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How Europe Can Defend Itself with Less America

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A Report of the CSIS Europe, Russia, and Eurasia Program

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INTERNATIONAL STUDIES

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Introduction

With a war raging in Ukraine and the United States signaling its intent to shift the burden of European defense to Europeans, the continent's leaders must act to ensure its security.

While the Trump administration's Global Force Posture Review is still taking shape, the direction in which the United States is headed is clear. The United States wants to shift the burden of ensuring European security to Europeans. Defense Secretary Pete Hegseth's prepared remarks at the February 2025 NATO Defense Ministerial, emphasizing that the United States "can't have the expectation of being [Europe's] permanent guarantor," encapsulate this shift.¹

Washington is considering a potentially dramatic reduction of its force posture in Europe, with the aim of focusing on the Indo-Pacific and trimming the Pentagon's budget. This new direction is also rooted in work produced by Trump-aligned U.S. think tanks, like the Heritage Foundation's Project 2025 and *Prioritization Imperative* report, as well as the Marathon Initiative's *Resourcing the Strategy of Denial* report, all of which offer insight into what is to come: The United States will prioritize the Indo-Pacific, shift resources toward that region, and demand that Europeans shoulder the primary responsibility for Euro-Atlantic security.² Unlike past U.S. calls for Europe to step up, this demand is no longer shrouded in vague timelines and warnings. The U.S. ambassador to NATO, Matthew Whitaker, said in May 2025 that the United States will begin discussions with European allies to reduce U.S. troops in Europe later this year.³

It should also be evident to Europeans that this is reflective of a structural shift in U.S. foreign policy. The bipartisan focus on China as the U.S. military's pacing challenge means that the United

States and Europe now differ in their defense approaches for the foreseeable future, with the United States focused on China and Europe focused on Russia. Moreover, the potential all-consuming nature of a U.S.-China conflict would inevitably leave Europe with the task of deterring Russia largely on its own. Wargames conducted by CSIS suggest that the United States would run out of essential munitions—particularly long-range missiles—within a few days of entering a conflict with China over Taiwan. This would severely limit Washington’s ability to supply Europe with certain critical munitions in the short-to-medium term.⁴ A future administration is thus unlikely to reverse cuts to U.S. forces in Europe, given the bipartisan China focus that will continue to animate U.S. foreign policy.

A new era of transatlantic relations is therefore emerging, in which Europe is largely tasked with ensuring its own security. At the 2025 NATO summit in The Hague, Europeans were relieved that a new Trump administration did not walk away from the alliance. But the United States also did not make any commitments to spend more or maintain forces in Europe. The Global Force Posture Review was scarcely discussed at the summit. What was discussed was European defense spending. NATO countries, with the exception of the United States and Spain, all committed to spend 5 percent on defense (3.5 percent to resource core defense requirements and meet the NATO capability targets, and 1.5 percent on security-related spending) by 2035. At first glance, this is an incredibly impressive sign of intent by NATO countries, as Europe would collectively spend roughly \$1 trillion on defense per year, more than the United States spends in both absolute and relative terms.

Yet despite these grand commitments, many European countries have little intention of meeting the targets. While some European countries possess both the political will and fiscal space to ramp up spending, and will thus heed the call to action, other countries like France, Spain, and Italy are limited by strained public finances. As a result, actual defense spending will be uneven across Europe, which will amplify existing political tensions between the northern and southern parts of the continent.

European countries simply increasing spending and buying equipment to meet more of NATO’s capability targets is necessary but not sufficient. Europe needs to fundamentally change how it fights. Europeans need to be able to fight as Europe.

More importantly, the incessant focus on spending has distracted European countries from addressing the deep structural problems that ail European defense. The issue is not so much lack of funding but rather, as economic historian Adam Tooze has noted in the *Financial Times*, “that Europe spends so much and gets so little for it—no effective deterrence, few deployable troops, no stockpiles of weapons to supply Ukraine.”⁵ Top-line European defense spending figures are in

danger of becoming the equivalent of a modern-day Maginot Line, providing Europe with the false confidence that because it is spending more it is protected, when in fact it remains deeply exposed.

Unfortunately, neither the NATO summit in The Hague nor NATO itself have seriously grappled with how Europe should fight with little or no American involvement. The alliance is structured around the United States and the power of the U.S. military. European countries simply increasing spending and buying equipment to meet more of NATO's capability targets is necessary but not sufficient. Europe needs to fundamentally change how it fights. Europeans need to be able to fight as *Europe*.

Currently, Europeans operate as roughly 30 individual national militaries that, fighting under a NATO banner, would more or less operate as appendages to a U.S.-led warfighting effort. Thus, without the United States, Europe would struggle to function militarily. Burden-shifting thus requires a dramatic transformation of the European defense enterprise that goes well beyond simply spending more. Europeans must transform their defense efforts with an eye toward the task of fighting as Europe. Thus, Europe must finally begin what is now an urgent task of integrating its military and defense efforts.

This will require bold and far-reaching reforms that, while both necessary and cost-effective, will create institutional and economic losers. But without change, Europe is in danger of spending huge sums on a European defense system that is broken.

Time is of the essence. Russia has successfully transitioned its economy to a war footing and will pose an acute military threat to NATO and the European Union should fighting subside in Ukraine. Europe's window to reach agreement on the bold measures required to fix its decrepit defense is closing fast. It will be critical for Europe to shift its focus from inputs (abstract spending goals) to outputs (clearly defined capabilities).

This report examines the military gaps that would be created by a significant reduction of the U.S. military footprint in Europe, and then outlines steps that Europe should take to mitigate capability gaps in order to deter further Russian aggression.

The report works from the assumption that the Trump administration will implement deep and substantial cuts to the U.S. military presence in Europe. It also assumes that the United States will remain politically engaged in the alliance and continue to offer its extended nuclear deterrence to its European allies, but its willingness to offer its conventional forces to NATO in an Article 5 scenario is no longer ironclad.⁶ However, given that the United States is still in the alliance, it would likely provide intelligence and logistical support to NATO and any European war effort. In this sense, the United States' approach to Europe in a conflict with Russia would be akin to its support for Ukraine. The probability of the United States largely standing on the sidelines as Europe is attacked is certainly up for debate. That probability may very well be low—but military planning is about preparing for (and thus hopefully deterring) low-probability events.

So how should Europe proceed? This report identifies a few key tasks Europeans should undertake. Namely, Europe should seek to integrate its warfighting efforts and take advantage of its size and scale. In particular, this report highlights the need to replace the ground combat capabilities

of the United States by forming a permanent standing pan-European reaction force that is able to quickly respond to a Russian incursion. This force should be made up of troops sourced largely from non-frontline states, particularly Europe's south. Additionally, Europe needs to integrate its weapons procurement efforts. Lastly, this report outlines how Europe can reduce its dependency on the United States for critical capabilities and create redundancies in command and control structures.

The report proceeds by first outlining the U.S. military footprint in Europe and identifying the areas in which Europe is most vulnerable to a U.S. rebalancing. It then provides recommendations for what capabilities and reforms Europe should prioritize.

This report is not intended to be comprehensive. It mostly focuses on the actions and reforms not currently being taken, while paying less attention to the productive steps that many European countries are indeed taking. These include promising efforts to increase regional cooperation—exemplified by Nordic countries moving to operate their air forces seamlessly—and concerted efforts to ramp up defense industrial production, for example on 155 mm artillery ammunition.⁷

Additionally, while this report is focused on steps Europeans need to take to deter Russia with less U.S. involvement, Europe's top short-term priority should be to increase support to Ukraine's war effort. Should hostilities in Ukraine subside, either due to a ceasefire or a Ukrainian defeat, Russia's military reconstitution will most likely keep pace, creating an acute threat to European states bordering Russia. Supporting Ukraine will buy Europe time and enable it to build up its defense industry both to support Ukraine and replenish its weapons stockpiles. A CSIS report from December 2024 outlined how Europeans should step in to fill the potential void in U.S. support to Ukraine, advocating a common European security assistance fund to dramatically increase defense production.⁸

Setting European support for Ukraine aside, Europe's objective in the medium term should not be to replicate the U.S. military presence like for like. Portraying the challenge in such a manner makes the task ahead seem hopeless. Rather, the aim is for Europe to be able to deter Russia without the United States. This is an eminently more achievable short-to-medium-term goal and should guide European action.

Building effective European combat capacity requires not just additional resources but also, critically, dramatic organizational and operational changes that focus on building Europe's collective combat capacity. Europe needs to undertake a major military reform effort, larger in scope and scale than the Goldwater-Nichols Act of the 1980s, which brought major changes to the structure of the U.S. military by forcing it to fight jointly across services. Europe needs a similar revolution to develop an integrated—or “joint”—European combat capability. Some sacred cows will need to be sacrificed on the altar of Europe's military transformation, which will entail ceding a degree of national sovereignty and control. Europe's very ability to defend itself depends on it.

How the United States Ensures European Security

What becomes apparent when looking at the U.S. force presence in Europe and the potential impact of a U.S. military withdrawal is that the United States provides Europe with a lethal, high-end, full-spectrum, pan-European force. The United States gives Europe 360-degree protection by operating in all parts of Europe. It also provides Europe with a large reserve force based in the continental United States and a considerable strategic nuclear deterrent. The following sections aim to identify which capabilities the United States may shift away from Europe.

