance might look like with this narrower set of shared interests as its foundation and what type of institutions Europe will need to defend itself without the United States, both within NATO and without.

A summit centred on these discussions would be challenging but productive. Even if no final decisions are reached, surfacing disagreements would set an agenda for member states to tackle at the working level over the rest of the year.

At the root of tensions within NATO is a simple reality. The United States and Europe have fundamentally different attitudes towards what has traditionally been the alliance's main adversary: Russia.

Planning for Article 5 against a credible Russian threat

Iana Maisuradze, Policy Analyst in the Europe in the World Programme, European Policy Centre

The Ankara Summit should shift NATO's debate from capability-building and burden-sharing towards clarifying how the Alliance would implement Article 5 against a credible Russian threat, particularly for Baltic and Eastern European allies.

The Hague defence investment pledge is now underway, and Europeans are accepting a greater share of responsibility within NATO. The allies in Ankara should demonstrate that they are becoming stronger and more capable by building the European industrial base. Yet a simple question remains: from whom is Europe defending itself? The answer is still primarily Russia.

Beyond war-gaming and red-teaming, Eastern European and Baltic NATO members are not shying away from warning their allies that this threat is real. The threats are already materialising through air incursions, cyberattacks, sabotage of critical infrastructure, disinformation operations and increasingly hostile diplomatic signalling. Most recently, a Russian ambassador threatened Latvia at the UN.

Even if Russia is not at the top of the US agenda and is described as a "persistent but manageable threat" in the US National Defense Strategy, decisions will have to be made. NATO must address what it would do immediately if Russia attacked a member state.

Regardless of how Europeanised NATO becomes, collective defence in action still requires consensus. Yet threat perceptions vary, as does the threshold for what would constitute an armed attack requiring a military response. NATO has rightly maintained a strategic ambiguity about what may trigger Article 5 and has deliberately avoided to set thresholds; however, it is important to have a confidential discussion about the kind of aggression that would require an armed action.

The Ankara Summit must therefore address Article 5 credibility. NATO allies need to demonstrate they are willing to activate and implement realistic plans to defend the Baltic and Eastern European members should Russia intervene.

For the Summit to succeed, it must go beyond burden-shifting and clearly affirm that all 32 allies stand ready to defend any NATO nation against Russian aggression.

Political commitments must match operational planning in crisis prevention and management process, which remains NATO's core task. Clear arrangements are needed for who leads, who supports, and how rapid response is organised.

Such planning is not meant to widen transatlantic gaps but to recalibrate around common interests under the new burden-shifting agreement. The aim is not to name and shame or shatter unity, but to honestly face reality and plan for what is feasible at the NATO level.

Regular and effective Article 4 consultations, which any ally can request if they feel the territorial integrity, political independence or security is under threat, should be used to share and communicate concerns, anticipations and policies, and to align further.

The real test in Ankara is the credibility of the Hague commitments, which require political will, mutual trust and renewed commitment to Article 5. This will strengthen allies' political preparedness should Russia challenge NATO directly.

Regardless of how Europeanised NATO becomes, collective defence in action still requires consensus.

Deep strike and the credibility of NATO's European pillar

Chris Kremidas-Courtney, Senior Visiting Fellow in the Europe in the World Programme, European Policy Centre

The wars in Ukraine and the Persian Gulf have shown that long-range strike does not deliver a decisive blow but works best when applied continuously against an adversary's critical logistics, communications and infrastructure. Europe collectively lacks the capacity to sustain deep strikes of this kind, and that gap is now a strategic liability.

Ukraine's use of the Flamingo cruise missile, with ranges exceeding 1,400 kilometres, illustrates this shift. Strikes on Baltic export terminals like Ust-Luga and Primorsk have crippled the core of Russia's oil export system.

The European Long-Range Strike Approach (ELSA) reflects a belated recognition that this dimension of defence can no longer be outsourced to the United States. But ELSA remains platform-centric, prioritising acquisition over the system-level integration required to achieve operational effects. Buying missiles is not the same as building a strike complex.

Modern conflict consumes munitions at rates that exhaust even substantial stockpiles.

