

A low-angle, upward-looking photograph of several classical stone columns. The columns are fluted and have papyrus capitals. They are set against a clear blue sky with a few wispy clouds. The perspective makes the columns appear to converge towards the top of the frame, creating a sense of height and grandeur. The lighting is bright, suggesting a sunny day.

böllpaper

The European pillar in NATO: from hollow to concrete

Dr Leonard Schütte

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A study by Dr Leonard Schütte

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Foreword

The ‘European pillar of NATO’ is a phrase almost as old as the alliance itself. In light of the geopolitical turbulence and upheaval in transatlantic relations, it is currently experiencing a rampant comeback.

Yet, the so-called European pillar comes with two caveats.

The first is the vacuity of the term. As captured by NATO Secretary-General Mark Rutte, the European pillar is ‘a bit of an empty word’. It is a textbook case of constructive ambiguity; a phrase everyone can sign up to, because no one has to agree on what it actually means. So far, the European pillar seems to entail little more than a symbolic desire for Europeans to take on a greater role in NATO. But what would this look like, and what would it entail, politically, militarily, and fiscally?

The second caveat concerns the assumption inherent in the term. It presumes a reduced, but nevertheless centralized, US position in the alliance. Europe is merely one pillar in the equation. Events, however, are overtaking this assumption. During his second term in the White House, Donald Trump has not only continued to cast doubt over US NATO commitments; his demands over Greenland, threatening the very sovereignty of NATO ally Denmark, have – for many – crossed a line that cannot simply be walked back. This fundamentally calls into question America’s role in NATO.

What if Europe has to hedge not for ‘less America’, but for ‘no America’? Under these circumstances, it may be more appropriate to think in terms of a ‘Europeanization of NATO’ or a more general ‘Europeanization of security’, understood as a process that includes, but is not limited to, strengthening the European pillar of NATO.

For the German and European Green movement, the debate on the European pillar of NATO cuts particularly deep. NATO has traditionally been a point of internal contention. Shaped by pacifist traditions, the alliance was often met with scepticism. This has evolved over time.

Today, the relevance and importance of NATO as the anchor of European security is recognized by the Greens. The basic programme of the German Greens states that NATO remains an indispensable actor guaranteeing Europe’s collective security. Speaking openly about NATO, higher defence spending, and deeper European defence coordination constitutes an expression of political responsibility and strategic realism in the face of a deteriorating security environment. Crucially, growing uncertainty about the US trajectory does not appear to lead back to old reflexes of distancing from NATO, but to a stronger emphasis on European responsibility within it.

As the German Green political foundation, we seek to engage with these debates and map out what Europeans, together with close allies such as Canada, must do to assume more responsibility for their own security under tougher geopolitical conditions. This means confronting uncomfortable questions and moving beyond the comfort of ambiguity.

It is against this backdrop that we commissioned this study by Dr Leonard Schütte.

The study traces the evolution of the concept of the European pillar, clarifies its meaning, and spells out what it would take to operationalize it. In doing so, it exposes the scale of the task Europe has set itself (often without admitting it publicly). The message is sobering: there is no cheap, fast, or politically painless way to build a credible European contribution to NATO's collective defence if the United States steps back.

Importantly, the study notes that strengthening the European pillar and Europeanizing the alliance need not be mutually exclusive. A short-term strengthening of the European pillar can lead to a long-term Europeanization of NATO.

This study does not offer comforting illusions. It confronts policymakers with the strategic consequences of their own rhetoric. If Europe is serious about taking greater responsibility, it must be serious about better spending, industrial cooperation, military integration, and political leadership.

In this vein, this study is a conceptual contribution to that necessary, and overdue, shift.

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Executive summary

Russia's war of aggression against Ukraine and President Trump's revision of 80 years of US Europe policy have shaken the foundations of the European security order. As a result, the debate about the future of NATO has returned with a vengeance. It is near consensual among Europeans that they need to strengthen the 'European pillar in NATO'. However, the concept of the European pillar remains vague and details scarce, thus risking that the concept remains a hollow soundbite.

This study will both look back to unpack the rhetorical baggage of the European pillar of NATO and ahead to discuss what it would take to strengthen the pillar. Historically, the meaning of the pillar has evolved since its origin in the 1960s. It has variably referred to an equal defence partnership between the US and Europe, greater European defence spending, or an autonomous European capacity for crisis management. Today, the European pillar is best conceptualized as European NATO's capacity to defend the continent with only limited US support.

Operationalizing the European pillar will inevitably require significant European efforts to replace American conventional capabilities, enablers, and command and control, though the details will depend on yet unknown US withdrawal plans. However, replacing all US assets is unrealistic and Europeans need to prioritize capabilities needed to deter Russia.

Implementing this strategic shift is an enormous task. Europeans will have to increase their defence spending, deepen defence industrial cooperation, devise their own plan and timeline to replace US assets, address retention and recruitment issues among their armed forces, and rebalance NATO's command structure.

However, even this challenging scenario may be overly optimistic. Given the current trajectory of US Europe policy, it may be prudent to prepare for *no* America rather than plan for *less* America. In that case, the goal would not be to strengthen the European pillar and replace only those capabilities that both the US says it will no longer provide and are needed to deter Russia but to *Europeanize NATO* by also duplicating certain capabilities that the US currently provides.