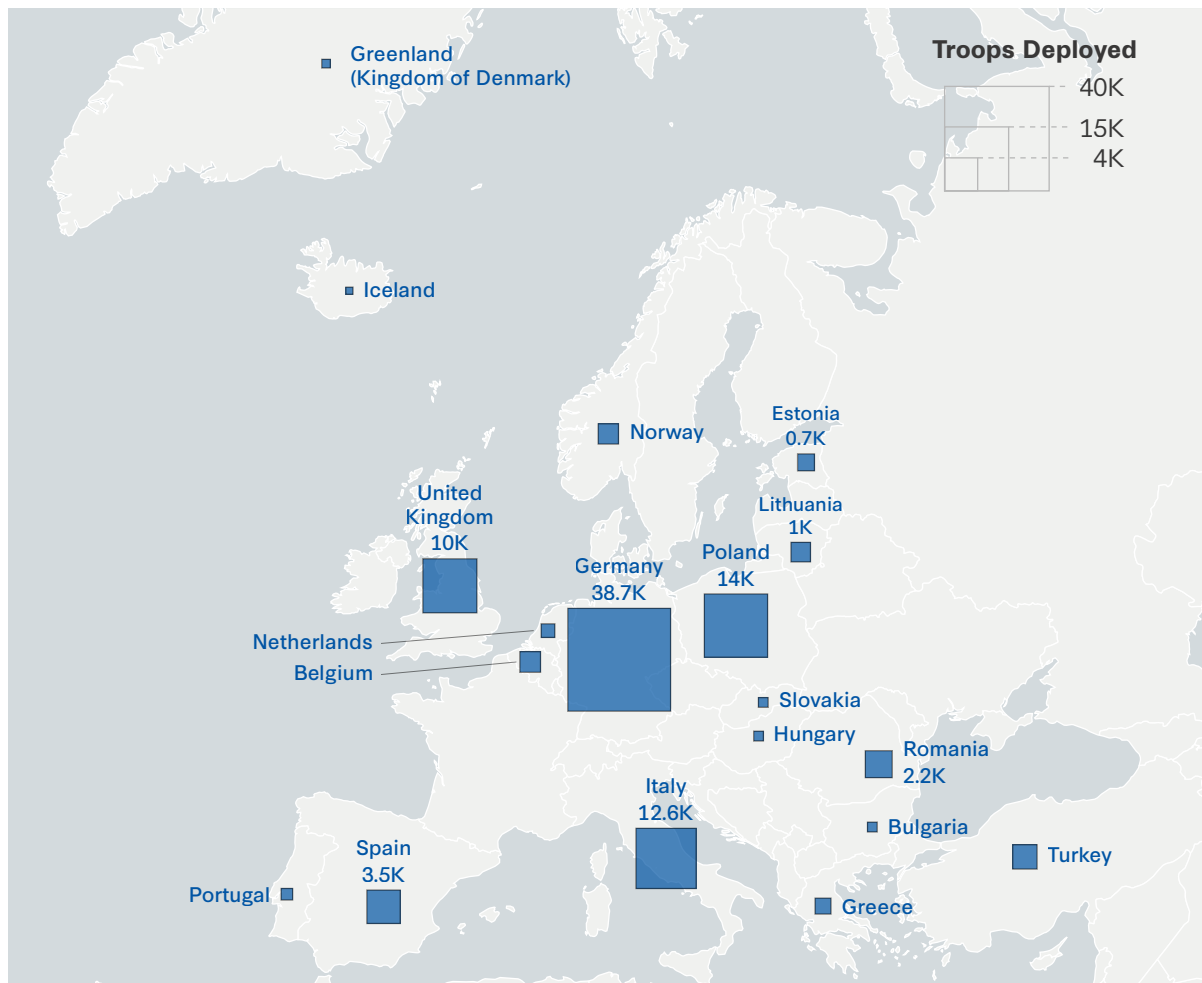
U.S. Ground Forces in Theater

While the U.S. Army, compared to the other service branches, is less relevant to the Indo-Pacific theater, it is incredibly relevant for Europe's defense. There are indications that the Trump administration may seek to reduce the overall size of the army, which would result in a smaller footprint and potential base closures in Europe. The United States has roughly 80,000 U.S. servicemembers stationed on the ground in Europe.⁹ At present, these troops serve as a de facto rapid response ground force against a Russian invasion. However, several highly capable U.S. combat units currently stationed across Europe could be swiftly reassigned following the ongoing force posture review. The redeployment of heavy combat formations such as armored brigade combat teams (ABCTs)—equipped with M1 Abrams tanks and Bradley Fighting Vehicles—as well as Stryker Brigades, which provide lighter, more mobile formations, would leave a significant void in Europe's defense capabilities. ABCTs are already rotating through NATO countries like Poland and Germany. Heavier formations like divisions (15,000-20,000 troops) and corps (30,000-50,000

troops) provide a crucial pillar of European deterrence and would be difficult for European countries to replicate.

The United States also leads a Forward Land Forces (FLF) multinational battlegroup in Poland and contributes to FLF brigades in Bulgaria and Hungary, which were established in 2022 in response to Russia's invasion of Ukraine.¹⁰ The nine FLF battlegroups in Bulgaria, Estonia, Finland, Hungary, Latvia, Lithuania, Poland, Romania, and Slovakia act as Europe's primary forward deployment on the eastern flank.

Figure 1: U.S. Troops in Europe



Source: International Institute for Strategic Studies, *The Military Balance 2025* (London: IISS, February 2025), <https://www.iiss.org/publications/the-military-balance/>.

Figure 2: U.S. Military Installations in Europe



Note: Persistent bases include overseas sites that have been continuously used by the U.S. Department of Defense for at least 15 years and at which the U.S. military exercises some degree of operational control. Selected other U.S. military sites include overseas sites that do not meet one or both of the criteria for persistent bases, but at which the U.S. Department of Defense maintains some sort of territorially linked presence or access.

Source: Luke A. Nicastro and Andrew Tilghman, *U.S. Overseas Basing: Background and Issues for Congress* (Washington, DC: Congressional Research Service, October 2024), <https://www.congress.gov/crs-product/R48123>.

Follow-On Ground Forces from the United States

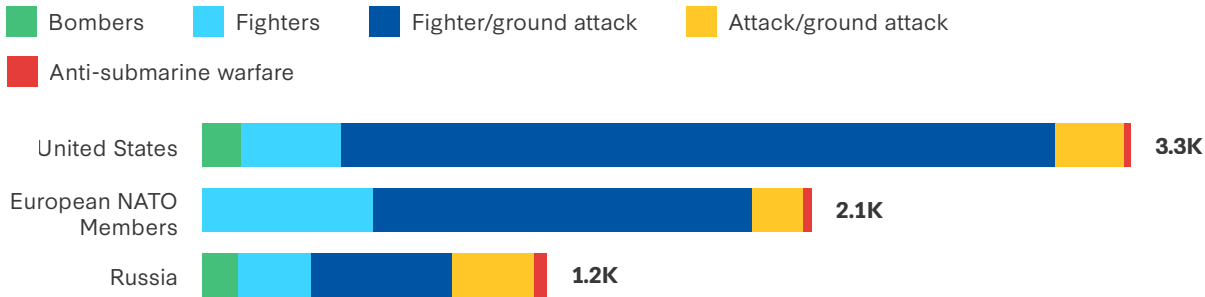
The defense of Europe is also premised on NATO's rapid reinforcement strategy, which stipulates that forward-deployed forces on Europe's eastern flank be reinforced by additional high-readiness forces and NATO's heavier follow-on forces, if necessary. NATO's largest exercise since the Cold War, Steadfast Defender 2024, demonstrated the alliance's ability to rapidly deploy troops from North America to reinforce Europe's defense.¹¹ JFC Norfolk, one of NATO's three operational commands,

is tasked with protecting the North Atlantic sea-lanes to ensure forces from the continental United States can arrive in Europe. Stockpiles of U.S. equipment in Norway and elsewhere are designed to augment and supply U.S. forces. Meanwhile, Europe’s military infrastructure and logistics networks were designed primarily to move U.S. forces and equipment from west to east. Should the United States disengage, Europe would need to rethink both its reinforcement strategy and its infrastructure networks to sustain new supply routes.

U.S. Air Power

Europe remains reliant on American aircraft, which are integral to maintaining air dominance and conducting long-range strike missions. The United States maintains about 217 fighter, attack, rotary wing, tanker, and transport aircraft operated under the command of the U.S. Air Force headquarters at Ramstein Air Base.¹² Among these assets are more than 100 fighter aircraft (namely the F-16 Fighting Falcon, F-15 Strike Eagle, and F-35 Lightning II) positioned at bases in Germany, Italy, and the United Kingdom. The F-22 Raptor stealth fighter aircraft, which is frequently deployed to Europe and brings significant long-range and stealth capabilities, would be particularly important (alongside the F-35) for maintaining air dominance and conducting precision strikes in a Taiwan contingency. Moreover, the United States maintains a substantial fleet of bombers, including the B-52 Stratofortress and B-2 Spirit bombers, which could deliver long-range strikes or serve as a strategic deterrent in the Pacific theater. The bombers are used for the U.S. strategic nuclear posture, not NATO’s nuclear mission, and serve as the delivery vehicles for advanced air-launched cruise missiles.

Figure 3: U.S., European, and Russian Combat-Capable Aircraft, 2025



Notes: The chart excludes training aircraft. For the purpose of this report, the European NATO members category excludes Turkey.

Source: International Institute for Strategic Studies, *The Military Balance 2025*.

U.S. Naval Power

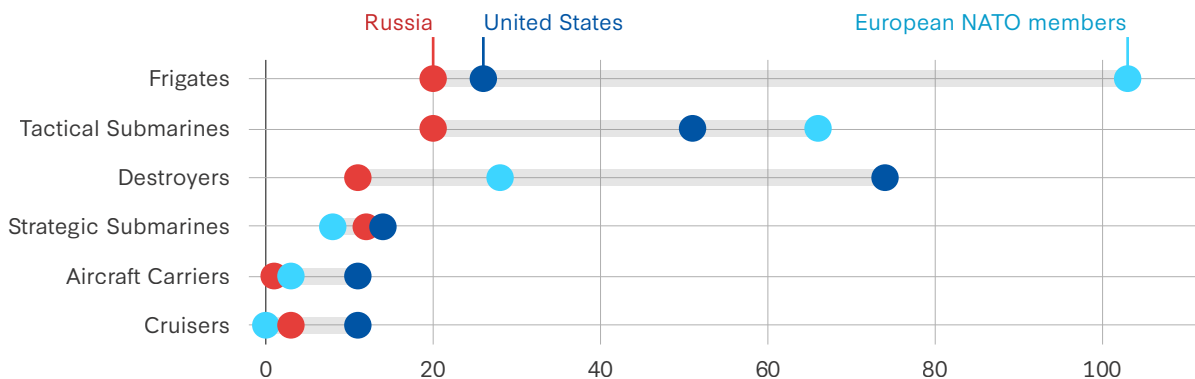
A reduced U.S. naval presence in European waters would diminish NATO’s deterrence in key maritime regions, particularly the North Atlantic, the Baltic Sea, and the Mediterranean. These waters are vital for ensuring the free flow of trade and for countering Russian naval activity, particularly by the Russian nuclear submarine fleet that operates out of the Kola Peninsula.

