

DEFENDING EUROPE WITH LESS AMERICA

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SUMMARY

- Russia’s war on Ukraine has revealed the sorry state of European militaries and defence industries after decades of peace dividends, as well as their deep reliance on the US.
- A second Trump presidency could drastically reduce US defence support for Europe. But regardless of the outcome of the US presidential election, the degradation of the European security environment and the shifting priorities of the US mean that Europe needs to be prepared to take more responsibility for its own defence.
- Europeans require a sustained plan over the next decade that combines immediate efforts to support Ukraine and rebuild readiness, and longer-term goals to develop a “full force package”, including the combat support capabilities and key enablers that are currently provided primarily by the US.
- Paradoxically, such a deliberate approach to overcoming institutional challenges and strengthening Europe’s defence capabilities may be the best way to preserve a strong transatlantic relationship and a degree of US commitment.

European defence policies are facing their most important stress test since the early days of the cold war. Russia's full-scale invasion of Ukraine brought war back to the heart of Europe and revealed just how reliant Europeans were on the United States for their defence. This forced Europeans to review their defence requirements, including the collective defence of the continent, and address the sorry state of their current plans. If re-elected as US president this autumn, Donald Trump has suggested that he will drastically reduce or remove US military support for Europe. But even setting aside the goal of "Trump-proofing" Europe, competing US priorities and polarised domestic debates, as well as Europe's deteriorating security environment, mean that Europeans urgently need to strengthen their ability to defend the continent with less input from the US.

At first sight, Europe has the means to defend itself. European NATO allies and EU member states together outspent Russia four to one on defence in 2023; their combined military forces are larger than those of Russia or the US; and European defence industries produce some of the most advanced weapons systems around, with six European countries among the top ten global arms exporters. Last but not least, Europe's GDP is ten times larger than that of Russia, second only to the US.

Yet after decades of "peace dividends" and free-riding, with the US military leading on the most demanding scenarios in Europe and providing the key capabilities, the atrophy of European military forces and defence industries over decades has made their assistance to Ukraine complicated and slow. Rebuilding European militaries now looks highly challenging.

NATO's defence planning process and parallel EU processes have identified the shortfalls of European defence, but Europe needs to overcome several challenges in order to address them. European countries need a robust plan, sustained over a decade, to strengthen their ability to defend Europe with less America.

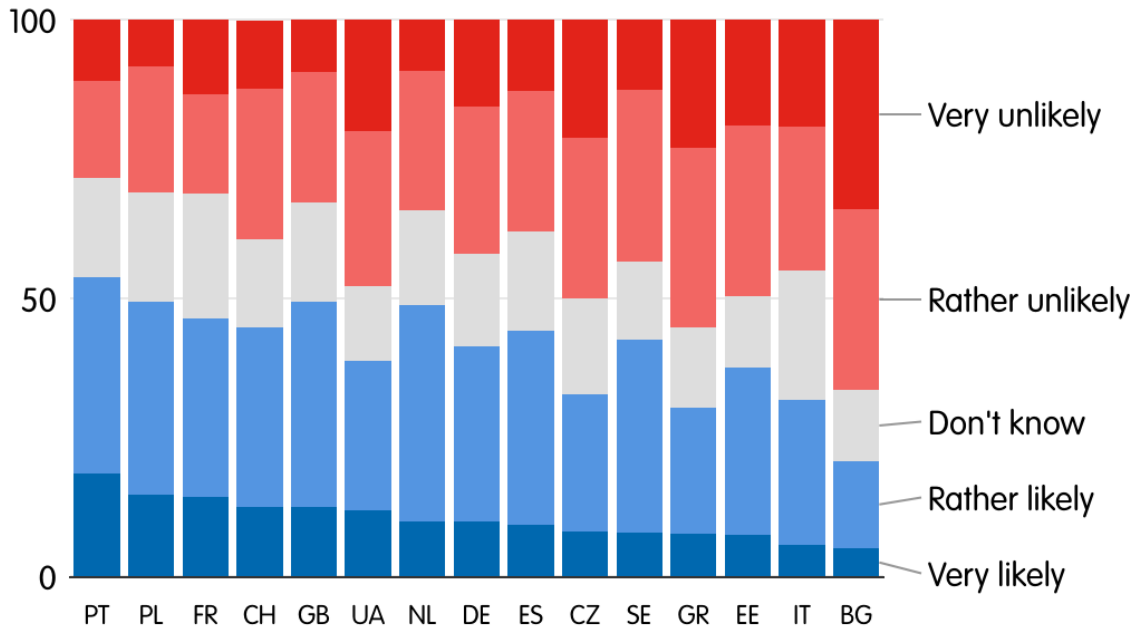
Europe's declining security environment

Russia's full-scale invasion of Ukraine in 2022 served as a wake-up call to many Europeans. But Europe's security environment had in fact been deteriorating for far longer. Europe's relationship with Russia had been on the decline since 2007, when Vladimir Putin gave his famous speech at the Munich Security Conference, in which he accused the US of creating a "pernicious" unipolar world with "one master, one sovereign" which was of no interest to Russia. After the US and the European Union had worked to include Russia in the post-cold war security system, Putin was calling for a system rethink. What followed was proof of these intentions: Russia's invasion of Georgia in 2008; its illegal annexation of Crimea and beginning of the protracted conflict in the Donbas in 2014; its steady withdrawal from the

arms control and security architecture that had been built since the 1970s; and then its full-scale invasion of Ukraine.

Whatever the outcome of the war on Ukraine, it is therefore reasonable to assume that relations between Russia and the West will remain confrontational for the foreseeable future, whether eventually in a new cold-war mode, or with more crises or conflicts to come. Most military and defence leaders predict that within years of the end of the war in Ukraine, Russia will have reconstituted a sufficiently solid military to be able to test the resolve, cohesiveness, and ability of European defence anew. Germany's defence minister, Boris Pistorius, has warned that "Germany must be ready for war by 2029" as "we must not believe that Putin will stop at Ukraine's border". The chairman of NATO's military committee, Admiral Rob Bauer, also noted in a recent speech at the US Army War College that "we should not underestimate [Russia's] ability to rebuild and regroup". The European public feels this threat too: in ECFR's latest polling in Ukraine and 14 other European countries, significant numbers of respondents said they believe it is either "rather likely" or "very likely" that Russia attacks another European country within the next two years, ranging from 21 per cent in Bulgaria to 54 per cent in Portugal.