1. Introduction

Two seismic shocks in quick succession have shaken the foundations of the European security order. Russia's war of aggression against Ukraine buried hopes that Europeans had found both an enduring way to transcend the power politics of a bygone era and a *modus operandi* with Russia. War between Russia and NATO, as early as the end of this decade, has become part of scenario discussions again. The re-election of Donald Trump and his comprehensive revision of US grand strategy have then called into question the very notion of the west. From his recurring fundamental criticisms of the transatlantic alliance, via the US administration's ideological assault on liberal democracy in Europe, its quest to normalize relations with Russia, and threats to sacrifice Ukraine, through to threats to annex sovereign territory of a NATO ally, the US administration speaks and behaves as if it no longer shares key values and interests with Europeans. Europe is now under pressure from both east and west. As a result, the debate about the future of NATO has returned with a vengeance, and an ostensible consensus has emerged on the continent that more needs to be done to strengthen Europe's role in NATO.

Perhaps the most prominent concept that captures the sense of Europeans needing to step up in the alliance is the 'European pillar in NATO'. Indeed, governments across Europe publicly support strengthening the pillar. Germany's first ever National Security Strategy, published in 2023, declared that the 'Federal Government wants to further strengthen the European pillar of the transatlantic defence community [and that] Europe's ability to act on its own is increasingly a prerequisite for German and European security' (Bundesregierung, 2023). Chancellor Merz went further and highlighted the need to become 'much more independent [from the US]' and emphasized that 'for the federal government, the strengthening of the European pillar is of highest priority' (Merz, 2025).

Traditional Atlanticist countries such as Poland and the UK have long been staunch supporters of NATO and been highly sceptical of the EU's forays into defence policy. While not invoking the concept of the pillar explicitly, the UK's 2025 Strategic Defence Review lays out a 'NATO-first' policy based on the assumption that 'greater political and military leadership by European Allies within NATO is the best way to meet the challenge posed by Russia' (UK Ministry of Defence, 2025). Setting out the contours of his government's foreign policy, Polish foreign minister Sikorski explained in 2024 that 'our goal is to maintain and strengthen US engagement in Europe while strengthening the European pillar of the Alliance in the spirit of strategic harmony between NATO and the European Union' (Polish Ministry of Foreign Affairs, 2024). Italian President Georgia Meloni, too, has declared her support for strengthening the European pillar (Pagliarello, 2025).

The French position on the European pillar has historically been ambiguous. As the country most invested in developing a European autonomous defence capacity ever

since the presidency of Charles de Gaulle, France has long pursued a policy of *Europe puissance* (European power), later framed as strategic autonomy. French politicians have long anticipated a US retrenchment from Europe; in his 2017 Sorbonne speech, President Macron predicted a ‘gradual and inevitable disengagement by the United States’ from Europe (Macron, 2017). In 2019, he went further and attested NATO’s ‘brain death’ because of a lack of coordination between the US and European allies, in the process also explicitly questioning the credibility of Article 5 (Economist, 2019). Since Russia’s invasion of Ukraine in 2022, however, official French rhetoric has gradually shifted, increasingly referring to strengthening the European pillar in NATO. The 2025 National Strategic Review promises that France ‘will be a driving force behind a strong and credible European pillar of the Alliance’ (French government, 2025). Thus, perhaps for the first time in recent history, all major actors in Europe are coalescing around the position that the future European security order ought to be centred on NATO as the primary provider of collective defence.

However, if consensus emerges among notoriously divided countries on an issue as complex, vexed, and sensitive as the future of NATO, it is likely that this agreement is vacuous. And indeed, notwithstanding the frequent references to ‘strengthening the European pillar’, policymakers often do not spell out what they mean. Reflective of his wider dismissive attitude toward greater European defence initiatives (Schütte, 2026), NATO Secretary-General Rutte described the ‘European pillar [as] a bit of an empty word’ (Rutte, 2026). One historian of NATO observes that the ‘multiple possible meanings of “European pillar” have provided a loose and ill-defined reference point for virtually any forms’ of European cooperation (Cromwell, 1992, p. xv). There is thus a danger that the concept of the European pillar remains a hollow soundbite that stifles rather than inspires the urgently needed debate about the future of the alliance.

The objective of this analysis is to instil analytical clarity into the debate and generate greater accountability by encouraging policymakers to concretize the means and ends of their NATO reform proposal. To do so, the first section surveys the history of the European pillar. The second section juxtaposes the pillar with rival visions for the security of Europe to delineate the contours of the concept. The third section operationalizes the pillar. The fourth section then shows what it takes to realize the pillar. And the fifth section discusses the risks of focusing on the pillar.

In brief, this study shows that the meaning of the European pillar has evolved significantly throughout history, from denoting merely greater European defence spending to an autonomous capacity for crisis management. Today, the pillar represents a vision of Europeans shouldering the bulk of the conventional defence of Europe, while the US continues to provide selected enablers, the nuclear umbrella, and institutional leadership. To implement that vision, Europeans will have to increase their defence spending, deepen defence industrial cooperation, devise a European plan and timeline for replacing US capabilities, and rebalance NATO’s command structure. However, given the deep uncertainty about the reliability of the US under the Trump administration, it may be prudent to plan for *no* America and to aim for Europeanizing NATO instead.

While strengthening the European pillar will aid the long-term Europeanization of the alliance, the two visions are not just sequential steps on the path toward European defence autonomy, and policymakers have a choice to make regarding which vision to pursue.

