

# DGAP POLICY BRIEF

## Why and How Europeans Must Prepare for US Retrenchment



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Donald Trump has not been the president of military restraint some in his coalition hoped for, yet elements of withdrawal toward Europe are evident. This paper argues that restraintist forces will continue to influence US foreign policy and examines a scenario that leads to significant American retrenchment. Europe urgently needs to build autonomous security architecture because – whether driven by debt, ideology, or populist politics – US reliability as a guarantor of European security must be doubted.

- The Trump administration has upended foundational principles of US Europe policy – abandoning support for NATO’s centrality, alliance solidarity, and shared values – while MAGA politics and public opinion, even if inconsistently applied, push toward restraint.
- Under a restraint scenario, the United States would withdraw most forces from Europe by 2035, hand NATO leadership to Europeans, and exit the Middle East.
- Even a status quo baseline offers no return to normalcy: US fiscal deterioration, with deficits projected to hit \$2.5 trillion by 2035, structurally constrains American global commitments regardless of which party holds power.
- Europe must design security architecture that functions with a reduced – or absent – US role. Waiting for Washington to correct course risks trading managed retrenchment for uncontrolled American fade-out.

Donald Trump is remaking the American presidency, and his coalition is seeking to transform US policy in a number of areas. One of them is foreign policy, specifically policy toward Europe, NATO, and European security. Throughout the 15 presidencies since Harry Truman, US Europe policy has been broadly consistent with this set of principles and assumptions about Washington: it supported European integration while maintaining its position as the preeminent force in European security; viewed European security as a top national security interest; was deeply committed to maintaining the political and military vitality of NATO; and subscribed to the ideas that there were common values at the center of the transatlantic relationship and that European countries (especially the EU big three France, Germany, and Italy) were allies *primi inter pares*.

Nearly all these principles have been abandoned by Donald Trump, who neither believes that the United States should be responsible for European security nor sees the value in alliances. Because of his previous criticism of “warmongers and America-last globalists” and “ridiculous endless wars,” Donald Trump has sometimes been seen as an isolationist or, in more contemporary terms, a restrainer.<sup>1</sup> He has assimilated key voices of restraint into his administration and coalition, most prominently Vice President JD Vance.

Therefore, this policy brief examines where the restraint vision for US strategy would take the country by 2035. It juxtaposes this restraint scenario against a likely baseline, laying out its implications for US force posture, priorities, and policy, with particular attention to the transatlantic relationship. The reasonable baseline of a more status quo approach to strategy shows that even those seeking a restoration will be bound by new constraints. The authors conclude that, while restraint poses daunting challenges for Europe, forestalling a reckoning may be even worse.

## THE FIRST YEAR OF TRUMP 2.0: ALL OVER THE MAP

Rhetorically, both the National Security Strategy and National Defense Strategy of the second Trump administration reflect a more restrained vision of US foreign policy. Restraint is a strategy that calls on the United States to ease tensions with adversaries, step back from existing alliances, reduce its overseas military footprint and spending, and set a higher bar for when force is justified.<sup>2</sup> This approach stands in contrast with “deep engagement,” also known as “primacy,” which had been the dominant US foreign policy approach since the Second World War. It had positioned the United States as the global security leader with commitments to a vast network of allies and partners and large forward military presence.

The focus of both documents on the Western Hemisphere emphasizes a return to homeland defense. They criticize past US approaches as pursuing “permanent American domination of the entire world” and refer to “favorable balances of power” in different theatres as the goal. The Defense Strategy explicitly argues that European countries alone should easily be able to balance against Russia. It cedes responsibility for European security to Europe while the United States offers “critical, but more limited” support.