Likelihood of Russia attacking another European country in the next two years. Survey respondents in Ukraine and 14 other European countries. In per cent



Source: Survey conducted in May 2024 by Datapraxis, YouGov, Alpha Research, Norstat, and Rating Group in Bulgaria, the Czech Republic, Estonia, France, Germany, Great Britain, Greece, Italy, Poland, Portugal, the Netherlands, Spain, Sweden, Switzerland, and Ukraine.
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Beyond Russia, Europe’s broader security environment is also looking increasingly unfavourable, with multiple other crises in Europe’s neighbourhood from the Sahel to the Middle East, and the development of great power competition, including with a strong hard power dimension. Europe’s traditional cooperative approach to international affairs appears unprepared for this environment. Its longstanding excessive reliance on the US for security is an additional weakness.

Less America

Trump’s comments in February 2024 that he “would not protect” a NATO ally that is not

meeting defence spending guidelines, and “would encourage [the Russians] to do whatever the hell they want” were a bombshell in Europe, even if he later referred to them as a “form of negotiation”. But these statements were not just a Trumpian whim. In an effort to transform his instincts into policy, think-tanks associated with the Trump campaign have developed multiple scenarios, ranging from modest reductions in the US commitment to European security to a “dormant NATO” – a de facto quasi withdrawal of the US from the European theatre and a halt on further expansion of the alliance. Trump’s former national security adviser Robert O’Brien recently articulated a Trump foreign policy of “peace through strength”, insisting that “Washington should make sure that its European allies understand that the continued American defense of Europe is contingent on Europe doing its part—including in Ukraine.” At a minimum this suggests that US support for Ukraine and the rest of Europe would be more conditional and uncertain should Trump be re-elected.

But even setting aside the outcome of the US presidential election this year and the need to Trump-proof Europe, there is a fundamental and deep trend in US security policy that suggests Europe will have to become less reliant on US support for its security.

Firstly, the US domestic debate is characterised by a strong push for more restraint and reduced foreign engagement, not just among MAGA Republicans. My colleagues Majda Ruge and Jeremy Shapiro have identified this sentiment in various strands of the Republican party, but it even finds echoes among Democrats. Even though recent polls suggest that “Americans remain committed to NATO,” US commitments abroad are likely to become more conditional and the US, no matter its administration, is likely to insist that its allies bear a much larger share of the security burden in the future.

Secondly, US policymakers from across the political spectrum are increasingly focusing their foreign and security policy on the Indo-Pacific and the US competition with China. Despite the war in Ukraine and the threat from Russia, Europe is no longer the pacing theatre that frames US defence planning priorities and receives the largest allocation of resources. For the 2024 fiscal year, and as war raged on in Ukraine, the Pentagon allocated \$3.6 billion from its budget to the “European Deterrence Initiative”, while the “Pacific Deterrence Initiative” was allotted \$14.7 billion. This China-first approach not only creates competition for America’s finite military resources, it also prepares the US for a different sort of competition with an emerging superpower, focused primarily in the air, maritime, space, cyber, and technology domains. Accordingly, the US will likely develop and prioritise capabilities more adapted to the Pacific theatre, for instance in terms of range.

Finally, the US presence in Europe has been continuously declining since the end of the cold war, with a small but significant rebound associated with Russia’s war on Ukraine. At the peak

of US deployment to Europe in the late 1950s, 430,000 US troops were stationed in Europe, mostly in West Germany. In 1989, there were still 248,000 US troops in Europe, but this figure had fallen to 64,000 by 2021. Since February 2022, the number of US troops in Europe has surged to 85,000-100,000 (depending on their rotational presence) – still far from the average number of 300,000 throughout the cold war. European armies have a total of 1.9 million military personnel (1.33 million in the EU alone) by comparison. This decline in US force presence has been accompanied by a reduction in the number of major combat platforms – including fighter aircraft, tanks, infantry fighting vehicles, and artillery, as well as nuclear weapons – assigned to the US European Command.

These trends suggest that the level of US commitment to European security will at best remain stable at the current relatively modest levels and more likely decline, or even partially vanish over the coming years. Geopolitical events and the outcome of the US presidential election might slow or accelerate this process. Ignoring or opposing this transformation would therefore be pointless: Europe needs to be able to defend itself with less America. This paper operates on the premise of a continued transatlantic alliance, but assumes that US engagement in Europe will decline, including in domains where Europeans are heavily reliant on American forces and capabilities. European policymakers need to embrace this paradigm shift and adapt. Given that continued excessive dependencies will only create risks for Europe and frustration in Washington, doing so might even prove the best approach to preserving a strong transatlantic relationship and a degree of US commitment.

Europe and defence: progress and shortfalls

European efforts to reinvest in defence have been genuine and significant since 2014 and have dramatically accelerated since February 2022. According to NATO estimates for 2024, EU member states and European NATO allies are now spending €150 billion more per year on defence than they did in 2014. This trend seems to be stable despite significant differences between European countries.

The EU has morphed into a defence player, mobilising resources to train and equip Ukrainian forces, and supporting European defence research and capability development. Since the start of Russia's war on Ukraine, Europe's defence industry has increased its ammunition production capacity by 50 per cent and aims to produce over 2 million shells per year by the end of 2025 – double its capacity in February 2022. The European Commission has tabled proposals for the EU to shift to a "war economy" – in which national economic structures are reconfigured to prioritise bolstering the European defence industrial base and addressing military shortfalls. While it remains to be seen if member states will support the right level of ambition,

the next European Commission seems set to put an even greater emphasis on defence-related work strands and increase the share of the EU budget allocated to defence.

