

## CHAPTER 1

# HEDGING AGAINST UNCERTAINTY

## How European defence is adapting to Trump 2.0

by  
**LUIGI SCAZZIERI**

European security since the Second World War has been built on the assumption that America would defend Europe against Russia. Trump's second presidency has shaken that assumption, while Russia appears increasingly threatening. Europeans are scrambling to keep America involved and strengthen their defences: nationally, bilaterally, through NATO and the EU and in small groupings. A transition towards greater European self-reliance is underway. The question is whether the process will be smooth and coordinated or uncoordinated and potentially incomplete.

### EUROPE ALONE?

Trump's second presidency has, for the first time, sparked genuine doubts about America's willingness to underpin European security. American officials and official documents emphasise that Europe is no longer a strategic priority, with Washington set to shift military resources towards the Pacific theatre and the defence of the US homeland. As Defence Secretary Pete Hegseth has argued, Europeans need to 'take ownership of conventional security on the continent'<sup>(1)</sup>. The upcoming National Defense Strategy will prioritise 'defense of the US homeland, including America's skies and borders, and deterring China in the Indo-Pacific'<sup>(2)</sup>. Internal guidance released in March reportedly indicates that the US is unlikely to direct substantial

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(1) Hegseth, P., 'Opening Remarks at Ukraine Defense Contact Group', 12 February 2025 (<https://www.defense.gov/News/Speeches/Speech/Article/4064113/opening-remarks-by-secretary-of-defense-pete-hegseth-at-ukraine-defense-contact/>).

(2) Parnell, S., 'Statement on the Development of the 2025 National Defense Strategy', 2 May 2025 ([https://www.defense.gov/News/Releases/Release/article/4172735/statement-on-the-development-of-the-2025-national-defense-strategy/#:~:text=Statement%20by%20Assistant%20to%20the,process%20can%20be%20found%20here](https://www.defense.gov/News/Releases/Release/article/4172735/statement-on-the-development-of-the-2025-national-defense-strategy/#:~:text=Statement%20by%20Assistant%20to%20the,process%20can%20be%20found%20here).)).

reinforcements to Europe in the event of a Russian attack<sup>(3)</sup>.

The Trump administration has also sent mixed messages about America's commitment to its allies. While US officials often strike a reassuring tone, the President sometimes cultivates ambiguity, for example arguing that NATO's Article 5 has 'numerous definitions'<sup>(4)</sup>. Trump's rhetorical embrace of NATO after the Alliance's summit in the Hague has somewhat lessened, but not dispelled, fears about America's commitment to Europe. Meanwhile, his trade war on the EU, his wish to normalise relations with Russia, support for the far right in Europe, and desire to acquire Greenland, have unsettled Europeans and deepened doubts about America's reliability as an ally.

Concretely, Europeans have several interconnected concerns. First, there is a fear that America will reduce its troop presence in Europe, making large or uncoordinated cuts. Europeans would struggle to make up for large-scale rapid reductions, as American forces form the backbone of NATO and Europeans militaries lack many key capabilities, such as intelligence and command and control assets<sup>(5)</sup>. Second, Europeans worry that Trump's rhetorical ambiguity on NATO and confrontational policies towards allies could undermine confidence in America's extended nuclear deterrence, even though US officials have not explicitly questioned the nuclear guarantee. Cuts in

US conventional forces in Europe, combined with growing doubts about the credibility of the nuclear umbrella, could open a window of opportunity for Moscow to test Europe's defences. Third, many Europeans worry about their dependence on American military equipment and intelligence. Notably, the Trump administration's intermittent suspensions of aid to Ukraine have heightened concerns about Europe's level of reliance on US systems such as the F35 fighter. A separate concern is that US *matériel* may not be available due to supply constraints in America's industrial base.

## HOW EUROPEANS ARE ADAPTING

In response to mounting uncertainty about America's commitment to European security, Europeans have adopted a dual hedging strategy. On one hand they are trying to address long-standing American grievances about unequal defence burden-sharing in order to keep Washington engaged; on the other, they are striving to be more self-reliant.

