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ZEITENWENDE

Towards a German
Grand Strategic
Awakening



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Grand Strategic Awakening**

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Part 1: Introduction

The question of European rearmament has permeated security debates on both sides of the Atlantic for a few decades, reflecting the profound changes now at work in the international geopolitical environment. One by one, the assumptions held dear by many Europeans have been shattered: borders are being redrawn, democracy is challenged, and alliances are being questioned, while a major conflict is still raging in Ukraine. It was in such an evolving context that the early rudiments of a new security and defence arrangement were first mooted with an aim to strengthen Europe's own defence capabilities and reduce excessive dependence on the United States. The current process can thus be described as forward-looking management of European rearmament, Germany's included. What has long been regarded as a taboo has turned into hopeful expectation, even logical necessity. Some expect Berlin to play a major role in safeguarding Europe as we know it. Others consider the potential consequences of this major shift, with particular attention to the wider continental balance of power as well as the rise of far-right forces within Germany itself. Regardless of whether history rhymes with its former avatars or not, we find ourselves forced to ask how *Zeitenwende* is being imagined and developed, expanded and constrained. What sort of political project are we talking about? Where does it lie within the constellation of historical phenomena? What is its potential and what risks does it carry?

While the relative vagueness of the term is often pointed out,¹ what escapes initial analysis is the contradiction between the term itself and its origin. Addressing the Bundestag only a few days after the start of Russia's full-scale invasion of Ukraine, German Chancellor Olaf Scholz delivered the speech that marked the origins of the term. What appeared to signify a profound shift in German post-World-War II policy, paving the way towards the country's rearmament, with the instant announcement of a 100 billion euros fund directed towards the Bundeswehr,² was nonetheless rooted in quintessentially status-quo reasoning.

“The twenty-fourth of February 2022 marks a watershed in the history of our continent. With the attack on Ukraine, the Russian President Putin has started a war of aggression in cold blood. [...] It is a violation of international law. There is nothing and nobody that can justify it.”

After recognizing the profound shock in European politics triggered by Putin's invasion, Chancellor Scholz proceeded to outline five key courses of action for Germany:

1. Staunch support for Ukraine in its “desperate situation”, through deliveries of both civilian help and considerable military support;
2. “[Diverting] Putin from the path of war” through the implementation of a solid set of economic sanctions;

3. “[P]reventing Putin’s war from spilling over into other countries in Europe”, through Germany’s reaffirmed commitment to the current institutional configuration of the European order, mainly NATO;
4. The strengthening of the Bundeswehr and the reorientation of Germany’s energy imports;
5. The continuation of diplomatic efforts to achieve peace in Ukraine by maintaining a dialogue with Moscow.³



Figure 1. Olaf Scholz speaking on the politics of *Zeitenwende*. The term became the central political frame through which Germany’s post-2022 security transformation was narrated, even as its meaning remained contested.”

Source: Anne Barth / re:publica, via Wikimedia Commons (CC BY-SA 2.0)

While the speech exudes a revolutionary aroma, a close look at Scholz’s actual wording leads to several more nuanced conclusions. First, that Germany’s main interest is maintaining the liberal, rules-based European order in which Germany itself is embedded, and which Germany helped shape and solidify. This is obvious from the chancellor’s sensibilities for multilateralism, reliance on the current European institutional configuration, reluctance to redraw existing borders, and, ofcourse, upholding the primacy of the rule of law.

Second, that Germany is willing to go to considerable lengths to achieve this aim: sanctions on Russia for aggression, remilitarization, political and even military support for Ukraine. And third, that the pursuit of this goal will seek to salvage anything close to a meaningful relationship with Moscow. In other words, Germany was announcing its willingness to defend the status quo, or any alternative resembling it as much as possible, *all of this while explicitly admitting the impossibility of achieving such a task:*

*“We are living through a **Zeitenwende**. **And that means that the world afterwards will no longer be the same as the world before.** The issue at the heart of this is whether power is allowed to prevail over the law. Whether we permit Putin to turn back the clock to the nineteenth century and the age of the great powers. Or whether we have it in us to keep warmongers like Putin in check. **That requires strength of our own.**”⁴*

In essence, we see that Germany’s newfound effervescence at the time, even if unprecedented, was fundamentally reactive in nature. Now, more than three years after Scholz’s speech and with a fresh coalition government in charge, many analysts point towards a renewed potential for a “2.0”, “real”, or “reloaded” *Zeitenwende*.⁵ This enthusiasm is usually rooted in a conviction that the new leadership has the necessary ability and incentives to finally implement meaningful change.

Germany's new Chancellor, Friedrich Merz, has embarked on an important series of international visits to Paris, Warsaw, Kyiv, and Brussels, emphasizing the readiness of his country to assume a more active role in European leadership.⁶ Germany has, in the past few months, exempted its defense spending from the debt brake,⁷ established a National Security Council,⁸ raised its defense and infrastructure spending,⁹ and voiced its ambition to take its foreign intelligence agency to the next level.¹⁰ In Merz's own words, the aim is a "strategic cultural shift in foreign and security policy," that would turn it from a reactive, "sleeping middle power" into a "leading middle power".¹¹ Nonetheless, are we ready to talk about such a change from an analytical perspective?

The same call for a reclaimed historical agency was made by Merz at the 2026 Munich Security Conference: "Our first task today, our task as Europeans and, of course, as Germans, is to acknowledge this new reality. That does not mean that we simply accept it as preordained. We are not at the mercy of this world. We can shape it." More importantly, the Chancellor emphasized quite lucidly how several key aspects of global politics have changed:

"I fear we must put this even more bluntly: this [rules-based] order, as imperfect as it was even at the best of times, no longer exists [...] We Europeans are also taking precautions – precautions for this new era. In so doing, we are arriving at different conclusions than the administration in Washington, for example."

As we shall see, both the liberal international order and the transatlantic partnership have been the key structural conditions for Germany's contemporary economic rise. With regards to these two aspects, a contradiction occurs: the speech admits the rupture, but refuses the conclusion. Merz is, in many ways, treating transatlantic erosion as a structural fact, but he responds with a *bargaining strategy*: Europe builds a stronger pillar inside NATO to make continued US commitment rational, not sentimental. The alliance is reimagined as a contract designed to survive the collapse of shared political imaginaries. The only way the United States can fit into this narrative is by splitting its image in two, as discursively performed by Merz: he draws a clear line between "MAGA America", which is to be ideologically distanced from Europe, and "ally America", which is indispensable for Europe. It remains to be seen whether Merz's bet on renegotiating the transatlantic relationship is at all valid. If the US is becoming less reliable, then designing Europe's security future "strictly embedded" in NATO (even nuclear thinking) could be a path dependency trap. At the same time, Merz's bet is that European rearmament will stabilize the US commitment; critics would say it may simply subsidize American exit: a scenario in which Europe pays more, yet the US still pivots...