Several world-class warships are regularly deployed to U.S. Naval Forces Europe-Africa (NAVEUR-NAVAF/6th Fleet) at Naples, including frigates, cruisers, and destroyers. Moreover, with

11 U.S. aircraft carriers in service, several are typically deployed in Europe and the Mediterranean at any given time. These carriers, along with their strike groups, could be redeployed to the Indo-Pacific to support Taiwan’s defense or to demonstrate U.S. commitment to Indo-Pacific security. In addition, the U.S. Navy operates a substantial fleet of nuclear-powered attack submarines (SSNs) and ballistic missile submarines (SSBNs), with approximately 50 active vessels in total. These submarines could be shifted from European waters to the Pacific, where they would be instrumental in ensuring undersea dominance and countering Chinese naval threats. Similarly, the Navy’s fleet of surface combatants, including Arleigh Burke-class destroyers and Ticonderoga-class cruisers, could also be redeployed to bolster the U.S. naval presence in the Indo-Pacific.

Without a strong U.S. Navy presence, Europe would need to strengthen its own naval forces to project power and maintain security in these crucial areas.¹³ A CSIS report from 2023 examining European navies found that naval capability gaps are particularly acute with regard to anti-submarine and seabed warfare, uncrewed undersea vehicles, and munitions stockpiles.¹⁴

Figure 4: U.S., European, and Russian Naval Capabilities, 2025



Note: For the purpose of this report, the European NATO members category excludes Turkey.

Source: International Institute for Strategic Studies, *The Military Balance 2025*.

U.S. Missile Defense Systems

The Aegis Ballistic Missile Defense System—deployed on U.S. Navy warships stationed in Europe—plays a pivotal role in regional missile defense. While European navies have made strides in missile defense, their reliance on the Aegis system underscores the importance of U.S. technological contributions in ensuring robust protection against regional ballistic missile threats, particularly from adversaries like Russia.

The United States also deploys Patriot missile defense systems across NATO’s eastern flank, including in Poland and Romania. These systems, along with their radar and interceptor capabilities, could be relocated to the Indo-Pacific to safeguard Taiwan and other regional allies from missile threats. The U.S. Navy’s Aegis Ballistic Missile Defense systems, which are deployed both on ships and land bases, could also be repositioned to provide enhanced regional missile defense (except for the land components of the Aegis, which are almost immovable).

The relocation of Patriot and Aegis Ballistic Missile Defense systems would reduce Europe’s ability to defend against ballistic missile threats, especially those from Russia. Given the proximity of Russian missile systems and the ongoing modernization of Moscow’s arsenal, European nations would face heightened vulnerability unless they significantly invest in their own missile defense infrastructures, potentially requiring further coordination with NATO partners to ensure regional defense.

Military Enablers

Europe’s fighting forces are dependent on a variety of logistical supports from the United States, particularly in the air domain. These supports come in multiple areas.

First, U.S. airlift capabilities are critical to getting forces to the fight and to sustaining and supplying them once there. The United States has significant strategic airlift capacity, with C-17 Globemaster and C-130 Hercules aircraft, both of which could be redirected to Asia. The loss of strategic airlift capacity and other airborne enabling capabilities would severely hamper Europe’s ability to respond rapidly to crises, as European nations have not developed their own capabilities for surveillance and mobility, relying heavily on the United States.¹⁵

Figure 5: U.S., European, and Russian Tanker and Transport Aircraft, 2025



Note: For the purpose of this report, the European NATO members category excludes Turkey.

Source: International Institute for Strategic Studies, *The Military Balance 2025*.

Second, U.S. air refueling is critical to keeping European fighter jets aloft and engaged. Including multi-role aircraft and aircraft that can perform aerial refueling operations when fitted with the appropriate equipment, the United States has approximately 850 aircraft capable of aerial refueling operations, compared to Europe’s 336.

Third, Europe is utterly reliant on the U.S. defense industrial base, which is far more robust than Europe’s. For decades, European militaries have bought American weapons at scale. According to analysis by *The Guardian*, “in the past five years, the EU27, the UK, Norway and Switzerland have bought more than 15,000 missiles, 2,400 armored vehicles and 340 aircraft from the US,” far more than what European countries have bought from each other.¹⁶ While this helps integrate European forces with U.S. forces, it also means that in an attritional war, Europe would be dependent on the U.S. defense industrial base to resupply them. In a context where the U.S. military is not heavily

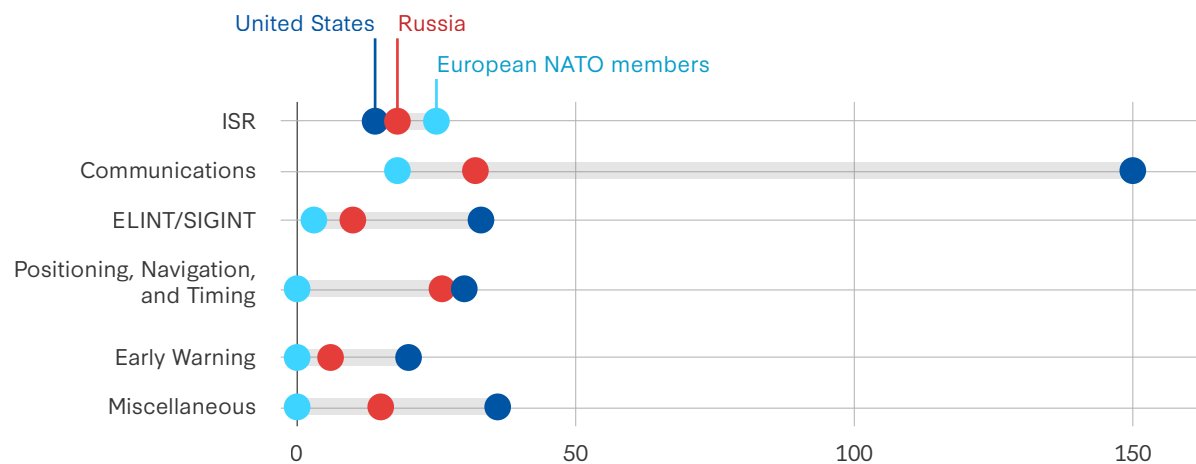
engaged in a European fight, European demand is unlikely to be prioritized over supplying the U.S. military.

Intelligence, Surveillance, and Reconnaissance (ISR)

ISR capabilities are essential for informed decisionmaking and operational effectiveness, yet Europe faces substantial gaps in this domain. For instance, when it comes to space-based ISR, the United States operates 246 military satellites, far outpacing the 49 satellites managed by European NATO members.¹⁷ This significant disparity highlights Europe's inability to independently gather critical intelligence, especially in areas requiring real-time, high-resolution data. EU projects that aim to develop a European a space-based missile early warning (SBMEW) system, such as Odin's Eye, are still at a research stage.¹⁸

Furthermore, aerial ISR assets illustrate another shortfall. For example, a 2023 CSIS report on critical enabling capabilities in the air domain found stark gaps in aerial ISR assets (a few dozen relevant aircraft in Europe compared to 150 for the United States, and roughly 200 unmanned aerial vehicles [UAVs] compared to over 900) and in airborne tactical command and control (C2) assets (about 35 relevant platforms in Europe compared to over 120 in the United States).¹⁹ This limitation compromises Europe's ability to effectively monitor and respond to emerging threats, particularly in dynamic operational theaters like Eastern Europe or the Mediterranean. In terms of space capabilities, the United States is similarly preponderant regarding satellite deployment, although Europe maintains the largest fleet of ISR satellites. Europe has steadily increased its satellite capability annually and is reportedly exploring a new network of military intelligence satellites to reduce its reliance on the United States.²⁰

Figure 6: U.S., European, and Russian Satellite Installations, 2025

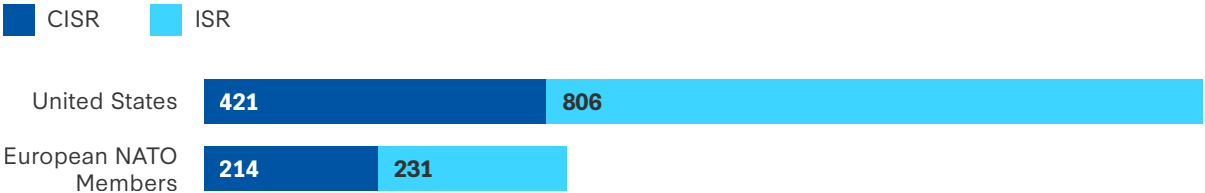


Note: For the purpose of this report, the European NATO members category excludes Turkey.

Source: International Institute for Strategic Studies, *The Military Balance 2025*.

The United States also operates high-altitude, long-endurance Global Hawk UAVs in Europe for intelligence gathering, and these platforms could be redeployed to the Indo-Pacific. Additionally, the U.S. Air Force’s AWACS (E-3 Sentry and E-2 Hawkeye) aircraft and P-8 maritime patrol aircraft, which are essential for surveillance and air control, could be reassigned to bolster air defense operations in the region. Given these gaps, continued U.S. support through ISR assets remains indispensable for Europe’s short-term defense readiness.

Figure 7: U.S. and European UAVs, 2025



Notes: CISR denotes intelligence, surveillance, and reconnaissance UAVs, such as the RQ-21A Blackjack and the MQ-27 ScanEagle. CISR denotes combat ISR UAVs, such as the MQ-9A Reaper and Bayraktar TB2, capable of conducting intelligence, surveillance, target acquisition, and reconnaissance tasks and carrying aircraft ordnance such as missiles, anti-tank guided missiles (ATGMs), and/or bombs in hardpoints for drone strikes. The chart excludes tanker and transport UAVs, of which there are 35 total, and none of which Europe possesses. For the purpose of this report, the European NATO members category excludes Turkey.

Source: International Institute for Strategic Studies, *The Military Balance 2025*.