The administration’s policy toward Ukraine shifts burden and responsibility to European allies and seeks a quick, even highly imperfect resolution – moves that are both consistently restraintist. (This is most obvious in comparison to the Biden administration, which took it for granted that the United States should lead the NATO response and promised to defend the principle of Ukraine’s freedom for “as long as it takes.”) Notably, the language toward China in both strategy documents is less confrontational than the strategies of the Biden administration or the first Trump administration. Trump himself seems to want to defuse tensions with Beijing, even using the term “G2,” frequently seen as shorthand for a US-China condominium.<sup>3</sup>

Yet Trump has recently partnered with Israel to launch war against Iran, just a few months after capturing

1 Associated Press, “In His Own Words: Trump’s Iran Strike Tests His Rhetoric on Ending Wars,” *US News & World Report*, June 21, 2025: <https://www.usnews.com/news/politics/articles/2025-06-21/in-his-own-words-trumps-iran-strike-tests-his-rhetoric-on-ending-wars>.

2 On restraint, see Eugene Gholz, Daryl G. Press, and Harvey M. Sapolsky, “Come Home, America: The Strategy of Restraint in the Face of Temptation,” *International Security* 21, no. 4 (Spring 1997): 5–48; and Barry R. Posen, *Restraint: A New Foundation for US Grand Strategy* (Ithaca, NY: Cornell University Press, 2015).

3 Didi Tang, “G2 or not G2: Trump’s new favorite term for US-China relations carries a lot of history’s baggage,” *Independent*, November 4, 2025: <https://www.independent.co.uk/news/donald-trump-china-xi-jinping-washington-beijing-b2857927.html>.

the leader of Venezuela. In practice, the first year and a half of the Trump 2.0 presidency has been far from consistently restraintist. In early January 2026, Trump even proposed a 50 percent defense spending increase in 2027.<sup>4</sup> Further, it turns out MAGA voters are still willing to support military interventions – at least Trump’s interventions.<sup>5</sup> In an in-depth survey of Republican voters conducted in December 2025 by the Manhattan Institute, a conservative think tank, it is clear that MAGA voters still support a “strong and lethal” military.<sup>6</sup>

However, longer term polling from the Chicago Council on Foreign Affairs does indicate that Republicans are becoming more restraintist.<sup>7</sup> It found that while, before 2015, “Republicans used to be the most enthusiastic champions of an active US role in world affairs,” they have since “become less positive than Democrats about an active US international role.” There has been “a steady drop every year since 2019” in international support among Republicans, the largest of any group. The polling also found that “[i]n 2023, for the first time in five decades of polling, a slim majority of Republicans preferred to stay out of world affairs (52%).” In 2024 and 2025, the majority again flipped in favor of action; nonetheless, more Republicans than Democrats (+8 percentage points) favor staying out of world affairs. In July 2025, 59 percent of Republicans surveyed support an active US role, while 40 percent want to stay out of world affairs.

The current Trump administration has pursued a mixed approach to foreign policy – both more adventurous (Iran) and more restraintist (strategy documents, Ukraine). Trump’s coalition has thus been an imperfect vehicle for a foreign policy of restraint, but restraint is nonetheless a force shaping politics on both the Right and Left. Vice President Vance, who stands a chance of being the next Republican presidential candidate, is

known to be more consistently restraintist. Polls also indicate that younger Americans are more restraintist than their elders.<sup>8</sup> Further, three days into the Iran war, nearly 60 percent of Americans opposed it<sup>9</sup> (compared to around 35 to 43 percent who opposed the Iraq invasion of 2003).<sup>10</sup> In fact, restrainers argue that a darkening fiscal picture at home and structural pressures internationally are constraining the US pursuit of primacy overseas; they believe that US policymakers should adopt a grand strategy of restraint before these pressures became acute. Consequently, it is important for Europe to understand and anticipate what a potential US foreign policy of restraint would mean for European and global security.