A credible deep strike capability requires a functioning strike chain connecting sensors, intelligence fusion, decision-making and shooters able to operate under fire. Europe's primary weakness is not only the absence of individual capabilities but the lack of a coherent system that links them all together. Without it, even the most advanced missile becomes an expensive signalling device rather than a tool to shape outcomes.

Geography sets the terms. A 2,000-kilometre strike envelope from Central Europe reaches into Russia's logistics and command footprint. Europe's current conventional weapons only range out to 500 kilometres, leaving Russia's operational depth unthreatened. Range determines whether European strike capabilities can shape the battlefield or merely seek to survive it.

Intelligence, surveillance and reconnaissance (ISR) sit at the centre of this challenge. Europe possesses significant space-based assets and analytical capacity, but struggles to convert data into timely, actionable intelligence at the speed that high-intensity conflict demands.

Industrial depth is the other half of the equation. Modern conflict consumes munitions at rates that exhaust even substantial stockpiles. Both the Ukraine and Iran conflicts have proven to be contests of endurance, with inventories drawn down across all sides simultaneously. A European deep-strike capability that cannot sustain production or secure the material inputs that advanced munitions require will only ever be capable of a short-lived surge.

ELSA is a beginning, not a destination. Moving beyond it means linking capability development to NATO planning, connecting financial instruments to strategic ambition and integrating ISR so the strike chain can function under either the European pillar of NATO or EU control.

Europe can either build the means to act on its own decisions, or accept that in a crisis, those decisions may not be its own.

Non-proliferation? Certainly. But not much ado on arms control and disarmament

Jamie Shea, Senior Adviser on Strategic Planning, Security and Defence Policy, European Policy Centre

Past NATO Summits often focused on arms control, as Cold War and post-Cold War treaties shaped East-West relations and underpinned Europe's balance of power. For decades, arms control and disarmament were the corollary of defence and deterrence, and monitoring treaty implementation – and calling out Russian violations – was core NATO business. Those treaties have now disappeared, following repeated Russian violations. notably of the Intermediate-Range Nuclear Forces Treaty (INF) and Treaty on Conventional Armed Forces in Europe (CFE) treaties, and declining US interest under two Trump administrations. Since the 2025 Hague Summit, the last major US-Russia nuclear accord, START II, has expired without renewal. As in the early Cold War, NATO must rely on brute force and credible deterrence.

As in the early Cold War, NATO must rely on brute force and credible deterrence.

Today NATO focuses more on nuclear proliferation issues that affect alliance security or divide allies. Iran's nuclear programme will likely dominate the Ankara Summit. The US–Israeli operation Epic Fury to end Iran's nuclear weapons potential, and the Trump administration has criticised allies of insufficient support and for restricting use of bases. It has linked the withdrawal of 5000 US troops from Germany and abrupt cancellation of 4,000 soldiers' deployment to Poland to European criticism of Trump's objectives. Non-proliferation has therefore become central repairing the transatlantic rift. Allies will seek to show they share the goal of preventing a nucleararmed Iran under strict IAEA monitoring, potentially backing demands for Iran to transfer its remaining highly enriched uranium and accept an enrichment moratorium.

If nuclear negotiations with Iran are underway at the time of the summit, Europeans can welcome and support them, recalling their key role in the the 2015 Joint Comprehensive Plan of Action (JCPOA). Most allies favour a negotiated solution, though they are mindful that the US President looks less for European mediation than for wholehearted support of his policy of maximum pressure.

Moscow continues to use its nuclear status to deter decisive NATO military assistance to Kyiv. Tactical nuclear weapons in Belarus heighten the threat to NATO, while Russia's rapid nuclear modernisation, and the absence if arms control talks increase the importance of nuclear deterrence. The summit will reaffirm NATO as a nuclear alliance. Exercises like Steadfast Noon in the Netherlands demonstrate burden-sharing and operational readiness. The US has not proposed withdrawing its nuclear shield from Europe thus far, while President Macron has started a quiet dialogue with Germany and others on extending French nuclear protection to Europe. With the INF Treaty gone, European allies can now procure intermediate-range conventional missiles, for which they previously relied on the US. Germany is seeking US Tomahawks now that the Pentagon has cancelled a planned deployment.