This is, of course, just a glimpse into the overarching plan of the current German government to adapt to a new geopolitical environment, the true substance of which cannot be extrapolated from the discursive level alone.

What remains undeniable is that, since 2022, or even earlier, a major change – *Zeitenwende* - has been taking place in German foreign policy. What sort of change are we actually talking about?

There are two ways of understanding the current shifts at the level of foreign policy, two different readings of *Zeitenwende* as a political program. The first refers strictly to a form of **reactive military rearmament**, a recognition from the German political elite that the Ukraine war ended post-Cold War illusions, and that remilitarization is the only way of becoming a serious actor in the current European security environment. This is simply a question of military culture. The second reading involves a renunciation of the core strategic foundations of modern German policy in general. This means accepting that Germany's entire model, with its export-oriented, fiscally disciplined economy and overreliance on the U.S. security umbrella, as well as on energy imports, is breaking. This is nothing short of a **grand-strategic revolution**. Therefore, we aim to understand which of the two paths Germany is embracing, or, maybe more importantly, whether the path of rearmament on its own is sustainable without a deep grand-strategy recalculation in the first place.

We can already receive a partial answer from the new Military Strategy and Plan for the Armed Forces, unveiled by the German government in late April 2026. Although largely classified, the document already reveals some general aspects critical to our question. The way it echoes Chancellor Scholz's diagnosis four years ago is particularly striking: "The Military Strategy reflects the idea that, as the

largest economy in Europe and in view of an increasingly complex and intense threat situation, Germany must and will assume a leading role within NATO – also at the military level. It represents a paradigm shift and underpins our ambition to play an active and substantial role."¹² In this sense, the strategic assumptions remain the same, with Russia rightfully identified as the main threat: "For the foreseeable future, today's Russia will therefore remain the largest immediate threat to peace and security in Germany and the Euro-Atlantic area."¹³ What has changed is not the diagnosis, but the degree to which this diagnosis is now being translated into military planning.

At the same time, the strategy treats American pressure primarily as an incentive for European burden-sharing, rather than as evidence that the United States itself has become a source of strategic uncertainty for Germany and Europe. In many ways, the text implies a strategy of alliance management, casting the United States in the peculiar role of an indispensable audience: "the United States is demanding in its 2026 National Defense Strategy that its Allies step up their efforts to safeguard their own security. Germany must therefore become an even stronger military Ally to the United States while working together with other Allies to take on more responsibility for the shared Euro-Atlantic security, in order to engage in successful deterrence and continue to defend the Alliance."¹⁴

Moreover, one can detect a hint of recognition that, fundamentally, rearmament poses a question of political economy: "Issues surrounding the economics of war are regaining relevance".¹⁵ What is critical to understand is that, if quantity has become a quality of its own,

then the relevant question is no longer only what Germany buys, but what kind of economic regime is capable of producing and sustaining military quantity over time and under pressure. In this sense, the creation of this military strategy partly answers our question: it shows that Germany is now capable of formulating a coherent military strategy. What remains to be seen is how Germany can develop the grand-strategic foundation required to sustain it. This question becomes all the more pressing, considering that Germany now aims to transform its armed forces into “the strongest conventional army in Europe”, boasting a wide variety of capabilities.

This paper will thus proceed to explore this question as follows: Part Two will explore the most common understandings of *Zeitenwende* as a political phenomenon, switching between various analytical frames, each providing us with relevant insights. The goal of this chapter is to identify the analytical blind spot that this paper aims to explore. Chapter three develops an economic, historical-materialist perspective on how Germany became a European geoeconomic hegemon and what that says about German grand-strategic thinking. Part four argues that “*Zeitenwende*” is, counterintuitively, a status quo-oriented, reactive policy. This argument is tested in the last chapter, which offers a selective analysis of Germany’s procurement strategy (essentially, the first concrete step towards *Zeitenwende*) in order to illustrate the successes and limits of the current German approach.

Part 2: The Latent Power “Paradox”

Contemporary Germany exhibits a paradox: it is at its historical peak in its relative latent power (the largest population in the EU, world-class industrial/technological capacity, economic weight, geopolitical centrality), but it severely lags behind in actualized military power, at levels comparable to its postwar impotency. It is among the weakest of the major European states, behind France, the UK, and arguably even Poland in terms of readiness and will to fight. This apparent contradiction is the key to understanding the core assumptions of German grand strategy. Apart from that, it also has an ambiguous European dimension: Germany’s military hibernation has been both stabilizing and debilitating for Europe.

Casting an eye on Germany’s record as a major player on the European and global scene reveals that its past bids for continental hegemony started from positions not very different from today’s, in terms of relative potential power. Shortly before the start of the First World War, the German Empire was already surpassing Britain, the dominant global power, in key sectors of industrial output, notably in iron and steel. It also considerably surpassed its neighbouring continental rivals in France and Russia. Nonetheless, its limited colonial presence was dwarfed by Britain and France, which translated into limited German access to key resources and economic boons, relative to those powers. Only two decades after its defeat in the Great War, Germany found itself in a similar position of industrial dominance, partly thanks to its intense remilitarization efforts in the 1930s, under the revanchist nazi dictatorship.

Still, economically, it lacked the benefits of a colonial empire, unlike other European powers. Access to key resources was limited, which was not the case for Britain, the Soviet Union, or even France.

Currently, Germany is more than ever the manufacturing backbone of Europe. Besides that, the institutional arrangements that tie Germany to the rest of Europe put it in a position close to economic hegemony. The German export-focused post-war economic success translated not only into growth at home but also into the export of the German economic ideology itself. The European Union, at its structural core, shares German ordoliberal ideals in spite of the neoliberal shifts in the past decades.¹⁶ German policy preferences have not once been successfully channelled through the EU. Moreover, Germany also boasts unprecedented soft power, both regionally and globally, especially through its leading role within the EU. In other words, Germany has never been as powerful and influential as it is today. Nonetheless, in terms of military strength, Germany is disproportionately weak. Past incarnations of the German state had militarism at its core, and always boasted an army at least comparable to all other great powers, as early as the late 18th century. How do we explain this paradox?