## THE RESTRAINT VISION FOR US STRATEGY

Restraint views the United States as a uniquely secure country. In an aphorism attributed to the former French Ambassador to the United States Jean-Jules Jusserand, the United States was “blessed among the nations. On the north, she had a weak neighbor; on the south, another weak neighbor; on the east, fish, and on the west, fish.”<sup>11</sup>

The security afforded the country by geography in its early years has been augmented by US possession of a large nuclear arsenal, the world’s largest navy (by tonnage), a comparatively vibrant demographic profile, and a large economy that is one of the world’s least trade-dependent, mostly due to its sheer size.<sup>12</sup>

The implications for strategy, drawing from realist international relations theory, are straightforward: US grand strategy should focus on preventing the rise of a peer competitor. A potential peer competitor would need to consolidate political control over a region with

4 Aamer Madhani, Associated Press, “Trump proposes massive increase in 2027 defense spending to \$1.5 trillion to build ‘Dream Military,’” PBS News, January 7, 2026: <https://www.pbs.org/newshour/politics/trump-proposes-massive-increase-in-2027-defense-spending-to-1-5-trillion-to-build-dream-military>.

5 On partisanship and support for war, see Adam J. Berinsky, *In Time of War* (Chicago: University of Chicago Press, 2009).

6 Jesse Arm and Matthew Knee, “The New GOP: Survey Analysis of Americans Overall, Today’s Republican Coalition, and the Minorities of MAGA,” Manhattan Institute, December 1, 2025: <https://manhattan.institute/article/the-new-gop-survey-analysis-of-americans-overall-todays-republican-coalition-and-the-minorities-of-maga>.

7 Dina Smeltz and Lama El Baz, “Slight Boost in American Support for Active US Role in World,” Chicago Council on Global Affairs, October 20, 2025: <https://globalaffairs.org/research/public-opinion-survey/slight-boost-american-support-active-us-role-world>.

8 Dina Smeltz and Emily Sullivan, “Young Americans Question US Global Engagement,” Chicago Council on Global Affairs, March 22, 2023: <https://globalaffairs.org/research/public-opinion-survey/young-americans-question-us-global-engagement>.

9 Ruth Igielnik, “59% of Americans Oppose the Military Action in Iran,” *New York Times*, March 4, 2026: <https://www.nytimes.com/2026/03/04/us/politics/iran-us-war-military-polls.html>.

10 Caroline Smith and James M. Lindsay, “Rally ‘Round the Flag: Opinion in the United States before and after the Iraq War,” Brookings Institution, June 1, 2003: <https://www.brookings.edu/articles/rally-round-the-flag-opinion-in-the-united-states-before-and-after-the-iraq-war/>.

11 The authors have found this cited in numerous sources but cannot track down the original quotation. It may be apocryphal.

12 The World Bank judges that only Sudan, Ethiopia, and Haiti are less trade-dependent than the United States although the causes of that condition are quite different than those in the case of the United States. See: World Bank Group, “Trade (% of GDP):” [https://data.worldbank.org/indicator/NE.TRD.GNFS.ZS?most\\_recent\\_value\\_desc=false](https://data.worldbank.org/indicator/NE.TRD.GNFS.ZS?most_recent_value_desc=false).

the economic and demographic strength that would make it a rival of the United States. The only regions with enough latent power to pose such a challenge are Europe and the Indo-Pacific.<sup>13</sup> Accordingly, in keeping with enduring counterhegemonic interests, restraint counsels a policy of offshore balancing in those key regions.<sup>14</sup>

Today's realists and restrainers are focused on more modest counterhegemonic aims. Both camps view the United States as having too many enemies, too many dependents masquerading as allies, too much defense spending, and too many wars. Although US policymakers have been urging allies for decades to accept a greater share of the burden of their own defense, those allied dependents have worked assiduously to preserve the status quo and maintain US power as the

linchpin of their own security. (In fairness, while they complained about European free-riding, US elites simultaneously tried to keep Europeans dependent on US arms and other forms of support.)