Europe's Challenge: Deterring Russia Without the United States

The sudden withdrawal of U.S. forces, combined with a halt or dramatic decline in the intensity of the fighting in Ukraine, would create significant dangers for Europe. In the event of a ceasefire, the Danish Defence Intelligence Service estimates that it would take five years for Russia to be capable of launching a large-scale war on Europe.²¹ Moreover, according to Danish intelligence, it would take only two years for the Kremlin to be ready for a regional war against several countries in the Baltic Sea region, and a mere six months for Russia to be ready to conduct a campaign against a single neighboring country. To do so, Russia would have to amass new forces to account for heavy losses suffered in Ukraine. Estonian intelligence similarly predicts that Russia can reconstitute its army over a three-to-five-year timeline—more pessimistic than the figures offered by Norwegian intelligence (five to ten years “at the earliest”), Ukrainian intelligence (five to seven years), and German intelligence (five to eight years).²²

Meanwhile, Russia's wartime economy will likely continue unabated regardless of circumstances in Ukraine. Russia's defense industry will use any cessation in fighting to recapitalize its forces and rebuild stockpiles of long-range missiles, artillery, drones, and other weapons systems. While most presume a ceasefire in Ukraine would create a temporary pause before fighting in the country resumes, a more worrying scenario for Europe would be that Russia could seize the opening to attack NATO territory while Europe's efforts to rearm are just beginning and American security commitment has weakened.

Russia's full-scale invasion of Ukraine highlights the potential danger of a conventional land invasion of NATO and European states. Russia is unlikely to invade NATO or EU member states

in the haphazard and overconfident manner in which it invaded Ukraine, under the assumption that Ukrainian forces would fold quickly. Moreover, Russia's ability to sustain massive losses in personnel and equipment should give European states pause. European forces may initially have an advantage, pummeling Russia's initial invasion force. But Europe would quickly run short of munitions and frontline forces, swinging the advantage dramatically back in Russia's favor. Furthermore, as the Ukraine war has demonstrated, once Russian forces are entrenched it could prove exceptionally difficult to dislodge them, making it exceptionally costly for Europeans to fight to take back lost territory.

While Russia's air power has been of limited effect in Ukraine, European war planners cannot assume that will be the case should Russia attack NATO and the European Union. Indeed, Russia's air force includes approximately 1,400 combat-capable aircraft, many of which are modern, such as the Su-35 and Su-57. Russia's S-400 air defense systems would also pose a significant challenge to NATO's ability to project air power in Eastern Europe. Moreover, Russian military analytical discussions, as well as its military investments in air defense, reflect a preference for defensive mass rather than a Western-style A2/AD bubble, as well as a desire to force NATO forces to establish air superiority through attrition.²³

In the naval domain, the departure of U.S. vessels would have a relatively smaller impact. Yet the threat from Russia's northern fleet will put more of an onus on the Norwegians and the United Kingdom to protect sea lines through the Greenland-Iceland-United Kingdom (GIUK) gap. In the Baltic, Europeans would seek to leverage their regional naval advantage to isolate Kaliningrad and maintain maritime supply, while Russia may adopt a more asymmetric approach akin to Ukraine's in the Black Sea.

Russia's willingness to accept mass casualties combined with massive investments in its defense industry may give the Kremlin the confidence to attempt to upend the European security order, believing it would prevail over the medium to long term. Thus, to deter Russia, Europe should prepare itself for a long-duration attritional war, aiming to defend every centimeter of NATO territory.

Transforming European Defense

Europe has its work cut out. The scale of the challenge warrants bold action that goes beyond incremental changes such as ramping up national defense spending and increasing weapons procurement from the United States. This report outlines five tasks Europe should undertake to ensure its security. All of these tasks seek to Europeanize Europe's disparate militaries, such that Russia is confronted not by a loose collection of individual states but by Europe.

Task 1: Replace U.S. Ground Forces: Create a Pan-European Force of 100,000 Troops

With 1.86 million active military personnel across European NATO countries, it is striking—if not embarrassing—that the departure of fewer than 100,000 U.S. troops might create a strategic vacuum. To replace U.S. ground forces in Europe will require Europeans to maintain a force of roughly similar strength that is ready and able to immediately deploy to defend the eastern flank. The issue for Europe is not one of scale. The issue pertains to coordination, ability, and willingness to rapidly deploy. Europe's armed forces are spread across more than two dozen national militaries with varying levels of readiness, capability, and doctrine.

Europe should currently be able to rely on several large militaries with significant amounts of active personnel to perform this task—for example, the armed forces of France (202,200), Germany (179,850), and Poland (164,100). However, both France and the United Kingdom have severe fiscal constraints at present, with France experiencing a 2024 budget deficit of 5.8 percent and the

United Kingdom 5.3 percent.²⁴ Moreover, both militaries maintain a global outlook and therefore maintain robust naval, nuclear, and expeditionary forces. A significant portion of both countries' defense budgets is consumed by maintaining a nuclear deterrent. According to the Institute for Government, the United Kingdom's Defence Nuclear Enterprise accounts for 20 percent of total defense spending.²⁵ Similarly, France spends about 15 percent of its annual defense budget on modernizing its nuclear capabilities.²⁶ It would be a struggle at present for either country to permanently deploy significant ground forces. Thus, the United Kingdom and France both lack the resources and capacity to backfill for the loss of a U.S. ground component.

Poland and other frontline states have invested significantly in their ground forces, with the Polish army comprising 90,600 troops out of the country's 164,100 active military personnel. This is significant and would hold the line against an invasion force. But Poland would need follow-on support, especially with the potential loss of U.S. ground forces.

The one country with the size and fiscal capacity to potentially fill the gap in ground forces is Germany. Berlin has announced plans to have the largest army in Europe and has committed to spending 5 percent of its national budget on defense. Germany has the resources and scale to serve as a backbone of European security, going a long way toward filling the void left by U.S. ground forces. Yet counting on Germany is potentially risky. In 2024, Germany spent \$97.7 billion on defense (excluding the "Sondervermögen" special fund allocations, military pensions, and military aid to Ukraine), which is more than France's \$64.3 billion and the United Kingdom's \$82.1 billion. Yet this funding delivers limited combat capacity, exemplified by Germany's continued difficulties in establishing a permanent deployment of approximately 5,000 Bundeswehr personnel in Lithuania.²⁷ Additionally, Germany is struggling with recruitment and military readiness.²⁸ In February 2025, a group of military officials, lawmakers, and defense experts stated that Berlin was woefully behind its pledge to contribute a NATO division by 2027 and that the German army's battle readiness was lower than it was when Russia invaded Ukraine in 2022.²⁹

In general, Europe's immediate goal should be to leverage its overall size and scale. Moreover, Europe should strive to ensure that every European country contributes meaningfully to deterring the Russian threat, while taking financial and institutional constraints into account. Many countries, most notably Spain, have rightfully pointed to the limitations of using defense spending as a benchmark for countries' commitment to European security. In a letter sent to NATO Secretary General Mark Rutte ahead of this year's NATO summit, Spanish Prime Minister Pedro Sanchez objected to the 5 percent of GDP defense spending target and instead requested a "more flexible model" that either makes the spending target optional or excludes Spain entirely.³⁰ Thus, Europe should provide a framework for countries like Spain to strengthen European security through other means than defense spending. This would allow these countries to take advantage of their size without placing excessive strain on their public finances. In the medium-to-long term, Europe could gradually transition the burden of sustaining these forces to a broader array of European countries.

Of course, this would not be the first attempt at creating a multinational European force, with previous efforts focused on furthering the military dimension of the European Union's Common Security and Defense Policy (CSDP). A 1999 European Council meeting in Helsinki formulated

the “Headline Goal” of developing a future European Rapid Reaction Force by 2003. This goal committed EU member states to being able to rapidly deploy and sustain up to 15 brigades (or 50,000 to 60,000 personnel) for 60 days, capable of performing Petersberg tasks, namely military tasks of a humanitarian, disarming, peacekeeping, and peacemaking nature. However, the Headline Goal missed its 2003 deadline, was revised in 2004 with 2010 as a new deadline, and remains unfulfilled to this day.³¹ Similarly, the European Union Battlegroup concept was conceived as an EU rapid response capability in the form of multinational battalion-sized combined arms units. While the EU Battlegroups reached full operational capacity in 2007, they have yet to see operational service.

While past attempts to create a high-readiness force have been largely futile, the sense of urgency in key capitals has shifted three years into Russia’s full-scale invasion of Ukraine. The expected, and potentially imminent, U.S. force reduction in Europe and heightened Russian threat necessitates a greater level of ambition at the European level.

More recently, the European Union’s 2022 Strategic Compass for Security and Defence, a roadmap document penned by the European External Action Service, proposed the establishment of an EU Rapid Deployment Capacity (RDC), consisting of modified EU Battlegroups and additional EU member states’ forces and capabilities, comprising 5,000 troops by 2025.³² In all cases, however, institutional obstacles and a lack of political will have kept European nations from utilizing politically established rapid reaction forces. Instead, EU member states have preferred to act alone or build coalitions outside EU frameworks.

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Europe’s goal should be to create a standing, high-readiness ground force comprising 100,000 troops. In the short term (i.e., over the next 10 years), personnel for this force would be generated primarily from fiscally constrained, non-frontline states, led by Italy or Spain. This would be challenging, since both have scant experience commanding above the battlegroup level since the formation of their respective modern states. However, pushing Madrid and Rome in this direction is a worthwhile endeavor in pursuit of greater pan-European solidarity with regard to deterring Russia.

The goal would not be to create a solidarity force, or a trip-wire force, such as NATO’s Forward Land Forces (FLFs). Rather, the goal should be to establish a highly ready, lethal European fighting force

able to quickly deploy to defend Europe, anywhere on the continent. This would in essence become Europe's army.

SHORT TERM: LEVERAGE LATENT MASS IN FISCALLY CONSTRAINED STATES

Instead of focusing on arbitrary spending targets to measure European defense, Europe should pair the fiscal capacity of its north with the size and scale of its south. Spain and/or Italy should commit to leading and contributing the lion's share of troops to a permanently deployed, pan-European force comprising 100,000 troops. Both Spain and Italy have large armed forces—122,000 and 160,000 soldiers, respectively—and either could become the leading “framework nation” (similar to the UK-led Joint Expeditionary Force's structure, based on NATO's Framework Nations Concept). Furthermore, this force should serve as the vessel for non-Eastern flank countries and smaller militaries to amplify their contributions to the defense of Europe. For example, Belgium, Croatia, Czechia, Greece, Portugal, Slovakia, Slovenia, and potentially Black Sea and Balkan NATO members could all contribute a significant portion of their armies to this force. In the short term, the force would not include the larger militaries of Germany, France, and the United Kingdom, which have the size and capabilities to serve as the backbone of European defense, assuming they follow through on their ambitious rearmament plans. Instead, this European force would operate alongside these large militaries, reducing Europe's military fragmentation.