However, European industry and governments have struggled to meet Ukrainian requirements in a timely manner. In April, a year after EU member states had promised to send Ukraine one million rounds of ammunition within 12 months, for example, only half that amount had been delivered. Rebuilding and expanding stocks of ammunition and equipment for Ukraine and meeting the growing capability requirements associated with the security environment has also proven slow and complicated, even when European NATO allies have chosen to buy equipment from non-European suppliers. The new discourse on the European war economy has not been followed at pace, as the traditionally slow EU decision-making process and complex budget cycles are not equipped for times of war.

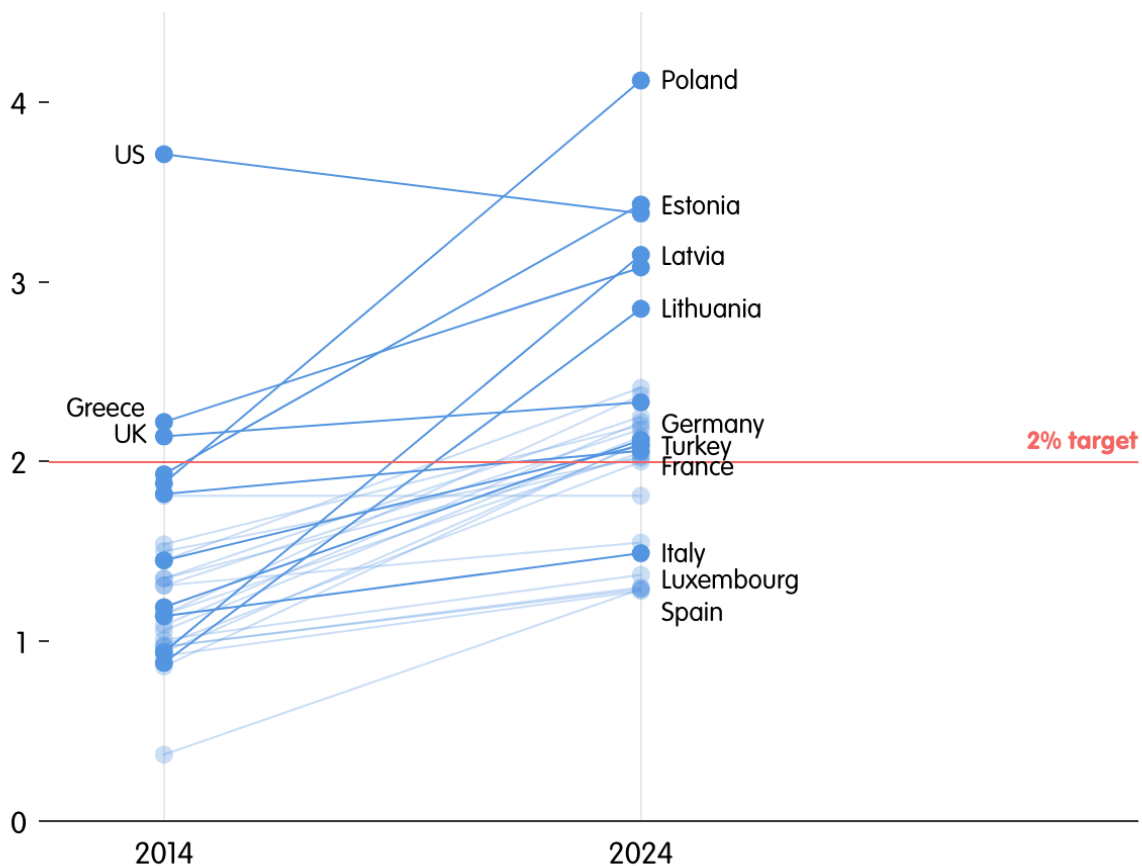
This is largely due to two main obstacles: resources and institutional issues.

Money matters

Decades of peace dividends and neglect of defence have atrophied the European military and defence industries, which have been more focused on lucrative exports than on meeting the often-shrinking domestic demand. The US has, often rightfully and sometimes vocally, criticised its European NATO allies and Canada for not bearing their fair share of the collective-defence burden by underspending on defence. As early as 2011, then US secretary of defence Robert Gates warned that “there will be dwindling appetite and patience in the U.S. Congress – and in the American body politic writ large – to expend increasingly precious funds on behalf of nations that are apparently unwilling to devote the necessary resources or make the necessary changes to be serious and capable partners in their own defense.”

The “Defence Investment Pledge” made by NATO allies at the 2014 Wales Summit established an important baseline in this regard, setting a goal for allies to spend at least 2 per cent of their GDP on defence. By comparison, during the cold war, European countries routinely averaged spending over 3 per cent of their GDP on defence. This varied, naturally, but rarely fell below 2 per cent. Following the cold war, there was a significant drop in defence spending and new NATO allies also tended to decrease their defence spending when they joined the alliance. As a result of the Defence Investment Pledge, European allies and Canada have invested an additional \$657 billion in defence since 2014, with ten consecutive years of increased defence spending. The number of countries meeting the 2 per cent target has risen from 3 to 23 since 2014, with those exceeding the separate 20 per cent investment target up from seven to 30 of 32 allies.

Defence expenditure of NATO countries as a share of real GDP, 2014-2024*. In per cent