The dynamic in which the United States carries a disproportionately large share of allied defense burdens will not change without Washington forcing the issue on its allies. Pleading and cajoling has not worked and cannot work.<sup>15</sup> The main lever Washington has to force a rebalance is its commitments – particularly, its troop deployments. We wish to explore the implications for Europe if US policymakers conclude that the time for restraint has come. Thus, what follows is a scenario that describes what could happen if, starting in 2026, the United States begins pursuing the strategy in earnest.

## SCENARIO 1 RESTRAINT SETS IN

US policymakers judge that there is no apparent hegemon on – or even over – the horizon in Europe. Russia had shown an aggressiveness and willingness to bear high costs to maintain a veto on Ukraine's international orientation (and even parts of its domestic politics), but this did not turn it into a candidate for hegemony in Europe. A Russia that struggled to subdue Ukraine was not a state with the potential to dominate France or Germany.

Accordingly, as foreshadowed in the 2026 National Defense Strategy, US policymakers begin withdrawing US troops from Europe immediately. In terms of scale and speed, a 2025 report by Jennifer Kavanagh and Dan Caldwell recommended drawing down US forces from Europe by 40 to 50 percent over four years. Policymakers decide to aim for those numbers.<sup>16</sup> They withdraw US troops to reduce costs and risks to the United States, as well as to encourage European states to view the threat environment as even less

benign than they did already. Since the specter of a deteriorating threat environment was historically what had spurred greater European spending on defense,<sup>17</sup> policymakers believe it will work again.

Similarly, the United States hands over the institutions of dominance in Europe to Europeans. Since NATO's inception, the Supreme Allied Commander – Europe (SACEUR) had always been an American. To Europe's shock, the US president nominates a European to become the next SACEUR after 2027/2028.<sup>18</sup>

The United States also stops participating, or participates less frequently, in NATO commands and political committees. This had begun happening in February 2026, when Washington devolved two NATO Joint Force Commands to European allies.<sup>19</sup> US policymakers judged that Europeans were unlikely to lead these institutions if the United States continued to do so. Therefore, US policymakers do with NATO institutions ►

- 13 While the Middle East could not produce a peer competitor, hegemony in the region could produce a market-maker in oil, which would still be a concern for US foreign policy. For discussion, see: Justin Logan, "The Case for Withdrawing from the Middle East," *Defense Priorities*, September 30, 2020: <https://www.defensepriorities.org/reports/the-case-for-withdrawing-from-the-middle-east/>.
- 14 On Europe, see: Justin Logan and Joshua Shiffrinson, "A Post-American Europe," *Foreign Affairs*, August 9, 2024: <https://www.foreignaffairs.com/europe/post-american-europe-justin-logan-joshua-shiffrinson>.
- 15 For the seminal work on why defense burdens are asymmetric in heterogenous alliances, see: Mancur Olson, Jr. and Richard Zeckhauser, "An Economic Theory of Alliances," *Review of Economics and Statistics* 48, no. 3 (August 1966): 266–279.
- 16 Jennifer Kavanagh and Dan Caldwell, "Aligning Global Military Posture with US Interests," *Defense Priorities*, July 9, 2025: <https://www.defensepriorities.org/explainers/aligning-global-military-posture-with-us-interests/>.
- 17 See: Justin Logan, "Uncle Sucker: Why US Efforts at Defense Burdensharing Fail," *Cato Institute Policy Analysis* no. 940, March 7, 2023: <https://www.cato.org/policy-analysis/uncle-sucker>.
- 18 Barry R. Posen, "The Transatlantic Relationship: Radical Reform Is in the US National Interest," *Hague Center for Strategic Studies*, August 6, 2021: <https://hcss.nl/report/radical-reform-is-in-us-national-interest/>.
- 19 Steven Erlanger and Lara Jakes, "U.S. Hands Over Some Commands to European Allies," *New York Times*, February 10, 2026: <https://www.nytimes.com/2026/02/10/us/politics/us-nato-commands-european-allies.html>.

what the Trump administration did with the Ukraine Defense Contact Group in February 2025: they simply hand them over to the Europeans to figure out.