This force would seek to be of the highest readiness, able to quickly respond to a military crisis. It could be command-and-control agnostic—able to augment NATO's Allied Reaction Force (ARF), act independently as an EU rapid reaction force, or function as a distinct European multinational force. This is not dissimilar to the premise of the Eurocorps, a multinational military corps headquarter, comprising six framework nations, that can be placed at the service of both the European Union and NATO. Participating countries would clearly have a role in managing the force, but operationally it could be placed under the command of NATO, the European Union, or a new multinational structure. The force would be led by a commanding officer from one of the participating member states who could report to whichever military commander is running the war, whether that be a U.S. supreme allied commander Europe (SACEUR) at NATO, an EU military commander, or a British or other European officer leading a multinational coalition.

On the one hand, creating an integrated pan-European force seems like a radical notion. But the proposal described here is merely an extension of or variation on past proposals and efforts, such as the ill-fated European Rapid Reaction Force (EUROFOR) and EU Battlegroups concepts, as well as NATO's Allied Reaction Force, a component of the new NATO Force Model. The crucial shift, however, is that this force would be permanently stationed (potentially in Germany should the United States choose to close bases), allowing it to develop into a cohesive and integrated unit. With soldiers and units permanently based together, the force would train and exercise continuously. As such, the force would be made up of soldiers from contributing European countries but would train, act, and behave as a pan-European force. In the short run, fiscally constrained countries would also be tasked with equipping the forces and bearing the cost of their deployment. While not inexpensive, this would be relatively cost-effective compared to spending an eye-watering 5 percent of GDP on defense.

Instead of having countries rotate units for short, temporary tours or simply designating part of their forces as belonging to a rapid reaction force (as is currently the case with NATO's Allied Reaction Force, for example), this new force would be made up of units permanently assigned and stationed together. NATO's current efforts involve "voluntary contributions" of forces from member states. Dr. Sven Biscop, when examining NATO's New Force Model following the 2022 Madrid Summit, concluded that it could lead to the creation of a European army.³³ His key recommendation was that "the EU experience teaches an important lesson: temporary multinational formations, such as the EU Battlegroups, do not work." The reason for this, he assessed, was largely that "working up a multinational unit during several months; putting it on stand-by and/or pre-deploying it for a fixed term; and then dissolving it: even if the will to deploy were there, this means that the accumulation of experience is almost zero. Also, there are no opportunities to create synergies and effects of scale between the constituent national units."

Critically, this force would help simplify Europe's short-term efforts to strengthen deterrence, as it would become the vehicle through which most smaller European countries would contribute to the continent's collective defense. Instead of Europe fighting as more than 20 different militaries engaged in combat, this force would simplify and focus European efforts and would effectively leverage the continent's overall size. This would therefore signify a tangible and impactful contribution of non-eastern flank countries to collective security and create a sense of geographic solidarity. Meanwhile, countries that can be more aggressive in accelerating their rearmament, such as Denmark, Sweden, and the Netherlands, could continue to ramp up their national defense spending, ideally aiming to rapidly fulfill NATO's force requirements to support the organization's regional defense plans with limited U.S. involvement. Moreover, these countries would continue to bear the brunt of responsibility for providing short-run military aid to Ukraine.

MEDIUM-LONG TERM: GRADUALLY INCORPORATE THE REST OF EUROPE

In the medium- to long-term, European countries would introduce an objective apportionment of forces to ensure buy-in from a wider array of states. The distribution of national contributions would be determined by a formula akin to the method used to determine the composition of the European Parliament. This could, for example, mean that countries falling below the 3.5 percent defense spending target over a 10-year rolling average would be asked to contribute commensurately to the force. Moreover, it would incorporate a broader array of factors, such as total defense spending, population size, and active military personnel.

Importantly, the force would eventually operate equipment jointly procured for its specific needs. Thus, instead of dealing with interoperability issues from a flurry of equipment brought by various national militaries, the force would gradually transition to a common set of equipment procured directly for it. The European Union's Permanent Structured Cooperation (PESCO) mechanism—set up to enable countries that wanted to work together on defense and form deeper levels of cooperation—could be the institutional vehicle for planning and building such a force. The goal would be for this force to establish a matériel standard for non-participating national militaries aiming to gradually ensure interoperability and integrate procurement orders with the European force. For instance, if the force were to be outfitted with 300 tanks, other member states would be

encouraged and incentivized by the European Union to put in joint orders. Thus, this force would also help standardize equipment across Europe.

Contributions to the force could follow an apportionment formula akin to the proportional distribution of seats in the European Parliament, gradually incorporating greater contributions from all European countries. In the long term, costs incurred by deploying and sustaining the force could be shared with the European Union and included in the long-term budget (the Multiannual Financial Framework), and the European Commission would be empowered to take a leading role in procurement.

Furthermore, while the force will serve as a short-term stopgap to deter Russia, it could eventually take on a broader range of tasks. Therefore, while non-frontline countries are ceding some control over a portion of their militaries to address the most acute threat facing Europe, they are also enhancing their security by building a large and highly capable European force that could eventually handle a wider array of European security needs, including threats emanating from the south.

Task 2: Operate the Same Equipment

The 2025 NATO summit in The Hague focused on increasing European defense spending, but there has been little discussion about reforming how Europeans spend. Presently, Europeans spend their precious defense resources in a fragmented and inefficient manner. Countries spend nationally, each with its own national procurement offices in its ministries of defense and national champion defense industries. This means that Europe has roughly 30 distinct national defense industrial complexes, making coordination and cooperation on procurement a bureaucratic quagmire. The lack of procurement cooperation both wastes money and makes it exceedingly difficult for Europeans to fight together. A 2023 CSIS report by Sean Monaghan found that when European ministries of defense have more money, they cooperate less with each other; when they have less money, they cooperate more to maximize efficiency.³⁴ A narrow European focus on ramping up spending without corresponding reforms to address how Europe spends will not only waste money but also undermine how Europe defends itself.

Fragmented national procurement means that Europeans do not leverage their collective size and purchasing power to create economies of scale. A 2025 Bruegel report from economists Guntram B. Wolff, Armin Steinbach, and Jeromin Zettelmeyer, commissioned as part of Poland's presidency of the European Council, highlighted that European countries could see a halving of unit costs if they spent together.³⁵ Andrius Kubilius, the European commissioner overseeing defense and space policy, has similarly noted that “if member states are going for joint procurement, which means bigger contracts, on average production price goes down to 70%.”³⁶

While integration creates efficiencies, those efficiencies create losers. There is therefore little interest in integrating efforts and reforming procurement among officials at national ministries of defense and within national champion defense industrial complexes. Integration would bring efficiencies, but it would also result in a loss of control over procurement within national ministries.

Additionally, national defense industries also fear European integration, as it may upend their current business models—which often rely on privileged access to funds from national ministries—and push them into mergers with other European companies.

The European Union has identified this as a problem and, when empowered, has proven historically adept at integrating fractured and protected economic sectors. In 2024, the European Union presented a defense industrial strategy and the high-profile Draghi Report—authored by former Italian prime minister Mario Draghi—on European economic competitiveness. The report outlines the need for reform and joint procurement, and the European Union’s new €150 billion SAFE loan program will now provide substantial resources toward incentivizing joint procurement.³⁷ Yet at the same time, by loosening its debt and deficit rules (the Stability and Growth Pact) for defense, the European Union has also greenlit rampant and uncoordinated national spending.³⁸ The current efforts to integrate do not likely reflect the scale needed to transform European defense.

The case for integrating procurement is ultimately not about maximizing resources. The fragmented procurement system creates significant battlefield issues, which the Ukrainians have experienced firsthand. Although NATO provides guidance to ensure the interoperability of weapons systems—e.g., through the NATO Interoperability Standards and Profiles (NISP)—the war in Ukraine has highlighted that NATO systems are far from fully interchangeable.³⁹ Receiving a panoply of varying systems from across Europe has created tremendous maintenance and sustainment issues for Ukraine. Military equipment breaks and is constantly in need of repair and spare parts, and therefore requires well-stocked supply chains and mechanics able to quickly get systems back to the battlefield. Operating a combination of French, German, British, Italian, and Swedish armored vehicles, for example, creates tremendous challenges. Europeans fighting together in an attritional conflict against Russia would face similar logistical and maintenance issues. Moreover, in a war of attrition, one national frontline unit may run short of armored vehicles or howitzers and could be unable to seamlessly transition to the systems being operated by other frontline forces from a different country. This creates battlefield asymmetries and faultlines that could be exploited by an adversary.

Additionally, European defense investment lacks unity of effort and focus. While NATO provides capability targets, it is up to individual countries to determine how they spend. This creates significant operational challenges and makes European forces tactically brittle. As Minna Ålander has noted in the *Financial Times*, centering Europe’s rearmament around national spending will produce different results in combat effectiveness across the continent. For example, allotting 5 percent of Germany’s €4.3 trillion GDP to defense would result in a €200 billion budget for that country, while the same share of Estonia’s just-under-€40 billion GDP would result in a €2 billion defense budget. Many of the countries that are put most at risk by Russian aggression are small states on Europe’s eastern flank, meaning that funds will be spent not only unequally but also further away from where they are most needed.⁴⁰

It is crucial that Europe address this problem in conjunction with the massive spending spree that is underway. There is a distinct danger that the increases in defense spending will result in underwhelming military capacity and will fail to trigger the necessary expansion of the defense

industrial base and enhanced combat effectiveness that is direly needed. There are many potential paths forward to address Europe's procurement coordination problem.

The first and most straightforward path is to develop a large pot of funding to procure on behalf of Europe. This fund could be created through joint European borrowing (colloquially known as Eurobonds); it could be similar to the NextGenerationEU instrument developed in response to Covid-19, or it could take the form of national contributions to a common pot. The European Commission could then procure on behalf of the European Union (playing a role similar to the one it played in securing Covid vaccines and facilitating their distribution), or it could distribute the funds for joint procurement among member states.