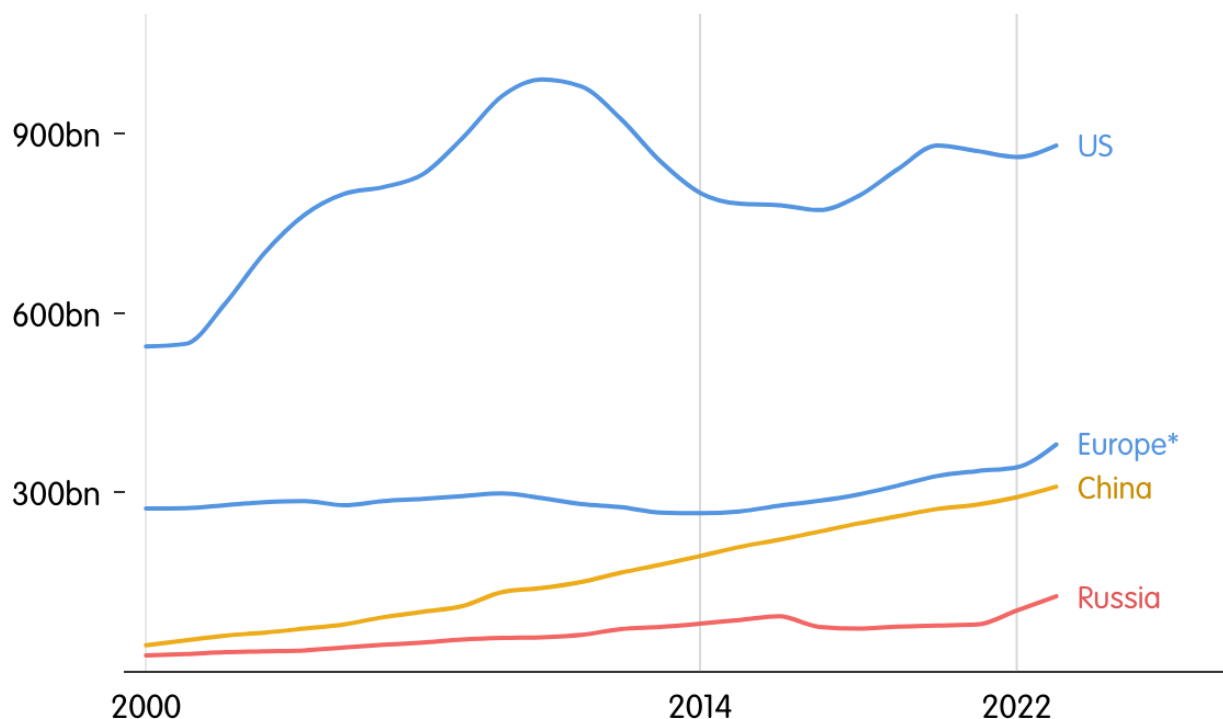
*Figures for 2024 are estimates.

Source: NATO Public Diplomacy Division
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Nonetheless, this increase has not been nearly enough to compensate for years of underspending in comparison with other countries. According to the Stockholm International Peace Research Institute's (SIPRI) military expenditure [database](#), since 2000 Russian defence spending has grown by 360 per cent in constant 2022 dollars while China's defence spending has expanded by 596 per cent. During the same period, US defence spending increased by 60 per cent (with a peak between 2009 and 2012), always remaining the highest in the world. In sharp contrast with these quasi-global trends, European defence spending declined or remained fairly stable during the same period until the early 2020s. Compared to 2000, it is now up by only 50 per cent, mostly due to increases since 2015 and especially since 2022, following a particularly low point in 2014. These average figures obviously do not capture the

diversity of situations from one country to another, but they reveal an overall trend of underspending compared to other countries or regions.

Military expenditure, 2000-2023. In constant 2022 US dollars



*Europe refers to EU member states + European NATO countries

Source: SIPRI Military Expenditure Database

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Although eight consecutive years of increases in defence spending make a difference, the extra money has not yet enabled Europeans to address the consequences of the previous cuts and years of shrinking defence budgets. It will require years of sustained effort to rebuild forces that in many instances had become quite hollow. In the current environment, several European governments have already announced plans to go well above the 2 per cent mark or have already done so. Poland, for instance, is now spending 4 per cent of its GDP on defence (more than the current US expenditure of 3.4 per cent). For some countries, this level of effort might be required to move forward at pace and to backfill for the many years of peace dividends.

Fortunately, increasing defence spending is largely possible with the fiscal resources of European countries, which are some of the most economically developed on the planet. The experience of the cold war has shown that spending more on defence is economically viable. The recent European fiscal efforts to address the covid-19 pandemic and the energy crisis were much more significant than the type of effort required today for defence. This would not present a dramatic “guns versus butter” or “welfare versus warfare” dilemma, even if it would require a deliberate and sustained prioritisation. Furthermore, in the current security environment, the European public is increasingly supportive of spending more on defence, especially in northern and eastern Europe. In December 2023, 77 per cent of respondents to a [NATO poll](#) agreed that their country should either spend more on defence or maintain current defence spending.

A pledge to sustain this level of effort for as long as necessary will be critical to rebuilding European militaries. A comprehensive scenario-based [study](#) by the International Institute for Strategic Studies (IISS) in [2019](#) assessed that it would cost European countries as much as \$357 billion in investment to build a force capable of addressing a serious Article 5 contingency in the Baltic region without significant US support. The lessons learned from Ukraine, as well as the investments made since 2019 and the recent addition of Finland and Sweden to NATO will naturally affect the exact sum, however this demonstrates both the magnitude of the effort required and the fact that it is not out of reach, given that European countries [spend](#) more than \$100 billion per year more than they did in 2019. The key is [sustaining](#) the effort in the long term to deliver capabilities and maintain a capable and ready force model over time.

Capabilities

With their limited defence budgets and US security umbrella, many European armies have become “bonsai armies”, with extremely limited force volumes that only offer samples of major capabilities rather than large and robust combat ready forces. For more than two decades, most European defence planning has neglected the issue of mass. NATO itself put the [emphasis](#) on the ability to quickly deploy limited forces out-of-area in Afghanistan or other crisis management operations rather than on the requirements associated with a potential major conflict in Europe.

While returning to the volumes of equipment on hand during the cold war is unlikely and unnecessary, European countries do need to rebuild some mass, especially in the land and air domain given the return of war to Europe.