Mainstream views in international relations tend to point to several conditions that were unfavourable for a potential German remilitarization. The most popular explanations focus on the effect of the current structure of the international system, and more specifically, of the European political environment, with causes ranging from security to economic considerations.

Political realism emphasizes the role played by US hegemony in Germany's decision to play down its armed forces as a political vector. The United States has been, since the fall of the Soviet Union, the sole superpower of the world. Its military presence in Europe, in essence an "offshore balancing" act, ensures that no European power will aim for regional hegemony and eventually threaten the United States itself.¹⁷ This has rendered Germany incapable of bidding for regional hegemony, as it tried twice in the past century; meanwhile, US hegemony has also meant that other European powers (such as Russia) have been in the same position of impotency, hence Germany had little immediate military threat to deal with. From this perspective, *Zeitenwende* is nothing but the local effect of much larger structural changes, namely, the rise of China to superpower status, which forces the US to turn its eyes away from Europe to focus on China. The end of the U.S. presence in Europe could reignite geopolitical tensions within Europe. From this perspective, the Russian aggression is not the main cause of German rearmament; both are symptoms of much larger structural events. Those of us who may be still unconvinced will ultimately be left with questions regarding the timing of German rearmament in a wider context, the reaction of neighbouring states, the actual substantiality of the American pivot to Asia, the continuity of NATO beyond its apparent "obsolescence", the perpetuity of European cooperation, cultural and ideological considerations regarding the main actors in the story, and other vast subject areas that realist views tend to obscure. Extensions of realist theory even describe Germany as a "civilian power", like Japan, whose lack of power actualization results in "strategic underreach". These are put in contrast to unambiguous "traditional great powers" like the United States

and China, which tend towards some form of strategic overreach in their translation of latent power to military power. These assumptions leave France and Britain as “residual great powers”, engaging in military displays that attempt to uphold the current world order and their self-perceived role as great powers.¹⁸

Other views emphasize the economic interdependence that Germany seems locked into, which goes hand in hand with the current institutional arrangements dominating the European political scene. Germany, the argument goes, is thoroughly integrated within NATO and the European Union, in a way that limits its room for manoeuvre in terms of traditional expansion, of a territorialist logic. In the words of Hastings Ismay, the whole purpose of NATO was “to keep the Soviet Union out, the Americans in, and the Germans down”.¹⁹ Institutional integration meant that now Germany’s security concerns, as well as economic and commercial interests, are not only intertwined with those of its neighbours, but also guaranteed by the formidable power of the United States.

From a deeper sociological-institutional perspective, German power has been “tamed” within Europe through two main mechanisms. The first is the deep internationalization of German state identity, which is located between two mirroring processes: the “Europeanization of Germany” and the “Germanization of Europe”. According to Peter Katzenstein, Germany’s “political leaders exercise power only in multilateral, institutionally mediated systems – in Germany, the EU, the Atlantic Community, and broader international fora - that soften sovereign power”.²⁰ At the same time, unlike traditional

great powers, Germany channels its influence through a system of “associated sovereignty” within Europe, where Germany only enjoys “semisovereignty”. This leads to the second mechanism: the institutional similarities between the German political system and the larger European polity, where power is pooled and diffused rather than concentrated and divided.²¹

One cannot grasp the entire picture of German strategic culture without addressing those historical episodes that shape Germany’s “national conscience”. Most obviously, the Holocaust and the Second World War left an enduring sense of historical responsibility, a political and cultural struggle known as “Vergangenheitsbewältigung” (“struggle of overcoming the past”). This naturally translates into an antimilitarist stance imprinted in German political identity, for fear of domestic strife and international suspicion, which is a direct impediment to rearmament and remilitarization. This political stance is codified in the Basic Law, with the role of the army being clearly defined and set under parliamentary control. Despite developments towards a more proactive military posture, the weight of the past will always remain an aspect that will retroactively shape the German military and strategic culture for a long time. Having these in mind, it is clear that **Zeitenwende must have an ideological, mentality-based dimension. Turning the consumerist, pacifist Germans into a society ready to back a massive rearmament that can ensure the security of both Germany and its European allies is not a mere material accomplishment. It is a battle to be fought in the hearts and minds of more than 80 million individuals.**

All these perspectives offer important insight into how Germany ended up in the current situation. At the same time, they are consistent with the prediction of an event such as *Zeitenwende*. All the structural incentives appear to be in place: the unpredictability of the European commitments of the United States, as well as global multipolarization that, in Europe, takes the shape of Russian resurgence, are solid explanations of the current turn in German politics. German embeddedness within European political, security, and economic structures determines how this turn can take shape: only within the European Union and NATO, in relative harmony and cooperation with its neighbours, allies, and partners.

However, one may observe that this is a portrayal of Germany that closely resembles what we earlier described as a *reactive* image of Germany. The German state is thus seen, in many ways, as a passive entity, shaped by the current system, a prisoner of its times under the specter of a dark past, rather than an actor in its own right. **I argue that this is an analytical blind spot that occurs when 1) we examine the German question from a lens that privileges military and security considerations, which have little to do with the foundations of the power and influence of the modern German state and/or 2) we focus excessively on systemic considerations on global great power politics, obscuring the agency of German elites, especially from the 70s onwards.** Again, this is not to say the insight we gain from these perspectives is faulty. On the contrary, they shed light on the conditions under which *Zeitenwende* can occur.

But since we are interested in the shape that *Zeitenwende* will take, we are forced to look at the German case from a rather different perspective. And since the “natural environment” for *Zeitenwende* is already in place, then the only remaining factors shaping it must be endogenous to Germany. Our argument will thus focus on an overlooked aspect: German geoeconomic strategic thought.

