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Building a Stronger Europe

A Companion to the Belfer Center Task Force Report on a New Transatlantic Bargain

By R. D. Hooker, Jr. with Max Molot

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Overview

Today the need for stronger and more self-reliant European security is more urgent than ever. This report examines the state of transatlantic security in an era of persistent conflict, marked by large-scale Russian aggression in Europe, the rise of China, and continued instability and violent conflict in the Middle East. Though still a vital U.S. interest, Europe is no longer America's first national security priority. With a population and collective economy far larger than Russia's, as well as growing defense budgets, an impressive defense industrial base, advanced technology, and an overall force structure significantly larger than that wielded by Moscow, Europe can and should assume greater responsibility for its own defense. A stable and secure transatlantic community, as well as continued US support, depend on it. However, readiness and interoperability shortfalls, capability gaps, and differing threat perceptions must be addressed. Above all, allies must find the political will to generate and sustain effective deterrence and defense, with the United States in an important but supporting role

The transatlantic security environment has changed dramatically in recent years, with collective security and the territorial defense of Europe returning as the most urgent priority following Russia's full-scale invasion of Ukraine in 2022. At the same time, U.S. domestic support for the NATO Alliance has eroded, fueled by perceptions that Europe is not doing enough to provide for its own security. While American economic prosperity and national security remain dependent on a stable and peaceful transatlantic region, the United States faces multiple global challenges and competing demands. Accordingly, European security must be strengthened if the Alliance is to survive and prosper. As the largest war since 1945 rages on its doorstep, NATO's ability to deter Russian aggression is depends more than ever on capable and resilient allies. On both sides of the Atlantic, new leaders are coming forward to face these threats. They face both challenges and opportunities. Perhaps none is more important than a new security relationship grounded in a stronger Europe.

There are of course competing demands and challenges. Coordinating defense and security policy across dozens of European polities, with different histories, interests and strategic cultures, is at best challenging. Despite collective defense obligations enshrined in the Washington and Maastricht Treaties, states that feel geographically removed and less threatened will be inclined to contribute less. Others, such as emerging democracies with weaker economies and more fragile governance, may welcome NATO and EU security guarantees without committing to the investment required to be security providers and not just consumers. A long and destructive European history of conflict lowers the propensity for military service and support for defense investment and preparedness. Extensive social safety nets and high domestic spending, as well as rising debt levels, push against defense spending across Europe. In some cases, long histories of neutrality, or proximity to (and in some cases occupation by) Russia prevent more active contributions. The rise of far right or nationalist parties, coupled with increasingly autocratic states inside Europe, can obstruct consensus-building and a shared view of the threat. Economic competition, tension between national and supranational perspectives, resource disparities, and differing approaches to immigration can obstruct bilateral relations inside Europe.

Transatlantic security is therefore a mosaic, marked by context and nuance, that can complicate concerted and uniform action. Nevertheless, the need is compelling. With major theater war on its borders and political change in Washington, Europe can no longer be complacent in assuming the United States will fill all security and capability gaps. Those days are gone and will not return. With global interests and responsibilities, the United States must see Europe as an important but clearly secondary priority. Europe can and must do much more in its own defense, both to preserve the peace and to ensure continued U.S. engagement and support. The resources are there. To prevail and prosper, Europe must generate the collective determination and resolve to lead in its own defense.

The Threat

The 2022 NATO Strategic Concept clearly identifies Russia as "the most significant threat to Allied security." Following its seizure of Abkhazia and South Ossetia in 2008, the annexation of Crimea in 2014, and the armed occupation of the Donbas in the same year, the Russian Federation and its separatist proxies waged a festering campaign in eastern Ukraine, resulting in more than 50,000 killed and wounded through 2021. Russia then launched an unprovoked, massive invasion of Ukraine in February 2022 that continues today. The war in Ukraine has also roiled global energy markets and contributed to worldwide food shortages due to the interdiction of Ukrainian grain and fertilizer. Direct and indirect costs of Russian aggression in Ukraine caused Ukrainian GDP to drop by more than 30% and led to the largest population displacement in Europe since the Second World War. From a pre-2022 population of more than 40 million, some 6 million Ukrainian civilians have fled the country and another 8 million are internally displaced.

Russian losses have been severe, with as many as 700,000 killed, wounded and missing since the 2022 escalation, more than twice the size of the entire initial invasion force. Losses in ships, tanks, and aircraft have also been extremely high. Nevertheless, the ability of the Russian Federation to replace its losses has been remarkable. Supported by China, Iran, North Korea and others, Russia has managed to evade sanctions to obtain the microchips and other electronics it needs to manufacture and repair its advanced military technology. Now on a war footing, and with new markets in China, India, and elsewhere for its energy and agricultural products, the Russian economy has actually expanded since 2023 despite strong international sanctions. Though it has sustained grave losses, Russia remains a formidable, capable and determined adversary that is slowly making incremental gains in Ukraine.

As Russian President Vladimir Putin has repeatedly asserted, his ambitions go beyond Ukraine to encompass the recovery of former imperial territories lost over the centuries and the restoration of Russian prestige and influence on the world stage. NATO allies Estonia, Latvia, and Lithuania are regular targets; all possess ethnic Russian minorities that are, according to Russian propaganda, oppressed and treated as "sub-human." Standing between Russian territory and the Russian exclave at Kaliningrad (home to the Russian Baltic Fleet), the Baltic States are a high priority for Russian disinformation and subversion. Poland's geographic proximity, growing military power, and long conflict history with Russia make it another particular focus, with senior Russian leaders characterizing the staunch NATO Ally as a "dangerous enemy" whose continued existence as an independent state is at risk.

The Russian Federation today is an aggressive, revanchist state determined to restore its former glory and its place as a great power. In addition to Ukraine, Russian troops occupy Moldovan and Georgian sovereign territory and are based in Armenia as well. With a powerful conventional military and the world's largest nuclear arsenal, Russia has used force repeatedly and successfully in recent years to achieve its political aims. Russian aggression and expansion align with a worldview and strategic culture with deep historical roots. Should the war in Ukraine degenerate into yet another frozen conflict, as now seems likely, Russia will continue to rearm and reconstitute its forces, posing a serious threat to the transatlantic region. Russian hybrid warfare – subversion, sabotage, propaganda and disinformation – will continue to play a prominent role.

Nor is Russia the only strategic challenge facing Europe and the transatlantic arena. Though not posing a direct military threat to Europe, European trade dependencies with China, close military and economic ties between Russia and China, the nexus between the Chinese Communist Party and autocratic regimes around the world, and China's advanced and often-demonstrated cyber capabilities are cause for concern. Apart from opening markets and creating favorable trade conditions, China's strategic aim is apparently to drive wedges between Europe and others – especially the United States – in support of broader Chinese foreign policy and security goals. Though not a formal alliance, Sino-Russian cooperation poses the greatest threat to the international order in decades. The rise of far-right, ultra-nationalist movements, supported by Moscow and open to accommodation with autocratic regimes, is a serious related concern. Illegal immigration, terrorism, transnational criminal organizations, pandemics, climate change, global food insecurity, disruption in supply chains and instability in Africa and the Middle East are also cited in NATO and European Union strategic documents as real problems requiring urgent solutions. However, with major theater war underway on its borders, Europe must see Russia as its first and most dangerous security challenge.