2. Historicizing the European pillar

The concept of the European pillar is nearly as old as NATO itself. US President John F. Kennedy is credited with coining the concept, though there are no records of him using the exact term. In a famous 1962 speech, he made a 'Declaration of Interdependence', appealing to Europe to become a partner in the alliance 'on a basis of full equality' (Kennedy, 1962) – which later came to be known as the European pillar. The history of the concept of the European pillar since can be divided into four phases.

Phase I: 1949–1990

Initially, the debate focused on greater European investment as an expression of the European pillar (even before the term was used). NATO's architects did not anticipate the hegemonic role that the US would end up playing in the alliance (Sonnenfeldt, 1989, pp. 91ff). Dwight Eisenhower, then NATO's first Supreme Allied Commander Europe (SACEUR), noted in 1951 that the alliance would be a failure if 'in 10 years, all American troops [...] have not been returned' (Eisenhower, 1951). The 'original transatlantic bargain' (Sloan, 2016, pp. 6ff) foresaw that the US would support Europe's economic recovery and aid its defence against the Soviet Union if Western Europeans organized themselves to pull their weight. While they lived up to the economic part of the bargain, they did not to the defence part. In 1954, the French National Assembly rejected the idea of creating a European army to embed German rearmament within the European Defence Community. Failing to construct an independent defence capacity thus elevated NATO's role as central actor in European defence and entrenched the role of the US as security provider (Cromwell, 1992, pp. 12–15).

Nonetheless, at various points since, US administrations pushed Europeans to shoulder a greater burden of defending Europe. Exacerbated by growing economic woes and the military failure in Vietnam, by the late 1960s, voices in Congress that demanded greater European defence efforts were getting louder (Cromwell, 1992, pp. 42,45). Europeans responded by creating the Eurogroup in 1968, a modest defence initiative to placate US concerns. Yet, the Nixon administration upped the ante, proclaiming 1973 the 'Year of Europe' and calling on Europeans to devote greater resources to defence. Under pressure from domestic opposition, Europeans refused to change course, drawing indignation from Washington (Sayle, 2019, pp. 181–185). At the same time, a new 'schizophrenic' (Howorth, 2020, p. 157) attitude toward the European pillar in Washington was emerging, which was best encapsulated by Kissinger's comment that the US 'has no objection whatever to an independent European policy. It does have an objection when independence takes the form of basic hostility' (Kissinger, 1974) to the US. In the 1980s, Europeans again deepened their cooperation. They resuscitated the Western European Union (WEU) in 1984 to provide a multilateral framework for defence consultations.

As the Cold War came to a close, however, it was apparent that no European pillar in NATO had been constructed. The Eurogroup and the WEU were modest initiatives to deepen coordination and placate the US, rather than structural adaptations of the alliance. Given domestic opposition, reluctance to pool sovereign competences on defence, and widespread fears that European steps to lessen their security dependence on the US could fuel the very process of US retrenchment from Europe that they hoped to avoid, Europeans failed to realize an autonomous defence capacity (Cromwell, 1992, p. 68).

Phase II: 1990–2014

In phase II, the European pillar became primarily an expression of an autonomous European capacity for crisis management. The rapidly changing security landscape following the disintegration of the Soviet Union and German reunification instilled new dynamics. The 1991 NATO Summit produced a new strategic concept that included the first, and hitherto only, official reference to ‘the European pillar’ (NATO, 1991). Concrete steps soon followed. In 1996, the alliance agreed on a new command-and-control concept – the Combined Joint Task Forces (CJTF) – that made NATO assets available for out-of-area missions commanded by the Europeans via the WEU (Rynning, 2024, pp. 194ff). This, in theory, allowed Europeans to act independently of the US, though only in crisis management rather than collective defence contingencies. Notwithstanding the operational limitations, this was as close as the alliance had come to a European pillar.

In the wake of the European inability to intervene in the Balkan wars without significant US military support, France and the UK adopted the St Malo declaration in 1998. They set out to create a Common European Security and Defence Policy (CSDP) and declared that the EU ‘must have the capacity for autonomous action [...] in order to respond to international crises’ (UK Parliament, 1998). Unlike the CJTF, the CSDP was located within the EU and thus raised the spectre of a European defence capacity outside of NATO. This prompted Secretary of State Madeline Albright’s famous intervention, urging Europeans to avoid ‘de-linking’, ‘duplicating’, and ‘discriminating’ (Albright, 1998). These concerns proved largely unfounded with CSDP merely developing into a modest crisis management capacity (Howorth, 2025, pp. 156–157).

Throughout the 2000s, debates about a European pillar were largely muted. But they returned with full force during the Obama presidency. The US policy to pivot to Asia and reluctance to do more than ‘lead from behind’ during the NATO intervention in Libya in 2011 demonstrated that Europeans had to shoulder a greater responsibility for crisis management operations in their neighbourhood.