Part 3: Contemporary Germany as a Geoeconomic European Hegemon

Germany’s road from total defeat and dismemberment in 1945 to becoming the heart of European politics by the beginning of the 21st century is, in essence, a story of economic success. The key components of German power today are its wealth and economic development. Understanding German grand-strategic thinking then requires a focus on economic and financial considerations. We argue that the German post-war material expansion, coupled with a geoeconomic expansion after the end of the Cold War, was an act of grand strategy that aimed at reestablishing Germany as a great power in Europe and beyond. That is because what Germany managed to achieve within Europe is not unlike a **regime of accumulation**: a systemic pattern of capital accumulation backed by a particular state that ties together modes of production, consumption, finance, and state institutions.²²

Of course, it is a bit of an exaggeration to compare Germany’s rise within the EU with British or American global economic hegemonies. But some similarities are striking:

a recovered post-war Germany managed to impose key aspects of its economic model within the newly institutionalized, integrated European economy that put it in a relatively commanding position within it. At present, Germany has the tools to reproduce its wealth and influence within Europe through a set of economic and financial institutions that safeguard its preferred policies and economic interests. We can thus regard German economic European hegemony as a bounded economic order, enabled and safeguarded by US global hegemony.

Wirtschaftswunder, Germany's post-war economic miracle, was outward-looking since the 1950s, since it was driven not by the creation of demand at home, but by a focus on exports.²³ West Germany was the main exporter of industrial goods throughout the Cold War. Even after 1991 and to the present day, it was this export-led model that allowed Germany to escape perils of deindustrialization.²⁴ Eventually, after the 1990s, German companies offshored their production to Central and Eastern European countries like Poland, Czechia, Slovakia, and Hungary, where German capital could reap the benefits of a cheaper, well-trained labour force. The result is a German-centered industrial core, sustained and reproduced by the current structural dependence of these states on the German economy.²⁵

The creation of trade and production chains was, of course, coupled with institutional embedding and the export of the German economic doctrine that lay at the core of *Wirtschaftswunder*. *Ordoliberalism* is the German variant of economic liberalism, which rejects the (neoliberal) idea of a self-regulating

market and reserves the right of the state to intervene when required, to ensure fair competition within markets and social stability. It puts a strong emphasis on price stability and balanced budgets, sometimes by debt limits²⁶ (such as today's "debt brake", the *Schuldenbremse*). In this model, an independent central bank plays a key role (the Bundesbank, and eventually, the European Central Bank), and allows for social policies, inasmuch as they support market order²⁷ (*Soziale Marktwirtschaft*).

Germany's European geo-economic expansion was, again, enabled by and heavily tied to US hegemony. In fact, West Germany played a central, though not fully deliberate, role in the rise of neoliberal globalisation during the economic crisis of the 1970s. During the stagflationary crisis of the 1970s, German elites were concerned that the collapse of the Bretton Woods system could lead to a new wave of protectionism and economic nationalism. This could have, in turn, closed the gates to German exports, critical to the growth of the German economy. In order to secure that foreign markets will remain open to German exports and that Germany's competitive position is retained, German policymakers pursued several tactics. Within Europe, many states pegged their currencies to the appreciating Deutsche Mark, while others were forced to adopt Germany's stringent anti-inflationary macroeconomic policies, a phenomenon described as "imported monetarism".²⁹ Even key European powers, such as Britain, Italy, and France, abandoned Keynesianist policies in favor of austerity.³⁰ With regards to the United States, German policy makers resolved to apply pressure on Washington: "by reducing its foreign exchange interventions, restricting American access to [the Deutsche Mark], and, finally, rejecting an

international dollar support program, German policymakers had contributed significantly to the external pressures that pushed the United States into the Volcker Shock”.³¹ That is not to say that the actions of German policymakers were consciously directed at triggering the US neoliberal shift, which would not even align with their ideology, but that **Berlin was proactive and strategic in carving space for its ensuing European geoeconomic expansion *within* US hegemony.**



Figure 2. G7 leaders at the 1978 Bonn Economic Summit. Hosted by Helmut Schmidt's West Germany, the summit captured Bonn's position within the U.S.-led Western economic order: institutionally embedded, but increasingly central to debates over the management of post-Bretton Woods capitalism. Source: National Archives and Records Administration, via Wikimedia Commons

The spread of ordoliberal ideals throughout the European Union, both at the state and interstate levels, is proof of Germany's efforts to export its model. Ordoliberalism, as an economic and societal model, can be seen as “a partly idealized, even mythologized, juridico-political project to be promoted abroad as a desirable model for other economies and states to copy and/or to be imposed where possible on an evolving European Union”.³² This can be seen in the EU's approach to several key aspects of its economic policy, mainly with regard to constitutionalized rules,

strict competition policy, low-inflation priorities, and tight oversight of public finances.³³ The independence of the European Central Bank heavily resembles that of the Bundesbank. Ordoliberal priorities are also obvious in the Maastricht convergence criteria of 1992, defining the conditions for acceding to the Eurozone: low inflation relative to the top Eurozone economies, limited deficit, sustainable public debt, exchange rate stability, and relatively low exchange rates.³⁴ In other words, Germany is reluctant to tie its economy to states not adhering to its principles through monetary union. **This is grand-strategic calculation at its best, through state-making at home, and not without a territorialist logic: Germany's domestic economic revival was eventually complemented by a geoeconomic, material expansion within Europe, through selective EU enlargement.**

The contemporary foreign policy of Germany has economic interests at its core. What has come to be known as *German neomercantilism* is exactly this: a foreign policy strategy focused on safeguarding its export-oriented economy by shaping European governance. This has resulted in a structural imbalance within the Eurozone: domestic wage and price suppression has boosted German exports and resulted in a massive trade surplus, while other countries using the Euro have no longer been able to devalue their currency to stay competitive and absorb shocks.³⁵ The resulting trade deficits in the periphery of the Eurozone, particularly in southern European countries, have been funded in a considerable proportion by German credit. This imbalance manifested decisively in the Eurozone crisis, and the lack of a fiscal union to complement the monetary union is being felt to this day.³⁶

We can thus observe a dual neglect of security considerations. First, domestically, a focus on export meant that military spending was often seen as a drag compared to investing in industry and welfare. Meanwhile, the *Schuldenbremse* has constrained defensive outlays. Second, from a foreign policy perspective, Germany has bet on cheap energy imports from the Russian Federation, neglecting the potential security consequences. This has proven to be a risky bet: a resurgent Russia is now Germany's main security threat, and a turn away from Russian energy imports has played an important role in plunging Germany into technical recession by early 2023.³⁷

This brings us to the key endogenous tension brought about by *Zeitenwende*. **Arguably, military rearmament is incompatible with Germany's economic outlook and corresponding foreign policy. That is for several reasons:**

