

JULY 2026

Managing the Long-Term Russian Threat to Europe

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

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CENTER FOR STRATEGIC &
INTERNATIONAL STUDIES



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Acknowledgments

This report is made possible by a grant from the Andrew Carnegie Foundation, formerly Carnegie Corporation of New York. Research for this report was sponsored by the Institute for National Strategic Studies at National Defense University.

The views expressed in this report are those of the author and are not an official policy or position of the National Defense University, the Defense Department, or the U.S. government.

The author would like to thank Nicholas Fenton, Tina Dolbaia, Maria Snegovaya, and Max Bergmann from the CSIS Europe, Russia, and Eurasia Program, as well as Lisa Aronsson from National Defense University's Institute for National Strategic Studies, for their encouragement and assistance in producing this report.

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Introduction

Russia's full-scale invasion of Ukraine has touched off the gravest security crisis in Europe since World War II. With the fighting grinding on into a fifth year, Russia has overhauled its military capabilities while mobilizing its economy and people for an enduring confrontation. Moscow has been clear from the beginning that the conflict is not just about Ukraine. Rather, Vladimir Putin's Kremlin sees itself locked in a long-term, systemic conflict with the Euro-Atlantic West. While Moscow long portrayed the United States as its main foe (*glavnyi protivnik*), in recent years Russian hostility has been directed primarily at Washington's European allies. The combination of improving Russian military capabilities and ideological hostility has led many European intelligence analysts, defense planners, and officials to worry that Russia is preparing for a war against European NATO members once the active fighting in Ukraine winds down.¹ In the coming years, Europe therefore risks finding itself on the front lines of a new conflict with a battle-hardened, aggressive foe.²

These developments are happening at a time when the transatlantic relationship that has served as the bedrock for European security since the Cold War faces unprecedented challenges. The United States is transferring its strategic focus to homeland defense and to deterring China in the Pacific, with potentially significant implications for U.S. force posture in Europe and the credibility of NATO deterrence.³ The Trump administration is increasingly speaking of "burden shifting"—that is to say, transferring the responsibility for deterrence and defense to Europe, with the 2026 National Defense Strategy (NDS) calling on European allies to "take primary responsibility for Europe's conventional defense, with critical but more limited U.S. support."⁴ Inherent to this transformation is a deliberate downgrading of the Russian threat in U.S. conceptual documents and administration statements.

Vladimir Putin's Kremlin sees itself locked in a long-term, systemic conflict with the Euro-Atlantic West.

Drawdowns of U.S. forces and equipment from Europe and efforts to transfer responsibilities within NATO to European hands suggest that this transformation is already underway. As it reduces its force posture, the United States aims to work with allies to “identify capability gaps, prioritize targeted assistance and cooperation, enhance Allied interoperability and readiness, and enable the deliberate transition of deterrence roles,” though implementation has been inconsistent.⁵ Some administration officials—up to and including the president—have moreover suggested that Washington’s commitment to NATO and to Article 5 of the NATO treaty may not be ironclad.⁶ Whatever the intention, transatlantic frictions and Washington’s strategy of doing less in Europe entail the conscious acceptance of risk on the European continent—risk that the United States sees as easily manageable by European allies but that many European governments and publics are not fully prepared to confront.⁷ Given bipartisan recognition of China as the principal threat to the United States, this acceptance of risk will likely endure under future U.S. administrations as well.

Europe is not standing still in the face of these challenges. Then-German Chancellor Olaf Scholz famously described the 2022 Russian invasion of Ukraine as marking a *Zeitenwende*, or change of eras. That recognition is increasingly visible across Europe in assistance to Ukraine, growing defense budgets, shifts in defense planning, and more frequent public discussions about the possibility of war.⁸ While the Trump administration acknowledges that “our NATO allies are therefore strongly positioned to take primary responsibility for Europe’s conventional defense,” much of Europe still suffers from a kind of “strategic avoidance” when it comes to preparing for conflict.⁹ Such avoidance is a product of Europe’s long peace and ensuing reluctance to accept the dangers and costs of a war with Russia. Some of this reluctance is also a consequence of hoping that the U.S. commitment to NATO will continue to do the heavy lifting of deterring Russia. In practical terms, European hesitancy entails a lack of urgency about building defense industrial capacity, cutting off lucrative avenues for sanctions evasion, preparing civil defense, or taking onboard lessons from Ukraine about the character of modern war.

While it is impossible to predict whether, when, or how Russia could launch military aggression against European NATO members, it is clear that the intersection of Russian intentions and capabilities, the solidity (or lack thereof) of the transatlantic alliance, and Europe’s own preparedness shape the risk matrix that Europe faces. The war in Ukraine obviously matters as well, though analysts are split on whether Russian aggression in Europe is more or less likely to occur while the war is ongoing. While the United States and its allies can do little to define Russian intentions and only a modest amount to constrain Russian capabilities, they have more leeway to work on the other elements of the equation. The key for governments on both sides of the Atlantic will lie in managing the transition to a European-led model of defense and deterrence in a way that does not create additional vulnerabilities, while still communicating strong resolve to Moscow. Learning the right lessons from the war in Ukraine and concluding that war on terms favorable to Kyiv that do not further undermine European security are also critical.

This report analyzes the nature and extent of the Russian threat to Europe over the next five to seven years. That threat is a product of four converging dynamics: escalating Russian hostility to Europe, the evolution of Russian capabilities, a growing transatlantic divergence (including over Russia), and Europe's challenges translating latent capacity into actual power. The report takes as a starting point the assumptions that the active fighting in Ukraine will wind down at some point during this window and that the United States will most likely continue—or even accelerate—its efforts to shift the burden of European defense onto European shoulders. While time could prove both assumptions wrong, they represent the most likely scenario and provide a useful baseline for future planning.