Selection of major combat platforms

	Main battle tanks	Infantry fighting vehicles	Armoured personal carriers	Artillery	Principle surface combatant ships	Submarines
US	3k	5k	10k	2.5k	122	66
Russia	2k	4k	5k	2.7k	33	50
Europe*	6k	9k	21k	7.1k	140	73
EU 27	4k	8k	13k	5k	101	45

*Europe refers to EU member states + European NATO allies

Source: Military Balance 2024, IISS

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The numbers of major combat platforms in the table above may seem significant, but they mask several discrepancies between countries. Firstly, there is a dramatic imbalance in the equipment owned by different countries, highlighting the need for a European approach. For example, 12 European countries do not possess any tanks, and 14 have no fighter aircraft, meaning they cannot contribute to core missions. While the development of a national fighting air force or armoured capability might prove demanding for many of these “small” countries, multinational approaches enable them to be part of the broader enterprise. Non-EU European NATO allies perform better in this regard, with Norway, Turkey, and the United Kingdom possessing significant volumes of equipment in several domains. Furthermore, different countries use different platforms, many of which are ageing or nearly obsolete,

including legacy Soviet equipment and other outdated systems such as the Tornado aircraft. The massive cuts put on maintenance and modernisation programmes further complicate the scene. Compared to the Russian and American inventories, Europe's absolute number of major platforms may not compare too badly, but comparatively few are modern enough or have the right level of readiness.

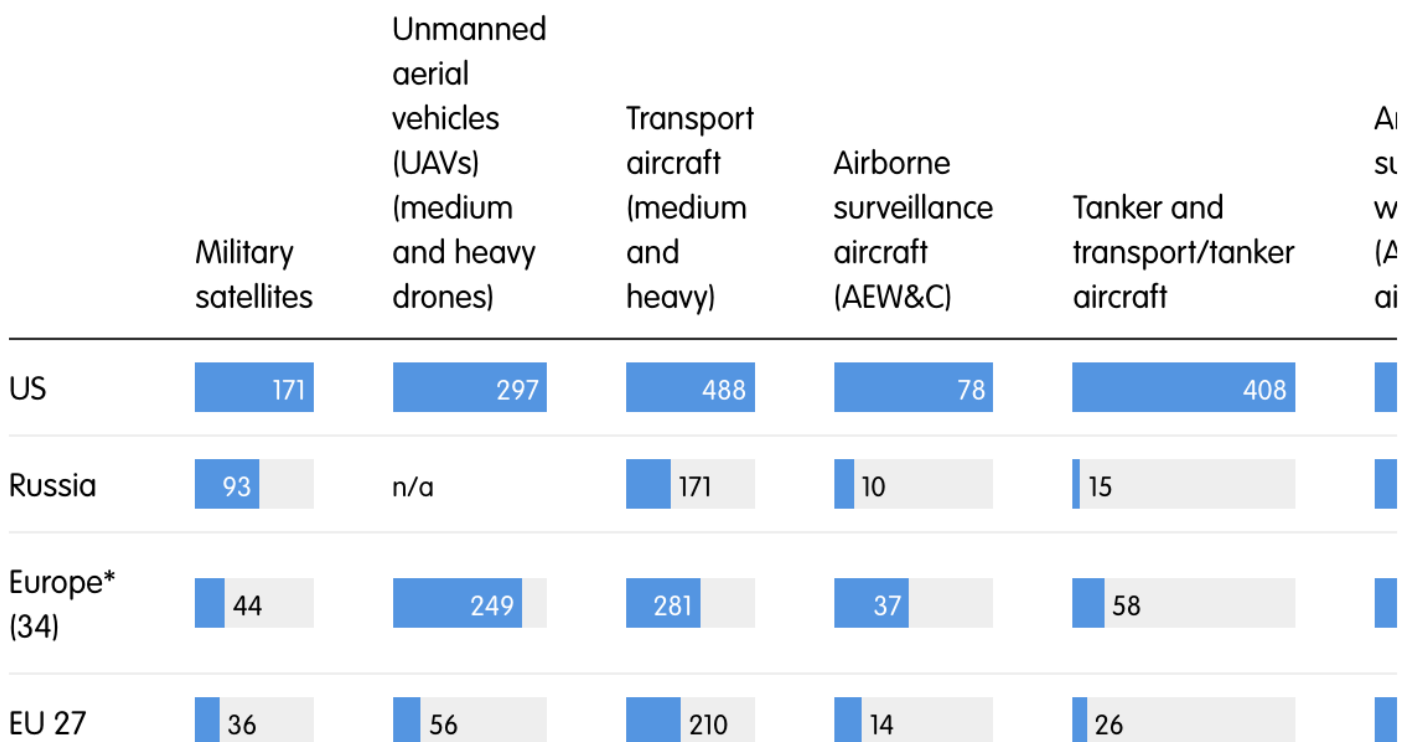
The volume of European combat forces has also been significantly reduced since the cold war, with the end of conscription and shrinking military forces. However, the remaining 1.9 million soldiers in European NATO countries' forces is sufficient to meet NATO's peacetime requirements on paper, and should be able to meet the demanding requirements of NATO's new force model. This force model, agreed upon at the 2022 NATO summit in Madrid, aims to make more than 300,000 troops available to respond to any contingency within 30 days (and over 100,000 in up to 10 days) and be able to immediately reinforce the alliance's eastern flank in the event of a crisis. This means that a general and massive expansion of the European armed forces is not necessary, provided European countries significantly increase the combat readiness of their forces to enable them to deter and defend against a major contingency in Europe.

To meet "European strategic responsibility", three leading American military experts argue that "Europe should build its conventional military capabilities to a level that would provide at least half of all the forces and capabilities — including the strategic enablers such as strategic lift, air-to-air refuelling and operational intelligence — required to deter and, if needed, to defeat a major-power aggressor." Given the likely decline in US defence support for Europe, this should be considered a baseline, which Europeans might need to exceed to limit vulnerabilities. This is not out of reach, assuming a sustained focus over a few years.

European countries therefore need to expand the numbers of units and major platforms they own to be able to sustain a high-intensity conflict. NATO has identified the requirements under its defence planning guidelines associated with the new force model and European states are in the process of acquiring the bulk of the forces, filling gaps, and expanding their inventories where necessary. The massive expansion of the Polish land forces or Germany's recent decision to expand its tank inventory are good examples of such efforts. The challenge is to produce the required equipment quickly enough and to address European shortfalls for which they are particularly reliant on the US.

The major issue in this regard is addressing European shortfalls of so-called strategic enablers, for which Europeans overwhelmingly depend on US forces. The gaps between US and European critical enablers are much wider than those for major platforms and immediately give a sense of the degree of European dependency on US assets.