Phase III: 2014–2022

Phase III of the history of the European pillar saw the advent of EU strategic autonomy as a potentially rival vision to the European pillar of NATO. The confluence of the Russian annexation of Crimea and invasion of Eastern Ukraine, which started in 2014, the UK decision to leave the EU in June 2016, and the election of Donald Trump as US president in November 2016 marked a turning point in debates surrounding a European defence capacity. The EU published its Global Strategy in which it declared the objective to develop ‘strategic autonomy’ (EEAS, 2016) and subsequently launched a number of defence initiatives, which led to ‘a conceptual shift in European security’ (Schütte, 2023, p. 433) by moving the EU onto NATO’s turf of hard security. President Trump’s antagonism toward NATO buoyed those actors pushing for greater European autonomy in defence by casting doubt on the longevity of the US security umbrella. President Biden’s election victory in 2020, however, arrested this momentum given his steadfast support for NATO. To many Europeans, his election proved that Trump was an aberration and that the transatlantic relationship was back to normal (Lissner, 2025).

Phase IV: since 2022

Russia’s attack on Ukraine in February 2022 heralded phase IV, marked by the return of the primacy of NATO in European security. Russia’s invasion fundamentally changed the European security landscape and led to a strategic awakening across the continent. The invasion also rendered the traditional dilemma of European defence – whether to focus on territorial defence with a view to the east or crisis management with a view to the south – less salient. Member States converged in their threat perceptions of Russia and collectively tilted toward territorial defence and Europe’s Eastern neighbourhood. This convergence, in combination with the indispensable role played by the US in supporting Ukraine, thus underscored the centrality of NATO for Europe’s collective defence (Koenig and Schuette, 2023). The return of Donald Trump as president of the US in 2025 then once again upended the dynamics in European defence.

3. Conceptualizing the European pillar

This historical survey shows that the meaning of the European pillar has evolved significantly. Initially implying an equal defence partnership between the US and Europe, it then became shorthand for greater defence spending, before implying an autonomous crisis management capacity, and finally being discussed in the context of collective defence again. But throughout, the discussions surrounding the pillar have been abstract, rarely spelling out what it means in practice. This section hence approaches the debate from a conceptual vantage point. It helps to distinguish the European pillar of NATO from other approaches to organize European security. This is not an expression of semantic pedantry. Delineating concepts – which erroneously tend to be used interchangeably or confusedly despite carrying distinct meanings – is a prerequisite for clarifying the debate.

Historically, two models for the European security order have been juxtaposed: an Atlanticist model based on NATO and a European model based on a strategically autonomous EU. The term strategic autonomy appears to have been first used in a 1994 French White Paper, which defines it as ‘the capacity to act independently in an interdependent world’ (Varma, 2025). It reflected a (French) vision of the EU as an actor that could defend Europe without the US and NATO, necessitating that the EU and its Member States acquire the relevant military capabilities, create military command structures and doctrines, forge a common strategic culture, and build a defence industrial base to produce the respective military goods (Besch and Scazzieri, 2020). Over time, however, the meaning of the term has gradually diluted so that today, it means little more than a heightened capacity to act.

Today, the theological debate between Atlanticism and Europeanism is largely obsolete. Even the most ardent proponent of strategic autonomy – France – recognizes the current indispensability of NATO, including the added value of unique elements of NATO such as NATO’s Defence Planning Process (NDPP) and the established command structure, and the necessity to include key European non-EU members like the UK, Norway, and Turkey (French government, 2025, p. 24; Daalder, 2025).

Instead, there are two competing visions for the future of NATO: the *European pillar of NATO* and the *Europeanization of NATO*. This is not to ignore the growing importance of informal, ad-hoc institutions in European security such as the E5, minilateral formats such as the Joint Expeditionary Forces, or new bilateral linkages (Kefferpütz and Bruck, 2025). But these formats are usually designed to support, complement, and/or operationalize NATO’s role, not replace it.

What the two models for the future of NATO have in common is that they both foresee greater European responsibility for Europe’s defence, assuming that some shifting of the burden of defending Europe from the US to European allies is inevitable. Indeed,

given the combination of structural forces driving the US and Europe apart, and the prominence of agents in the current US administration willing to translate these forces into reality, it is almost consensual that the transatlantic status quo is untenable (Schütte, 2024). Both visions also transcend the old divide between NATO and the EU, instead emphasizing the importance of the EU as a 'strategic enabler of NATO' (Koenig and Schütte, 2023, p. 64). By facilitating greater national defence spending, supporting the ramp-up of the defence industrial base, and incentivizing greater cooperation in development and procurement by using its growing toolbox, the EU has a critical role to play in helping Member States realize NATO's capability targets and the wider rearmament of the continent. While residual bureaucratic tensions remain between the two organizations, mostly gone are the days when EU initiatives in security cause gasping at NATO HQ.

Where the two models differ is the end point: will there be *less* America or *no* America in the future? The premise of the European pillar of NATO is the dual nature of the alliance, as originally envisioned by Kennedy. That is, it assumes that the US will remain an active member of the alliance, even if it abdicates its current hegemonic leadership role and reduces its military presence. While it acknowledges shifting US priorities toward the Indo-Pacific, including the need to relocate selected assets, and growing scarcity of resources that place limits on US engagement in Europe, the pillar vision assumes that the US maintains central security interests in Europe (Desmaele, 2023). Greater European efforts thus allow the US to shift capabilities elsewhere while demonstrating European willingness to shoulder a greater burden. The pillar vision is thus fundamentally about a new division of labour for Europe's defence. Proponents of this view variably dismiss NATO-hostile rhetoric by the Trump administration as a bargaining tactic to drive greater European efforts or highlight that the US troop presence in Europe, as well as support for NATO in Congress and among the US military establishment, persists.

