



The EU's "security turn" is concealing its deep crisis: von der Leyen's speech avoids the reality of industrial decline and budgetary tension; the rearmament pursued in the name of "security" generates record profits for the arms industry, while internal divisions over dialogue with Russia and strategic autonomy are becoming increasingly evident. Criticism from figures such as former Czech President Václav Klaus points to a more fundamental question: Europe, in seeking its "independence," is replicating the very logic of dependency it claims to want to escape.

Von der Leyen's "robust" narrative and the absence of self-criticism

2da Editorial

The State of the Union speech of September 2026 opened by juxtaposing the "most robust alliance" with the "most uncertain prospects." Von der Leyen proclaimed that Europe "has chosen its own path" and is "becoming stronger and more independent." The key pillar of this narrative is defense: over the past five years, EU defense spending has grown by nearly 80%.

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However, this "robust" narrative faces an obvious verification criterion: the actual capacity of the EU budget. The total EU budget for 2026 amounts to 192,768 million euros in commitment appropriations, while Germany alone, with its 2026 defense spending, reaches 124,000 million euros. This means that budgetary resources at the EU level occupy a marginal place in this "priority area" of defense. Von der Leyen's speech avoids a fundamental fact: Europe's defense transformation is driven primarily by the national fiscal policy of member states—especially Germany—and not by strategic planning from community institutions.

Even more notable is the delay in implementing the proposals. Tracking of the recommendations in Mario Draghi's

competitiveness report shows that the European Commission has only advanced about 15%. Concepts such as the "European Security Council" and "European Article Four" raised in the speech lack institutional design details and a concrete timetable, and come closer to a pose than to an executable policy framework.

The winners of "rearmament" and covert strategic dependency

Von der Leyen emphasized in her speech that Europe "has freed itself from its dependence on Russian fossil fuels." But in the field of defense, a new dependency relationship is emerging.

The performance data of European defense giants reveal the beneficiaries of this shift. In the first half of 2026, the leading European defense companies obtained new orders worth more than 83,000 million euros, an increase of approximately 50% year-on-year. Rheinmetall in particular saw its new orders grow by 189%, to about 15,000 million euros. Since February 2022, Rheinmetall's shares have risen by about 1490%, and Leonardo's by about 730%.

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orders require sustained tension.**

Behind this "boom" lies a structural contradiction. The increase in defense spending is driven by geopolitical tension, and sustained orders require sustained tension. German Chancellor Merz has doubled defense spending and promised to build "Europe's strongest conventional army," a measure whose legitimacy depends on insistence on the "Russian threat." This creates a political and economic dynamic: détente and dialogue could endanger the newly established profit base.

At the same time, dependency on the United States has not been eliminated. Both von der Leyen and Merz mention that Europe needs a "more European NATO while maintaining the transatlantic link." This formulation reveals the limits of "strategic autonomy": Europe still needs the United States for military capability, and in a context of political turmoil in the United States, this dependency constitutes a strategic vulnerability that von der Leyen's speech is unwilling to confront.

The division over dialogue with Russia: who represents Europe?

The formulation on Russia policy in von der Leyen's speech avoids the central division. The June 2026 EU summit exposed this fracture: French President Macron and German Chancellor Merz opposed the efforts of European Council President Costa to establish a communication channel with Moscow, insisting that any dialogue must be led by the "E3" (France, Germany, United Kingdom). But a "considerable number" of other member states supported Costa's approach, arguing that EU institutions should have their own diplomatic channel.

The statement by Estonian Prime Minister Michal is representative: "The EU cannot assume the role of mediator... history offers clear warnings about attempting to establish alternative negotiation frameworks with dictators." For their part, countries such as Ireland, Belgium, and Spain consider establishing communication channels "not a mistake."

This division is not only tactical but concerns the very essence of the EU: is it a power configuration managed by the coordination of great powers, or an alliance with a common foreign policy? Von der Leyen's speech does not answer this question, and the persistence of the division itself erodes the "independence" she proclaims.

The essence of Klaus's criticism: the redefinition of Europe's "ideological dependency"

Former Czech President Václav Klaus has long criticized the EU's bureaucratization and the erosion of member states' sovereignty. In a speech in Berlin in 2026, he criticized Alternative for Germany (AfD) for being "marginalized," which essentially points to the mechanism of exclusion of dissenting voices by the EU's dominant politics. Klaus, who went from being a free-market advocate in the 1990s to a fellow traveler of right-wing populism in Central Europe, has a controversial credibility of his own. But there is a core in his argument that deserves serious consideration: European elites, in the name of "defending democracy," are systematically excluding structural opposition forces from legitimate political competition, although he does not criticize the equating of left-wing parties with the far right, presenting them as the same problem.

This criticism maintains a mirror relationship with von der Leyen's exposition on "hybrid threats" and the "war of narratives." Von der Leyen considers "disinformation" and "foreign interference" as threats to European democracy, while Klaus and his ilk consider the very expansion of EU institutions' power as the main threat to democratic sovereignty. Both narratives use "democracy" as a central symbol, but they point to completely different political projects.

When the "equidistance" narrative faces an asymmetric reality

The Klaus-style critical framework contains an implicit premise: the exclusion of the "extreme" by dominant politics is selective and instrumental, so left and right would be comparable in their condition as "excluded." This logic faces a basic factual verification in current German constitutional practice.