The report itself is based on an analysis of primary and secondary sources (U.S., European, and Russian) as well as not-for-attribution interviews conducted in Washington, Brussels, Stuttgart (home of U.S. European Command), and Warsaw in the spring of 2026. Interview subjects included a mix of serving and former officials, military personnel, academics, independent analysts, journalists, and others. The report focuses on what Russia is doing, as well as on what NATO allies are doing, both singly and collectively, to deter and—if necessary—defeat Russian aggression. It does not assume such aggression is inevitable; only that conditions will exist in the coming years in which it is a realistic possibility for which NATO allies on both sides of the Atlantic should be prepared.

Russia

An Enduring Rival

Both U.S. and European officials recognize that Russia remains an enduring threat to Europe, albeit to different degrees. The Russian threat appears existential to states on NATO's eastern flank but can seem distant in other parts of Europe; the 2026 U.S. NDS, meanwhile, describes Russia only as “a persistent but manageable threat to NATO's eastern members.”¹⁰ The origins of Russia's threat to Europe lie in history and geopolitics, as well as in the more proximate grounds of ideology and Russian domestic politics. The war in Ukraine has acted as an accelerant, intensifying the long-standing geopolitical confrontation between Russia and the Euro-Atlantic West into open conflict.

Russian officials claim that the “collective West,” comprising both the United States and its European allies, unleashed this conflict in order to weaken Russia and “impose their new world order on [the rest of] the world.”

Even before February 24, 2022, however, confrontation between Russia and Europe—in the sense of the multilateral Europe embodied by the European Union and NATO—was a structural condition of the “post-post-Cold War era,” one that is almost certain to endure beyond the conclusion of the active fighting in Ukraine. Russian officials up to and including President Vladimir Putin perceive the war in Ukraine as a product of that confrontation—a conflict not primarily *between* Russia and

Ukraine, but between Russia and the West *being fought in* Ukraine. Russian officials claim that the “collective West,” comprising both the United States and its European allies, unleashed this conflict in order to weaken Russia and “impose their new world order on [the rest of] the world.”¹¹

Sparsely populated, underdeveloped, and with comparatively weak institutions, Russia in its various incarnations has always sought security in strategic depth.¹² The collapse of the Soviet Union—which followed the loss of Moscow’s “outer empire” in Eastern Europe—therefore represented a massive geopolitical setback, what Putin in 2005 called the “greatest geopolitical catastrophe of the century.”¹³ The ensuing expansion of NATO and the European Union into the former Warsaw Pact territory, plus the Western Balkans, the Baltic states, and (aspirationally at least) the former Soviet Union itself, contributed to post-Soviet Russia’s wider political and psychological dislocation. Russian claims that Western officials violated promises not to expand NATO may be tendentious, but they reflect a genuine concern about the diminution of Russia’s status and its loss of strategic depth.¹⁴

Russia’s invasion of Georgia (2008) and first invasion of Ukraine (2014) openly challenged the post-Cold War settlement and weakened the European security architecture that had been in place since the early 1990s. Following Putin’s return to the Kremlin in 2012 in the face of large-scale protests he blamed on Western interference, Moscow embraced an ideological hostility to the West while deploying atavistic nationalism and imperialism as tools of political legitimation.¹⁵ One strand of this ideology, or ersatz-ideology, was the portrayal of multilateral Europe as decadent and deracinated—but also as an existential threat, by way of the “pseudo-humanistic or other neo-liberal ideological views” it sought to promote.¹⁶ More concretely, Europe’s gravitational pull and ability to use integration as a tool to transform neighboring states directly threatened inherited levers of Russian influence across post-Communist Europe and Eurasia. Indeed, Putin has openly stated that Kyiv’s pursuit of closer ties with the European Union was responsible for causing the war.¹⁷

While Moscow long lumped the United States and Europe together under the rubric of the “collective West,” it has during the second Trump administration come to differentiate between the two sides of the Atlantic. As recently as 2023, the Russian Foreign Policy Concept termed the United States the “main inspirer, organizer, and executor of the aggressive anti-Russian policy of the collective West.”¹⁸ That portrayal shifted with inauguration of the second Trump administration, which has downplayed the Russian threat to the United States, pursued a diplomatic solution to the Ukraine war with limited European input, and floated the possibility of an economic partnership with Moscow.¹⁹ While Russian hostility remains, the Kremlin appears open to restoring transactional relations with Washington; on the other hand, it increasingly portrays institutional, multilateral Europe as an implacable foe.

Indeed, Putin noted in his 2025 Valdai speech that it was “first and foremost Europe, who continues to escalate the conflict” between Russia and Ukraine.²⁰ Security Council Deputy Chairman and former President Dmitry Medvedev termed not just NATO, but the European Union a “real enemy” and a “direct threat to Russia.”²¹ The emphasis on a hostile Europe is also reflected at the popular level. For the first time, a spring 2025 survey by the Levada Center showed that ordinary Russians regard Germany, the United Kingdom, and Ukraine as more hostile to Russia than the United

States.²² Even if this rhetorical shift masks continued antagonism toward the United States, it is Europe that remains most exposed to Russian aggression.