As the United States draws back from NATO, Washington encourages European states to use both NATO institutions and the patterns of cooperation that emerged over the last 76 years to enable European cooperation without the United States as the hub of the wheel. Accordingly, not only does NATO headquarters remain the central node for European defense, but the United States leaves behind US materiel that helps fill gaps in Europe's defense. The United States also continues to provide so-called enablers such as intelligence, surveillance, and reconnaissance (ISR) that European states would struggle to replace quickly.

Troop withdrawals focus heavily on Germany, partly because so many US troops were in Germany, and partly because it was German foreign and defense policy that needed to change most dramatically.<sup>20</sup> US withdrawals from Germany focus on "teeth" rather than "tail," with a particular emphasis on units such as the 2nd Cavalry Regiment and Ramstein Air Base, then the largest concentration of Americans abroad anywhere in the world.

Skeptics protest that giving up, or even scaling down, Ramstein Air Base would inhibit the ability of the United States to project power into the Middle East in large numbers. As made clear below, this is viewed as a feature rather than a bug.

Policymakers finally conclude that the Middle East is a "small, poor, weak region beset by an array of problems that mostly do not affect Americans – and that US forces cannot fix. The best thing the United States can do is leave."<sup>21</sup> In the early 2020s, Washington spent, conservatively, \$80 billion per year in peacetime to maintain forces in the Middle East, but it was rarely peacetime in that region, and the US costs were rarely that low. The president rapidly draws down all US ground forces from the region, retaining naval access at bases like Manama in Bahrain because the host governments are amenable.<sup>22</sup>

In the Indo-Pacific, things look less certain. On the one hand, there is a plausible regional hegemon in the form of the People's Republic of China. On the other, US allies in the region are geographically

separated from China in a way that European states were not separated from the Soviet Union. Mountains and water are a defender's friend and an aggressor's enemy. Still, the lackadaisical approach to defense taken by frontline states such as Japan and Taiwan raised questions about their potential to resist China, particularly if present defense spending trends were to continue. For this reason, restraint does not revolutionize US strategy in Asia. As cuts to force structure take place elsewhere, Asia maintains priority among the three regions, and the US Navy and Air Force are not cut as deeply as the US Army.

### The Picture in 2035

In this illustrative restraint scenario, by 2035, Washington has roughly 5,000 troops in Europe – only those required to assist with ISR and nuclear weapons. Retirements begin to attrit the rest of the force, primarily comprised of the US Army and contractors, shrinking the military budget. Similarly, as US procurement begins to deemphasize ground warfare, Europe's defense-industrial base continues to grow substantially, sending European aerospace and defense stocks consistently higher as European companies focus on the sorts of products European governments want for the defense of their continent.<sup>23</sup>

In the Middle East, all US bases are left in the hands of host governments. The US forces that staffed them redeploy to the United States, leaving the US presence in the region with no ground troops and only a minimal access agreement to deep-water ports like the one in Bahrain. In Asia, policymakers sow doubts about precisely when and where the United States was likely to intervene, bolstering the incentives for countries like Japan and Taiwan to spend more – and better – on their own defense.<sup>24</sup> In terms of budgets, defense spending shrinks, helping produce a more fiscally solvent United States that also dedicates relatively more funding to the Navy but shrinks the Army considerably.

20 Sumantra Maitra, "Europe, the Rationale of Burden Shifting, and the Promise of Germany," in *New Visions for Grand Strategy*, eds. Emma Ashford and Nevada Joan Lee (Washington, DC: Stimson Center, 2025), pp. 31–37.

21 Justin Logan, "The Case for Withdrawing from the Middle East," *Defense Priorities*, September 30, 2020: <https://www.defensepriorities.org/reports/the-case-for-withdrawing-from-the-middle-east/>.