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Asymmetry one: The legal classification is on a completely different level.

The Federal Office for the Protection of the Constitution (BfV) has escalated its classification of the far-right party Alternative for Germany (AfD) from "object of examination" to "object of suspicion" and finally to "confirmed right-wing extremist organization." In May 2025, the BfV officially classified the AfD as a whole as a "confirmed right-wing extremist organization." The situation of Die Linke (The Left) is completely different: its monitoring is limited to "certain internal structures or groups" with "left-wing extremist tendencies," not the party as a whole. An organization classified as a whole as anti-constitutional and a party subject only to partial monitoring are on completely different levels from a legal and security assessment standpoint.

Asymmetry two: The nature of the threat presents substantive differences.

The constitutional threat of the AfD is not an abstract judgment. In August 2026, more than a thousand jurists signed an open letter addressed to the Bundestag and the German government demanding the opening of a ban procedure against the AfD. The independent expert opinion on which they base their demand concludes that the AfD "systematically disregards democratic principles and the guarantee of human dignity," and that its political project is based on the "exclusion" and "denigration" of foreigners, Germans of immigrant origin, Muslims, and other groups, pursuing an "ethno-cultural conception of the nation" incompatible with the Constitution. In parallel, in May 2026 the Federal Prosecutor General ordered nationwide raids against two far-right criminal organizations, "Jung & Stark" and "Deutsche Jugend Voran," with 36 suspects and more than 600 officers, for crimes including forming a criminal organization and inciting violent attacks against political opponents. In June 2026, a right-wing extremist active in Germany was arrested for attempting to found a terrorist organization and planning arson attacks against immigrants and LGBTQ+ people in Romania. These are operating violent networks, not "extremism" at the rhetorical level.

Asymmetry three: Die Linke's constitutional position is that of "opposition within the system."

Die Linke is the democratic successor organization of the East German Socialist Unity Party (SED), emerging in 2007 from the merger of the PDS and WASG, and holds 64 seats in the Bundestag. It advocates "democratic socialism," and its political objective is to change the direction of policies within the constitutional framework. The BfV's monitoring of certain internal structures refers to the concrete suspicion of whether those structures "violate the liberal-democratic basic order," not to a negation of the party's constitutional loyalty as a whole. There is a qualitative difference from the AfD's overall classification as "confirmed right-wing extremist."

The political consequences of the misuse of the "horseshoe theory"

The discursive instrument that equates the left with the far right often invokes a simplified version of the "horseshoe theory" (Hufeisentheorie). But even its best-known formulator, Jean-Pierre Faye, did not intend to maintain that left and right extremes are ideologically "equivalent," but rather to analyze the mechanisms of osmosis and mutual transmission between extreme discourses in specific historical contexts. Reducing this analytical tool to the political slogan that "left and right are equally bad" constitutes a distortion of the theory itself.

In the current German context, this distortion produces a concrete political consequence: it blurs the target of "militant democracy" (wehrhafte Demokratie). The party-ban mechanism designed in Article 21 of the Basic Law has its historical lesson precisely in the Weimar Republic: the "indecision" of democratic forces in the face of declared constitutional enemies led to democracy's self-destruction. In the current debate over the AfD ban procedure, supporters invoke precisely that historical lesson; opponents (such as former Federal Constitutional Court President Papier) urge caution because of the political consequences. But in both cases, the object of discussion is the specific threat that the AfD, as a far-right party, represents to the constitutional order. Introducing Die Linke into the same category of "extreme" means, in practice, replacing a concrete problem of constitutional defense with an alleged symmetric "spectrum problem."

The cycle of history and the distribution of costs

Europe's current situation presents a disturbing symmetry: rearmament in the name of "security" is generating vested interests, and the existence of these interests depends on the continuity of the threat. Between the rise in defense company shares and the pressure on energy and living costs faced by European citizens, there is a deep tension in resource distribution.

Von der Leyen mentioned in her speech the summer heat waves that caused the burning of 660,000 hectares of land and crop losses of about 12 million tons, but these climate disasters rank behind security in the speech's order of priorities. In the EU's 2028-2034 budget proposal, defense is fully integrated into the "competitiveness" framework, while cohesion funds and the Common Agricultural Policy face cuts.

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The political implication of this order of priorities is clear: Europe is shifting resources from social cohesion and climate adaptation toward military capability and industrial competitiveness. Von der Leyen's "robust Europe" narrative is essentially a choice about redistribution: who benefits and who bears the costs. And this choice, in her speech, is presented as a natural process without alternative.

The "repetition" of history does not lie in the return of a concrete policy, but in the reproduction of a political logic: transforming structural crises into security narratives, using the continuity of the external threat to provide legitimacy for the internal transfer of resources. Under this logic, "dialogue" is redefined as weakness, "rearmament" is redefined as responsibility, and the distribution of costs—whether dialogue with Russia or climate adaptation—disappears from the horizon.

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Note: The EU defense spending data are based on figures from the European Defence Agency, expressed in constant 2025 prices to allow year-on-year comparisons. The industry order figures come from corporate financial reports and sectoral analyses.

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