The identification of Europe as an enemy has provided inspiration and justification for increasingly aggressive Russian campaigns of destabilization and political warfare. State-linked Russian actors have long sought to insinuate themselves into European financial institutions to launder money, purchase influence, and create webs of corruption implicating European officials and businesspeople.²³ Even in the mid-2000s, Europe faced energy cutoffs, assassinations, recruitment of proxies, disinformation, and funding of political parties and media outlets aligned with Kremlin interests. Since the full-scale invasion of Ukraine, Russian efforts at destabilization have become more brazen. Moscow has stepped up electronic warfare (including jamming and spoofing) against navigation tools; disrupted or destroyed critical infrastructure such as railways, data cables, and pipelines; dispatched drones into NATO airspace; and even attempted to assassinate European citizens involved in supporting Ukraine.²⁴

While these efforts have caused significant disruption, they have not thus far directly caused European casualties, and they have remained below the threshold that would trigger a kinetic response.²⁵ Given the brazenness and risk acceptance of Russian security services, though, governments cannot reliably expect such luck to hold forever. In Russian strategic culture and doctrinal writings, activities such as disinformation, sabotage, and other dark arts are not separate from conventional military activities. Rather, they are tools to “prepare the battlefield, complement direct military force, and secure Russia’s strategic interests.”²⁶

Russia

Capabilities, Intentions, and Opportunities

The war in Ukraine continues to impose significant costs on Russia's military. Credible estimates suggest that Russian casualties during the first four years of war have exceeded 1 million (possibly as many as 1.4 million) troops killed, wounded, or missing in action, along with nearly 14,000 tanks and other armored vehicles, more than 360 aircraft, and nearly 30 naval vessels destroyed.²⁷ These losses impose a material constraint on Russia's ability to generate forces and conduct military operations beyond Ukraine for the foreseeable future. They will also create long-term problems that the Kremlin will have to confront at the war's end, from an accelerating demographic decline to the challenge of veteran reintegration to popular anger at renegotiation of the social contract. And critically, in the short term, the war in Ukraine will constrain Russia's ability to conduct high-level operations against European NATO members: Any kinetic military operations against NATO while active fighting in Ukraine is ongoing would be an act of desperation not likely to go well for Moscow.²⁸

That said, Moscow is already taking steps to prepare for future conflict beyond Ukraine. Russia's reconsolidation of the Leningrad Military District provides for the unification of military operations across NATO's eastern flank, while shifts in operational planning emphasize long-range strikes on command, control, communications, computers, intelligence, surveillance, and reconnaissance (C4ISR) infrastructure and naval and aerial bases to overcome NATO's strategic depth.²⁹ Russia maintains a vast arsenal of reconnaissance and strike drones as well as cruise and ballistic missiles capable of targeting European assets. Russia's defense industry has been on a war footing since 2022 and in many areas has been able to offset battlefield losses with new production. Defense spending rose from \$65.9 billion (at current prices) in 2021 to more than \$172 billion in 2025,

equal to around 7.5 percent of Russia's GDP and 38 percent of all government spending.³⁰ Defense spending has grown further in 2026.

The surge in defense expenditures has allowed Russia to improve its qualitative and quantitative military capabilities in ways that enhance its ability to hold Europe at risk.

Russia's production of artillery, ammunition, tanks, drones, and other capabilities continues outpacing that of Western powers.³¹ Production of fighter aircraft has increased since the start of the war as well, and now exceeds 30 units a year for domestic use—more than enough to compensate for combat losses in Ukraine.³² Given the importance of defense spending in sustaining economic growth under sanctions and ensuring public buy-in for the Putin regime, dramatically curtailing it when fighting winds down in Ukraine would also create risks to stability.³³

The surge in defense expenditures has allowed Russia to improve its qualitative and quantitative military capabilities in ways that enhance its ability to hold Europe at risk. Russia has developed and deployed new long-range strike capabilities capable of hitting targets in Europe, including long-range attack drones and the dual-capable Oreshnik intermediate-range ballistic missile.³⁴ Russian troops have upgraded their already formidable ground-based air defense with new software, stronger measures against electronic warfare, and more advanced interceptor systems. Russian forces also have gained experience coordinating the operation of these systems with airborne early warning and fighter aircraft.³⁵ Such adaptation is visible in Russia's production and use of autonomous systems, which have been ubiquitous on both sides of the war in Ukraine.³⁶ Some of this adaptation is the result of technology- and production-sharing with fellow revisionist powers China, Iran, and North Korea. It also flows from efforts to mobilize public initiative to scale drone production.³⁷

Beyond this wartime adaptation, military analysts generally agree that Moscow will seek to reconstitute its forces specifically to prepare for possible conflict with NATO.³⁸ German intelligence assesses that Moscow could be capable of launching a major attack against NATO by 2029.³⁹ What reconstitution looks like in practice is hard to forecast given the range of options available, uncertainty about the lessons Russian planners and officials are learning, and the range of potential outcomes and timelines in Ukraine. Sanctions, personnel losses, and Russia's own manufacturing limitations will all slow or limit reconstitution.⁴⁰ Nor have Russian leaders provided a coherent vision for what postwar reconstitution would look like in terms of numbers, force posture, or mixes of capabilities.⁴¹ The range of scenarios that the Russian military would be prepared to execute in the near-to-medium term could therefore vary.⁴² Reconstitution, however, is not an either/or proposition: European observers recognize that Russia could launch offensive operations against NATO targets even without its forces being fully rebuilt, should the Kremlin perceive an opportunity to do so.⁴³ Even if such operations fail to seize and hold territory, for instance, they could still cause significant loss of property and life in Europe while touching off a major political crisis for NATO and the European Union.