American interests are also affected by Russian state behavior, which directly challenges U.S. leadership of the transatlantic community and the international order, a rules-based system that has greatly contributed to American and global prosperity and avoided direct conflict between great powers. Russia's well-documented interference in U.S. electoral politics poses a direct threat to the integrity of elections and to confidence in American democracy and democratic institutions worldwide. The European Union conducted $976 billion in two-way goods trade with the United States in 2024, more than 18 percent of total U.S. goods trade. This outstrips trade with the largest U.S. bilateral partner, Mexico, by more than $130 billion and outstrips trade with China by almost $400 billion. U.S. trade ties with Europe are essential to American prosperity; large scale Russian aggression in Europe could affect the U.S. economy dramatically. Moscow's ties to Iran and its surrogates help to destabilize the Middle East and divert American focus and resources to that region – even as its regular coordination with the Gulf States and Saudi Arabia give it leverage in international energy markets. (These activities will not be materially affected by the fall of the Assad regime in Syria). Russian collaboration with China in virtually all domains—military, economic, political and informational—also magnifies and complicates threats to U.S. national security in ways that directly challenge U.S. vital interests.

Looming over all is Moscow's increasingly bellicose nuclear posturing. Far better equipped than the United States with air, sea and ground-launched delivery systems below the strategic threshold, and with a significantly larger nuclear inventory, Russian threats to use nuclear weapons exert real pressure on U.S. allies and complicate an already troubled strategic landscape. The suspension of arms control agreements such as New START and Russian investment of hypersonic and other nuclear delivery technologies amplify these concerns. Fear of escalation that might lead to a nuclear exchange colors U.S. diplomacy and strategic thinking, a reality well understood in the Kremlin.

Major Issues in the Transatlantic Relationship

After a rocky period from 2017 to 2020, and despite strenuous efforts by Putin to sow dissension between Europe and the United States, the transatlantic relationship has shown remarkable unity since the invasion of Ukraine in 2022. The war has unquestionably served as a "wakeup call" for Europe, spurring increases in defense spending and bringing allies together in response to a common threat. The ongoing conflict powerfully demonstrates Europe's actual and potential contributions to regional security. Heavily dependent on Russian energy before the war, Europe has largely turned to other sources, a major accomplishment. Since February 2022 the European Union has contributed more than $101B in financial, military, humanitarian and refugee aid to Ukraine, with another $54B in prospect. Non-EU members Britain and Norway have contributed another $12B and $4B respectively. European states have provided large quantities of ammunition and equipment to stiffen Ukraine's defense against a much larger and stronger adversary, along with large-scale intelligence sharing and training programs. (Per capita, allies like Poland, Norway, and the Baltic States have contributed significantly more than the United States.) However, following U.S. policy, long range fires, airpower, and other capabilities have been withheld or only provided in limited quantities by most European donors, limiting Ukraine's offensive potential.

NATO and the European Union

The North Atlantic Treaty Organization has served as the principal security provider for the transatlantic community since 1949 and remains so today. From an original 12 members, the Alliance has grown to 32 today. NATO allies and official partners constitute approximately 70% of the world's economic and military power and provide essential overflight, basing, and intelligence support. Though outwardly united, there are fissures in NATO. The Nordic and Baltic States along with Poland and Romania understandably view the threat from Russia as more severe; their defense spending, military readiness, and contributions to Ukraine are greater per capita than other allies. Though NATO maintains an official "open door" policy, in practice, admission for states like Ukraine or Georgia has been effectively suspended over concerns about possible Russian reactions. Turkey, Hungary, and Slovakia are difficult allies; all maintain closer relations with Moscow and continue to buy Russian energy and other commodities. As NATO operates on the principle of unanimity, should conflict with Russia erupt, these factors could complicate an effective Alliance response.

Though primarily an economic and political organization, the EU performs security functions in line with its Common Security and Defense Policy (CSDP). Composed of 27 member states (the UK withdrew in 2020), it maintains a standing military committee with senior representatives from member states. Many NATO military representatives perform the same function with the EU, as both organizations are based in Brussels. Twenty-three NATO allies are also members of the EU. The EU's European Defense Agency is structured to assist integration and improve defense capabilities in support of the EU's Permanent Structured Cooperation (PESCO) initiative. Like NATO, the EU is chartered by its founding document, the 1992 Maastricht Treaty, and by the Lisbon Treaty (2007) to provide collective defense, though unlike NATO, the EU does not have a permanent standing operational headquarters. The EU is currently engaged in 21 military operations, mostly focused on capacity building and monitoring.

Both located in Brussels, NATO and the EU conduct regular consultation. While sometimes seen as a potential competitor with NATO as an autonomous security provider, the EU is not structured to conduct high intensity, major combat operations and is best seen as a strategic partner and not an alternative to NATO. Both organizations should strive to strengthen NATO-EU cooperation across the range of security and defense tasks.

Burden Sharing

For the past decade, debates over defense spending have dominated transatlantic relations, impairing Alliance cohesion and driving perceptions of "free riding" on the part of Europe. European defense spending declined following the breakup of the Soviet Union as threat perceptions receded, exacerbated by the 2008 financial crisis. Since 2014 allies have increased defense spending by $600B, including an 11% increase in 2023 alone. In 2024, non-US allies collectively spent 2% of GDP or slightly more than $500B on defense, more than four times that of Russia. Collectively, the allies reached the 2% of GDP target in 2024, with frontline states Poland, Estonia, Latvia, Lithuania, Finland, Sweden, and Romania going well beyond. However, important allies like Canada, Italy, Spain, Portugal, Belgium, and the Netherlands remain well below the 2% of GDP goal for defense spending. To preserve Alliance cohesion and build a stronger and more self-reliant Europe, allies must maintain 2% of GDP defense funding as a spending floor across NATO, individually and collectively, and where possible increase spending to offset years of underinvestment.

Readiness

Despite higher defense spending, overall *readiness* of NATO's European allies is a pressing concern. Even with healthier budgets, major powers like the UK, France, and Germany suffer from readiness issues and a lack of enablers that hinder performance. Many allies field only nominal – in some cases no – air forces. Many also possess active land forces of only a single brigade, despite populations and economies that can and should support larger formations, not to mention strategic threats that demand them. Costly volunteer forces are the rule, limiting the ability to generate reserves. These trends degrade deterrence and constitute a wedge or "seam" that can be exploited by adversaries to undermine Alliance cohesion.

Readiness can be defined as fully manned, fully trained, well-equipped, and well-maintained forces able to deploy within theater in strategically meaningful time frames. This concept implies much more than solely the existence of combat forces or systems. As seen in Ukraine, modern warfare consumes resources at an astounding rate; therefore, adequate stocks of munitions, fuel, spare parts, and other critical supply items must be available, supported by an industrial defense base that can sustain and support operations over time. Reserves must be available to replace casualties. "Enablers," supporting arms and services such as logistics, maintenance, air and missile defense, engineer, electronic warfare, military intelligence, and medical units are critical components of readiness; the existence of large units on paper means little without them. European nations, almost without exception, also lack force projection capabilities, such as strategic air and sealift, prepositioned equipment sites, and tanker aircraft.

NATO has attempted repeatedly to boost its readiness, most recently at the Madrid Summit in 2022, which announced a new "NATO Force Model" to replace the NATO Response Force (NRF) and Very High Readiness Joint Task Force (VJTF). In Madrid, allies agreed to a tiered system, with 100,000 troops ready to move in ten days, 200,000 in thirty days, and 500,000 in 180 days (This model is intended to support a classified "family of plans" which together implement NATO's Concept for Deterrence and Defense of the Euro-Atlantic Area or DDA, approved by heads of state and government in 2021.)