Selection of critical enablers



*Europe refers to EU member states + European NATO allies

Source: Military Balance 2024, IISS

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Acquiring such strategic capabilities would render Europe capable of performing the quasi-full range of tasks with limited or no US assistance and would be the biggest game-changer. In a recent [interview](#), the chairman of the EU military committee confirmed this priority. NATO has identified the priority domains, in which Europeans depend the most on US assets, as:

intelligence, surveillance, and reconnaissance (ISR), including unmanned systems and space-based capabilities; integrated air and missile defence; long-range precision strike capabilities; and strategic airlift and air-to-air refuelling. The good news is that the EU's 2023 capability development priorities, agreed under the auspices of the European Defence Agency (EDA) – largely overlap with the priority domains set out by NATO. Some efforts are already under way, including the joint acquisition of long-range transport or tanker aircraft, and others, such as in the missile defence or space domain are taking shape including with EU funding, but Europeans are still falling short when it comes to investing in long-range fires and ISR capabilities.

Addressing institutional ambiguities

Beyond its financial and capability shortfalls, European governments need to address some institutional debates about their defence in this new security environment, including the roles and responsibilities for the EU in European defence and of a much stronger European pillar in NATO, as well as how the EU and NATO can effectively work together. These debates may seem arcane and often can be, but such institutional challenges can no longer be debated by experts without political attention.

At first glance, NATO-EU relations have never been as deep. The president of the European Commission Ursula von der Leyen and the secretary general of NATO Jens Stoltenberg meet regularly, as do their staffs. Cross invitations to segments of EU and NATO summits, ministerial meetings, and senior committees have become customary. But these regular encounters and cross briefings should not hide the fact that relations remain strained, and not only because of the well-known reservations of Turkey and Cyprus, which often serve as a useful pretext. My first-hand experience as a former senior NATO official suggests that mutual ignorance, a degree of competition and distrust, and legal and political hurdles remain common in both organisations and continue to constrain the relationship.

Despite some modest successes, such as in the domain of military mobility, EU-NATO cooperation still fails to organise a seamless process to better align NATO capability requirements and EU efforts to support capability development or foster cooperation. In the absence of proper and efficient mechanisms to ensure their alignment and deliberate efforts to ensure the broadest possible cross-participation of non-members to their activities, competition between the two organisations will remain a reality.

The new security environment and the prospect of less American involvement in Europe necessitates a rethink of the EU-NATO relationship which both recognises the unique and leading role of NATO's command structure and defence planning and the EU's new role as a

security player, in particular in the Ukraine context, and its unique set of regulatory and financial tools.

Policy priorities

To achieve significant policy progress, Europeans should focus on a short list of priorities – ranging from immediate objectives to long-term efforts to address capability gaps and fix organisational challenges – to prepare for the future without dodging some of the difficult debates.

Organise mid-to-long-term military assistance for Ukraine

Given the trend towards declining US support for European defence efforts, it is critical and urgent that Europeans increase their assistance to Ukraine immediately. In the worst-case scenario after the US presidential election, Europe could find itself supporting Ukraine largely without the US, but even in a better-case scenario, given the polarised electoral year, a new US assistance package for Ukraine is unlikely before spring 2025.

Rather than hoping for the best or engaging in a beauty contest of who spends more or sends better weapons, Europeans should, as a matter of urgency, develop a joint emergency plan to ensure that Ukrainian forces survive beyond the next few months, especially if US assistance dries up again. This plan needs to revolve around three urgent priorities: ensuring a steady flow of ammunition to hold the front line; bolstering Ukrainian air and missile defence to protect cities and infrastructure; and focusing on support and spare parts to maintain the Western equipment that is donated.

When it comes to ammunition, European countries seem to be finally on track, with production rising, and should be able to meet Ukrainian demands in 2025. The joint effort to rally allies to send their Patriot air defence systems to Ukraine, led by Germany and supplemented by the US, is creating the conditions for an improved situation to protect Ukrainian cities and critical infrastructure. It is, however, essential to work on a long-term plan to spur production capacity in Europe to sustain this welcome boost to Ukrainian air and missile defences and prevent a new shortfall. A well-coordinated approach, in which Europeans know they can rely on each other, would encourage governments to free up more weapons that are currently in stock that could make a difference to the war effort, especially as some might prefer to backfill for an ally than donate to Ukraine.

A specific focus needs to be put on the maintenance of the systems that have already been donated. The development of a joint hub for the repair and maintenance of complex

equipment (possibly in Poland) could partially serve this purpose. This should be open to all countries that have donated equipment to Ukraine.

Moreover, complex equipment such as fighter jets will require closely coordinated forms of technical assistance, most probably in-country. This is particularly urgent as Ukraine should receive up to 85 F-16s from the Netherlands, Denmark, Norway, and Belgium in the coming months as well as the recently announced Mirage 2000-5 from France. As Europeans have taken the lead on the “fighter jet” coalition, they should closely coordinate the support associated with these donations in terms of training, maintenance, the flow of associated ammunition, and spare parts.

Finally, European policymakers need to examine, preferably jointly, what additional assistance, from longer-range fires to large forces training or in-country support, could be delivered to Ukraine to enable it to regain the initiative. The French president Emmanuel Macron chaired a first meeting on this subject in February 2024, but the effort proved controversial and was not continued. Given the need to create the conditions for a Russian defeat, Europeans should relaunch such an enterprise as a closely coordinated effort. As I, alongside my ECFR colleagues Piotr Buras and Jana Puglierin, have previously suggested, the Weimar triangle could be a useful format to develop such initiatives as it brings together France, Germany, and Poland which hold three different approaches. If these three countries can reach an agreement among themselves, they may therefore be able to rally a large group of European countries towards consensus.

A strategic plan to support Ukraine should be a European priority and an integral part of a European effort on defence, not least because a Russian victory would create additional risks for European security and imply costly additional military requirements.

Address the immediate requirements of rebuilding mass and readiness

European defence industries are struggling to meet demand and deliver within a reasonable timeframe. To this end, the EU should mobilise its toolbox to structure the European defence technological and industrial base and support joint acquisitions.