In contrast, the Europeanization of the NATO model implies that, at least over time, the Europeans (and Canada) take over NATO's core functions and replace the US. While that does not necessarily mean a formal US withdrawal, the objective would be for the Europeans to develop military autonomy, or a complete force package (Biscop, 2025). This is then not a new division of labour but a takeover. Here, the assumption is that the US will no longer be able and/or willing to defend the European continent. Even before Trump's return to the White House, the growing scarcity of resources coupled with the simultaneity problem in US defence planning, namely the assumption that a Russian attack on NATO would be synchronized with a Chinese attack on Taiwan to split US forces, cast doubt on whether the US would be able to significantly support European defence against Russia (Schütte, 2025a). Under the second Trump administration, for the first time in 80 years, the US grand strategy appears no longer Eurocentric. From the original 28-point plan for Ukraine that treated the US as a neutral mediator between NATO and Russia and gave in to many of Moscow's maximalist demands, via the National Security Strategy that underscored the administration's political

contempt for mainstream European political parties, through to the threats of aggression against Denmark in a dispute about control over its autonomous territory Greenland, the Trump administration speaks and behaves as if it no longer has core security interests in Europe. As a result, the credibility of the US security umbrella has been severely damaged (Schütte, 2025b).

Notwithstanding their conceptual differences, the two visions for the future of NATO may not be mutually exclusive but merely sequential steps on the path toward European defence autonomy. Strengthening the European pillar by taking over a greater share of the burden will aid the long-term Europeanization of the alliance. However, this logic needs nuancing. Europeanizing NATO involves duplicating certain capabilities that the US currently provides, irrespective of announced retrenchment plans, whereas strengthening the pillar is a response to US retrenchment plans and implies replacing only those capabilities that both the US says it will no longer provide and are needed to deter Russia. Given the time pressure on European rearmament in light of the acute Russian threat and the development and procurement times for certain systems, sequencing the two steps risks taking too long (Gilli et al., 2025). In other words, *if* Europeans doubt the credibility of the US security umbrella, they cannot wait until they have replaced those systems that the US initially said they will no longer provide before replacing the remaining US capabilities. In practice, the difference between the two visions depends on the extent of the announced US withdrawal. The more the US withdraws (or announces that it will), the less is left to duplicate, and vice versa.

4. Operationalizing the European pillar

Strengthening the European pillar implies that Europeans take over certain shares of the burden of defending the continent that the US currently provides. But the concept is indeterminate which exact shares Europeans should shoulder – a central reason why the concept has been used ambiguously throughout its history. In theory, anything from merely providing more of the same fighting mass – such as aircraft, tanks, and missiles – to providing almost all of the conventional capabilities, enablers, and command positions counts as strengthening the European pillar.

Thus, operationalizing the European pillar based on *less America* initially requires specifying the current role that the US plays within NATO. The US contribution consists of four major elements. First, the US provides significant conventional military assets in terms of troops and capabilities deployed on the continent. At present, around 100,000 US troops are stationed in Europe (around 35,000 of which on a rotational basis) as part of five brigade combat teams. The US army also maintains permanent bases in Germany and Poland and four logistical sites to preposition stock. The US Air Force has deployed seven squadrons across the UK, Italy, and Germany. Six US Navy destroyers are based in Spain, while aircraft carriers regularly deploy to Europe and the Mediterranean (Jones and Daniels, 2025). And in the event of a major contingency, the US could seek rapid reinforcement from forces from beyond those currently assigned to the US European Command (Barry et al., 2025).

Second, the US provides the bulk of strategic enablers (Lange and Pothier, 2026). These include intelligence, surveillance, and reconnaissance (ISR) capabilities such as satellites, surveillance aircraft, and data processing means. They also include integrated air and missile defence, heavy airlift aircraft, and air-to-air refuelling tankers. Third, the US provides the extended nuclear deterrent. At the moment, the US deploys around 100 tactical nuclear bombs across five countries in Europe and possesses the world's largest nuclear arsenal (Kristensen and Korda, 2023). And fourth, US personnel fill key positions within NATO's command structure, including the strategic leadership role of SACEUR. The US contribution thus extends far beyond troops and capabilities and includes the 'connective tissue' (Scazzieri, 2025) that allows NATO allies to fight effectively together.

Concretizing the European pillar based on *less America* then requires engaging with plausible plans for US retrenchment from Europe. There is some academic work on different scenarios, ranging from the US withdrawing almost all assets bar the nuclear deterrent to only returning to a pre-2022 force posture (Simon and Boswinkel, 2025). Official details on US retrenchment plans remain scarce at the time of writing, as the Global Posture Review is yet to be published. Nonetheless, US officials have made abundantly clear that they intend to withdraw a significant number of conventional

assets from Europe. Secretary of Defense Hegseth told fellow NATO defence ministers in February 2025 that they needed to ‘take ownership of conventional security on the continent’ (Hegseth, 2025). The US National Security Strategy echoed these sentiments, urging Europeans to take ‘primary responsibility’ for their defence (White House, 2025, p. 12). The National Defense Strategy published in January 2026 merely offered the addendum that the US will offer ‘critical but more limited’ support (US Department of War, 2026, pp. 4ff). According to a widely discussed but as of yet unconfirmed report, Pentagon officials recently told their European counterparts that the US expects Europe ‘to take over the majority of NATO’s conventional defense capabilities, from intelligence to missiles, by 2027’ and that ‘if Europe does not meet the 2027 deadline, the U.S. may stop participating in some NATO defense coordination mechanisms’ (Slattery and Pamuk, 2025). Yet, the US administration ensured that the position of SACEUR would still be filled by an American – General Grynkewich took up this post in July 2025.