These goals are ambitious. What is unclear is how the Alliance will translate these concepts into actual readiness, where earlier attempts have failed. On the whole, allied naval forces are adequate relative to the Russian navy. Moreover, many allies beyond the United States field very capable special operations forces that are already aligned under NATO's SOF command. However, much remains to be done in other domains.

To overcome these deficiencies, NATO should push strongly for specific and verifiable standards, proctored by the Supreme Allied Commander Europe (SACEUR) and NATO component commanders (AIRCOM, LANDCOM, MARCOM). Large powers (the UK, France, Germany, Poland, Italy, Turkey) should be expected and required to provide an air wing with 4th and 5th generation fighters and a fully equipped mechanized division with tanks and supporting artillery, ready to move 14 days from notification. Regional blocs (the Nordic states, Spain and Portugal, the BENELUX countries) should provide interoperable composite wings and divisions. Given the imminent threat they face, Estonia and Latvia should each expand their forces from one active brigade to two, financed in part through security assistance from wealthier allies (Lithuania is in the process of expanding its land forces to division strength.) Medium-sized allies (Canada, Greece, Romania, Bulgaria, Hungary) should provide trained and ready brigades and air squadrons. Smaller allies (Luxembourg, Albania, North Macedonia, Croatia, Montenegro, the Czech Republic, Slovakia, and Slovenia) can contribute battalion battlegroups to defend command posts, logistics nodes and critical infrastructure

NATO and national leaders should ensure that these forces are truly ready – fully trained, manned, equipped, and supported with ammunition, fuel, supplies and spare parts for up to six months of high intensity operations. Corps and divisional-level enablers are imperative, including electronic warfare and air defense units, a clear lesson from the conflict in Ukraine. Regular exercises to test readiness and interoperability are a must. An appropriate U.S. contribution is two divisions—one permanently based in Europe, and one flown in from the continental United States (CONUS) to fall in on prepositioned equipment—and four air wings. Such a contribution would constitute about 20% of available U.S. forces, corresponding to the importance but not dominance of Europe among U.S. strategic concerns. This force structure translates into 14 ready division-equivalents and 14 air wings across the NATO Alliance, most of which are European. It is well within the capabilities of allies at current funding levels and adequate to deter and defend against the Russian threat.

At the corps level, NATO currently has nine "rapidly deployable" corps headquarters, but all lack many of the enablers that constitute true corps-level capability. The forces described above require three corps headquarters (doctrinally, a corps can provide command and control of two to five divisions). The U.S. V Corps, based in the United States with a forward headquarters in Poland, is one. The Allied Rapid Reaction Corps (ARRC), based in the UK, is another – but requires the addition of significant enablers to achieve full readiness. NATO's Multinational Corps Northeast in Szczecin, Poland, is the best candidate for the third, but again requires significant augmentation. Currently, no battle-worthy field army headquarters exists in Europe to provide command and control for these corps. The best option here is to build out and strengthen NATO's Land Command to fill this gap.

Of the many security challenges facing Europe today, low readiness is perhaps the most serious. To meet the threat, allies must strengthen readiness across the board with firm, objective standards rigorously enforced.

European Strategic Autonomy

Common funding, greater standardization, and stronger supranational institutions raise the larger question of European strategic autonomy. Partly due to perceptions of U.S. disengagement and declining confidence in U.S. leadership, a push for greater "strategic autonomy" under EU leadership has gained traction since 2016. Sometimes parsed as "strategic sovereignty" in Europe, the push towards reduced dependence on U.S. military assistance and a greater ability to act independently has engaged EU officials (and national leaders, notably in France) since at least 2013. The gradual maturation of EU security institutions, higher defense spending, and a greater appreciation of threats and challenges in the European security space have helped to generate momentum towards stronger European defense.

The European Union's Strategic Compass, published in 2022, charts an ambitious course for the EU but stops well short of asserting EU primacy for security and defense. In some cases, the EU can take on security tasks without significant U.S. assistance. Through greater defense investment, readiness, defense industrial capacity, and interoperability, European security can be enhanced – and given America's many priorities, it must. Yet full autonomy remains at best aspirational – and by no means universally supported in Europe. The idea of autonomy generates concern in some circles, both within and outside Europe, for its perceived deemphasis on NATO as Europe's principal security provider. European leaders generally dispute this, citing the drive for common standards, a more coherent foreign policy, and a more unified stance on climate change, immigration, and democratic values as the core of this concept.

There remains, in any event, a lack of true consensus on threats to European security and what to do about them. This will continue to hinder collaborative action at the European level. For now, and for the foreseeable future, NATO will remain indispensable to transatlantic security across the warfighting domains and in the economic, diplomatic and information arenas as well.

The United States provides the leadership and connective tissue that make transatlantic security work. That should not change. U.S. strategic nuclear weapons, space-based systems, offensive cyber, C4ISR, theater logistics, airlift and sealift, and tanker assets represent massive investments that European states cannot easily match, even collectively. Comprehensive suppression of enemy air defenses (SEAD) is another mission set requiring US capabilities for success.

Where Europe can and should step up is by providing trained and ready air, sea and landpower that exceeds U.S. contributions, and by supporting cyber, space, and informational activities to complement U.S. efforts. For the most challenging security tasks, NATO will remain the principal provider. A stronger, more self-reliant Europe depends upon hearty and sustained NATO-EU cooperation across the range of security and defense tasks.

The European Defense Industrial Base

The current state of defense acquisition and procurement across Europe illustrates the many challenges inherent in a union of dozens of nation-states. Here, national interests regularly trump Alliance needs. As in the United States, European national defense industries enjoy strong political support and employ thousands of workers. While successful joint acquisition programs do exist, such as the A-400M transport aircraft and the Eurofighter, they are far from the rule.

Unquestionably, the United States will remain a major player in European defense acquisitions. Yet European protectionism and national politics will always be strong elements in this equation. For the first time, the EU issued a Defense Industrial Strategy in March 2024, intended to address "years of underinvestment and fragmentation of defense demand along national lines." Streamlining procurement regulations to speed up production times is a primary objective. The strategy's goals are ambitious: for member states to procure 40% of European defense production collaboratively by 2030 and 60% by 2035 (up from 18% in 2022). The EU has provided $1.7B to jump start the initiative. The 2023 European Defence Industry Reinforcement Through Common Procurement Act (EDIRPA) committed $500M to spur joint defense production to address critical capability gaps. Under the auspices of the European Defence Agency, an EU action arm, member states are also pursuing collaborative programs in air and missile defense, loitering munitions, and electronic warfare, an encouraging effort to promote common approaches.

Reducing the number of competing national systems is an important part of the EU's strategy, but encouraging European defense production to compete with American providers is as well. Here the push to strengthen European security may collide with the interests of U.S. defense industries; as Europe expands its capacity and investment it may also reduce its dependence on American defense technology. While U.S. defense systems are likely to remain competitive and even dominant in the European market, a stronger European defense industrial base can mean more reliable supply chains, better logistical support across national boundaries, economies of scale, and quality standardization. A common defense industrial strategy across the European Union will draw opposition in some quarters, principally on grounds of national sovereignty, but it represents the best approach to a more resilient and productive European defense sector. Here, sustained investment is critical if defense industries are to generate the additional infrastructure and expanded work force required.