North Korea's programme may also feature, especially if NATO's Asia-Pacific partners attend. Prospects for a US-North Korea nuclear deal, which flickered briefly during Trump's first term, have now vanished. Growing Russia-Iran-North Korea links in ballistic missile, space satellite and navigation technologies are a shared concern.

While short-term arms control prospects are bleak, allies still hope that strength and unity may eventually brin Russia back to negotiation and de-escalation.

Europe needs “subscription-style” defence procurement to scale innovation

Juraj Majcin, Policy Analyst in the Europe in the World Programme, European Policy Centre

Russia’s war on Ukraine has reshaped modern warfare and must revolutionise the way Europe procures defence systems. The most visible change is in the widespread use of First-Person View (FPV) drones, long-range attack drones, loitering munitions and the growing transparency of the battlefield. These developments have made traditional warfare far more difficult. When the battlefield becomes static, the use of armour also becomes more complicated, as tanks and other heavy platforms are easier to detect, track and destroy.

NATO has recognised this challenge through the Rapid Adoption Action Plan (RAAP), endorsed at last year’s summit in The Hague, in which allies pledged to “procure new technological products at greater speed”. However, procurement practices are still not fully adapted to the speed and scale of technological change. Defence procurement should now reflect two parallel trends: the need to absorb innovation quickly, and the need to sustain high-intensity warfare.

On innovation, the national defence strategies of major NATO allies, including France, the United Kingdom and Germany, all recognise the need to simplify procurement, especially for SMEs, start-ups and other smaller technology companies. This is not enough. Armed forces may be able to buy small quantities of new technologies from start-ups for testing, but the real challenge comes when they need to adopt innovation at scale. Rapid adoption requires not only more flexible procurement, but also procurement methods designed for high-intensity warfare.

For many years, European armed forces procured equipment mainly to maintain minimum capabilities and support expeditionary operations. Territorial defence and high-intensity conflict require a different model. They demand large quantities of defence material, from consumables such as ammunition, drones and missiles to major platforms.

Europe has not yet created the economies of scale needed to transform its defence industry into a production base capable of sustaining a major war. This means procurement should increasingly be treated as a long-term industrial commitment rather than a series of short-term purchases.

To tackle this, NATO allies should give industry more predictable demand through “subscription-style” arrangements: multi-year orders and framework contracts that keep production capacity warm. This is especially important for drones and cheaper missiles, including some air defence interceptors, which can become outdated quickly as countermeasures evolve and may also degrade in storage because of explosives, propellants and other chemical components.

Since these systems cannot simply be stockpiled indefinitely, allies need a model that maintains continuous baseline production and allows output to surge when demand rises instead of buying yesterday’s technology in bulk.

Defence procurement should now reflect two parallel trends: the need to absorb innovation quickly, and the need to sustain high-intensity warfare.

Enhancing NATO's maritime power

Mihai Sebastian Chihaia, Policy Analyst in the Europe in the World Programme, European Policy Centre

The importance of the maritime domain has grown exponentially over the past years, increasingly becoming a space for competition and confrontation.

Naval warfare in the Black Sea, incidents involving critical underwater infrastructure in the Baltic Sea, freedom of navigation disruptions in the Red Sea and the closure of the Strait of Hormuz highlight the importance of developing naval strategies and capabilities to respond to a spectrum of threats and their cascade effects on trade, supply chains and energy security.

In October 2025, NATO released its new maritime strategy, updating a document that had remained unchanged since 2011. The Strategy aims to illustrate how the alliance's maritime power addresses current threats and challenges and ensures defence and deterrence.

The strategy names Russia as the main threat, including in the maritime domain through its "capability to disrupt Allied reinforcements, to hinder freedom of navigation and to avoid sanctions". Other challenges include terrorism, China and climate change, while emerging and disrupting technologies present both opportunities and challenges.

The strategy also emphasises NATO maritime power's contribution to allied security and outlines the priorities in the maritime domain: maximising warfighting readiness, detecting and countering threats to maritime critical infrastructure, investing in and integrating new technologies, and increasing focus on training and exercises.

In view of the NATO Ankara Summit and beyond, the implementation of the strategy and enhancement of NATO's maritime power will require navigating multiple hurdles.

Political will to dedicate financial resources to the naval domain will be essential. The current state of fleets requires modernisation, new capabilities and new technologies.