1. Fiscal orthodoxy vs military spending.

Rearmament is, by definition, a demand-driven endeavor, requiring deficit financing and long-term investment. This is incompatible with ordoliberalism's emphasis on fiscal orthodoxy and the *Schuldenbremse* itself. The fact that Germany has exempted defense spending from the debt brake is a major symbolic breakthrough, but still a symptomatic measure. That is because other sectors key to significant rearmament are still limited by the *Schuldenbremse*: transport, R&D, energy, industrial policy, etc. In fact, most major rearmament efforts in history have been Keynesian in nature, or at least in effect: the United States before the Second World War

famously relied on the New Deal; Britain's simultaneous rearmament was supported by Keynes himself; even the Mefo Bills behind the rearmament of Nazi Germany were, in essence, a shadow deficit instrument that massively stimulated industry and employment. Contemporary Germany can only achieve credible rearmament through deficit spending, as many voices inside Germany already suggest.³⁸

This tension manifests not only at the level of German fiscal doctrine but at a higher, European level, where the same ordoliberal norms have been transferred, as we have described above. Many analysts point to the fact that continued defense spending through debt will eventually put Germany in breach of European fiscal rules, namely that public debt shall remain below 60% of GDP.³⁹ This is the most immediate way in which this rearmament can be contextualized within a European dimension. The other alternative (if not complement) to a shift in German, and implicitly European fiscal doctrine, is "cuts elsewhere". Which brings us to the second point:

2. Legacy of the welfare state: guns vs butter

Germany's economic rise was complemented by careful social considerations; its legitimacy rested on prosperity coupled with welfare compromise. It is true that budget cuts, including in terms of welfare, have rarely been employed successfully in rearmament efforts.⁴⁰ Nonetheless, in a context in which Europe is forced to tackle the inflationary trends⁴¹ and potentially reduced growth,⁴² the welfare system is bound to be strained. Some measures of countering the fall of purchasing power due to inflation, such as wage increases, are known to be offset by fiscal drag and benefit erosion.⁴³

Cutting welfare would not only be an inefficient means to save money for defense, but it would also be a political bomb in the case of Germany that could further erode the popularity of the mainstream parties. This can either favour the rising AfD, which has been very successful in capturing the working class, or die Linke, whose leftist platform might be more favourable to changing the current system, but which has no interest in rearmament and is more favourable to reviving a form of Ostpolitik detrimental to European security. Although meaningful cuts in social welfare have not yet taken place (most budget cuts targeted development aid, humanitarian budgets, climate/energy funds, parts of culture, research, and local services), intense political debate already exists in Europe on the guns - butter⁴⁴ dichotomy. The only way forward is to recognize it for the false dichotomy it is: do not touch welfare.

3. Energy dependence vs Strategic Autonomy

Germany's rise was facilitated by cheap energy imports from Russia. This was in many ways the result of a risky bet made by the German elites in terms of energy policy. Germany, and Europe by extension, can only escape this predicament by strategic diversification, reshoring, dual-use industrial policy, and reduced exposure to authoritarian suppliers. The imminent climate crisis adds an even more terrifying layer.

4. Geoeconomic hegemony vs security provider role.

Germany's leadership within Europe rested on its geoeconomic dominance, manifesting in the

institutionalization of its policy preferences and the dominance of its export. At this point, protecting the conditions for German prosperity requires a shift from civilian leadership to strategic leadership, including hard power projection, deployments abroad, and shaping NATO/EU defense.

All in all, we can conclude that *Zeitenwende*, or attempts thereof, unfolded as a crisis of the German-led regime of accumulation within Europe. Currently, the conditions of possibility of this regime are melting away: Russia, a former enabling economic partner, has now turned into a geopolitical rival, while the US's appetite for European commitments is falling. While the boundaries of Germany's economic sphere are under threat, the very rules of the game that have propelled Germany to economic might prevent its massive rearmament. In this sense, the problem is both structural and agential. Structural, because Germany is embedded in a set of fiscal norms it cannot easily violate (both constitutionally, on a national level, and by treaty, at the European level). Agential, because the German elite (both political and economic) is socialized into a particular mode of doing business and politics. German capital, having benefited enormously from cheap Russian gas, open Chinese markets, and EU fiscal discipline that protected competitiveness, will have a rational preference for continuity. Thus, "policy inertia" is another reason why Germany has been slow in taking measures to counter Russian aggression, when compared to France or Poland.

Part 4: Zeitenwende as Status-Quo policy?

As revolutionary as they may be, most of Germany's latest policy shifts are symptomatic treatment rather than an actual grand-strategic pivot. Some of these moves are attempts at safeguarding the socio-economic European order that existed before Putin's invasion. Others are more significant milestones that are necessary, but insufficient for the transformation of Germany into an unambiguous great power on the European stage. Nonetheless, when calling Zeitenwende a "status quo" policy, we have to be very precise. By status quo, we refer to a particular version of European politics: a Europe where Germany is the normative centre of gravity, institutionalist, mercantilist, and risk-averse. A Europe where the conditions for Germany's economic rise remain in place, and its political influence stands firm. **Thus, Germany is not defending "the status quo" in the sense of European stability. It is defending a German-centered ordering of Europe that only functions under three conditions:**

- **U.S. hard-power security backstop**
- **Fiscal discipline embedded at EU level**
- **Externalization of kinetic risk to the periphery**

A grand-strategic "Zeitenwende" requires a fundamental political and social change, in the shape of a new economic model and a new social contract. Without a significant shift in the European economic order built around Germany, rearmament is bound to remain compensatory, not constitutive of a new grand strategy.