At the Vilnius Summit in 2023, NATO also announced a Defence Production Action Plan designed to set common standards for ammunition and equipment production and enhance interoperability and standardization. Supported by a Defence Industrial Production Board with subordinate working groups, the board reports to NATO's Conference of National Armaments Directors. NATO documents cite the need for regulatory reform, sustained political will, and long-term investment to address the enormous consumption of resources shown by the war in Ukraine. Since the 2023 Summit, the NATO Support and Procurement Agency has let contracts in the amount of $10B for ammunition. These steps have been accompanied by greater emphasis on NATO-EU coordination in defense production at high levels.

If national interests prove stronger than the collective desire for commonality, as is likely, there may still be opportunities for progress in the form of common programs built locally under license. In this way defense spending can still stimulate national economies and employment. An example is Rheinmetall's Lynx Infantry Fighting Vehicle. Hungary has agreed to purchase 218, under consideration to be produced locally in Hungary under license from the German manufacturer, with many Czech companies involved in the system supply chain. Another example is Poland's Integrated Air Defense System, now being built in partnership with U.S. defense industries, with production lines for key components located in Poland. As older Soviet equipment is retired from former eastern bloc countries, the trend can be towards fewer systems produced in more nations, reducing Alliance logistical burdens and interoperability challenges.

U.S. defense industries, as noted above, are also very active in the European market. Seven allies – the UK, Italy, Belgium, the Netherlands, Poland, Norway and Denmark – are fielding the F-35, with Romania and Spain also showing interest. Other U.S. programs like the Patriot high-altitude air defense system, the M1-series main battle tank, the HIMARS and MLRS wheeled and tracked rocket artillery systems, the Javelin fire-and-forget antitank system, and the shoulder-fired Stinger air defense system find ready European buyers. In part this is due to the greater capacity and advanced technology of the U.S. defense industrial base; urgency of need due to the war in Ukraine and strong U.S. diplomatic pressure to "buy American" also factor in. In some cases, U.S. defense industries partner with European counterparts in joint projects that employ local national workers and production facilities.

Despite encouraging progress, most NATO and EU initiatives are non-binding and dependent on support from dozens of national authorities, which can be concerned about a loss of sovereignty and competing domestic priorities. Promised funding for common development and procurement to date falls far short of actual requirements. The European Investment Bank currently cannot lend to defense industries, something the European Commission is working to correct. Published EU standards for military equipment are not yet closely aligned with NATO's. Though NATO-EU cooperation is as strong as it has ever been, a strong and resilient European defense industrial base will require many years of sustained investment, closer integration, and political will. Polling confirms there is strong support across Europe for more integrated defense investment. With the EU in the lead, European leaders must ramp up the European defense industrial base for greater efficiency, productivity, commonality and agility.

Economic Integration

A major obstacle to building a stronger European security is the lack of a capital markets union. In 2014, European Commission President Jean-Claude Juncker proposed a single European capital market to enable cross-border capital flows and rationalize European financial structures. More than ten years later, that initiative remains a work-in-progress. Without it, the EU and Europe in general will not realize the capabilities needed to mobilize private investment on a massive scale; encourage innovation; support and stabilize economic growth; strengthen the euro as an international currency; and broaden the European investment base. Today, a fragmented banking system across Europe (exacerbated by Brexit, as the City of London is a fulcrum for European banking and capital formation) constrains the European financial system in ways that limit real progress in building European defense. The EU's goal is "a capital markets union to organize Europe's investment landscape into an integrated whole," fostering a financial system equal to the size and strength of the EU's economy — the second-largest in the world. Real gains in European defense and security will largely depend on a more integrated economy with fewer barriers to investment and capital formation.

Deterrence and Defense

With Russian forces permanently poised in Kaliningrad and western Russia very close to NATO borders, moving forces to threatened areas will take time that may not be available. Following the 2014 annexation of Crimea and Russian aggression in the Donbas, NATO deployed "Enhanced Forward Presence" battalions in the Baltic States and Poland as "tripwire" forces. Following Russia's 2022 full-scale invasion, another four were deployed to Romania, Slovakia, Bulgaria, and Hungary. At the same time, NATO announced an intention to expand these formations to brigade size "when and where required," though this has not yet happened.

To buy time for reinforcements to arrive in the event of aggression against NATO members, and to achieve real deterrence against such aggression in the first place, it is imperative that these formations be strengthened along NATO's threatened borders. The tripwire strategy must be replaced with one of robust forward defense, focused principally on the Baltic states, with prepositioned equipment and supplies protected by NATO airpower and air defense. NATO brigades forward deployed in this manner would be counted towards the contributions described above. To achieve real deterrence, NATO must increase its forces on the eastern flank from battalion to brigade strength in Poland and the Baltic States.

Alliance Command and Control

One way to secure European support and buy-in for a stronger defense is to relook at NATO's current command structure, which pre-dates 2022 and was largely designed for an era when Russia was considered a "strategic partner." Today, the United States provides four-star leadership for one of NATO's two "strategic" commands, two of three "joint force" commands and two of three "component" commands. As Europe assumes greater responsibility for its own defense, European military leaders should replace US commanders in some of these posts. (To ensure continued robust U.S. engagement in transatlantic defense, however, the United States should retain the SACEUR position.)

In some other cases, newer NATO members with stronger forces should be represented in the command structure at higher levels. For example, responsibility for NATO's eastern flank currently falls to Joint Force Command (JFC) Brunssum, located in the Netherlands and traditionally commanded by a German or Italian four-star. Given the preponderance of its forces and its proximity to the threat, locating the command in Poland under a Polish four-star, with senior representation by Romania and the Baltic states, is more appropriate.

Similarly, the accession of Finland and Sweden now makes the Nordic region larger than the rest of Europe combined. The aggregate strength of the Nordic states and the sheer size of their territory suggest that a major command, perhaps "JFC North," now makes sense, possibly commanded by a Swedish four-star since Sweden is the largest and most powerful Nordic country. NATO might also consider placing JFC Naples under an Italian four star instead of an American. This kind of adaptation can recognize and encourage important allies and the resources they bring to the table. To build a stronger Europe, the Alliance should revise the command structure to align with current threats and promote greater European leadership and participation.

Interoperability

Defined by NATO as "the ability to act in synergy," interoperability has been a high Alliance priority for many years but remains incomplete. European militaries field 29 different types of warships, 17 different main battle tanks, 20 different fighter planes, and 17 different artillery systems. One 2017 study documented 178 different types of weapon systems across EU member states—148 more than the United States, despite having half the budget. Standardization is therefore a major challenge, while differing fuel and ammunition types and a lack of commonality with spare parts severely complicates Alliance logistics. With 32 allies, the ability to share information and to conduct operations using compatible systems, terminology, and procedures is critical to battlefield success. Insistence on common ammunition standards and technical requirements, as found now with much of the 7.62mm small arms ammunition, 120mm tank rounds, and 155mm artillery ammunition in use across NATO, is a promising strategy.

Strategic culture, sovereignty concerns, defense cuts, technology and resource differences, competing national interests, and the desire to protect national defense industries often militate against interoperability. Overcoming these altogether is unlikely – but a higher degree of commonality and standardization can and should be achieved. To improve interoperability, allies should employ Standardized NATO Agreements (STANAGS), which specify the agreement of member countries to implement a given standard. They should also pursue compatible secure voice/data communications systems, standardized equipment and ammunition types, and regular, large-scale exercises on the scale of the annual REFORGER exercises of the 1980s. This would reflect today's daunting strategic picture, which bears more in common with the Cold War than with the quiescent period that followed.