22 Ibid. See also: Eugene Gholz, "Nothing Much to Do: Why America Can Bring All Troops Home from the Middle East," *Quincy Paper* #7, June 24, 2021: <https://quincyst.org/research/nothing-much-to-do-why-america-can-bring-all-troops-home-from-the-middle-east/>.

23 Justin Logan explored this idea with Joshua Shiffrin in the unpublished manuscript "The US Case for the European Defense-Industrial Base."

24 On the history of Japan and Taiwan stepping up when the United States did less, see: Logan, "Uncle Sucker," pp. 8–9 (see note 17).

As shown above, US strategy under restraint would differ considerably from the US strategy pursued during living memory. Many observers on both the political Left and Right in the United States, and especially those in the transatlantic community, yearn for a return to the *status quo ante Trump*. However, a reasonable baseline scenario that hews closer to the recent past still shows that US global posture is likely to shrink by 2035. In short, even if Washington does not decide to shift its foreign policy approach, its fiscal picture and political dysfunction will force more restraint.

The options available to the United States in the period from 2026 to 2035 are not like those available to it from 2015 to 2025. Data from the Congressional Budget

Office about the deficits facing the United States in the years 2015 and 2025, as well as projections into 2035, offer a dismal picture (see Figure 1).

In this second baseline scenario, the authors assume that these fiscal constraints limit the options of the United States. The three largest drivers of US deficits and debt – Social Security, Medicare, and interest on the debt – prove largely impervious to policy reforms that could narrow the deficit and stop the debt from growing. Yet these constraints are only one scissor blade joined with a second: the challenge posed to the United States by the People’s Republic of China, which has a larger GDP relative to the United States than the Soviet Union ever did. The resulting scenario looks something like the following:

**Figure 1: US Congressional Budget – Deficits and Projections**

	2015	2025	2035
<b>Budget deficit</b>	<b>\$500 billion</b>	<b>\$1.9 trillion</b>	<b>\$2.5 trillion</b>
<b>National debt</b>	<b>\$13 trillion</b>	<b>\$37 trillion</b>	<b>\$59 trillion</b>

Sources: US Congressional Budget Office (CBO), “Updated Budget Projections: 2015 to 2025,” March 2015: <https://www.cbo.gov/system/files/2018-10/49973-UpdatedBudgetProjections.pdf>; US CBO, “The Budget and Economic Outlook: 2025 to 2035,” January 2025: <https://www.cbo.gov/system/files/2025-01/60870-Outlook-2025.pdf>.

**SCENARIO 2**  
**A BASELINE COMPARISON SHOWS THERE’S NO TURNING BACK FROM CHANGE**

The Generation X policymakers who romanticized the unconstrained era of the 1990s and 2000s remain determined to persist with US global leadership. They kludge together an approach that clings tightly to all US responsibilities but under-resources every one of them. Representative of this view was the report of the Commission on the National Defense Strategy released in July 2024, which argued that US strategy was profoundly insolvent, urging huge increases in defense spending through unspecified “additional taxes and reforms to entitlement spending.”<sup>25</sup> Despite the urgency, reforms do not come, international commitments are not limited, and the insolvency deepens.

In Europe, policymakers are at pains to point out that NATO’s door remains open, although no new members make it through. During the late 2020s, politicians in the large European economies made a heroic effort to generate military power, but it comes to little. With the United States maintaining more than 60,000 troops

in Europe and reassuring Europeans of its capacity for leadership, Europe does not have a sense of urgency that is sufficient to generate enough conventional military power to replace the United States. Initiatives such as ReArm Europe 2030/Readiness 2030 flounder, and German aspirations to dramatically increase defense expenditures falter amid ongoing domestic economic woes.