Second, a new European body could be created to integrate procurement, as suggested by the Brussels-based research organization Bruegel.⁴¹ The Bruegel report calls for a new European procurement authority to essentially take on the lion's share of the procurement responsibilities for national militaries. This would no doubt face significant national pushback. But the cost efficiency would be immense: Integrating procurement efforts would deliver vastly increased combat capacity. This new body, as the report suggests, could be based on an intergovernmental agreement and could procure and own certain strategic enablers and charge usage fees to participating member states, as a way of lessening the budgetary impact of weapons procurement.

Task 3: Prepare for Attritional Warfare by Expanding Stockpiles

Once Europe fixes how it procures, it needs to build stockpiles of weaponry and boost its defense industrial capacity to produce those weapons. Europe needs ammunition of all types: artillery, long-range strike, air defense interceptors, precision-guided munitions for its air forces, small first-person view (FPV) drones, and munitions and drones for its naval forces. Moreover, Europe needs the defense industrial capacity to produce these resources at scale and over time.

Europe's short-term dependency on U.S. munitions renders an outright decoupling strategy unsound. But Europeans should urgently focus on building redundancy and "de-risking" in certain areas where there is real risk to Europe if the United States is unable or unwilling to supply munitions.

Europe should heed some lessons from the lack of support provided by Russia to Iran in its war with Israel. Iran is dependent on Russia for air defense and is awaiting delivery of Russian fighter jets; given the war in Ukraine, however, Russia has limited defense industrial capacity to spare for its partners. Something similar could occur should the U.S. become militarily engaged with China, as Washington would need to reserve its stockpiles and production of systems like long-range missiles for itself and may lack the spare capacity for Europe and other partners. Strains on U.S. stockpiles and the limits of the defense industrial base resulted in the Biden administration slowing or limiting

transfers of certain systems—such as ATACMS missiles—to Ukraine in an attempt to preserve U.S. military readiness. More recently, during Israel’s 12-day conflict with Iran in June 2025, the United States and Israel burned through air defense interceptors at an alarming clip, depleting nearly a quarter of the THAAD interceptors purchased by the Pentagon and raising concerns about the sustainability of U.S. stockpiles.⁴²

Europe’s short-term dependency on U.S. munitions renders an outright decoupling strategy unsound. But Europeans should urgently focus on building redundancy and “de-risking” in certain areas where there is real risk to Europe if the United States is unable or unwilling to supply munitions. This means investing in deep stockpiles and creating robust defense industrial capacity in areas critical to supporting an attritional war with Russia. Common European funding should be leveraged to scale up production capacity and build stockpiles.

ARTILLERY AMMUNITION: EXPAND PRODUCTION CAPACITY

The massive scale of Ukraine’s artillery shell usage has highlighted artillery ammunition production as a major priority for Europe’s munition production ramp-up. Europe’s stockpiles are woefully low at present, having supplied Ukraine with approximately 1 million shells by the end of 2024, mostly from existing national deposits. In April 2025, Chris Cavoli, then NATO’s SACEUR, warned that Russia is expected to currently produce 250,000 artillery shells monthly, “which puts it on track to build a stockpile three times greater than the United States and Europe combined.”⁴³ *The Economist* estimates that Europe’s current annual production of 155 mm shells is around 1 million, while the United States has aimed to increase its monthly production from 30,000 to 100,000 shells by the summer of 2025, which would yield 360,000 to 1.2 million shells annually.⁴⁴

Throughout the war, there has been an ongoing debate over whether Europeans should seek to buy 155 mm artillery or invest in their own internal production to support Ukraine. This debate offers a false choice, as Europe can and ultimately has done both. Europe needs to continue to expand its artillery production. Although the European Union missed its goal of supplying Ukraine with 1 million shells within a year by early 2024, production capacity is rapidly expanding. For example, Rheinmetall, Europe’s largest producer, has surged its global annual production of 155 mm rounds by a factor of 10 from its pre-2022 capacity, now reaching 700,000—and with plans to reach 1 million by 2026.⁴⁵ In April 2025, EU high representative Kaja Kallas stated that Brussels had secured two-thirds of the €5 billion required to deliver a target of 2 million artillery shells to Ukraine by the end of 2025. This would allow Ukraine to maintain its current rate of fire at just under 5,500 shells a day—still a far cry from Russia’s average rate, which the Royal United Services Institute (RUSI) estimates at roughly 10,000 rounds per day, and at times as high as 36,000.⁴⁶

Europe is well on its way toward a more robust defense industrial base for ammunition, as previous efforts to accelerate production are beginning to pay off. EU defense commissioner Kubilius has noted that Europe’s annual capacity to produce ammunition increased from 300,000 shells at the start of Russia’s invasion to about 2 million shells by the end of 2025.⁴⁷ For example, satellite imagery analysis by the *Financial Times* shows that arms production sites receiving EU funding through the Act in Support of Ammunition Production (ASAP) are rapidly expanding their physical production areas.⁴⁸ However, European ammunition producers are still grappling with supply chain

bottlenecks, including shortages of nitrocellulose, gunpowder, and certain explosives.⁴⁹ This is being addressed, partly through incentives to mass-produce shells, but it also requires adjusting and streamlining EU regulations.

LONG-RANGE STRIKE CAPABILITIES: SCALE UP PRODUCTION

One way for Europe to deter Russia is to develop deep stockpiles of long-range strike capabilities able to hit Russian territory and Russian forces deep behind the front line.

In general, Europe remains deeply reliant on the United States for its missile supplies. According to *The Guardian*, the European Union, the United Kingdom, and Norway have imported a total of 26,036 missiles from other states since 2020; less than 10 percent involved deals between European states, while the lion's share came through deals with the United States.⁵⁰ Europe should seek to increase its security of supply and focus its efforts on ramping up production of domestic long-range missiles such as the air-launched German-Swedish Taurus, which has a 500-kilometer range, and the French-British SCALP EG/Storm Shadow, which has a 550-kilometer range. Scaling up production of these systems has been a problem, however. Annual production of Taurus missiles by MBDA Germany and Saab is estimated to be between 40 and 50 missiles, with MBDA's production of SCALP EG/Storm Shadow between 50 and 100.⁵¹ In comparison, Russia's monthly production includes 40 to 50 Iskander missiles (with a range of 500 kilometers), 30 to 50 Kalibr missiles (1,500–2,500 kilometers), and 50 Kh-101 missiles (2,500–2,800 kilometers).⁵² The European Long-Range Strike Approach initiative, which was launched in 2024 and gathered France, Germany, Italy, Poland, Sweden, and the United Kingdom with the aim of acquiring a 2,000 kilometer-range land-attack weapon, could also contribute to expanding Europe's long-range strike options by the 2030s.⁵³

Additionally, European fighter fleets need deep stockpiles of munitions to avoid losing air dominance in an initial campaign due to a lack of precision-guided munitions. As part of ongoing modernization efforts, Europe is moving forward with the development of integrated long-range strike aircraft, including systems capable of carrying advanced missiles like the MdCN (Missile de Croisière Naval), which has a range of approximately 1,000 kilometers.

UAVS: BUILD UP UKRAINE'S CAPACITY

The war in Ukraine, and the daring Ukrainian attacks on Russian aerial assets far behind enemy lines, have underscored the utility of UAVs on the modern battlefield.⁵⁴ The European Union is building from a solid domestic production base, as 40 percent of global drone companies were based in Europe as of 2022.⁵⁵ Fortunately for the continent, Ukrainian defense industrial production is roaring and could, with additional funding, augment the European defense industrial base and backfill stockpiles over time. Innovative models of defense industrial cooperation and integration are being tested with promising initial results. Denmark's efforts, for instance, provide an intriguing model for how supporting Ukraine's industrial base can enhance European resilience. Copenhagen has shown the way through the "Danish model," in which orders for weapons and military equipment are placed directly with the Ukrainian defense industry, allowing Ukrainian manufacturers to move parts of their supply chains onto Danish soil.⁵⁶

MISSILE DEFENSE SYSTEMS AND INTERCEPTORS: PROCURE MORE OF EVERYTHING

Air defense is an area in which Europe should both dramatically increase its procurement and maintain a diversity of suppliers, encouraging innovation. The war in Ukraine has demonstrated the vital importance of air defense. Critically, this is also an area for more research and development funding, given the cat-and-mouse game of drone warfare. Also vital is the development of low-cost interceptors produced in mass quantity.

The European Sky Shield Initiative (ESSI), launched by the previous German government, provides one model for European cooperation. ESSI involves a group of European nations that have agreed to cooperate on the manner in which defense systems are procured, maintained, and trained, thus complementing one another.⁵⁷ At ESSI's inception, the 15 participating NATO allies signed a letter of intent for the joint procurement of air defense systems, which would create significant economies of scale.⁵⁸ Yet ESSI's multilayered defense system, possessing four kinetic capabilities, has relied on non-European suppliers for long-range and exoatmospheric systems (namely the U.S. Patriot and Israeli Arrow-3 systems, respectively). It has also not yielded much joint procurement, despite its intention to "jointly procure an air and missile defence system in an efficient and cost-effective way using interoperable, off-the-shelf solutions." French President Emmanuel Macron has been a notable critic of ESSI's purchasing of non-European systems. France has aligned with Spain and Italy in declining to join the initiative.

While ESSI has been unable to unite Europe's major powers and spur joint procurement, it has been a useful framework for coordinating acquisitions and ensuring interoperability of systems. Although no European supplier currently offers a product in Arrow-3's class for very long-range systems, the omission of the French-Italian SAMP/T long-range system could be reconsidered. The SAMP/T system, developed by MBDA and Thales, is one of the primary air defense systems in Europe, capable of intercepting both ballistic missiles and aircraft. Deployed by France and Italy, this system is set for continued expansion and modernization, with both countries operating five batteries apiece. However, SAMP/T has a much sparser battlefield record than its U.S. Patriot competitor, and this fact has contributed to a reduced global market share for SAMP/T and little incentive to expand production capacity. In contrast, the Patriot has been a mainstay of Western combat operations since the Gulf War in 1991, with decades of use by Israel, by the U.S. in Iraq, by the Saudis against the Houthis, and by Ukraine currently.⁵⁹ At least six European countries use the Patriot system, with billions of additional orders in the pipeline. Meanwhile, Thales and MBDA had not sold any SAMP/T systems since Singapore placed an order in 2013, until Denmark recently announced plans to invest 58 billion kroner (approximately \$9.1 billion) in two SAMP/T systems as part of the country's integrated ground-based air defenses. This will make Denmark the first EU export customer, with France and Italy the only other member states that use the system.⁶⁰

However, the surging demand for Patriot systems presents a defense industrial challenge for Europe. There are huge back orders for Patriot systems, with a massive global order book resulting in lead times of approximately seven years for deliveries of new batteries.⁶¹ Lockheed Martin has recently sought to move parts of its supply chain for Patriot interceptors to Europe, which would assuage some economic and supply concerns.⁶² However, efforts to onshore parts of the Patriot

supply chain will hardly be enough to reassure European defense planners that they can count on adequate and timely deliveries.