European Nuclear Capabilities

The world's strongest nuclear power, the Russian Federation fields an array of strategic and tactical nuclear systems that provide a wide range of options on the escalatory ladder. Although France and the UK have nuclear forces totaling some 515 deployable warheads (compared to Russia's 5,600), U.S. strategic nuclear forces (totaling some 3700 warheads with another 1,336 in storage awaiting dismantlement) are clearly essential to strategic deterrence. The United States maintains about 100 tactical nuclear weapons in Europe, in the form of air-delivered B-61-12 gravity bombs stored on air bases in Belgium, Germany, Italy, the Netherlands, and Turkey. Seven allies participate in NATO's "Dual Capable Aircraft" (DCA) program, which provides certified aircrew and aircraft configured to deliver tactical nuclear weapons. In response to Russia's stationing of nuclear weapons in Belarus, Poland has volunteered to host tactical nuclear weapons on its territory.

Although the prospect of U.S. disengagement from Europe has sparked debate over nuclear capabilities in Germany, the UK and France are likely to remain the only European nuclear powers for the foreseeable future and are unlikely to extend their modest nuclear umbrellas over all of NATO. Meanwhile, the United States is unlikely to support nuclear proliferation in Europe. In short, there is no real substitute for U.S. extended nuclear deterrence. Within this framework, Allies can improve NATO's nuclear posture by expanding the number of trained aircrews and dispersal airfields and increasing the number of DCA-participating nations to bolster deterrent options.

Ballistic Missile Defense (BMD)

The Russian Federation currently fields an array of conventional ballistic and cruise missiles than can reach deep into NATO territory to target critical nodes and infrastructure. These include the SSC-8, a ground-launched cruise missile with a 450kg warhead and a range of 2500km; the *Kaliber,* a terrain-following cruise missile with a range of 1400km;

and the *Iskander-M*, a hypersonic, satellite-guided ballistic missile with a range of 500km. (These systems can also deliver tactical nuclear weapons.)

At the 2016 Warsaw Summit, NATO announced that NATO BMD had achieved "initial operating capability," largely based on US *Aegis* and *Patriot* systems deployed in modest numbers in Europe. 21 European states (with Poland expected to join) are now collaborating in the European Sky Shield Initiative (ESSI) to field a comprehensive, layered air defense system against aircraft and ballistic missiles. Though promising, ESSI faces long development lead times and funding challenges, as well as opposition from key European actors (currently, France, Italy, and Spain have declined to participate). Going forward, effective and coordinated BMD is critical to European deterrence and defense. Allies should therefore accelerate funding and fielding of European Ballistic Missile Defense as an urgent priority.

Cyber

Most European states have improved their cyber defenses, both civil and governmental/military in the past decade, in response to Russian and Chinese intrusions. Both NATO and the EU have launched major initiatives, such as the EU Cyber Resilience Act, passed in 2024. Though highly classified, both France and the UK possess offensive cyber capabilities that can respond to computer network attacks. Offensive cyber throughout the rest of Europe, though, is far more limited. The European Union generally avoids an "overtly offensive cyber posture or using offensive capabilities" for fear of escalating the digital arms race. Approaches that seek to deter cyber attacks through other means, such as sanctions or kinetic action, have also fallen short. In the cyber domain, a capable and demonstrated capability to retaliate, well-coordinated across transatlantic security structures, can contribute to a cyber deterrence regime that is now lacking. Allies should therefore support and develop coordinated offensive cyber capabilities to better deter Russian cyber attacks.

Space

Europe is a late arrival to space, but has done much in recent years to catch up. In 2022, the EU published its first *Space Strategy for Security and Defence*, highlighting the importance of space assets in providing critical capabilities to armed forces. These include navigation, targeting, communication, missile defense early warning and battlefield observation and analysis. Since 2019 the EU has invested almost $300M in space research. The EU's European Defence Agency sponsors a six-nation "Defence of Space Assets" consortium (France, Germany, Italy, Poland, Portugal, Austria), while the European Space Agency, with an annual budget of €7.8B, has launched commercial payloads, including dual-use telecommunications satellites, since 1979. The UK, France, Germany, Italy, Turkey, and Poland all have space agencies or space commands focused on the military applications of space, while a NATO Space Center was established in 2020 at Ramstein Air Base in Germany. The ability to launch, maintain, and replace telecommunications and reconnaissance assets in space at scale, independently of the US, must be an important component of a sturdy and resilient European security architecture.

Emerging and Disruptive Technologies

NATO formally recognized the importance of managing and encouraging the development of emerging, advanced technology in 2019 as the impact of Artificial Intelligence (AI), quantum computing, machine learning, hypersonics, 3D printing, biotechnology, robotics and autonomous weapons systems, and other advances became apparent. Evolving at speed, these technologies offer decisive advantages if they can be developed and fielded effectively and affordably. They also represent grave vulnerabilities if employed by adversaries in ways that cannot be successfully countered. Indeed, these technologies have come to dominate the conflict in Ukraine.

In this domain, Russia enjoys a competitive advantage as a unitary actor with far fewer bureaucratic and regulatory obstacles and inefficiencies than are present in Europe. As EU experts have noted, "The EU is weak in the emerging technologies that will drive future growth. Only four of the world's top 50 tech companies are European." In 2020 European Defense Agency member states (27) spent €2.5 billion on research and technology in these fields, or only 1.2% of total defense expenditures. For its part, in 2022 NATO established the Defence Innovation Accelerator for the North Atlantic (DIANA), chartered to foster the development of emerging and disruptive dual-use technologies. A stronger Europe must reduce regulatory barriers and promote investment in advanced technology to offset adversary advantages and to successfully compete and prevail in this critical arena.

Military Mobility

The ability to move forces, equipment, and supplies quickly across national boundaries to threatened areas is another significant problem in Europe. Though endorsed by virtually all European states and a priority for the EU's Permanent Structured Cooperation (PESCO) initiative, progress in this critical area remains halting, beset by national border control regulations, legal and customs hurdles, and infrastructure gaps (such as differing rail gauges and bridges that cannot bear the weight of heavy armored vehicles). Flagged as an urgent priority as far back as 2015, the EU nevertheless cut funding for military mobility from €6.5 billion to €1.7 billion just weeks before Russia's full-scale invasion of Ukraine. Critically important is standardizing rail gauges across Europe and strengthening bridges and overpasses in forward areas to hold main battle tanks. Today, these shortcomings in NATO's ability to rush reinforcements to its eastern flank constitutes a serious vulnerability requiring investment, effort, and attention.

Reserves

Following the collapse of the Soviet Union, most European states abandoned conscription in favor of smaller, volunteer forces (the Nordic and Baltic states as well as Greece and Turkey are notable exceptions). As the war in Ukraine has shown, trained reserves at scale are needed to reinforce regular forces and replace casualties in conflict. Conscription reduces personnel costs, generates larger reserves, and involves the national population more closely in the defense of the state. Where politically feasible, a return to conscription – tailored for the politics and demographics of allies and partners - can offer significant military and security advantages. Here, very short terms of service (6-12 months) are not optimal as they promote constant turnover in fielded units. Regular, annual refresher training is also important. Employment preferences, educational assistance, veterans' health care, and other incentives can be employed to help promote the call to service. Wherever possible, European leaders should encourage a return to conscription to reduce personnel costs, generate reserves, and bolster civil-military ties.