While remaining colored by preexisting assumptions about the character of warfare—including emphasis on offensive operations and maneuver warfare, reliance on the weight of numbers to offset qualitative deficiencies, and a higher degree of risk acceptance than Western democracies—Russian doctrine and tactics have also evolved in line with battlefield experience in Ukraine. According to Swedish analyst Oscar Jonsson, Russian theorists have discovered a “renewed appreciation for positional warfare” as a reality of modern combat, while emphasizing the networking of sensor data, weapons systems, and command-and-control functions as the key to restoring the conditions for maneuver.⁴⁴

Coupled with the Russian military’s traditional focus on massed firepower, this network-centric approach to warfare is likely to predominate in any future Russian conflict with NATO. Russian planners would have to account for NATO’s preeminent naval, aerial, amphibious, and satellite capabilities, among others. Even in a conflict largely confined to the Baltic littoral, Russia would struggle to match allied airpower. Were it to anticipate facing a unified NATO response, Moscow would therefore likely focus on an air-denial strategy using ground-based air defense capabilities based on Russian soil.⁴⁵ It could also conduct massed strikes on targets across the European theater using its drone and missile capabilities.

Indeed, the war in Ukraine has turned into a positional stalemate largely because of the central role played by drones—which, in turn, has contributed to a rapid technological and doctrinal innovation cycle on both sides.⁴⁶ Recent exercises with Ukrainian drone units and the experience of countering Iranian drones in the Persian Gulf suggest that NATO forces would struggle in the early phases of a conflict to fend off widespread Russian drone attacks.⁴⁷ Russia’s decision to establish an independent Uncrewed Systems Force (*Voyska bespilotnykh sistem*), along with the Rubicon incubator and special operations drone unit, entails both a significant expansion of drone capabilities and a reconfiguration of procurement, logistics, and doctrine to integrate uncrewed systems into large-scale operations.⁴⁸

In the face of a successful Russian coup de main, NATO could struggle to maintain a unified posture in response to the likely invocation of Article 5 by affected member states.

Given the inferiority of its conventional forces compared even to just the United States’ European NATO allies, any Russian aggression in Europe is likely to prioritize indirect operations aiming to fracture cohesion rather than seize territory or topple governments. The most frequently discussed conflict scenarios center on either escalation from the gray zone or a rapid blitzkrieg into the Baltic states to create facts on the ground, placing the onus on NATO to respond forcefully in ways that could trigger further escalation. Other targets, including Norway’s Svalbard archipelago or the Polish and Finnish border regions, are also possible.⁴⁹

In the face of a successful Russian coup de main, NATO could struggle to maintain a unified posture in response to the likely invocation of Article 5 by affected member states. Other states—including those far from the front lines or with more Russia-aligned governments, or even the United States—could block consensus or refuse to contribute to any collective response. The practical result would be to expose Article 5 as hollow, accelerating the alliance’s fragmentation, leaving many European states to look for some kind of accommodation with Moscow, and forcing a renegotiation of the European security architecture on Russian terms.

The United States

What Role in Europe?

One of the biggest variables facing Europe over the coming decade is the durability of the transatlantic relationship. Strategic perspectives on either side of the Atlantic have been diverging for a generation or more; some experts have been forecasting the demise of NATO almost since the moment the Cold War ended.⁵⁰ Every twenty-first century U.S. administration has called for Europe to take on more responsibility for its own security while the United States prioritizes other challenges. This divergence has been especially pronounced during the second Trump administration, as the White House pursues what it hopes will be “a sustainable transition to an Allied-led defense in Europe,” such that “allies will take the lead against threats that are less severe for us but more so for them.”⁵¹ Though NATO remains an important force multiplier for the United States, Washington’s shifting priorities suggest that the U.S. footprint in Europe will continue declining. How and when this transition occurs will matter greatly, however, in minimizing risk.

While most European allies accept the need to take on more of the burden of their own defense, they worry that the United States will pursue the transition in a hasty and uncoordinated way. The Trump administration has discomfited European allies by calling into question U.S. willingness to uphold Article 5 of the NATO charter—or to remain in NATO at all.⁵² Several European observers view the crisis over Greenland in spring 2026 as a particularly damaging moment for transatlantic relations (and fear that the crisis is not over). The U.S. decision to pull some troops from Romania and Germany as well as the U.S. departure from the NATO Center of Excellence for Countering Hybrid Threats are perceived in much of Europe as not just steps toward encouraging allies to “take primary responsibility for Europe’s conventional defense” but as the start of a wider and

uncoordinated disengagement.⁵³ Even with the war in Ukraine on their doorstep, European allies faced additional White House pressure to contribute to the U.S.-Iran conflict. A future U.S.-China conflict would generate similar tensions—especially because of European concerns that Moscow could take advantage of a crisis in the Pacific to engage in opportunistic aggression closer to home.⁵⁴

Diverging views of Russia are a key element of this transatlantic divide. Along with the NDS only describing Russia as “a persistent but manageable threat to NATO’s eastern members,” NATO’s 2025 Hague summit saw intense debate over whether and how to characterize Russia as a threat to the alliance. While the Hague Declaration did ultimately term Russia a “long-term threat . . . to Euro-Atlantic security,” it only mentioned Russia once, and in language far milder than the 2024 Washington summit’s repeated condemnations of Russia’s invasion of Ukraine and characterization of Moscow as “the most significant and direct threat to Allies’ security.”⁵⁵ Efforts to develop a common threat assessment within NATO were equally fraught.⁵⁶

Attempts to conclude the war in Ukraine risk further divisions between the United States and Europe. Moscow has long believed that the path to resolving the conflict runs through Washington, rather than Brussels, Berlin, Paris, or Warsaw. Since 2025, the United States has been the driving force behind ceasefire talks that would allow Moscow to maintain de facto control of its conquests in eastern Ukraine, relax sanctions, and forge a new economic partnership. European leaders, meanwhile, have been skeptical of ceasefire negotiations and have called for committing additional resources to Ukraine.⁵⁷

Though most European governments oppose any agreement that would limit Europe’s rearmament or impose constraints on the deployment of European troops, they worry that Washington could use the threat of a precipitous withdrawal to force the issue.