Russia settles into a frozen conflict with Ukraine that heats up from time to time. The United States shows little inclination to help contain this conflict, which periodically radiates out from Ukraine’s borders into the Baltic states and larger countries to Ukraine’s west. Because this occurs via sabotage and cyberattacks at a low enough level, Europe is deterred from responding with conventional military means. US aid to Ukraine drops close to zero with European states picking up the tab. Although this further stimulates the growth of Europe’s defense-industrial base, a lack of coordination leads to minimal overall capacity gain. ▶

<sup>25</sup> Report of the Commission on the National Defense Strategy, July 2024, p. xii: [https://www.rand.org/content/dam/rand/pubs/misc/MSA3057-4/RAND\\_MSA3057-4.pdf](https://www.rand.org/content/dam/rand/pubs/misc/MSA3057-4/RAND_MSA3057-4.pdf).

In the Middle East, the United States watches as Israel consolidates its annexation of the West Bank, and Gaza remains a disastrous, mostly ungoverned humanitarian emergency. The Gulf States send billions to Gaza, but the rebuilding that takes place is hardly commensurate with the financial inputs. Washington occasionally insists that it has a vision for peace in the Holy Land, but neither Israelis nor Palestinians are listening.

In Asia, US politicians assure Asian allies and partners that the United States is in a strong position as the hub of Asia's hub-and-spokes system of alliances. Yet the balance of power continues to deteriorate. China, feeling the wind in its sails, does not invade Taiwan, but it invests in influencing Taipei's politics.

These whipsaw back and forth between provocations by the Democratic Progressive Party (DPP) about declaring independence and dalliances by the Chinese Nationalist Party or Kuomintang (KMT) with tighter ties with China. By 2032 it begins to look like the denouement of the cross-Strait dispute resembles either

Hong Kong or a replay of the Chinese civil war. Taiwan's lackadaisical approach to its own defense leads an increasing number of US policymakers to conclude that Taiwan would lose in a conflict before US forces could even arrive.<sup>26</sup>

By 2030, the shock therapy of four years of the Trump-Vance administration, combined with a burgeoning bipartisan consensus in Washington that the structure of international politics has shifted from Europe, leads many analysts in Europe and elsewhere to conclude that their efforts to keep the United States onside had been counterproductive. As early as 2025, European observers had begun to worry that "the current situation is even worse than" a dormant NATO or even a US withdrawal from the alliance.<sup>27</sup> This view winds up being quite representative of US allies and partners. In their effort to stave off a careful, systematic US retrenchment, they wound up with a policy that did not stimulate greater effort by US partners. Instead, they watched passively as the Americans just faded away.

## RECOMMENDATIONS FOR EUROPE TO PREPARE FOR A RESTRAINED UNITED STATES

The first illustrative scenario above describes a designed and coordinated US withdrawal from Europe; the second a slightly delayed erosion of US leadership. While real-world developments will undoubtedly vary significantly, both outcomes are likely enough that they should shape German and European planning. As highlighted in the second scenario, US debt levels are a grave and mostly intractable problem – regardless of who will next reside in the White House. As early as 2012, Admiral Michael Mullen, former chairman of the Joint Chiefs of Staff, warned that the debt is "the single biggest threat to [US] national security."<sup>28</sup> A number of other prominent officials concur.<sup>29</sup> There is little reason to hope that the American political system is up to the task of tackling its debt problem.

Although not highlighted in these scenarios, a key political fact remains: the American public elected – not once, but twice – a president openly disdainful of alliances, norms, and the rule of law. Further, elected Republicans have been almost entirely unwilling to censure or constrain him. Despite the fact that support for NATO remains above 60 percent among Americans according to numerous polls, Germans must draw sobering conclusions from these domestic developments in the United States. First and foremost: Europeans should no longer feel safe with their security in someone else's hands.<sup>30</sup>

Indeed, whatever the reason – growing debt insecurity that prevents Washington from sustaining commitment levels; a rational and cooperative retrenchment driven by a restraintist administration; or populist-nationalist strongman politics – there is a significant possibility that US commitment to European security will

26 Eric Gomez, "Taiwan's Urgent Need for an Asymmetric Defense," Cato Institute Policy Analysis no. 965, November 14, 2023: <https://www.cato.org/policy-analysis/taiwans-urgent-need-asymmetric-defense>.