While reaping some economic and supply benefits from Patriot production is a positive development, Europe simply needs a more diversified air defense pipeline. As such, stimulating demand for the SAMP/T should be a priority for European joint procurement efforts. While it may make sense at a national level for Europeans to buy the more proven and familiar Patriot, from a broader European perspective, Europe needs more air defense batteries and expanded production capacity. Thus, focusing joint procurement efforts on building out European air defense production is vital.

ARMORED VEHICLES: CONSOLIDATE EUROPEAN SUPPLIERS

European ground forces also need fleets of protected mobility to quickly deploy. While the utility of armor has been questioned in Ukraine, especially as frontlines have become less dynamic and increasingly fixed, protected vehicles are still essential to the movement of forces behind the front lines, vital in initial phases of conflict, and necessary to making any advances. European defense spending is attuned to this reality. According to analysis by GlobalData, Europe will dominate the global military land vehicle market over the next decade, accounting for 38.8 percent of the global market share by 2034.⁶³

This is an area in which Europe will find it relatively easy to prioritize domestic producers. While the U.S. Army will gradually reduce and discontinue acquisitions of platforms such as the Armored Multi-Purpose Vehicle (AMPV) and Joint Light Tactical Vehicle (JLTV), Europe will continue to produce high-quality tanks, infantry fighting vehicles, and armored personnel carriers.⁶⁴ Germany, for example, is preparing massive orders of Boxer (built by German KNDS and Rheinmetall) and Patria (built by Finnish Patria) armored vehicles estimated at 10 and 7 billion euros, respectively.⁶⁵

Yet Europe still produces too many different types of systems. Ongoing modernization efforts span a myriad of combat vehicles involving several coproduction, technology transfer, and long-term sustainment strategies. These include variants of the ASCOD II and Piranha 5 from GDELS, the KF41 Lynx from Rheinmetall, various types of CV90s from BAE Systems, and the Polish Borsuk produced by HSW.⁶⁶ Operating so many different vehicles would create a logistical nightmare for European forces should they engage in high-intensity attritional combat.

Europe should ramp up production of select systems, incentivize industrial consolidation, and encourage countries to divert older systems to Ukraine. One promising platform is the Common Armoured Vehicle System (CAVS) program, established in 2020 with the aim of developing a six-wheeled armored vehicle system that meets the common requirements of the five participant countries (Denmark, Finland, Germany, Latvia, and Sweden). The CAVS program seeks to enhance mutual defense resilience and bring cost benefits through joint procurement, and is partly funded by the European Defence Industry Reinforcement Through Common Procurement Act (EDIRPA) funding instrument, which promotes joint defense procurement by EU member states.⁶⁷ European leaders should incentivize the development of European champions and encourage the losing

companies to merge with the winners, preserving their industrial capacity while reducing the number of systems under production.

Task 4: Mitigate Dependencies on U.S. Enabling Capabilities

There remain critical domains—including air refueling, air transport, integrated command-and-control systems, and ISR—in which continued U.S. involvement is vital to Europe’s defense. European forces could operate without U.S. capabilities, but their operations would face significant challenges, requiring on-the-fly reforms and improvised solutions. In short, without the United States, European forces would be much less effective and would face challenges operating in a conflict.

Yet not all Europe’s gaps in enabling capabilities are equally urgent. Physical air assets that the United States may redeploy to the Indo-Pacific, such as air refueling, air transport, and ISR drones, are likely the most pressing for Europe. There are other U.S. enabling capabilities, such as space assets providing intelligence for targeting, that are not fixed in Europe and that a U.S. administration still committed to NATO would be expected to provide. The willingness and ability of the United States to support European warfighting efforts will likely remain as long as the United States remains in NATO and the alliance avoids a major rupture.

Nevertheless, it makes sense for Europe to work over the medium-to-long term to reduce its dependence and build its own enabling capabilities while ensuring compatibility with the United States and NATO partners. Europe has the wealth and technological capacity to do so. This requires bold reforms, increased investments, and, crucially, greater cooperation among European nations.

RAPIDLY PROCURE ADDITIONAL AIR TANKERS AND AIR LIFT CAPABILITIES

European NATO countries field approximately 2,046 fighter aircraft, including 610 F-16s, 158 F-35s, 426 Eurofighter Typhoons, 279 Dassault Mirages, 127 Gripens, and 145 F/A-18 Hornets. However, Europe’s substantial fighter aircraft fleets remain reliant on U.S. strategic enabling capabilities, such as aerial refueling and C2.

To operate an air war against Russia, air refueling is vital to keeping fighter jets aloft and extending their range, allowing them to loiter longer and take off further from the front. Operation Unified Protector, the 2011 NATO operation in Libya, highlighted the limitations associated with Europe’s insufficient air refueling. According to Major Jason R. Greenleaf of the U.S. Air Force, although the United States flew only 25 percent of sorties, “it still supplied half of the aircraft, flew 80 percent of the air-refueling and ISR missions, and augmented airborne C2 with 25 percent of the coverage and control.”⁶⁸

A conflict with Russia would require a tremendous amount of aerial refueling to enable Europe’s air war. Unfortunately, European countries fall well short of meeting this requirement. When NATO’s Multinational Multi-Role Tanker Transport Fleet is included, Europe collectively possesses just 339 aircraft capable of performing aerial refueling and air transport operations, compared to the United States’ 850.⁶⁹ Europe’s fleet of aircraft are also in varying of states of readiness. Europe must therefore urgently acquire more of these capabilities. However, this will take time.

Given the specialized nature and extensive cost of Europe's fleet, plugging these gaps through continent-wide cooperation and joint procurement is by far the most sensible path. Established in 2010 to ensure the most efficient management of aerial assets, the seven-nation European Air Transport Command (EATC) enables participating member nations to pool their air mobility assets under a unified multinational command. Member nations transfer their aerial assets to the EATC and derive benefits from optimized utilization, efficiency in the planning and execution of air mobility, information sharing, and joint exercises.

Europe should prioritize similar initiatives in which strategic enablers are pooled and shared, and European militaries should preserve older air refueling planes set to be retired to act as a strategic reserve. Airbus manufactures the A330, which has already been procured jointly by Europeans in an EU-NATO initiative. Given that these are already programs of record, supported by the multinational European procurement agency OCCAR, the European Union could simply fund a massive procurement of aircraft to meet European needs and create economies of scale. Currently, European militaries have been procuring in small orders, sometimes of just one or two planes at a time. This is another area where the European Union should focus its joint procurement efforts. Many countries have also taken steps to improve operational effectiveness, exemplified by the Nordic countries' move to integrate their air forces and operate their roughly 250 fighter aircraft jointly as one fleet.

BUILD OUT EUROPEAN ISR CAPABILITIES

To reduce dependence on the United States for ISR, Europeans need to expand the quantities of their Command and Control and Intelligence, Surveillance, and Reconnaissance (C2ISR) aircraft, as well as their space capabilities and intelligence integration capacity. As with air refueling and transport, it is not that Europe does not have assets; the continent just does not have enough of them. According to Douglas Barrie of the International Institute for Strategic Studies (IISS), for European militaries, “quantity has a quality of its own, and it is in the former that more needs to be done.”⁷⁰

Europe lacks sufficient “big wing” aircraft to serve as C2ISR platforms.⁷¹ These are crewed aircraft that can conduct a variety of specialized tasks, such as managing combat operations in the air domain, gathering signals intelligence, and providing situational awareness. Only the United Kingdom operates big wing aircraft, with its inventory of three RC-135 Rivet Joint aircraft.

Aerial early warning (AEW) platforms are a noteworthy liability for Europe. In June 2025, the U.S. Air Force announced that it would cancel the E-7 Wedgetail program—which had been selected in 2023 as NATO's next airborne moving target indicator and air battle management aircraft—due to significant delays and cost increases.⁷² The E-7 was expected to replace the aging E-3 Sentry aircraft, which provide the backbone of NATO's AWACS (airborne early warning and control) fleet, including 14 E-3s manned by multinational crews operating out of Geilenkirchen, Germany. Instead, the USAF will replace the E-3 Sentry with a combination of cheaper Cold War-era radar aircraft and high-end space sensors. Despite European ambitions to develop its own military space capabilities, European countries will be hard-pressed to launch their own space-based radar and battle management system from scratch.⁷³ Instead, they will likely fill the gap with less capable alternatives to the

Wedgetail, such as Saab's GlobalEye, which Sweden already operates and which France plans to procure.⁷⁴ Alternatively, NATO could move ahead with its plan to acquire the Wedgetails, despite the United States pulling out.

Europe faces a similar challenge with regard to UAVs. In NATO, unmanned stealth aircraft, such as the RQ-170, are currently only operated by the United States (although France's Dassault is developing a stealth wingman drone that can be operated directly from the cockpit of a Rafale fighter jet).⁷⁵ For unmanned combat aerial vehicles, Germany, France, Spain, and Italy are similarly developing the Eurodrone platform, akin to the U.S. MQ-9 Reaper, through the European Union's PESCO mechanism. With prototypes slated for delivery by mid-2027, the Eurodrone is intended to undertake long-endurance ISR, as well as ground support missions with precision-guided weapons.⁷⁶

The European Union and its member states should also seek to rapidly build out Europe's space assets and intelligence collection capabilities. IISS analysis examining how space capabilities can better support military operations in the European theater points to several key challenges, including regulatory hurdles and fragmented policies, member states focused primarily on sovereign capabilities, and insufficient intergovernmental cooperation.⁷⁷ However, while the European Union will be hard-pressed to close the gap with China and the United States for space technology dominance in the short term, some European organizations are already well established. The Galileo global navigation satellite system is operated by the European Union Agency for the Space Programme (EUSPA) and provides an alternative to the U.S. GPS and Russian GLONASS systems for European military and political authorities. Copernicus, also operated by EUSPA, is the preferred earth observation system globally. France's Eutelsat Group has positioned itself as a competitor to Elon Musk's Starlink, pouncing on instances when the latter has restricted its satellite-based connectivity services to the Ukrainian armed forces.