Beyond increased volumes, combat readiness requires the most significant effort. As noted above, the volume of troops, though important, is not the core issue here, as European armies are still quite large. European countries need, however, to increase the volume of ready combat forces that are available at short notice to fill the NATO force model and enable NATO (or the EU) to meet a larger range of potential crises without over-relying on US

reinforcements. European militaries need therefore to organise more regular, large-scale training exercises for personnel and headquarters, acquire spare parts and ammunition, and increase the availability of key equipment. These are absolute priorities to generate a level of readiness consistent with the current security environment.

Logistics and support are essential parts of sustaining ready forces, and integral to success in warfare. Transporting forces and equipment over significant distances requires transport platforms, engineering, and bridge-building tools. Troops also require medical support and proper infrastructure when deployed. Yet European logistics and support capabilities have diminished below any reasonable threshold. The EU and NATO launched efforts in 2017 to improve military mobility, and expanded them in 2022, but these were under-resourced. During the next budget cycle, European policymakers need to adequately fund and pursue a more ambitious plan to improve relevant infrastructure, including ports, airports, railways, roads, tunnels, and bridges, and address administrative barriers to the rapid deployment of personnel and equipment across Europe.

Develop a ten-year plan to reduce dependency on US strategic enablers

With expanding European defence budgets, Europeans need to be much more deliberate in their efforts to jointly acquire some of the key missing strategic enablers in Europe, therefore reducing critical European capability shortfalls and the massive and excessive dependency on US assets in this domain. The conflict in Ukraine has demonstrated the critical importance of these assets, as Ukraine's defence has been dependent on space, command and control, integrated air and missile defence, and drones. By learning the lessons from this conflict and investing in such capabilities, Europeans have an opportunity to leapfrog to the next generation of emerging technologies.

Given the cost of these expensive capabilities, European-wide cooperation and joint procurement make the most sense. The EU has had recent successes in the joint acquisition of major enablers, including of a joint fleet of seven tanker aircraft operated by the European Air Transport Command (EATC) based in Eindhoven (the Netherlands) or the German-led European Sky Shield Initiative focused on air and missile defence.

A structured plan should address the current well-identified shortfalls by 2035 through joint acquisitions. The EU can play a useful role in this domain by using its toolbox to support the development of key technology and capabilities and facilitate and incentivise cooperation and joint acquisition amongst EU member states and European partners.

The establishment of the Directorate-General for Defence Industry and Space in 2021 gave a solid role to the European Commission in this context for the first time. The European Defence Industrial Strategy and the European Defence Industrial Programme announced in 2024, meanwhile, offer a valuable series of instruments. The commission now needs to focus on adequately implementing and funding these instruments to allow the development and joint acquisition of the missing capabilities. The current short-term funding of €1.5 billion between 2025 and 2027 will not be sufficient to make a difference in the short term, and the disagreements among member states on the best funding streams to use demonstrate a lack of sense of urgency that is inconsistent with the level of effort required. A funding stream combining EU core budgets and the use of European loans to allocate tens of billions per year could make a real difference and have a direct impact on national procurement across Europe.

This funding should be used to address a set of strategic priorities such as meeting integrated air and missile defence shortfalls, fielding a fleet of European drones, and developing European air transport and refuelling capabilities and space assets. This new EU effort needs to be well aligned with the defence planning priorities developed by NATO under the NATO Defence Planning Process and the EDA's Coordinated Annual Review on Defence. If properly funded and used strategically it can also fund the development of key technologies and incentivise Europeans to procure such enablers jointly. This would develop a European offer which could prove useful, should the US industrial base be more focused on addressing other priorities.

NATO agencies, the Organisation for Joint Armament Cooperation (OCCAR), and the EDA have a proven track record of facilitating such joint efforts in multinational frameworks. The experience of the development, delivery, and sustainment of the joint European air-to-air refuelling fleet of eight multi role tanker transport aircraft based in the Netherlands and operated by the EATC on behalf of six countries should serve as an example and a framework to build upon. With strong EU and NATO political support, this multinational effort addressed a NATO shortfall, and benefitted from the cooperation between the EDA which developed the requirements, OCCAR which served as acquisition agency, and the NATO Support and Procurement Agency now in charge of the life-cycle management – demonstrating that agencies can in fact work together to deliver a critical enabler. Europeans can use various

multilateral procurement frameworks tailored to each project, but when it comes to major enablers joint procurement needs to be actively pursued.

Review the role of the EU in the European defence sphere

European policymakers should use the start of the next institutional cycle to clarify the role of the EU in European defence, including the right level of ambition for the EU's defence budget.

Part of this should involve streamlining and better coordinating the EU's activities. To this end, EU member states should support the European Commission's proposals for a defence commissioner. A dedicated commissioner would signal the EU's readiness to prioritise defence, while endorsement from member states would guarantee the right level of ambition, funding, and political ownership for the position. As the new commission is being designed, a portfolio focused on defence industry and technology (including its positioning within the European Commission and in relation to the High Representative/Vice President) would create the conditions of success for such a new role. This is not about having an "EU defence minister" that covers all aspects of defence policy (which would require amending the EU treaties and a sea-change) but rather enabling EU-level coordination for defence research and development, industrial policy, and procurement support. From this perspective, as noted in Politico, this would not be a high-profile political job, but rather a focused portfolio that ensures that the EU delivers in its limited but increasingly important role.

Beyond the potential role of a defence (or defence industry) commissioner, the EU also needs to review its role in the continent's defence. Its effort was traditionally focused on crisis management and (marginal) capability development. Given the demands of the new security environment, the EU's role should now encompass four pillars: resilience and cyber defence, military mobility, research and development, and capability development and delivery. Based on the useful experience acquired during the previous institutional cycle, the EU institutions need to clarify their respective roles and ensure the right level of funding and urgency to deliver on these four fronts. Rather than bringing all these priorities under the defence commissioner, these issues should be shared between other departments, including those responsible for transport and infrastructure, and resilience and security. This would allow them to tap into multiple budget lines and ensure that defence is an EU-wide priority rather than just a modest part of the portfolio of a couple of senior commissioners.