Europe's Borders

A stronger Europe must also encompass neighboring states now left outside European political institutions, not only NATO and the EU but also other informal groupings such as the Three Seas Initiative, the Visegrad Group, the Lublin Triangle, and the Bucharest Nine. In individual cases, accession or membership in the EU and NATO may be politically impossible for now – but the default setting should be inclusion, not exclusion, if these states are not to fall back into Russia's orbit. Many of these states suffer from weaker governance and lower standards of living than other parts of Europe, contributing to chronic instability and halting progress towards democracy. Stringent standards for membership leave some in open-ended "candidate" status that denies both security and opportunities for economic growth and foreign investment.

Left on the margins, these states are susceptible to Russian disinformation, subversion and even (in the cases of Ukraine, Georgia, and Moldova) outright occupation. Both NATO and the EU remain divided on the issue of membership for Ukraine, whose accession is agreed in principle but delayed indefinitely in practice. In several cases, accession was put on hold for fear of "provoking" Russia. In Georgia and Ukraine at least, that approach clearly failed. A more integrated Europe is a stronger and safer Europe. European leaders should accordingly support the accession of excluded states to European institutions as a general rule, while NATO membership for Ukraine should be fast-tracked once hostilities have ended.

The U.S. Role

While Europe must not be Washington's only priority, a stable and secure Europe remains an enduring and vital interest for the United States. The EU and the United States, two of the three largest economies in the world, are each other's largest trading partners in goods and services. The two together made up more than 43 percent of global GDP in 2023. The U.S.-European investment relationship is also the largest in the world, with nearly four times more U.S. foreign direct investment in Europe than with Asia-Pacific countries. According to the U.S. Chamber of Commerce, "no two other regions in the world are as deeply integrated as the United States and Europe." The loss or disruption of these trade relations would have an immediate and drastic impact on the U.S. and global economies.

Close transatlantic ties also yield important political benefits. Nuclear powers France and the United Kingdom are permanent members of the United Nations (UN) Security Council and often join with the US to balance out China and Russia. Major European powers play critical roles in international organizations such as the UN General Assembly, Group of Seven (G7), the International Monetary Fund, and the World Bank, in advancing democracy and the rule of law. In the growing rivalry between democratic and autocratic states, Europe is an essential partner, often aligning with US interests and supporting US efforts to maintain a stable international system—particularly with respect to the growing US rivalry with China. As a community with a shared commitment to human rights, representative democracy, and the rule of law, the transatlantic region represents a bulwark against a rising tide of autocracy that threatens these ideals everywhere.

American prosperity and national security are therefore tied closely to Europe, and will be for the foreseeable future. Even so, the U.S. contribution to European security need not be massive. American extended nuclear deterrence and advanced intelligence, space and cyber capabilities, plus the limited conventional forces described above, represent an affordable and realistic backbone to transatlantic security that nonetheless reserves the great bulk of U.S. resources for the Indo-Pacific or other contingencies. The United States can and should perpetuate this commitment, as a matter of its own self-interest in a world of multiple strategic threats.

A major enabling factor for continued U.S. involvement, however, is stronger and more prominent European leadership. This can reassure American voters that NATO remains a security bargain and weaken the argument that Europeans are free riders. Perhaps the best form of support the United States can provide is to encourage a shift in transatlantic relations from one of European dependence to one of greater European self-reliance, with the United States in a key but supporting role.

In both nuclear and conventional modes, U.S. contributions are essential to deterrence and defense in Europe – but more money and more troops are not in the offing. U.S. leadership, particularly of Allied Command Operations, should continue, but a new security landscape suggests that senior leaders from Europe – in the north and on the eastern flank in particular – should play a greater role in transatlantic defense. U.S. defense industries will continue to be important components of European security but should not crowd out or suppress a European defense industrial base that must ramp up, coordinate, and advance its technological prowess. The United States should support a larger European contribution to NATO, and should embrace and encourage the EU as an integral and critical security partner whose financial, industrial, and political power and influence are indispensable.

Conclusion

Strengthening Europe in today's transatlantic security environment has become an urgent need given the scope and scale of recent Russian aggression and the many competing demands facing the United States. With Europe's great wealth and large population, overreliance on American power is a luxury Europe can no longer justify and one the American public must increasingly question. For the North Atlantic community to endure, Europe must do more.

Stronger European defense and security can and should be accomplished sooner rather than later. The future of the transatlantic community depends upon it. The resources are there. What is lacking today is the political will to muster sustained investment and to align European national with NATO and EU priorities. Europe must adapt with urgency to a new and far more dangerous reality with greater commitment, stronger and more ready forces, and improved coordination and cooperation. Failure may well mean active conflict, not just on NATO's periphery, but on NATO territory itself. In the contest between autocratic and democratic regimes, the defense of our shared national territories and our citizens, of our values and our institutions, must be an active and forward defense, its burdens shared collectively and fairly by all members of the transatlantic family. That means a stronger Europe, more able and more determined to do its share.

Appendix A - European Security: A Tour d ’Horizon

This section provides specific and detailed information on allies’ military strengths and gaps. It is intended to build on the foregoing discussion of strategic obstacles and requirements in transatlantic defense.

In general, defense spending and military readiness is higher for allies that border Russian territory, decreasing as the distance from Russia increases. Most European militaries are volunteer, with limited reserves and persistent problems with readiness and maintenance, resulting in low operational availability of combat systems. Many European countries possess no tanks or fighter aircraft and cannot contribute to demanding missions. Many also lack some or all of the “below the line” capabilities needed to conduct and sustain large-scale combat operations, such as theater logistics, spare parts, ammunition stocks, and force-projection platforms. In many cases, high personnel costs associated with excessive overhead and volunteer recruitment eat away at defense spending.

Public support for NATO is generally strong, something that has helped sustain increased defense investment in recent years. Collectively, the European allies achieved the 2% of GDP goal in 2024, a remarkable achievement given the costs of divestment from Russian energy, aid to Ukraine, and the lingering effects of the COVID pandemic. Yet important outliers like Italy, Spain, Portugal, Belgium, and Canada still fall well short.

The United Kingdom

A nuclear power and UN Security Council member, the UK was projected to attain a defense budget of $82B in 2024. The UK has met the 2% of GDP pledge for many years, spending 2.23% in 2024. The UK military totals 138,000 and currently fields 157 operationally ready *Challenger II* main battle tanks, 214 artillery pieces, 159 fighter jets, 19 principal surface combatants (including two *Queen Elizabeth*-class carriers), and ten submarines.

British forces are generally high quality but suffer in terms of scale, with land forces projected at 70,000 active troops and 27,000 reserves (including 148 new *Challenger III* main battle tanks). The UK military lacks reserves, force-projection platforms, ammunition and enablers such as corps artillery and theater logistics. Much of the British defense budget is consumed by its nuclear deterrent (four *Vanguard*-class nuclear ballistic submarines), its two carriers, and its F-35 acquisitions.

The UK does possess among Europe’s most capable expeditionary forces. One British infantry battalion with a company of *Challenger II* tanks is deployed to Estonia. The UK also leads the Joint Expeditionary Force (JEF), a ten-nation consortium focused on deterrence and defense in northern Europe within a NATO framework. Its airborne brigade and Royal Marine brigade are highly ready and among Europe’s best. Experts estimate, however, that the UK can deploy just a single combat-ready division in a regional European conflict in 90 days.