Greater detail on a potential US withdrawal of conventional assets can be found in reports published by influential voices in the MAGA ecosystem. Sumantra Maitra coined the concept of ‘Dormant NATO’, which reconceptualizes the role of the US from a primary security provider with a strong forward presence to balancer of last resort. To achieve this, Maitra advocates for, eventually, removing ‘all American artillery, armour, and infantry’, though nuclear forces and limited air and naval assets could remain in Europe (Maitra, 2023).

Similarly, a report by Alex Velez-Green (now the nominated Deputy Undersecretary of War for Policy) and Robert Peters for the Heritage Foundation argues that ‘NATO allies must take primary responsibility for Europe’s conventional defense. That includes providing most if not all of the conventional forces required to defeat Russian aggression against NATO’ (Velez-Green and Peters, 2025, p. 16). They urge the US to urgently withdraw those forces ‘required for a Taiwan contingency’, which likely include: ‘submarines and surface combatants; heavy bombers; fighter, electronic attack, maritime patrol, and airborne early warning and control (AEW&C) aircraft; air and missile defenses; certain ground-based long-range fires; critical munitions for air, naval, and ground platforms; and critical enablers, such as airlift, sealift, and intelligence, surveillance, and reconnaissance (ISR) assets’ (Velez-Green and Peters, 2025, p. 17). The authors add, in ominously vague terms, that the US should only keep ‘as conventional forces that are not required to defend the U.S. homeland or deter China and do not need to be divested in service of those higher priorities’ (Velez-Green and Peters, 2025, p. 7). Like Maitra and a number of other influential accounts (Miller, 2025, p. 94; Colby, 2022), they do support maintaining the US nuclear umbrella (Velez-Green and Peters 2025, pp. 16ff). However, these accounts ignore that the withdrawal of conventional forces will likely undermine the credibility of US nuclear deterrence not only because it shows reduced willingness to assume the costs of defending Europe but also because it deprives the US of escalation options short of the nuclear response. Europeans could thus be forced to consider unpalatable alternatives to the US nuclear umbrella. These include individual states acquiring nuclear weapons (or nuclear latency), creating a

Eurodeterrent that is usually shorthand for expanding the role for French nuclear weapons in a new nuclear-sharing arrangement, or doubling down on non-nuclear strategic weapons such as long-range, deep precision strike capabilities that, due to their growing effectiveness, could increasingly serve as deterrent (Bunde et al., 2026; Ellison et al., 2025).

If taken as authoritative, these reports from within the MAGA ecosystem, combined with the available official comments, suggest that over time the US will likely withdraw most conventional capabilities. Indeed, the increased US military attention to its immediate neighbourhood amid the resuscitated ‘Monroe Doctrine’ (White House, 2025) only intensifies the competition for US resources and attention among the different regions (Gawthorpe and Wood, 2025), and likely further relegates Europe among the US strategic priorities (Schütte, 2025).

However, for Europe to replace all of those US capabilities and enablers that are subject to withdrawal is an unrealistic proposition. Regardless of how determined the European rearmament effort is, European hardware and software gaps are too vast to be completely plugged in the short to medium term (Barry et al., 2025). Instead, European procurement should prioritize those assets that are most urgently needed to deter Russia. This requires a strategic shift, which Schütz and Mölling (2025) call a ‘European way of war’. And, indeed, European NATO allies need to develop what may also be understood as a ‘European way of defence’. That is, Europeans need to forge their own defence plans and doctrines based on existing and realistically acquirable capabilities, rather than relying on US material superiority and US conceptions of how to fight wars. To that end, Ellison and Sweijs propose in a recent paper that Europeans should pursue a ‘regionally specialized dual “shield and spear” posture’ which prioritizes conventional (deep precision strike) capabilities to deter Russia by denial and punishment, complemented by UK and French nuclear forces (Ellison and Sweijs, 2026). A European way of defence should also closely integrate Ukraine, as its experience in territorial defence and drone warfare constitutes a vital asset.

Providing a detailed to-do list for European defence planners extends beyond the scope of this study, not least because minutiae on the US withdrawal remain unclear. But operationalizing the European pillar will inevitably require significant European efforts in terms of conventional capabilities, enablers, and command and control.

In terms of troops, it is clear that the Europeans will have to provide the bulk of personnel needed for NATO’s defence plans. The current NATO Force Model is based on a three-tier system: within the first 10 days of a contingency, 100,000 troops should be available; within 10 to 30 days, another 300,000 troops; and within one to six months, 500,000 more troops. A task force report by the Belfer Center calls for Europeans to provide 70–80% of all of those forces by the end of the decade (Daalder et al., 2025, p. 12). Given the cumulative size of European militaries – in total, European NATO allies have around 1.5 million active military personnel – this should be a manageable task, at

least on paper (SIPRI, 2024). However, unlike US troops in Europe, many European land forces currently lack the readiness to be rapidly deployed (Barry et al., 2023).