Reinforcing dialogue and cooperation with the European Union in practical ways will require sustained engagement and a concrete plan.

Cooperation with the private sector is paramount. Designing an all-encompassing public-private model of cooperation to tackle threats to critical maritime infrastructure, much of which is privately owned, is also an urgent necessity.

As NATO leaders gather in Ankara, the alliance will also need to reflect on the lessons emerging from maritime developments in the Strait of Hormuz – including those related to maritime readiness, naval warfare and the integration of new technologies – and their relevance for NATO's defence and deterrence posture in the maritime domain.

In October 2025, NATO released its new maritime strategy, updating a document that had remained unchanged since 2011.

How to shape and enforce Black Sea security guarantees

Amanda Paul, Deputy Head of the Europe in the World Programme and Senior Policy Analyst, European Policy Centre

The Black Sea has become a major front of European security since Russia's annexation of Crimea in 2014, with Moscow's full-scale invasion of Ukraine in 2022 dramatically worsening regional security. Russia's attacks on Ukrainian ports, commercial shipping and critical infrastructure have threatened freedom of navigation, disrupted global grain exports and increased pressure on NATO's southeastern flank. Moscow's militarisation of Crimea and use of the Black Sea as a platform for coercion and hybrid warfare have transformed the region into a critical theatre of European security and deterrence. For NATO, securing the Black Sea is a strategic imperative tied directly to the credibility of European deterrence and the durability of any future ceasefire in Ukraine.

Discussions among the coalition of the willing increasingly emphasise maritime security guarantees as an essential component of any ceasefire. Any durable settlement must include a structured maritime security framework that guarantees freedom of navigation, protects Ukrainian exports and critical infrastructure – including the Danube and Black Sea-Baltic corridor – and deters Russian coercion. Such a framework should function as a layered deterrence and monitoring mechanism led jointly by European allies and Ukraine with NATO coordination.

Primary responsibility would fall to the Black Sea littoral states — particularly Romania, Türkiye, and Bulgaria — working alongside Ukraine to monitor shipping corridors, maritime activity and potential violations. Ukraine would remain responsible for coastal defence, port security, and territorial waters through anti-ship missile systems, maritime drones, and air defences. The war has demonstrated that, with sustained Western support, Ukraine can deny Russia naval dominance in the Black Sea.

NATO's role would focus on coordination, deterrence and intelligence. While political and legal constraints will limit the deployment of non-Black Sea littoral state naval vessels under the Montreux Convention, NATO structures could still provide the command-and-control architecture necessary for sustained maritime monitoring operations. This would include satellite surveillance, airborne early warning systems, intelligence fusion and rapid attribution mechanisms for violations. A dedicated Black Sea Maritime Coordination Cell could support this effort.

The EU can provide the economic and civilian dimension. Through its emerging Black Sea strategy, Brussels is positioning itself as an actor in infrastructure resilience, port reconstruction, sanctions enforcement and commercial shipping security. The proposed EU Black Sea Maritime Security Hub – likely to be centred in Romania – would strengthen maritime situational awareness, critical infrastructure protection and regional coordination, complement NATO's military role while further integrate Ukraine into Europe's economic and institutional structures. It would also deepen engagement with the broader region, including Moldova and the South Caucasus, to strengthen regional stability and connectivity.

Crucially, any monitoring mechanism must be automatic and transparent. Previous ceasefires have suffered from weak enforcement and ambiguity over attribution. A credible Black Sea framework should therefore establish predefined responses to violations, including automatic sanctions escalation, expanded military assistance to Ukraine and coordinated public attribution by NATO and the EU.

The Summit should recognise that maritime security guarantees are no longer secondary within ceasefire diplomacy. If Ukraine cannot operate freely in the Black Sea, no ceasefire will remain durable.

Through its emerging Black Sea strategy, Brussels is positioning itself as an actor in infrastructure resilience, port reconstruction, sanctions enforcement and commercial shipping security.

Ukraine's emerging role as a security provider

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NATO allies provide the bulk of military, financial and humanitarian assistance to Ukraine in response to Russian aggression, including critical air defence interceptors and ammunition. As the conflict in the Middle East escalates and risks diverting resources, sustained and predictable NATO support, alongside strong transatlantic coordination, which remain vital for Ukraine's defence and wider regional deterrence.