Beyond Ukraine, some European officials worry that the Trump administration is receptive to Moscow’s call for a broader peace deal that would reshape the European security architecture, including through a new framework for conventional arms control to replace the lapsed Conventional Forces in Europe treaty.⁵⁸ Though most European governments oppose any agreement that would limit Europe’s rearmament or impose constraints on the deployment of European troops, they worry that Washington could use the threat of a precipitous withdrawal to force the issue.⁵⁹

Done poorly, a U.S. pullback from Europe could create additional risk. Unilateral reductions along the eastern flank are particularly sensitive. More broadly, NATO’s command structure, force generation, and operational planning process all rely on the United States filling a central role. The United States provides advanced capabilities that its European allies cannot replace for the foreseeable future. Along with strategic deterrence, the most important include space-based C4ISR, intelligence (especially signals intelligence and intelligence fusion), long-range strike weapons, and high-end air defense.

The United States is also critical for strategic airlift and aerial refueling capabilities. The war with Iran has placed significant strain on U.S. stockpiles, especially of air defense munitions; a war in the Pacific would impose an even greater strain. Despite the claims of recent U.S. strategic documents that Europe already possesses sufficient latent economic and industrial capacity to assume additional defense responsibilities, the reality is that were the United States to withhold its contributions to NATO's defense plans, European allies would be unable to fill the gap for the foreseeable future.⁶⁰

U.S. officers also fill critical roles within the NATO command structure. While Washington sees its European allies as “strongly positioned to take primary responsibility for Europe's conventional defense,” there are short-term costs to the transition in terms of experience and capabilities lost.⁶¹ The shift to more Europe-centric command structure is already underway, with European officers taking over NATO's three Joint Force Commands. However, there are advantages to Washington's remaining central to the NATO command structure, such as signaling credibility while also ameliorating or limiting rivalries between European NATO members. The presence of a U.S. officer as Supreme Allied Commander Europe (SACEUR) has, for instance, prevented the position from becoming a bone of contention between member states.⁶²

With massive increases in German defense spending, U.S. leadership in NATO helps anchor German power to a multilateral framework and provides reassurance to smaller allies worried that Europe's growing military might will “have a German accent.”⁶³ U.S. reassurances also help smooth the edges off the rivalry between NATO members Cyprus, Greece, and Turkey, which is critical since Ankara's absence from the European Union and nonrecognition of Cyprus impede some forms of EU-NATO security cooperation. Keeping Turkey on board for Europe's defense is critical, since Ankara maintains NATO's second-largest military and a rapidly expanding defense industrial base.⁶⁴

Because Russian perceptions, not only Russian capabilities, matter in Moscow's calculations about the use of force, a diminished U.S. role in NATO or further questioning of Washington's commitment to Article 5 could encourage the Kremlin in greater risk-taking. Many European observers consequently worry that fissures in the transatlantic relationship could stoke perceptions of European weakness and tempt Russian aggression even before Moscow has fully digested the consequences of its war in Ukraine or fully reconstituted its military power.⁶⁵ Even as Washington pushes the Europeans to accelerate the transition to “Allied-led defense,” its own commitment to European security will remain fundamental to limiting the risk of a new conflict.

Europe

Searching for a Coordinated Response

While the 2026 U.S. NDS recognizes that “our NATO allies are substantially more powerful than Russia—it is not even close,” translating Europe’s latent power into capabilities that will successfully deter the Kremlin will take time and political will.⁶⁶ Europe’s total economic and demographic capacities far outstrip those of Russia: The collective GDP of the European Union was around \$19.5 trillion in 2024, while Russia’s was only \$2.2 trillion.⁶⁷ The combined military strength of European NATO members (including Turkey) exceeds 2 million troops, most of them long-serving professionals; Russia’s military comprises around 1.26 million battle-hardened but often poorly trained combatants, many still tied down in Ukraine.⁶⁸

Despite this seeming disparity, “Europe” is far from a unitary actor, and it faces a host of political, institutional, economic, and regulatory challenges. Strategic perspectives diverge not just across the Atlantic, but within Europe as well. Despite significant progress since 2022, European stockpiles remain inadequate and the European defense industrial base struggles to innovate or produce at scale.⁶⁹ Europe’s long post-1945 peace has left much of the Continent reluctant to bear the burdens of conflict. The fragility of the European political and security order meanwhile risks turning Europe into an object of the ambitions of Russia and other outside powers.⁷⁰ Many observers in Europe acknowledge that individually and collectively, Europe “does not have a vision of a desired outcome, or a strategy for how to achieve this.”⁷¹

Irrespective of how much European states spend on defense, they will be unable for many years to replace critical capabilities currently provided by the United States.

Amid turbulence in the transatlantic relationship, some European governments are seeking ways to reduce Europe's dependence on and entanglement with the United States. Despite a recognition that Europe cannot decouple its security from Washington, calls for increased strategic autonomy—including with respect to the development and procurement of weapons—are growing. The push for greater European autonomy comes with its own set of political and strategic challenges; not all European governments share or even support that goal, and absent the traditional U.S. coordinating role in NATO, Europe risks even greater fragmentation. And while the call for Europe to do more for its own defense echoes the demands of the Trump administration's National Security Strategy and National Defense Strategy, pursuing it too aggressively risks making a transatlantic schism a self-fulfilling prophecy.⁷²