Improve NATO-EU cooperation

It is high time to take NATO-EU cooperation to the next level and enable a truly coordinated effort. The next NATO secretary general and EU leadership must be mandated to fix and

expand the relationship as a first step. This should include but not be limited to:

- Coordinating much more closely on issues of mutual interest such as standards, innovation, military mobility, and cyber.
- Aligning to the maximum extent possible NATO and EU capability development efforts to ensure coherence between EU efforts and NATO defence planning priorities.
- Allowing a quasi-systematic cross-participation of staff (as non-voting invitees) in relevant committees and working groups.
- Mitigating the concerns of those states which are not members of both organisations by facilitating their closest possible involvement and granting an observatory or partner status to willing non-members in as many defence formats as possible.
- Organising a more fluid exchange of information (including through security arrangements facilitating the flow of classified information).
- Organising systematic mechanisms for staff exchanges between the two organisations to develop mutual understanding.

More broadly, as a more European NATO emerges, the two organisations need to refine the concept of the European NATO pillar. This should not be an EU caucus but rather a European pillar that combines burden sharing and responsibility sharing. This might entail some revision of the NATO command structure, as well as of the flags assigned to the various senior posts, giving a more prominent role to European flag officers. The Berlin Plus agreement from 2002 that allowed NATO to command EU operations should be revisited to ensure it allows for a variety of scenarios. Finally, NATO and EU exercises as well as stand-by forces should be aligned to bolster readiness.

NATO is likely to retain a central role in the defence of Europe, not only politically to enshrine the transatlantic link but also because it has unique experience in planning and conducting large-scale operations (including for collective defence in the Euro-Atlantic area). But it should have a closer and more balanced relationship with the EU now that the latter has become a serious defence player of its own.

Develop a European contribution to deterrence

Developing a stronger European pillar in NATO will require a stronger European contribution to deterrence, including its nuclear dimension.

European governments hold a variety of views regarding nuclear deterrence. A handful of EU member states, such as Austria and Ireland, are actively engaged in the Nuclear Ban Treaty and all NATO allies agreed in the 2023 NATO Summit communiqué that “as long as nuclear weapons exist, NATO will remain a nuclear alliance”. Europe benefits from a unique set of US nuclear sharing arrangements through NATO and all NATO allies (except France) participate in the organisation’s nuclear planning. Two European NATO allies are nuclear weapon states themselves (the UK and France), though they follow distinct nuclear policies. Five NATO allies (Belgium, Germany, Italy, the Netherlands, and Turkey) fly dual-capable aircraft which could potentially deliver US atomic bombs, while Poland has expressed an interest in getting more involved in the nuclear mission or hosting US weapons. These US weapons and their means of delivery are being modernised while France and the UK are pursuing the long-term modernisation of their nuclear forces.

In this complex environment, a new “great debate” is emerging across Europe, unseen in decades, as some call for a “euro-bomb” while others would like to see the US nuclear presence upgraded, and others favour the status quo.

For his part, Macron has reiterated his openness to a nuclear dialogue with European states, stressing that France’s vital interests have a “European dimension”. This triggered more interest in Europe than similar previous French offers but also numerous questions. A number of European countries, including the Nordic states, the Baltic states, Poland, and Germany have engaged in informal or formal dialogues with France to clarify the nature of this offer and share their own views and priorities.

Europeans need to have a realistic debate about how they can preserve and enhance deterrence. They should not engage in unrealistic or misleading proposals, such as the euro-bomb, a distinct EU deterrent, the financing of the French deterrent by others, or proposals for a British or French deterrent to replace like-for-like the US extended deterrent. Such a deterrence conversation must respect a “do no harm” principle, as any proposal perceived as undermining the US nuclear guarantee would not only be politically problematic for most Europeans, but strategically dangerous for European security. Europeans should therefore aim to complement and strengthen it while avoiding – again – an excessive reliance on any single ally. This would also mitigate the most extreme scenarios if the US weakened or withdrew its extended deterrence commitment.

Such a complex debate needs to involve all parties concerned, including both the three Western nuclear weapon states and the non-nuclear allies. Governments should take a holistic view of deterrence beyond nuclear weapons, which also looks at the role of long-

range conventional strike capabilities and missile defence. Such capabilities can usefully complement nuclear deterrence by complicating potential adversaries' calculus and offer a broader range of options preventing an "all or nothing" dilemma as part of a more integrated deterrence posture.

An increased European role in the deterrence mission could take the form of a deepened strategic conversation (both within and outside NATO) and more national nuclear exercises open to non-nuclear allies. The UK and France might have to adapt their nuclear posture and doctrines to give more substance to the "independent role" of their deterrent recognised in the NATO context since 1974. If the political and strategic deterrence messaging is robust and clear, deterring potential adversaries might prove easier (as Russia is well-versed in understanding nuclear messaging) than reassuring all allies (as many tend to only rely on the US and discard the European dimension of NATO's nuclear posture).

A more responsible Europe

It is time for Europeans to approach defence much more strategically, invest in defence in the long term, and actively prepare to accept more responsibilities for the defence of Europe.

They should focus on developing a European "full force package", including the combat support capabilities and the key enablers that are currently provided primarily by the US. Such an objective is achievable and fiscally sustainable provided the Europeans develop a joint plan and efficiently leverage the NATO and EU toolboxes.

This would give European countries the ability to address most scenarios from crisis management to collective defence with limited US support and might prove not only the best way to guarantee Europe's security, but the best way to secure the future of the transatlantic alliance, a more security- and defence-oriented EU, and a more European NATO.

Paradoxically, such a deliberate approach to strengthening Europe's ability to defend itself might also be the best way to preserve a US commitment to European security, including to address the most demanding scenarios or provide ultimate reassurance.

The journey suggested in this paper requires a decade-long, sustained effort that will profoundly transform NATO and the EU. This may have to be adapted depending on the direction of travel of the US and the evolution of European security. It is, however, essential that European policymakers begin this journey without delay.

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