Strengthening long-term mechanisms for NATO–Ukraine cooperation is therefore essential. This includes mechanisms such as the Prioritised Ukraine Requirements List (PURL), NATO Security Assistance and Training for Ukraine (NSATU), the Comprehensive Assistance Package (CAP) and the NATO–Ukraine Council, all of which enhance interoperability, defence planning and integration.

At the same time, Ukraine's role is evolving from a security recipient into an emerging security provider for Europe. Since gaining Enhanced Opportunities Partner status in 2020, Ukraine has expanded its exchange of lessons learned with the alliance and increasingly contributes combat-tested expertise in conventional and hybrid warfare, including countering mass drone and missile attacks. This two-way relationship has been further institutionalised through the NATO–Ukraine Joint Analysis, Training and Education Centre (JATEC) in Poland in 2025. JATEC not only supports Ukraine but also systematically integrates Ukrainian battlefield experience into NATOdoctrine, training and capability development.

Ukraine's rapidly developing defence-industrial sector is also becoming strategically significant for NATO deterrence and Europe's defence. Since 2022, Ukraine has emerged as a hub for military innovation, particularly in unmanned systems, counter-drone technologies and electronic warfare platforms. Rapid battlefield innovation has enabled the development of a multi-layered air defence system against mass Russian drone attacks, including a new generation of remote-control systems with ranges of up to 2,000 km.

Ukraine's defence cooperation with Gulf states, including Saudi Arabia, Qatar and the UAE, reflects this shift. Relations have moved beyond food security and humanitarian cooperation to defence-industrial partnerships focused on cost-effective and combat-tested drone technologies, electronic warfare systems, maritime drones and air defence solutions. According to the Ukrainian President, nearly 20 countries in the Middle East, Gulf region, South Caucasus and Europe are interested in long-term "drone deals", involving exports of Ukrainian weapons, joint production, technology development and defence investment.

For Ukraine's allies, urgent priorities include procuring missiles for Patriot systems, financing interceptor drones and supporting the PURL. At the same time, scaling domestic anti-ballistic missile production and expanding output of extended range artillery ammunition remain critical challenges, requiring support from NATO's industrial base. Ukraine is therefore seeking to advance the creation of an "anti-ballistic coalition" bringing together European allies and NATO leadership under a coordinated manufacturing framework.

Additional areas of cooperation – military education and training, innovation and operational experimentation and integration Ukraine into Western defence supply chains – can contribute directly to NATO's adaptation to high-intensity warfare while strengthening Ukraine's role as a durable pillar of Europe's security architecture.

JATEC not only supports Ukraine but also systematically integrates Ukrainian battlefield experience into NATOdoctrine, training and capability development.

Reality check – looking back at the NATO 2030 vision and adjusting the sight

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The report titled "NATO 2030: United for a New Era", prepared within the NATO 2030 reflection process and published in 2020, sought to offer strategic guidance for adapting the alliance to an increasingly complex security environment in 2030 and beyond. Its goal was not only to strengthen NATO's deterrence and defence posture, but also to reinforce its political dimension at a time of growing strategic uncertainty, diverging threat perceptions, and internal strains among Allies.

More than five years later, the report remains remarkably relevant. Many of its recommendations have gained even greater importance amid the structural volatility now confronting the transatlantic community.

As a member of the independent expert group that co-authored the report, I believe its enduring value lies in recognising that NATO was entering a period of profound structural transformation rather than a temporary phase of adjustment. The report correctly predicted that military power alone would be insufficient to preserve the alliance's credibility. It emphasised that NATO's greatest strategic asset would remain political unity, cohesion and solidarity despite differing regional priorities and threat perceptions. Strategic consultations, resilience and political solidarity were identified as indispensable pillars of transatlantic security.

Recent geopolitical developments have reinforced the validity of this assessment. Disagreements between the United States and several European allies over the military confrontation with Iran once again demonstrated the importance of consultation and mutual trust. The fact that Washington undertook military action alongside Israel, a non-NATO country, without prior substantive consultations with European allies – and later criticised them for insufficient support – exposes the risks that unilateral approaches may create for alliance cohesion. Such episodes underline why strengthening NATO's political consultation mechanism is still as relevant today as when the NATO 2030 report was drafted.