Irrespective of how much European states spend on defense, they will be unable for many years to replace critical capabilities currently provided by the United States. The biggest constraint Europe faces is not funding but the capacity of the European defense industrial base (DIB). Even in the best-case scenario, supply chain constraints and production bottlenecks mean that it could be a decade or more until Europe is capable of producing either sufficient numbers of air defense and counter-drone systems or high-end capabilities like hyperscalers for cloud computing and AI, advanced satellites, and strategic lift platforms.⁷³ Along with technical limitations, Europe struggles with a fragmented DIB, which inhibits production at scale and complicates efforts at cross-border collaboration. The recent demise of the Franco-German Future Air Combat System is indicative of the challenge.⁷⁴

With NATO in a state of flux, European analysts and officials are looking for ways to bolster European capacity within NATO as well as ways to supplement NATO capabilities via the European Union, national contributions, or smaller “coalitions of the willing.”⁷⁵ Several European states have made or are in the process of making substantial upgrades to their military capabilities, with an eye to deterring Russia (and, more tacitly, to hedging their uncertainty about the United States). Poland has boosted defense spending from 2.2 percent of GDP in 2022 to 4.2 percent in 2024, with an aspiration to reach NATO's 5 percent target by 2030.⁷⁶ Though German spending remained below 2 percent until 2024, Chancellor Friedrich Merz has pledged to reach 3.5 percent by 2029. Because of the size of its economy, Germany's total defense spending already outstrips that of France and the United Kingdom combined. And since Germany lacks nuclear weapons, its entire defense budget is dedicated to conventional forces that could be employed in a conflict with Russia.

Greater outlays on defense have created new challenges. With this massive boost in defense spending, some German voices have begun calling on Berlin to build its own national command capacity outside of NATO for the first time in the history of the Federal Republic.⁷⁷ This step would likely be read in European capitals—and in Moscow—as undermining the NATO command structure. Given the fiscal constraints facing governments in Paris, Rome, and elsewhere, conversely, meeting

NATO's spending targets would require higher taxes or cuts to social spending that officials worry could stoke instability.⁷⁸ France has instead expanded its nuclear forward-deterrence arrangement with Belgium, Denmark, Germany, Greece, the Netherlands, Poland, Sweden, and the United Kingdom.⁷⁹ While this arrangement could provide the kernel for a larger European nuclear deterrent, for now it plays a supplementary role and is far less robust than the nuclear umbrella provided by the United States—even as Paris remains outside NATO's Nuclear Planning Group.

The European Union is also in the process of taking up a larger role in defense and deterrence. In response to the strain the war in Ukraine has placed on existing reserves of ammunition, air defense, long-range strike capabilities, and other assets, the European Union is making additional financing available for defense procurement. A key tool is the Security Action for Europe (SAFE) initiative, designed to provide up to €150 billion of defense procurement financing. Along with the European Defense Industry Program, SAFE is a tool for catalyzing cross-border defense production and procurement.⁸⁰ To overcome the fragmentation of Europe's DIB and the inclination of many governments to favor national industry, SAFE prioritizes common procurement among EU and partner states (including Ukraine).⁸¹ SAFE, however, is just a preliminary step in the effort to create a European common market for defense.

Member states are still responsible for setting and enforcing defense production standards, which limits progress toward interoperability; several states still prioritize domestic procurement and undermine steps toward building an integrated DIB.⁸² Products acquired with SAFE funds must also contain no more than 35 percent non-European content. This “buy European” requirement has stoked tensions with both NATO leadership and Washington, the latter of which argues that Brussels' approach inhibits joint ventures and “threaten[s] intellectual property rights, constrain[s] supply chains, and impede[s] transatlantic interoperability.”⁸³ Similar sensitivities have emerged over the €90 billion loan backed by joint borrowing that the European Union has provided Kyiv, and which Brussels wants to use to finance purchases from European manufacturers.⁸⁴ Handled poorly, these points of contention could exacerbate transatlantic trade tensions and deepen the strategic divergence between the United States and Europe.

That said, the European Union remains an important player in the continent's military ecosystem. EU efforts are designed to be complementary to NATO (though some European analysts are calling for an “EU-centric” architecture that would supplant many NATO functions).⁸⁵ EU funding for defense production is closely coordinated with NATO and designed to help states meet NATO's capability targets.⁸⁶ In late 2025, the European Union adopted a military mobility initiative (“Military Schengen”) to “ensure the swift, coordinated and secure movement of military personnel and equipment across the European Union.”⁸⁷ The European Union is also collaborating with NATO to counter Russian hybrid threats, defend critical infrastructure, and provide support to Ukrainian troops.

Member states continue to disagree about the type and level of defense competencies that should be entrusted to Brussels.

The European Commission is working to operationalize and develop Article 42.7 of the Treaty on European Union, which obligates EU members to provide “aid and assistance by all the means in their power” to a member state facing armed aggression.⁸⁸ While this language echoes NATO’s Article 5, the European Union has no command-and-control framework, no defense plans, and no resources set aside to fulfill its collective defense commitments. Member states continue to disagree about the type and level of defense competencies that should be entrusted to Brussels, particularly as the intergovernmental European Defense Agency would be in charge of the EU response to Russian aggression, not the supranational European Commission. In the event of a conflict, the European Union’s role would center on resilience and preparedness, including civil defense and ensuring that systems continue operating. What the European Union almost certainly cannot do is create a standing army, given legal restrictions, uncertainty about command authority, and political sensitivities.⁸⁹ Those limitations also affect the efficacy of any EU-centric security assurances that Ukraine could receive as part of a ceasefire agreement.