France

Like the UK, France stands among the world's major powers, possessing a nuclear deterrent and a permanent seat on the UN Security Council. French defense spending in 2024 is projected at 2.06% of GDP or $64B. The French military establishment includes 114,000 army troops with 23,000 reserves, 215 main battle tanks, 113 artillery systems, 231 fighter aircraft, 22 principal surface combatants, one carrier (the nuclear-powered *Charles de Gaulle*), four *Triomphant*-class nuclear ballistic missile submarines, and five nuclear attack submarines.

Like most European states, France lacks force projection capabilities and key enablers, though the quality of its all-volunteer force is high. A traditional focus on francophone Africa and on internal security and homeland defense somewhat limits its ability to contribute to regional contingencies. A French infantry battalion and tank company are currently deployed to Romania. France can deploy one combat-ready division to a regional European conflict in 45-60 days.

Germany

Germany is the strongest economic power in Europe, with a GDP of $4.7T. Its military, however, does not match this strength, suffering from low ammunition stocks and indifferent maintenance. The total strength of the Bundeswehr is 181,000 with 35,000 reserves. Official NATO estimates project German defense spending at a surprising 2.12% of GDP or $98B for 2024, a large increase over prior years, though actual budget execution is in question.

After years of neglect, the Bundeswehr received a promised transfusion of funds (a $107B "special fund" announced by Chancellor Olaf Scholz in June 2023), to be doled out over the next several years). One third will go to procurement for the Luftwaffe (air force), mostly to purchase the F-35 and Eurofighter, with only 16% earmarked for the land forces. (The rest will go to the navy and for "command and control and digitalization.") However, the dismissal of finance minister Christian Lindner in November 2024 risks collapse of Scholz's governing coalition, putting the follow-through on these commitments in question. At the time of writing, elections are expected in late February 2025.

With 4,700 tanks in 1989, Germany today fields some 300. Moreover, operational readiness rates in 2023 were reportedly only 30% for tanks and artillery systems, with three days of ammunition on hand. Other holdings include 109 artillery howitzers, 206 fighter aircraft, 11 surface combatants, and 6 diesel-electric submarines. The German army currently has one mechanized infantry battalion deployed to Lithuania, and has announced plans to station an armored brigade there by 2027, though significant obstacles exist.

Indeed, despite its economic heft, Germany at present cannot deploy a single combat brigade ready for combat. Correcting these deficiencies will take years if effort is sustained. A majority of German voters support increased defense spending, though not through higher taxes (offsetting cuts elsewhere or taking on more debt are preferred.) It remains to be seen whether the *Zeitenwende* or "national turning point" in policy announced by Chancellor Scholz in February 2023 will be fully realized.

Poland

At $35B, Poland's defense budget for 2024 represents 4.12% of GDP. Though far less in absolute terms than those of the UK, Germany, or France, Poland's defense outlays support the strongest conventional force in Europe aside from Turkey, with 134,000 active and reserve service members, four heavy divisions, 476 main battle tanks, 531 artillery systems, and 83 fighter aircraft. The Polish navy, on the other hand, is quite small, with only a handful of coastal patrol vessels.

Poland's emphasis on modernization is impressive. Current plans call for expanding the military to 300,000 active service members and procurement of Abrams main battle tanks, Patriot high altitude air defense systems, 5th generation F-35 aircraft, and other advanced military technology. Poland demonstrates that with strong domestic support and effective political leadership, budgeting, acquisition, and fielding can be both timely and efficient.

Italy

With 2024 spending of 1.5% of GDP for defense, or $34B, Italy is well under the 2% of GDP standard despite having the third-largest economy in the EU and the ninth-largest in the world. With active forces of 161,000 backed up by 14,500 reserves, the Italian armed forces can field 150 main battle tanks, 255 artillery systems, 178 modern fighter aircraft, and 19 principal surface combatants, including two smaller carriers, the *Cavour* and the *Garibaldi*. Like many European militaries, Italy suffers from low readiness, with half its tanks not operationally ready. Italy today can provide perhaps two brigades to a regional European conflict in 45-60 days, supported by an air wing from the Italian air force. An Italian infantry battalion is currently deployed to Bulgaria as part of NATO's "Enhanced Forward Presence" program.

Turkey

With projected defense spending of 2.1% of GDP or $23B in 2024, Turkey fields active forces of 355,000 and reserves totaling 380,000. Turkey can field 2,400 main battle tanks (though many are 1960s-vintage), 1,800 artillery systems, 294 fighters (mostly U.S.-supplied F-16 variants), 16 principal surface combatants, and 12 German-built submarines. Unlike many European states, conscription is mandatory.

Turkey stands today as a capable but difficult ally. It has suffered from runaway inflation in recent years and ranks among the least democratic countries in Europe. Unlike almost every European state, Turkey has not sanctioned Russia over its invasion of Ukraine, and in fact doubled its imports from Russia in 2022, an economic lifeline during Turkey's current economic troubles. Turkey also imports about 40% of its natural gas from Russia. Ankara is focused strategically on territorial disputes with Greece, controlling maritime access to the Black Sea, and containing Kurdish militias in Syria and northern Iraq. Any major military contribution to NATO in the event of Russian aggression on NATO's eastern flank is unlikely.

The Nordics

The accession of Sweden and Finland to NATO following the Russian invasion of Ukraine is a striking development after many decades of neutrality. With total defense spending of more than $41B for 2024, the Nordic states (Sweden, Finland, Norway, and Denmark) all exceed the 2% of GDP threshold and all require mandatory military service. (Iceland, which is also among NATO's Nordic members but which has no military, is an exception.)

Beyond their spending, the Nordics constitute a regional bloc conferring real geostrategic and military advantages for the Alliance. A common history, culture, and geography encourage high levels of interoperability. In particular, the Scandinavian landmass is larger than the rest of Europe's surface area combined, greatly complicating the task of Russian planners who must now worry about NATO surveillance and strike platforms based there. With Finnish and Swedish accession, NATO is much better postured to counter Russian influence in the Baltic Sea; Sweden has reinforced Gotland with ground troops, while its super-quiet diesel-electric submarines can threaten the Russian Baltic Fleet in waters where U.S. nuclear submarines cannot operate due to technical limitations. With more than 400,000 troops (active and reserve), 255 modern combat aircraft, 853 howitzers and multiple rocket launchers, 2000 armored vehicles (including 390 main battle tanks), and 287 naval combatants of all types (including 10 submarines), the Nordic allies represent a formidable and modernized deterrent force.

The Baltic States

Of all European allies, Estonia, Latvia, and Lithuania are most at risk from Russian aggression due to their geographical proximity, small populations, weak militaries, prior histories as Russian imperial possessions, and Russian ethnic minorities. With combined defense budgets for 2024 of $5.1B, all three spend more than 2% of GDP on defense (projected to rise to 3% in the near term), but their small economies translate into very modest combined military forces of some 39,000, with 64,000 reserves. All rely on conscription for their modest regular forces, but they lack modern fighter aircraft, advanced air defense, and main battle tanks. NATO maintains battalion-sized tripwire forces in each of the Baltic States and conducts regular air policing missions in their airspace. With sizable Russian forces located just across their borders, the Baltic States cannot resist a serious Russian incursion, while NATO reinforcements would not be able to respond for some weeks.