In terms of strategic enablers, European dependencies on the US remains vast, but some gaps are more urgent than others. For example, given their importance for the Indo-Pacific theatre, replacing heavy airlift aircraft, air-to-air refuelling tankers, and ISR drones appear among the most pressing tasks for Europeans (Bergmann and Svendsen, 2025). Moreover, Europeans need to invest in the stockpiles of essential ammunitions – from artillery, via air defence, to long-range missiles – which also requires ramping up the respective defence industrial capacity to produce them at scale.

Finally, the European reliance on US capabilities and enablers is reflected in NATO's command and control structure. In debates dominated by defence spending and, to a lesser extent, capabilities, it is often neglected that US officers disproportionately staff key positions in NATO's headquarters and integrated command structure. It is imperative that Europeans assume greater operational responsibility to reduce their dependence on US officers, even if the US keeps the position of SACEUR.

5. Realizing the European pillar

Defending the continent with only limited US support is an enormous task for the Europeans. To realize the European pillar, far-reaching reforms are needed to at least partially replace US troops, capabilities, and enablers, as well as to increase operational responsibilities. To do so, deeper EU defence integration and closer cooperation between the EU and NATO are prerequisites for several of the following recommendations.

First, significantly increasing defence spending across the continent is the prerequisite for the necessary pan-European rearmament. The overall investment needs are vast. The Stockholm International Peace Research Institute (SIPRI) estimates that to meet NATO's new five-percent spending target, annual defence spending among European NATO allies would have to increase from 454 billion dollars in 2024 to 1,647 billion dollars in 2035 (Tian et al., 2025). And even if the more realistic target is 3.5 percent of core defence spending, this still involves a massive increase from the current average among European NATO allies (and Canada) of 2.27 percent (NATO, 2025). Indeed, the European Commission suggests additional funding needs of 500 billion euros over the next decade (Bayer and Gray, 2024). While countries close to Russia already spend prolifically and Germany has also already laid out ambitious budgetary plans to spend 3.5 percent by 2029, there are serious doubts over whether, or how swiftly, key countries in Western Europe can significantly increase their defence budgets given widespread budgetary constraints.

There are three broad funding options (Koenig and Schütte, 2025, pp. 6–7). First, governments can increase national defence spending. The European Commission's ReArm Europe plan injected greater flexibility into the EU's fiscal rules for countries to spend more on defence and created the Security Action for Europe instrument to offer EU Member States up to 150 billion euros of loans for joint procurement. However, greater flexibility for national defence expenditures and the availability of cheaper loans, which would add to national debt levels, will do little to alleviate the budgetary pressures that many countries face (Beetsma et al., 2025). Second, EU Member States, the Commission, and the European Parliament should collectively ensure that in the negotiations for the next Multiannual Financial Framework (MFF), initiatives to incentivize joint development and procurement are adequately funded. EU initiatives such as the European Defence Industry Programme and European Defence Fund have long lacked financial heft, and even the most ambitious plan by the Commission would only raise annual spending on all defence and space initiatives to less than 20 billion euros – a paltry sum compared to national spending and thus unlikely to have a structural impact (Koenig and Schütte, 2025). As such, the increases in defence spending proposed by the European Commission for the MFF 2028–34 are a step in the right direction. Third, EU Member States could issue joint debt for defence to help fund European public defence goods, such as support for Ukraine or capital-intensive projects like a pan-European air defence structure (Scazzieri and Tordoir, 2024). For marketing

reasons, it could be called a Special Help Initiative for European Long-Term Defence (SHIELD). Joint debt instruments are politically the most sensitive option and controversial in countries like Germany. But during the Covid crisis, the EU did set a precedent with the NextGenerationEU instrument. And the twin shock of Russia's war and potential US abandonment could create a window of opportunity. Indeed, the three funding options are not mutually exclusive and should be pursued in parallel.

Second, it is imperative to reform the European defence industrial base to ensure that the additional spending translates into additional capabilities. As a recent Heinrich Böll Foundation study by Sophia Besch outlines, Europe's defence industry remains fragmented on both the supply and demand side, which drives up costs and hampers the interoperability of military goods (Besch, 2025a). Moreover, Europeans spend too little on innovation, buy too little equipment from other European countries, and buy too much from third countries. And supply chains face critical dependencies for important weapon systems. However, Member States remain reluctant to empower the Commission, and, in practice, existing collaborative projects have often been costly and delayed.

It is principally for the biggest spenders in Europe to overcome their home bias in procurement and drive collaborative efforts to procure and develop necessary capabilities (Burlikov et al., 2025). Germany has indeed started to act as a lead nation for procurement to aggregate demand, including for artillery munition and air defence. But joint development projects, such as the Franco-German-Spanish Future Combat Air System are plagued by industrial rivalries and delays that are jeopardizing the very project. Finally, the big European states need to lead by example on creating a single market for defence and avoiding defence industrial protectionism. Doing so requires avoiding the excessive use of the national security exemption in EU treaties (Article 346 of the TFEU), which allows exempting defence industrial orders from European competition. Instead, Member States should support the Commission's defence omnibus package to streamline and accelerate procurement, permitting, and cross-border cooperation regulations.

Third, it is vital that European NATO allies agree on a concrete plan which capabilities and enablers to prioritize in order to deter Russia with *less* America. This also means proactively developing a timeline for when Europeans will replace which US assets. Such a plan with measurable benchmarks – which will have to be agreed upon based on military advice – will both focus minds and ensure accountability. This author has elsewhere called this a *European Burden-Seizing Initiative*, to seize the initiative before it is too late and the US presents Europe with a *fait accompli* (Schütte, 2024).