Conclusion and Recommendations

Between Russian aggression, U.S. strategic adjustments and burden shifting, and internal divisions, the risk of conflict in Europe is significant. Preventing—and, if necessary, defeating—Russian aggression in the coming years will require a concerted European effort to manage the transition to “Allied-led defense.” Russia’s ongoing structural transformation, including the centralization of power and the emphasis on societal mobilization during wartime, make any assessment of Russian intentions difficult. Uncertainty over how and when active fighting in Ukraine ends adds another layer of unpredictability. Analysts are divided over whether a triumphant Russia or a defeated one would be more aggressive beyond Ukraine. Washington’s interest in a negotiated settlement rests, in part, on a hope that a ceasefire will “reestablish conditions of strategic stability across the Eurasian landmass,” an objective many Europeans find implausible.⁹⁰

Getting to a stable equilibrium, however, requires negotiating from a position of strength—which will only be possible if Europe and the United States take steps now to shore up existing and looming vulnerabilities.

It remains possible that negotiations with Moscow can lead to a more stable European security architecture that prevents the outbreak of a new war.⁹¹ Getting to a stable equilibrium, however, requires negotiating from a position of strength—which will only be possible if Europe and the

United States take steps now to shore up existing and looming vulnerabilities. In the likely case that a negotiated framework for restoring security in Europe remains out of reach as long as Putin (or someone with Putin's ambitions) holds power in the Kremlin, a strategy of containment will remain the only viable option. In that case, managing the U.S. rebalance from Europe in a way that ameliorates risk rather than exacerbating it will be of supreme importance.⁹² Washington, Brussels, and European capitals all have a role to play in managing risk. Their primary objective should be to manage the transition to European-led defense in a way that minimizes gaps while communicating strength, resolve, and unity to Moscow.

Seek Consensus on Characterizing the Russian Threat

Inter-allied wrangling over how to characterize the Russian threat has exacerbated mistrust and contributed to anxiety about U.S. priorities in several European capitals. These divergent perceptions are rooted in history, geography, politics, and strategic culture. Four-plus years into the war, U.S. and European officials continue expressing different views on Russian capabilities and the risk of Russian aggression beyond Ukraine. Furthermore, some governments across NATO's eastern flank that see the Russian threat as existential express concern that the United States downplays it for political reasons. The language about Russia in the 2026 NDS and closed-door haggling over the Hague Summit Declaration both caused significant trepidation in Europe.

Despite these frictions, the differences between U.S. and European perceptions of Russia are not as wide as they sometimes seem. The concerns expressed in the NDS about the High North and homeland defense suggest that Washington is also worried about Russian capabilities and intentions, even if the geographic scope of its concerns is not identical to Europe's.⁹³ Washington also worries about the implications of Sino-Russian alignment, including the possibility that Moscow and Beijing could coordinate aggression against U.S. allies in their respective theaters. NATO's military commands, in any case, continue planning for a possible conflict with Russia in Europe. With the United States urging its European allies to bear more of the burden of deterrence and defense, it should work toward a common understanding and scoping of the Russian threat. Even if Washington plans to shrink its own role in managing the Russian threat in Europe, it should avoid downplaying allied threat perceptions or impeding NATO from forthrightly acknowledging that Russia represents a major threat to stability and security on the Continent.

Coordinate Force Posture Shifts Within NATO

As the United States rebalances its global force posture to focus on homeland defense and deterrence of China, it should coordinate closely with its NATO allies, above all through ensuring transparency in the NATO Defense Planning Process and NATO Force Model. The handover of assets and responsibilities to allies can be accomplished without creating additional risks if it is done in a managed, coordinated way. European officials point to Norway's assumption of responsibility for security at Poland's Rzeszów-Jesionka air hub and the transition to European leadership of the Joint Force Commands as positive examples.⁹⁴ Conversely, the early conclusion of a U.S. brigade rotational deployment to Romania and the announced withdrawal of an additional 5,000 U.S.

troops from Germany were more problematic from a signaling standpoint, irrespective of their impact on overall readiness and force posture. Political rhetoric surrounding the withdrawal from Germany, in particular, undermined perceptions of U.S. resolve both in allied capitals and in Moscow. These drawdowns could affect the perceived credibility of U.S. extended deterrence, but regardless, a reduction in conventional forces would leave NATO with fewer options for responding to a Russian coup de main.⁹⁵ Announcement of further unilateral drawdowns that could impact capabilities would only exacerbate the problem.⁹⁶

Further reductions of the U.S. troop presence in Europe seem likely. The challenge for Washington will be to manage those reductions in ways that do not create additional risk. European officials and analysts agree that, apart from maintaining at least a modest tripwire force as a deterrent, managing any drawdowns in a coordinated way is critical to ensuring that changes to U.S. force posture do not create new vulnerabilities. Since the impact of U.S. troop reductions ripples across the alliance, decisions about force posture should be coordinated with allies in advance to allow allies time to prepare and backfill gaps that emerge in NATO's deterrent posture. Furthermore, to avoid reducing the U.S. presence along NATO's eastern flank, any drawdowns should come primarily from U.S. forces currently in Germany and points further west. With the next quadrennial planning cycle set to begin in 2027, Washington should be engaging with allies now to discuss troop levels, timing, vulnerabilities, and management of the associated transfer of responsibilities. Consistent messaging of U.S. commitments and avoiding precipitate or uncoordinated changes is also essential.

Address Europe's Defense Industrial Bottlenecks

The European Union and national governments have taken significant steps to provide funding for defense procurement and readiness. While they will need to ensure that these funding levels are sustained over time, the more immediate challenge lies in addressing the continued fragmentation of Europe's DIB. Some of the responsibility lies with national capitals, which need to overcome their aversion to cooperating with one another (and with Brussels) on defense production and procurement. Germany is particularly important in this regard given the size of its military budget and comparatively slow embrace of regional DIB cooperation.⁹⁷ Brussels can also do more to encourage joint procurement and the adoption of common technical standards that enable interoperability. Further centralizing authorities in the European Commission could help create greater strategic coherence around production and procurement.⁹⁸ Expanding the pan-European DIB will be particularly important in the event that European governments decide—or are forced—to reduce their dependence on U.S. technology and weapons systems. In the meantime, Brussels should show greater flexibility on “buy European” requirements, especially for systems provided to Ukraine, where these requirements both exacerbate transatlantic tensions and slow down development and delivery of new capabilities.