Romania

A rising economic and military power in the Black Sea region, Romania is projected to spend 2.25% of GDP or $8.6B on defense in 2024. Its armed forces include 377 tanks (mostly modernized T-55 models), 693 artillery systems, 17 fighter aircraft (F-16s), and three frigates. Romania is acquiring M-1 Abrams tanks, F-35 fighters, the Patriot air defense system, and other modern technology to upgrade its Soviet-era equipment. A

5000-soldier NATO brigade (“Multinational Brigade Southeast”) built around Romanian troops with some augmentation is stationed in Craiova, while a U.S. combat brigade was deployed to Romania following Russia’s invasion of Ukraine. In 2015, the U.S. Aegis ballistic missile defense system was fielded at the Romanian air base at Deveselu. With Russian forces located nearby in Transnistria and the Black Sea, Romania cannot offer more than token forces in support of NATO operations elsewhere.

Bulgaria

Located at the nexus between Europe, Russia, and Turkey, Bulgaria must navigate carefully. Corruption, indirect Russian influence, and military weakness relative to its neighbors all complicate Bulgarian security planning, which is above all based on NATO’s Article 5 guarantees. Bulgarian defense spending for 2024 is projected at 2.18% of GDP or $2.3B. The Bulgarian military includes fewer than 100 tanks, 96 artillery systems, 50 dated combat aircraft, and 3 frigates. In 2022, NATO deployed a multinational battlegroup of 1500 soldiers to Bulgaria. With active forces of 37,000, supported by 3,000 reserves, Bulgaria has almost no force projection capacity and can contribute little to major NATO contingencies.

Hungary

Hungary committed a projected $4.9B to defense in 2024, or 2.11% of GDP. With active forces of 32,000 and 20,000 reserves, its military inventory includes 56 main battle tanks (primarily the venerable T-72), 21 artillery systems, 14 Swedish *Gripen* fighters, and a handful of coastal patrol vessels. Hungary’s political system is rated as “partly free;” its electoral authorities are not independent and suppression of journalists and opposition parties is problematic. In power from 1998-2002 and since 2010, Viktor Orban’s government continues to import energy from Russia and opposes EU aid to Ukraine. NATO can expect little from Hungary in the event of conflict with Russia.

The Balkans

In 2024, new allies Albania, Montenegro, North Macedonia, and Croatia collectively will spend $2.6B on defense out of a combined GDP of $136B, averaging just above 1.5% of GDP. Their small populations and economies translate into modest armed forces with generally outdated equipment that cannot realistically contribute meaningfully to collective defense; they are more consumers of security than providers.

The Central Europeans

The Czech Republic, Slovakia, and Slovenia together will spend $11B on defense out of a combined GDP of $578B in 2024, just under the 2% threshold. Their militaries include 51,400 active duty service members but almost no reserves. Equipment holdings include 83 main battle tanks, 126 artillery systems, and 14 fighter aircraft. With dated equipment, low readiness, and little in the way of enablers, these states can contribute symbolic contingents to NATO missions but lack the capacity to generate meaningful forces if called upon. Under the leadership of Prime Minister Robert Fico, Slovakia ended military support for Ukraine and has suppressed the media and moved closer to Moscow. While the Czech Republic and Slovenia might make modest contributions in Article 5 scenarios, Slovakia's role is uncertain.

The Benelux Countries

Belgium, the Netherlands, and Luxembourg are among the wealthiest NATO allies but lag behind many others in defense spending. As a bloc, the Benelux countries spent a projected $31B in 2024, but with a combined GDP in 2024 of $2T, two fall well under the 2% of GDP goal in 2024 (Belgium 1.3%, the Netherlands 2.05%, Luxembourg 1.3%). Where Luxembourg's military is all but nominal, Belgium and the Netherlands field weak land forces (with no tanks and very limited artillery) but capable air forces totaling 131 F-16 and F-35 fighters, as well as 8 principal surface combatants and three submarines. In a time of war Belgium and the Netherlands can contribute in tandem a light mechanized brigade and composite air wing in the 30-60 day time frame.

The Southern Flank

Understandably, Greece, Spain, and Portugal share a geostrategic focus on the Mediterranean and, in the case of Greece, historic tensions with neighboring Turkey. As a percentage of GDP, Greek defense spending is among the best in NATO; with a difficult conflict history with Turkey, Greece will spend an estimated 3.1% of GDP or $7.7B on defense in 2024. Spain and Portugal lag far behind at 1.28% and 1.55% respectively, spending an estimated combined total of $25.6B for 2024. The Hellenistic Armed Forces include 132,000 active troops and 289,000 reservists, and field a mix of up-to-date and older equipment including 1,228 tanks, 3,526 artillery pieces, 229 fighter aircraft, 13 principal surface combatants, and 10 submarines. Spain and Portugal together field 252,000 active-duty service members with 38,200 reservists. Their equipment holdings include 253 main battle tanks, 462 artillery systems, 212 modern fighter aircraft, 15 principal surface combatants, and 4 submarines. For NATO contingencies involving Russia, Greece is unlikely to deploy significant forces. Spain and Portugal might contribute 1-2 combat brigades and a composite air wing in 60-90 days.

Canada

Like Belgium, Canada ranks near the bottom of NATO in defense spending at 1.37% of GDP or $30.5B. Prosperous and advanced, and with a population greater than most allies, Canada's forces are modern but relatively small; its military includes 68,100 active and 31,600 reserve service members with 74 tanks, 163 artillery pieces (mostly towed, light 105mm howitzers), 89 F-18 fighters, 12 principal surface combatants, and four attack submarines. In a European conflict with Russia, Canada might provide a battalion battle group and fighter squadron in 30-60 days. The Canadian Navy will focus on the defense of territorial waters in the Arctic region as its first priority.

The Neutrals

A number of European states (Ukraine, Switzerland, Austria, Ireland, Malta, Serbia, Cyprus, Moldova, Georgia, Kosovo, Belarus) remain outside of NATO and in some cases outside the EU as well. EU members Austria and Ireland enjoy special status as true neutrals inside the EU (the famous "Irish Clause" in the EU charter excuses them from the obligations of collective defense). Switzerland is not a NATO Ally or an EU member and, though well-armed, cannot be expected to contribute to pan-European security arrangements unless attacked. Moldova and Georgia are EU and NATO candidates but, with Russian troops on their sovereign territory, will not be admitted to the Alliance in the near term and possess very limited military capacity in any case. Malta and Cyprus likewise possess little military capacity. Serbia traditionally tilts towards Moscow and remains a difficult partner due to western support for Kosovo's independence. Belarus hosts Russian troops and maintains at best a tenuous independence.

Ukraine

Ukraine is of course a special case. Its large and capable army is formidable, but committed to territorial defense and not available for other contingencies. The Ukrainian air force and navy are small in size but have shown great innovation and effectiveness in defending Ukraine's airspace and confronting the Russian Black Sea Fleet. The war to date has resulted in a loss of some 30% of Ukrainian GDP, though foreign assistance has mitigated that impact, with reconstruction costs estimated at almost $500B. Ukrainian military casualties were estimated as high as 70,000 killed and 120,000 wounded through August 2023 and have certainly increased since then, seriously affecting operations in the field given difficulties in fielding combat replacements. As a direct result of the war with Russia, "Ukraine has the lowest birth rate (six births per 1,000 people) and the highest death rate (18.6 deaths per 1,000 people) in the world."

NATO and EU membership are open to Ukraine in theory, but in practice are not available at this time due to reservations from key allies and members. Unless Ukraine is provided critical capabilities it now lacks, the war appears headed towards another frozen conflict, like Georgia, leaving Russia in possession of Crimea and significant parts of the Donbas and able to generate forces for use elsewhere. In this event, opportunities would arise for Russia to rebuild its armed forces and pursue its expansionist agenda in other parts of Europe.