EUROPEAN MILITARY INTELLIGENCE INTEGRATION

Building out ISR capacity is one thing; integrating and fusing that information to seamlessly support military forces and provide real-time targeting information is another. Europeans presently rely on the United States for this critical task.

The United States may also deprioritize gathering and sharing intelligence on Russia. The Trump administration has already signaled as much by ordering several national security agencies to halt work on efforts to counter Russian sabotage, disinformation, and cyberattacks, while also pushing to reach a peace agreement between Russia and Ukraine.⁷⁸

Europe should seek to expand European intelligence cooperation, for instance by creating a "Euro Eyes" coordination mechanism. This is by no means a novel idea. Establishing a "fully fledged intelligence cooperation service" at the EU level to counter espionage and foreign interference was a prominent recommendation named in the Niinistö report on Europe's civilian and military readiness, commissioned by European Commission president Ursula von der Leyen.⁷⁹ More recently, the Euro Eyes idea was floated by Konstantin von Notz, the chairman of the German

parliament's intelligence oversight committee, as a way to reduce reliance on intelligence provided by the United States.⁸⁰

A Euro Eyes intelligence network would take on a role akin to the one Europol plays for law enforcement in sharing information, and could serve as a European intelligence fusion center on Russia. This would not be a CIA for Europe, as European states would maintain intelligence collection and analysis focused on statecraft and policy. But on defense—and, in particular, on Russia and Russian military doctrine—Europeans would coordinate efforts.

Furthermore, the United Kingdom should become a key node in leading European intelligence coordination. The United Kingdom's SIGINT capabilities through its Government Communications Headquarters (GCHQ) represent a global standard and could help support and integrate European SIGINT collection efforts.

Task 5: Build Redundancy into European Command Structures

As noted, Europe can likely count on NATO in the short term to run a hypothetical future war with Russia and provide command and control (C2) to direct allied forces. Nevertheless, Europeans may want to plan for a contingency in which Europe would be required to run such a war with limited support from the United States. Europe has three general options.

OPTION A: EUROPEANIZE NATO

Various scholars, such as former U.S. ambassador to NATO Ivo Daalder, have presented options for a gradual “Europeanizing” of NATO over the medium-to-long term.⁸¹ These efforts include a deeper conversation about Europe's nuclear umbrella in order to transition from a U.S. to a European SACEUR; installing more European military leaders in NATO's regional commands; and leveraging the European Union's fiscal capacities to support NATO activities. Moreover, as this report has outlined, Europe would be tasked with bearing the brunt of the alliance's force requirements, particularly in the development of critical capabilities necessary for the conduct of high-intensity and sustained combat operations.

However, setting aside military and technological capability gaps, Europe may not have time to undertake an orderly process of Europeanizing NATO's command structure. In a crisis scenario in which the United States is unwilling to lead, the most straightforward option is for Europe to continue operating NATO's political and military headquarters, integrated command structure, and joint defense planning, training, exercises, and operation. Should the United States not want its personnel to participate in a European war effort, instead of the American SACEUR, Europeans could turn to the supreme allied commander transformation (SACT), NATO's other strategic commander (usually a senior French military official), or the deputy SACEUR (typically a British officer) to lead the war effort.

OPTION B: INSTITUTIONALIZED “COALITIONS OF THE WILLING” AND SUB-REGIONAL COALITIONS

Another option for organizing Europe's defense if NATO is not operable is to utilize coalitions of the willing and regional groupings. The Joint Expeditionary Force (JEF) provides a useful

framework. Designed for rapid response and expeditionary operations, the JEF is a multinational, United Kingdom-led military partnership capable of acting independently or deploying in support of NATO or other cooperative ventures. All 10 members of the JEF (Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, The Netherlands, Norway, Sweden, and the United Kingdom) are also NATO members. Moreover, the JEF is led by the UK Standing Joint Force Headquarters, based in Northwood, England, representing a rapidly deployable component capable of providing operational command and control.

The benefit of the coalitions concept is that it can exclude unwilling or reticent countries like Hungary and would be directly focused on the specific warfighting task. Yet JEF is not connected with the main ground forces in Europe, which are operated by France, Germany, and Poland. One option is to establish complementary multinational forces based on the “framework nations concept,” with each force led by a major European power and designed for rapid response operations in vulnerable areas on Europe’s periphery. Additionally, such a dispersion of multinational forces would require another political body to be formed, akin to the North Atlantic Council, to provide civilian oversight and input. Thus, the “coalitions of the willing” structure would need to become institutionalized as a pan-European organization with a political body providing oversight.

A new structure that emerges from a coalition of the willing concept must be built and staffed, likely pulling resources and staffing that would otherwise go to NATO and consuming thousands of diplomatic hours in negotiations over rules and structures. However, the evolution of small national groupings into bigger pan-European institutions is not unprecedented. One example is the European Space Agency, which is made up of 23 European member states and is not an EU or NATO institution, although the European Union is the largest financial contributor.

OPTION C: BUILD OUT THE EUROPEAN UNION’S DEFENSE STRUCTURES

Partly due to opposition from the United States, the European Union has not created a permanent military command structure that is similar to NATO’s Allied Command Operations (ACO) and capable of running large-scale military operations. However, Brussels does deploy operational headquarters for CSDP military missions, and certain ACO resources may be used to conduct those missions. Moreover, the 2017 creation of the European Union’s Military Planning and Conduct Capability (MPCC), a permanent headquarters for operations involving up to 2,500 troops, marked Brussels’ first foray into establishing a permanent military command structure.

The European Union could build on these efforts toward creating structures that provide redundancy to NATO’s ACO. Brussels already maintains an EU Military Staff (EUMS), which serves as the directorate general of the European Union’s diplomatic service (the EU External Action Service) through advising the bloc’s top diplomat, the high representative of the union for foreign affairs and security policy/vice president of the European Commission (HR/VP), and commanding CSDP operations at its MPCC operational headquarters. The EUMS is led by a director general (currently a three-star Dutch general, Michiel van der Laan) and reports to the European Union Military Committee—in which all member states’ chiefs of defense are represented—and performs early warning, situation assessment, strategic planning tasks for member states.

The European Union also has a track record of conducting small military operations around the world under the CSDP. These include naval operations in response to regional security threats, such as Operation ATALANTA to counter piracy off the coast of the Horn of Africa and Operation IRINI in the Mediterranean to enforce a UN arms embargo to Libya.⁸² In Bosnia and Herzegovina, the EU military mission EUFOR Althea has been present since 2004 under an executive mandate of the UN Security Council to ensure continued compliance with the Dayton Agreement and support local authorities in maintaining a safe and secure environment.⁸³

Furthermore, the challenge of incorporating non-EU member states, such as the United Kingdom and Norway, is surmountable. Norway already pays into the EU budget and could be included in the staffing and decisionmaking at the European Council on issues pertaining to defense. A similar arrangement could be made with the United Kingdom. The European Union would have to create its own permanent headquarters and dramatically scale up its staffing. EU member states could move staff from NATO headquarters or make them double-hatted.

Conclusion

This report has examined the growing military capability gaps in Europe and the potential consequences of a significant U.S. drawdown of forces and equipment from the continent. It has highlighted the need for European countries to take decisive action to integrate their efforts and enhance their defense capabilities to ensure Europe's collective security. To translate these findings into concrete action will require European leaders to build consensus for a defense reform agenda. One mechanism for doing that is to commission a high-level independent study, akin to a "Draghi report" on defense, to develop a comprehensive European Strategic Defense Review to assess Europe's collective ability to defend itself and offer an ambitious reform agenda.

Additionally, European defense reform can only happen if Germany, Europe's largest country and economy, is supportive. While Germany is now committed to spending more on defense nationally, Berlin has simultaneously opposed efforts for more ambitious measures at the EU level, such as large-scale joint borrowing for weapons procurement. Germany needs to decide whether it will shoulder the lion's share of Europe's defense—a burden it is potentially capable of carrying—or whether it wants to share that burden with the rest of Europe. Presently, Germany is pursuing the former course. The danger for Europe is that it is uncertain whether Germany is presently capable of turning its overly bureaucratic military around. Germany presently spends a great deal on defense but gets little for it. A twin track course is offered in this paper; wherein German rearmament would be augmented by a pan-European force and effort; this would be the better and safer course for Europe.

Furthermore, while the European Union should become a strong driver of European defense integration, it should also include non-EU countries critical to Europe's defense, such as the United Kingdom and Norway. Norway is in many ways a de facto EU member, as it is highly integrated with the bloc and pays into the EU budget. The United Kingdom is also integral to the European defense industrial base and has long played a vital role in the defense of the continent. UK-EU talks on security have advanced and should be prioritized. While European defense efforts should not seek to exclude Turkey, they should not be developed to accommodate Turkey. European defense plans should be developed assuming minimal involvement from Ankara, given its increasingly differing strategic and ideological outlook.

Lastly, the United States should shift its diplomatic focus from pressuring Europeans on spending levels to insisting upon European defense reform. This means pushing Europe to integrate its efforts and accepting—and potentially encouraging—a much larger EU defense role, as the European Union is the vehicle through which Europe integrates itself. Ultimately, this means acknowledging and accepting that burden shifting has drawbacks for the United States. By stepping back, Washington will, hopefully, spur Europeans to step up. This will make Europe less reliant on the United States, which will mean that Washington will lose diplomatic influence in Europe. As Europe's defense industry is built up, the United States will lose market share and face stronger European competition in the global arms market. Yet this could also make the transatlantic security partnership stronger, as it will give NATO a much more robust defense industrial base. The character of NATO may also change, as it evolves from a U.S.-led alliance that revolves around American military power to more of an alliance of equals, in which Europeans begin calling many more shots. That will be tough for the United States to stomach at times, but it should lead to a stronger alliance in the long run—one that looks more like a partnership.

It is indeed time to shift the burden of European security to Europe. But doing so will require sweeping changes and deep structural reforms to integrate European efforts that will take time to implement. It is time for Europe to get started.

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