Many of the report's ideas later found expression in NATO's 2022 Strategic Concept, particularly on deterrence and defence, resilience, emerging technologies and burden-sharing that would enable European Allies to assume greater responsibility for the defence of their continent. The decision reached at the The Hague Summit in 2025 for allies to increase their defence spending to 5% of GDP is a crucial benchmark. These themes are even more pressing today.

Against this backdrop, the upcoming Summit offers an opportunity to show that allied unity and the transatlantic bond remain indispensable amid war in Europe, instability across the Middle East, increasing hybrid threats and intensifying geopolitical competition. One of the principal expectations from the Ankara Summit will be a strong reaffirmation of commitment to Article 5 of the Washington Treaty. The antidote to the current crisis of confidence within the alliance lies not only in military capability but also in shared political will with mutual trust.

The Summit must also credibly demonstrate NATO's "360-degree approach," addressing all threats and challenges emanating from any direction simultaneously – These include Russia's war in Ukraine, instability in the Middle East and the fight against terrorism – a key concern for Türkiye and one of the principal threats identified in NATO's Strategic Concept.

The decision reached at the The Hague Summit in 2025 for allies to increase their defence spending to 5% of GDP is a crucial benchmark.

Looking ahead – The US pivot to America and the future of NATO

Ricardo Borges de Castro, Senior Adviser, European Policy Centre

For most Transatlanticists, thinking about NATO without the United States is anathema. Entertaining the idea or even speaking it aloud seems to be fared as if it could trigger a set of events leading to Washington's exit from the alliance. The basic assumption is that without the US, NATO would indeed become a "paper tiger." After all, the collective security arrangement has endured through trial and tribulations and provided deterrence for more than 75 years largely due to the American security umbrella.

NATO's future and the role that Europeans may play in it and within the Alliance cannot be prepared without thinking hard about what futures may lie ahead for the organisation.

The current US president has, more than once, threatened to leave the alliance, suggested his country could take Greenland – an autonomous territory of another NATO member – by force if necessary, and, worse, often questions the sacrosanct commitment to collective security. More recently, President Trump seems to be using American troop withdrawals from the 'old continent' as payback for outspoken European leaders. But there could be more profound changes on the horizon.

The new National Security Strategy is an important document. First, because it strategically pivots the US to the 'Western Hemisphere' or to the Americas, north and south. The 'Trump Corollary' to the Monroe Doctrine states that the US "will deny non-Hemispheric competitors the ability to position forces or other threatening capabilities, or to own or control strategically vital assets, in our Hemisphere." While Washington reaffirms its commitment to a "free and open" Indo-Pacific, the priority is America.

Beyond the 'America First' focus, the document also questions the long-term allegiance of Europeans to US interests: "Over the long term, it is more than plausible that within a few decades at the latest, certain NATO members *will become majority non-European* (emphasis added). As such, it is an open question whether they will view their place in the world, or their alliance with the United States, in the same way as those who signed the NATO charter." It is hard to pin down who these NATO members are and on which basis such projections on the evolution of European populations are made, but it is nevertheless a sign of how the current American administration is thinking about the future Europe.

This could all come down to ideological posturing. Yet, Europeans would do well to think hard about these signs of strategic divergence and assess what the US pivot to America means for NATO and for them in the long run.

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The **European Policy Centre** is an independent, not-for-profit think tank dedicated to fostering European integration through analysis and debate, supporting and challenging European decision-makers at all levels to make informed decisions based on sound evidence and analysis, and providing a platform for engaging partners, stakeholders and citizens in EU policymaking and in the debate about the future of Europe.

The **Europe in the World** (EiW) programme scrutinises the impacts of a changing international system on Europe and probes how the EU and its member states can leverage their untapped potential to advance their interests and values on a regional and global level. It thus examines the evolution of EU relations with major powers, such as the US, China and Russia, and how Europe can contribute to a rules-based global order. Second, the programme focuses on the role of the EU in fostering reforms, resilience and stability in neighbouring regions. It looks closely at the developments in Turkey and Ukraine. Third, the programme examines how the EU can strengthen its security in the face of terrorism, jihadist radicalisation or hybrid and cyber threats. It also seeks to advance the debate on Europe's defence policy.

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