Since 2022, there have been several significant defense policy decisions that Berlin made. Some of them are rightfully framed as major shifts in German policy. In terms of posture and defense of the Eastern Flank, Germany has increased its military presence in Lithuania. It assumed the role of framework nation for the multinational eFP (enhanced Forward Presence) Battlegroup Lithuania. Together with two more units (the 122 Mechanised Infantry Battalion from Oberviechtach, Bavaria and 203 Tank Battalion from Augustdorf, North Rhine-Westphalia), it forms a heavy brigade that is planned to be at full operating capability by 2027.⁴⁵ Germany also took the lead of NATO's highest-readiness military force, the Very High Readiness Joint Task Force (VJTF) in 2023. Air defense on the Eastern Flank has been increased through the deployment of Patriot air defences in Slovakia, near Sliač airbase (together with the Netherlands)⁴⁶ and Poland, at Zamość. The latter also aims to protect critical logistics for Ukraine.⁴⁷ Finally, Germany has also launched the European Sky Shield Initiative, a coalition-building move to accelerate joint European procurement for layered ground-based air defence.⁴⁸



Figure 3. Transfer of authority ceremony for NATO's enhanced Forward Presence Battle Group Lithuania. Germany's military role on the Eastern Flank shows how Zeitenwende is being translated into practice: through greater responsibility, within NATO's alliance framework. Source: Lt. Col. Ryan Donald / U.S. Army HQ MND-NE, via Wikimedia Commons

As relevant as they are, these policies remain a response to the strategic pressures of the Russian Federation. The paradigmatic example of the “status quo-defence” logic of German strategy is the inefficacy of the air policing doctrine. Germany has naturally re-engaged in NATO’s air policing mission over the Eastern Flank, especially in the Baltic region. Since 2024, the Luftwaffe has contributed Eurofighter Typhoon jets for the enhanced Baltic Air Policing (eAP) mission based out of Latvia.⁴⁹ By 2025, Germany’s presence increased in Romania as well, covering the Black Sea flank,⁵⁰ and most recently to Poland, at Malbork base.⁵¹ First, Germany’s move was a direct response to Russia’s drone incursions in NATO airspace, not a meaningful power-projection action, shifting the regional balance. This move does not cover the strategic-military need to meaningfully protect NATO borders, in only covers the political cost of not doing anything. Second, this is unsustainable in terms of resources: in costs Russia nothing to keep pushing NATO’s boundaries with cheap, mass-produced drones, and extremely expensive for Germany (and its allies) to use advanced, expensive Eurofighters as counters.

But the German air policing effort is not just inefficient and unsustainable deterrence. It is deterrence that avoids meaningful strategic transformation. It reproduces a logic that prevents any major shifts in the way we can imagine European security: a logic of defence-as-services, providing security through *episodic, modular, reversible activities*, as opposed to one of defence-as-sovereignty, which would amount to an *enduring, territorially grounded capacity* that would give Berlin control over escalation and denial.

Germany’s strategic behavior is not only reactive toward Russia. A similar behaviour is apparent in the way Berlin tries to cope with a far more traumatic reality, that of an unpredictable United States. Finding itself in the position of a declining hegemon, the United States has increasingly engaged in behaviours that contradict or directly oppose European and German interests. Washington is increasingly uninterested in European security while giving in to Russian demands and narratives, which has historically been, as discussed above, a condition of possibility for the German economic rise of the past decades. At the same time, the United States is dismissive towards negotiating a meaningful global green transition, and it is undermining the economic interests of its European allies by imposing tariffs on its partners. Most importantly, the US is ideologically challenging European powers, Germany included, by questioning the European project (another pillar of German power), by directly interfering in the domestic politics European nations by supporting right-wing Eurosceptic political actors, and by actively undermining NATO unity. In other words, the United States has become a source of strategic risk for Germany and for the European order on which German power rests. This is a conclusion that the German elite seems to be aware of, at least rhetorically. Merz himself admitted in Munich that “a chasm, a deep rift, has opened between Europe and the United States”.⁵² Nonetheless, Berlin still responds as if the main task were to preserve alliance grammar rather than theorize the U.S. as a serious strategic problem.

The US under the Trump administration has been an unpredictable, unreliable ally whose unilateral geopolitical moves have made its

European allies, Germany included, uneasy. At best, US disruptive actions contradicting German views have forced Berlin in a difficult position where it is forced to pursue alliance-management language in its responses. In the case of Venezuela, for instance, Chancellor Merz's declaration sounded more like an explanation, even an apology, for the actions of the United States, highlighting a rather selective approach towards international law: "Nicolás Maduro has led his country to ruin. The last election was faked. [...] The legal classification of the U.S. operation is complex. We'll take our time to do that".⁵³

In early 2026, the Trump administration increased its diplomatic pressure on Denmark to virtually surrender Greenland to the United States. Seeing its Danish allies under the prospect of military coercion (Trump repeatedly said that the US considers military intervention, backtracking only in late January)⁵⁴, Berlin sent 13 soldiers on a short reconnaissance mission to Greenland at Denmark's request, to explore possible contributions such as maritime surveillance. Interestingly enough, before that Merz said he expected the United States to continue protecting Greenland together with Denmark⁵⁵, attempting to frame the problem back into NATO cooperation rather than publicly imagining a posture against Washington. More importantly, Washington has not abandoned Greenland as a political objective, even though it has stalled its pressures on Copenhagen.

This leaves us to the question of the US-Israeli-Iranian war, which is not a simple case of German passivity, as the US administration would portray the situation. In fact, it fits the exact same logic of the previous two instances, an example of Germany refusing escalation

while still managing the alliance on American terms, promoting a narrative of German-US policy compatibility, a practice of alliance-preservation. Merz criticized the fact that there was "no convincing plan" for how the operation could succeed and complained that Washington had not consulted Europe or asked for its assistance. What is more revealing is that the chancellor also said Germany shared the U.S. and Israeli interest in ending the Iranian regime's "terror" and later told Trump they were "on the same page" about getting rid of that regime.⁵⁶

In essence, the current German government appears to be betting on the possibility that the future of US-German relations can fall somewhere in between an outright strategic divorce and a costly, genuine European emancipation. This is a future of an increasingly tense coexistence that will be marked less by trust than by negotiation under pressure and under American terms. Such a coexistence is, however, a costly and potentially unsustainable compromise, because it virtually forces Germany to operate under the prospect of more disputes over tariffs, more pressure of burden-sharing, and, very importantly, more uncertainty over US military presence in Europe. In this sense, Berlin's emerging answer to American unpredictability is a form of hedging without exit, which stems from the lack of a fully developed plan for how to treat the United States as a strategic risk in its own right.