A key part of this effort will be further anchoring EU partners Ukraine and Turkey to the European DIB. More progress has been made so far with Ukraine, which maintains a world-class drone industry and is a low-cost producer of other capabilities that could be more available for NATO militaries once a ceasefire is in place. While Brussels “treats Ukraine as an EU member” for defense

purposes, this cooperation needs to be further extended and institutionalized.⁹⁹ Brussels should in particular make available additional direct funding and incentives to support Ukrainian defense production, including partnerships and joint ventures with European firms.¹⁰⁰

Turkey's large size and advanced manufacturing capacity make it vital for European defense in a world where Europe cannot necessarily count on access to U.S. capabilities. Sensitivities over Turkey's domestic politics, relationship with Moscow, and regional ambitions all limit defense cooperation with the European Union. Brussels, however, needs to prioritize finding a *modus vivendi* with Ankara on defense; at a minimum, the European Union should encourage joint ventures with Turkish defense companies and create a pathway for Turkey's inclusion in SAFE.

Ensure NATO's Continued Centrality to European Defense

Regardless of what role the United States chooses to play in European defense and security, NATO remains the best institutional framework for coordinating multilateral defense cooperation. Common NATO standards ensure interoperability while existing commands, operational plans, operating procedures, and other “software” provide a framework for cooperation. Transitioning to a less U.S.-centric NATO will be challenging—but nowhere near as challenging as creating a whole-cloth replacement. Endowing the European Union with its own military capabilities would require significant change to existing treaties and would touch off a difficult debate across Europe about sovereignty, command-and-control, and other fundamental issues.

Both the European Union and coalitions of the willing have a role to play in deterrence and defense, but that role should center on supporting and enabling NATO operations. The European Union can use its regulatory power to push countries to implement NATO standards and enhance interoperability. It can also continue providing funding to enable defense production that fulfills NATO operational requirements and accelerate the process of creating a “Military Schengen” to enable seamless mobility of military assets across the Continent. During a conflict, Article 42.7 could be used to provide specific assets subject to Brussels' control to support a NATO-led operation, from fuel reserves to information from the EU Satellite Centre.¹⁰¹ Coalitions of the willing, meanwhile, should coordinate their actions with NATO, acting as implementers when NATO cannot reach consensus or is otherwise constrained from acting collectively. Such coalitions could involve NATO members (as regional coalitions not directly subject to Brussels) as well as wider frameworks that draw on the capabilities of Ukraine and other partners.

Secure a Favorable Outcome in Ukraine

The front lines in eastern Ukraine have largely stabilized since autumn 2022, and as of mid-2026, Kyiv has been on the front foot, making net territorial gains and imposing increasing costs on Russian forces. A Russian seizure of Kyiv or the outright collapse of the Ukrainian state seem unlikely at this point. Still, Ukrainian resilience is not infinite. A ceasefire that leaves Russia in control of substantial Ukrainian territory, people, and assets would be harmful not just for Ukraine, but for Europe as well. Russian troops deployed in Ukraine (and Belarus) reduce Europe's margin of security and enhance the risk of renewed conflict. Any agreement that constrains the size,

capabilities, or deployment of Ukrainian forces inside Ukrainian territory would also remove one of the most important deterrents against future Russian aggression.

With future U.S. support for Ukraine an open question, European actors need to do more to enable Kyiv's military and diplomatic leverage. While the United States continues providing Kyiv with critical intelligence and facilitating weapons deliveries via the Prioritized Ukraine Requirements List, the Kiel Institute calculates that U.S. assistance to Ukraine fell by 99 percent in 2025 compared to the previous year, while EU humanitarian assistance increased by 59 percent and military assistance by 67 percent.¹⁰² This assistance has enabled Ukraine's 2026 battlefield gains and helped address some of its ongoing humanitarian challenges. It has also given Brussels leverage to insist on a seat at the table for any ceasefire negotiations. With negotiations delayed by the conflict in the Middle East, the European Union should take advantage of the pause to press for an enhanced European role in talks, as well as for the inclusion of the following key conditions:

- No restrictions on Ukrainian security cooperation with the European Union
- Parallel restrictions on Russian deployments (including on the territory of Belarus) to match any geographic restrictions on the deployment of Ukrainian forces
- Gradual sanctions relief conditioned on fulfillment of ceasefire terms
- No amnesty for perpetrators of war crimes and crimes against humanity
- Nonrecognition of Russian annexations, including Crimea

In the interim, European security and humanitarian assistance to Ukraine should continue, enabling Ukrainian firms and the Ukrainian military to contribute to EU (and by proxy, NATO) defense capabilities that can help anchor Ukraine in Europe and guard against slippage in European support in the event of a ceasefire. Enabling the Ukrainian military to take back more territory and impose escalating costs on Moscow is, in turn, the surest path to a ceasefire that respects both Ukrainian and EU/NATO equities. Keeping Kyiv on track for eventual EU membership can also help anchor and institutionalize reforms inside Ukraine. Brussels needs to guard against the danger, however, of allowing the process of accession to supplant the concrete outcome.

A strong Ukrainian state and military is not only Ukraine's most powerful security guarantee; it is also a crucial check on future Russian aggression.

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