27 Rym Momtaz, "Why the US Security Stance is Worse than a Dormant NATO," Carnegie Strategic Europe, September 23, 2025: <https://carnegieendowment.org/europe/strategic-europe/2025/09/why-the-us-security-stance-is-worse-than-a-dormant-nato?lang=en&center=europe>.

28 Kenneth G. Lieberthal and Michael E. O'Hanlon, "The Real National Security Threat: America's Debt," Brookings, July 10, 2012: <https://www.brookings.edu/articles/the-real-national-security-threat-americas-debt/>.

29 "Resolution Recognizing the Seriousness of the National Debt and Its Threat to National Security," American Legislative Exchange Council (ALEC), August 11, 2025: <https://alec.org/model-policy/resolution-recognizing-the-seriousness-of-the-national-debt-and-its-threat-to-national-security/>.

30 For example see these two polls from 2025: Pew Research Center, "How Americans view NATO and U.S. NATO membership": <https://www.pewresearch.org/2025/04/17/how-americans-view-nato-and-u-s-nato-membership/> and The Chicago Council on Global Affairs, "American Endorse US Commitment to NATO, Though GOP Support Has Dipped": <https://globalaffairs.org/research/public-opinion-survey/americans-endorse-us-commitment-nato-though-gop-support-has-dipped>.

be softened or sapped by 2035. Thus, Berlin, together with European NATO allies, must *now* start building alternative security architecture that functions with a much smaller US role and, if need be, can be transitioned to work without the United States. The early steps for either result are largely identical. The one possible positive political outcome of Donald Trump's insistence that he "needs" Greenland, especially given recent US interventions in Venezuela and Iran, is that it may convince Europe to get serious about designing a European strategy for European security.

Although the next steps are rather well-established and uncontroversial, they are nonetheless challenging:

- **Focus on the most urgent gaps:** In the short term, doing so means increasing air tankers and airlift assets as well as intelligence, surveillance, and reconnaissance (ISR) capabilities, including European satellite capabilities. It also means integrating European military intelligence structures and mundane updates such as standardizing railway gauges to allow the quicker movement of troops and materiel across the continent. Considering the rapid US burn rate of air and missile defenses, Europe should also aim to bolster production of these platforms.
- **Build mass and enhance coordination:** In a second step, Europe needs more troops, ammunition, and industrial capacity. Stockpiles of relevant artillery and long-range strike capabilities, armored vehicles, drones, and more need to be expanded while simultaneously finding ways to enhance coordination. Another way to gather mass is to limit fragmentation in national efforts and militaries, also in terms of procurement.

- **Europeanize NATO command:** As colleagues recently argued, a gradual Europeanization of selected commands is the smart path forward.<sup>31</sup> The recent decision to put Joint Force Commands into European hands is a solid start. US control over the domain commands is a sign of continued US commitment, but it is not in line with a restraintist development. In the medium-term, even more commands, including domain commands, should be Europeanized.

The 2026 National Defense Strategy promises "critical, but more limited" US support for Europe. The European NATO members should not wait for this or future administrations – or US fiscal and political constraints – to determine what is critical and how limited "more limited" is. Instead, a coalition of leading European NATO members should together define what the most critical limited US support in the next three, five, and ten years comprises. Then, they must quickly work to collaborate to provide the rest.

31 Emil Archambault, Max Becker, and Patrick Keller, "To Ensure Its Security, Europe Needs a Stronger Hand in NATO," DGAP Memo, February 4, 2026: <https://dgap.org/en/research/publications/ensure-its-security-europe-needs-stronger-hand-nato>.



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