The debate around Germany's financial strategy for endowment is another complex topic. The financial engine of *Zeitenwende* developed gradually. First, the €100bn "Sondervermögen" (special fund) for Bundeswehr procurement was approved⁵⁷, mainly to clear procurement backlogs. Second, the current government under Merz expanded this effort, not only exempting

defense spending above 1% of GDP from the debt brake, but also through a €500bn infrastructure fund. Besides the economic tension discussed in the previous section (between Germany's ordoliberal model and the need for a demand-driven rearmament) and the strategic tension between strategic autonomy and reliance on the US, we witness an additional political dynamic worth discussing. Critics of the infrastructure fund claim that the reform was meant to allow Germany to take on new debt of 180 billion euros for 2026 in order to lift pressure off the core budget. This allowed the government to "create space for electoral gifts in the regular budget, such as the mother's pension III".⁵⁸ At the same time, the Institute of the German Economy (IW) claims that a considerable part of the fund will be used to finance projects already planned in the regular budget, and consequently, out of "new loans of 271 billion euros by 2029, up to 133 billion, i.e. almost 50 percent" will be used for other purposes than additional investments.⁵⁹ It is in this sense that the governing coalition is using the fund to reinforce its position, rather than strengthening Germany's economic and strategic position.

All in all, policies framed under "Zeitenwende" may very well describe meaningful developments, but they remain reactive in nature and trapped under various layers of political and economic tensions. Politically, the financial process behind obtaining funding exhibits hindrances generated by the precarious position that the government finds itself in. Strategically, Germany opts for temporary, unsustainable solutions that showcase the limits of its resolve. As a result of these tensions, **German rearmament becomes an attempt to avoid changing the political economy of European security.**

Part 5: The conditioned logic of Procurement

Within grand strategic calculations, the armed forces play a key role in both power projection and signaling. Therefore, the German procurement strategy is one of the key aspects to be brought under analysis. The main concern of this chapter is to do a brief assessment of whether Germany's military transformation expresses a coherent strategic imagination or merely institutional adaptation under pressure. In that sense, an investigation of the way Germany manages procurement is quite revealing. The main argument made is that, while Germany is clearly making important steps in terms of endowment, its procurement process is still subject to the same economic logic presented above: **where strategic autonomy clashes with ordoliberal principles of efficiency, competition, and export orientation, Germany consistently chooses the latter.**

In terms of strategic imperatives, it is necessary to understand the scenarios for which Germany is preparing and what they dictate in terms of procurement. It can be assumed that, if Germany is to deploy armed forces in combat, it will be against the Russian Federation on the Eastern Flank. To that end, Germany is tailoring its armed forces to become a credible deterrent, first and foremost, within the context of **the most obvious political trigger point** for NATO, which is the Baltic States. The defense of the Baltic States is more of a political than a military test, and the prime epicenter of crisis escalation that Germany considers. The Baltics are the Article 5 tripwire, a war to be fought on short warning time, with brutal geography. Berlin wants to make sure its forces are ready and convincingly prepared for a war they would

never have to fight. Therefore, the question for the Germans is not Poland: if Russia invades Poland, deterrence has already failed. It is not Finland either: an operationally brutal theater, politically unified, and with a highly militarized society. Ultimately, Romania is not a primary theater for Germany. Deterrence responsibility currently falls on France, whose interest in the Black Sea is more visible. However, assuming a much greater role in Europe's security affairs will compel Germany to expand its area of interest not only toward the Arctic region, but also toward the Black Sea. As a Danubian country, Germany has a direct connection to the Black Sea. The Danube corridor is an important vector for Europe's connectivity, via the Black Sea, with the Caucasus and Central Asia, regions of strategic interest for the European Union.

The Danube will also play a key role in Ukraine's reconstruction, with the EU financing the "Fast Danube" project,⁶⁰ aimed at improving navigation on the river, especially during the summer. The Danube will represent an environmentally friendly transport route for large volumes of goods between Germany and Ukraine. The Romanian ports of Galați and Brăila, the Ukrainian ports of Reni and Izmail, and the port of Giurgiulești in the Republic of Moldova could become a major logistics hub supporting the reconstruction of southern Ukraine. At the same time, the Danube can serve as a corridor for military mobility between Germany, Romania, and Ukraine. Germany's growing interest in Romania is also justified by the fact that, starting in 2027, Germany will begin importing gas from the Black Sea, from Romania's offshore fields, once the infrastructure for the Neptun Deep project is completed. In practical terms, Germany's energy security will also depend on Romanian

gas from the Black Sea.⁶¹

The standard rearmament narrative within Europe at this point in time revolves around "learning the lessons from Ukraine" as an "empty signifier". That is, what the lessons from Ukraine are and how they should be applied is often reinterpreted and instrumentalized by policymakers depending on the political context. However, when talking strictly about procurement, these "lessons from Ukraine" gain a narrower meaning. And that applies to Germany as well: there is an understanding about the need to invest in drone technology, mass production of ammunition, the role of air defense, etc. At the same time, it would be wrong to assume that Germany would fight a war from Ukraine's position. Ukraine operates largely without air superiority; it is improvising under existential pressure and is relying on mass and adaptation, not peacetime efficiency. Germany is preparing for a fight within NATO frameworks, where air superiority is achievable and, essentially, it would not have to stand alone. That is why Germany does not exclusively focus on drones. The rise in the usage of drones is directly connected to the shortage of artillery shells. At the same time, it would make sense to rely solely on drone technology against a considerably superior enemy, especially if we are talking about the number of soldiers. When we refer to Germany, the first things that come to mind are its technology and industrial strength. Germany's capacity to innovate and produce at scale will not be limited to drones, but will also extend to other combat systems—from armored vehicles, a hallmark of German technology, to missile defense systems and deep-strike capabilities such as the Taurus missiles. However, it is also important to note how political decision-making and the determination of German industry are adapting to the expansion of unmanned systems

in the conduct of warfare.



Figure 4. Leopard 2A8 main battle tank. In the field of armored vehicles, German rearmament aligns with the country's wider economic logic: scale is generated not only through national demand, but through export-oriented industrial networks. Source: Defensie, via Wikimedia Commons.

The best example of how the German economic doctrine translates itself in its procurement practices can be observed in the field of unmanned vehicles, Germany is taking increasingly solid steps to get the most out of the Ukrainian war experience, within an (unsurprising) economic logic. On 15 December 2025, the German federal government (under Merz) presented a "10-point plan" to expand German - Ukrainian armaments cooperation, alongside President Volodymyr Zelenskyy's visit to Berlin. These measures include the establishment of a liaison office of the Ukrainian arms industry and the reinforcement of the staff of the military attaché at the German Embassy in Kyiv.⁶² More importantly, in terms of industrial links:

- "Ukraine is to build self-developed combat drones in Germany. An agreement has already been reached between the Ukrainian drone manufacturer Frontline Robotics and the German arms company Quantum Systems.