The most obvious place to start is to revise NATO's intricate NDPP. The NDPP is NATO's defence planning instrument that provides a common framework to identify military requirements, derive necessary capabilities, and apportion minimum capability requirements for each individual ally. However, the NDPP continues to assume a significant US role, untethered from the political reality. While details are classified,

NATO Secretary-General Rutte remarked that the US still delivers 44% of all capabilities, with this figure set to reduce to a still substantial 30% by 2032 (Rutte, 2025). To forge a European way of defence, NATO's defence plans have to wrestle with a much-reduced role of the US, something which the NATO leadership has hitherto been reluctant to do out of a (misguided) fear of creating a self-fulfilling prophecy (Schütte, 2025b).

The EU has tried to fill that void with its own defence planning processes – such as the Coordinated Annual Review on Defence – to identify European capability priorities. But these processes have lacked support from key Member States and exclude key allies such as the UK, Turkey, and Norway. NATO thus remains the institution to conduct defence planning, but there is hitherto unexplored potential for creating much greater synergies with the EU. Indeed, for the first time, EU Member States that are also part of the alliance agreed to share their 2025–2028 NATO capability targets with the EU, thereby laying the foundation for aligning EU initiatives with NATO targets. Member States should push for this to become a regular, binding exercise. Ukraine should also be integrated into revised defence plans, given the important role Kyiv could play in the defence of Europe if its Euro-Atlantic integration proceeds.

Fourth, European ministries of defence need to address recruitment and retention issues that threaten to hamper its efforts to increase the size and readiness of European armed forces. Increasing the attractiveness of military jobs is imperative. Across the continent, armed forces have struggled to retain experienced personnel due to more attractive working conditions in the private sector, drains on family life, and workplace culture issues, among others (Kremidas-Courtney, 2025).

Fifth, European allies also need to rebalance NATO's command structure, even if the US keeps the position of SACEUR. Ellison and Sweijs note there is actually no shortage of European staff given the plethora of European headquarters, structures, and initiatives – from NATO, via the EU and the Joint Expeditionary, through to NORDEFECO. They suggest that existing structures need 'streamlining into regional commands' (Ellison and Sweijs, 2026, p. 21). As a corollary, the authors argue that Europeans (and Canadians) should take over important command positions, including the Joint Force Command in Naples and Norfolk as well as NATO's air and land commands (Ellison and Sweijs, 2026, pp. 30ff). In a broadly similar vein, Ruiz Palmer and Simon propose a four-step roadmap to rebalance the NATO command architecture and strengthen European operational capacity. To do so, they suggest 'moving beyond nationally bounded force structures in favour of deep multinational integration' by creating multinational army-level commands, air strike forces, and fleets with staff from various European states to drive European force integration and interoperability (Ruiz Palmer and Simon, 2025, p. 16). In subsequent steps, NATO's Joint Force Command Norfolk should be relocated to Europe and leadership of all of NATO's joint force commands transferred to European officers, before Europeans gradually taking over domain-specific commands (air, land, and maritime).

Sixth, Europeans need to synergize the growing patchwork of governance formats across the European defence architecture. NATO and the EU continue to be the two focal organizations in European defence, but, as detailed above, the inter-organizational relationship needs deepening to ensure the EU can truly act as the enabler for strengthening the European pillar. Moreover, there is also an increasing number of regional and issue-specific intergovernmental coalitions – from the coalition of the willing for Ukraine, via the Nordic-Baltic Eight, through to procurement coalitions like the ELSA initiative – created in response to perceived gridlock at NATO and/or the EU, as well as to speed up decision-making. While many of these initiatives serve important purposes, there is a risk that this fragmented landscape produces inefficient overlaps and confusion (Besch, 2025b). Political leadership by the key European states is needed to ensure coherence – this could come in the form of the E5 format consisting of France, Germany, Italy, Poland, and the UK or, potentially, a new coordinating body such as the European Security Council proposed by, among others, MEP Sergey Lagodinsky (2026) or Commissioner Kubilius (Stanley-Smith, 2026).

6. Outlook: risking the European pillar?

Strengthening the European pillar will place great demands on the Europeans. It implies a new division of labour in which the Europeans provide the capabilities, enablers, and command and control staff that the US will no longer supply and that are needed to deter Russia. This will require far-reaching reforms regarding European defence spending, defence industrial cooperation, defence planning, recruitment policy, NATO's command structure, and the governance of European defence.

And yet, just strengthening the European pillar may still be overly optimistic because it assumes that the US will remain an active member of the alliance. Rather than planning for *less* America, it therefore may be prudent to prepare for *no* America – at least for as long as Trump or one of his disciples is in the White House. In that case, rather than strengthening the European pillar, Europeanizing NATO would be the goal. That means that Europeans could not rely even on a limited amount of US capabilities and enablers. They would also have to replace US leadership in NATO, including the position of SACEUR. And most consequentially, they would have to make do without the US nuclear umbrella, leaving the Europeans with a range of unpalatable options.

NATO's history is famously one of crises and Trump already came close to announcing a withdrawal from the alliance during his first term. But this time appears different. Europeans have no choice but to rise to the challenge to defend the continent with *less* or plausibly *no* America. 80 years after the Second World War, the post-transatlantic era has begun.

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