- The joint development and production of armaments is to be extended to other areas.
- The joint procurement of armaments for Ukraine by European partner countries is to be further intensified.
- Ukraine should be more integrated into the EU-wide market for defence equipment.
- The German government is examining the use of federal investment guarantees to promote the commitment of German defense companies in Ukraine.
- Germany wants to use digital battlefield data from Ukraine and insights into the use of German weapons in the defense fight against Russia to improve the training of soldiers and the development of strategies."⁶³

This continues an already-existing trend. Back in August 2025, KNDS Deutschland CEO Ralph Ketzler arrived in Kyiv to discuss the prospects for further cooperation with Defense Minister Denys Shmyhal. In an interview, Ketzler explained very clearly:

*"It is on the agenda of the German government [...] we also want to produce here the components of our products, spare parts. There is potential even in relation to the co-production of entire systems. We have informed the minister very clearly that we are interested in such cooperation, because now is the time to study the Ukrainian experience as best as possible. We see that Ukrainian companies have their own solutions and concepts, for example, regarding drones that deliver other drones, or air defense systems, or self-propelled mortars. We are open to such cooperation."*⁶⁴

In other words, what the Germans are doing is not “learning the lessons” in an existential sense. **Germany is actively trying to turn Ukraine’s wartime innovation into a market-compatible, de-risked industrial ecosystem.** While Ukraine has the experience and real-time battlefield, Germany has capital, market access, and integration into the EU defense-industrial ecosystem. Drone technology is especially viable in this sense. First, drones don’t require decades-long national programs, don’t demand massive state-backed demand, and can be developed by SMEs and startups. Drone production and development can be enabled rather than directed by the state, which is the ordoliberal “comfort zone”. Second, by embedding Ukrainian experience into German firms, innovation and testing costs can be partially externalized.

Thus, drones represent the rare capability domain where rapid wartime learning, industrial competitiveness, and ordoliberal governance align. Germany wants to generate a diversified, modular, export-capable defense ecosystem that can evolve and ensure German security without abandoning its economic preferences. This explains why Germany is more efficient and proactive in this field compared to other fields. In terms of developing drone tech, Germany is not forced to choose between economic rationality and security adaptation.

To conclude, the procurement strategy pursued by the German armed forces does align with the strategic realities it is likely to encounter in a scenario in which it would have to play a role in the defense of Europe. The Bundeswehr is, consequently, being equipped for the most likely contingency within NATO planning,

namely deterrence and short-warning defense on the Eastern Flank, particularly in the Baltic theatre. In this sense, German rearmament is neither incoherent nor directionless. It is the shape of this rearmament that demands attention. Where rearmament can be scaled through exports, facilitated by European demand, Germany moves quickly and decisively. Where it would require long-term state direction, or the acceptance of structural fiscal and political costs, Berlin relies on external suppliers and exceptional funding mechanisms. Of course, there are fields, as we have seen in the case of drones, where Germany appears to adapt in a promising way.

Part 6: Conclusion

Since 2022, Germany has been engaged in a process of military transformation, discursively framed as an epochal moment that would fundamentally change the nation’s role within Europe and the world. As this paper shows, Germany has undeniably taken at least some significant steps towards something that could eventually be described as a “grand-strategic awakening”: increased defence spending, a less reluctant posture, renewed procurement efforts, and institutional reforms. However, structural conditions continue to hinder a true shift in grand strategy because there has been **no reordering of priorities across domains**, which can be observed at multiple levels.

First, security thinking is still disciplined by economic primacy. Even after the full-scale invasion of Ukraine, the main strategic concerns have reproduced themselves: export stability, some level of fiscal orthodoxy, and industrial competitiveness. These concerns define the outer limits of German security ambitions.

Second, Germany continues to externalize both security costs and kinetic risks. Berlin avoids full ownership of deterrence outcomes and continues to bet on US guarantees and its NATO allies. Meanwhile, Germany enjoys all the privileges of not being a frontline state, a responsibility fully externalized to the European periphery. Third, even though the use-of-force taboo has weakened, it has not inverted into a willingness to shape the strategic environment proactively.

The mechanism constraining the transformation of Germany into a proactive actor is the same that made post-World War II Germany powerful in the first place. The country is at the centre of a bounded regime of accumulation within a larger, US-led regime, that rests on a geoeconomic model built on export stability, ordoliberal discipline, externalized security costs, and cheap external inputs. Consequently, the current rearmament efforts are aimed less at building a new order than at preserving the conditions of possibility of the current order under more hostile circumstances. More importantly, as it has been briefly explored in the fifth chapter, the way this endogenous economic logic imposes a reactive and status-quo-oriented stance is revealed by procurement patterns. Germany moves fastest where rearmament aligns with export logic or low-friction adaptation, and hesitates where it would require structural transformation.

If this diagnosis is correct, then the question of European security cannot depend on a collection of state-level rearmament efforts, understood strictly as national projects. And this is not merely the legacy of a European political culture of deliberation, or the result of ideals of European unity. In the German case

specifically, the degree to which Germany is embedded in the geoeconomic space it helped carve does not structurally allow for such disparate efforts. What is required is a broader European renegotiation of economic doctrine, industrial and energy priorities, as well as defence cooperation. In effect, the real question is not whether Germany can rearm, but whether Europe is capable of creating a political order and economic regime, which in turn requires a new social contract, that would make such rearmament strategically meaningful.

Two events could radically change Germany's response and, implicitly, its strategic behavior: an accelerated withdrawal of the U.S. military presence, driven by an abrupt political decision at the White House, and a Russian action at the limits of Article 5, aimed at testing the unity of the North Atlantic Alliance and demonstrating that NATO is a "paper tiger." The second event could be triggered by the first or, in any case, facilitated by an evasive U.S. posture in assuming security commitments toward its European allies in the event of a crisis on the continent.

At the same time, a new French president less willing to support the European project would force Berlin to assume a more prominent role within the European Union, including in the field of security and defence. Even if the "German mental *Zeitenwende*" is envisioned in Berlin as a gradual, evolutionary process designed to better prepare society in longer time, international developments may compel Germany to take on much more prominent strategic roles externally.

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