First, Europeans are pouring new resources into defence. Many Member States have increased their defence budgets significantly since 2022 and those that

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(3) Horton, A. and Natanson, H., 'Secret Pentagon memo on China, homeland has Heritage fingerprints', *Washington Post*, 29 March 2025 (<https://www.washingtonpost.com/national-security/2025/03/29/secret-pentagon-memo-hegseth-heritage-foundation-china/>).

(4) 'Trump casts doubt on Article 5 commitment en route to NATO summit', *Politico*, 24 June 2025, <https://www.politico.eu/article/donald-trump-nato-summit-sidesteps-article-5-mark-rutte-eu-defense-budget-russia-vladimir-putin-iran-israel-strikes-qatar/>

(5) Spatafora, G., 'Fit for purpose? Reforming NATO in the age of Trump 2.0', Brief no. 13, EUISS, 4 June 2025 (<https://www.iss.europa.eu/publications/briefs/fit-purpose-reforming-nato-age-trump-20>).

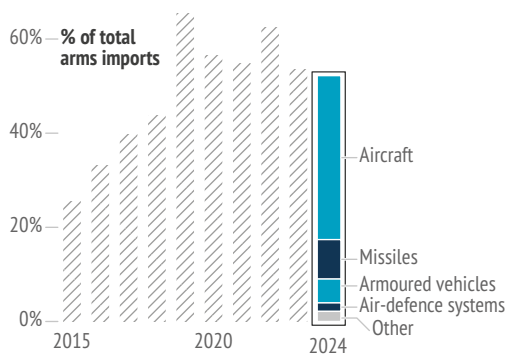
are NATO members have agreed to raise spending to 5% by 2035<sup>(6)</sup>. For its part, the EU has unlocked significant resources, by easing limits on national deficits and offering €150 billion in low-interest loans to Member States. The Union is also making it possible for Member States to channel extra funding into defence by reallocating resources from national EU cohesion funds and loans from the post-COVID Recovery Fund. For now, promises of greater spending seem to have placated Trump, though tensions could resurface if Europeans are slow to deliver.

Second, there has been an intensification of bilateral and small group cooperation. In diplomatic terms, Europe's dealings with the Trump administration on Ukraine have been driven by a core group consisting of France, Germany, Italy and the UK – often with other Member States and the EU institutions also involved. This group has had some success in steering Trump towards a more supportive stance towards Kyiv. Small groups have also been at the heart of efforts to fill specific defence capability gaps. For example, several countries are collaborating on long-range strike weapons through the European Long Range Strike Approach group, while supply of specific arms to Ukraine has been driven by 'capability coalitions'. Finally, when it comes to operational cooperation, planning for a possible post-ceasefire military deployment to Ukraine has been driven by the so-called coalition of the willing, led by France and the UK.

Third, cooperation between EU and non-EU European partners is deepening. Europeans increasingly see Ukraine as an essential player in Europe's security. Major European defence companies

## Still on top?

The US share in EU arms imports has recently stabilised



Data: SIPRI, 'Arms Transfer Database', 2025  
NB Calculation based on year of delivery

such as Rheinmetall or SAAB have forged partnerships with Ukrainian firms, while several Member States and the EU are directly channelling funds into Ukraine's defence industry. On the other side of the continent, ties with the UK are also strengthening. One of the key outcomes of the May EU-UK summit was the conclusion of a Security and Defence Partnership, which provides a platform for closer EU-UK cooperation. Shortly after, a France-UK summit led to an agreement to relaunch defence cooperation, with a focus on long-range capabilities and the nuclear domain<sup>(7)</sup>. Separately, in mid-July Germany and the UK signed a bilateral treaty designed to foster more defence cooperation.

Fourth, doubts about the reliability of the US nuclear umbrella are leading Europeans to discuss nuclear deterrence issues more openly than in the past. Closer co-ordination between France and the UK is only part of the story. Non-nuclear powers are also increasingly thinking about nuclear deterrence. Notably, both Poland and Germany have expressed interest in

(6) European Defence Agency, 'Defence spending data 2023-4', 29 November 2024 (<https://eda.europa.eu/docs/default-source/brochures/1eda---defence-data-23-24---web---v3.pdf>).

(7) 'UK-France Leaders Declaration', UK Government, 10 July 2025 (<https://www.gov.uk/government/news/uk-france-leaders-declaration>).

deepening cooperation with France, and in July President Macron ordered the launch of a strategic dialogue with key partners on the future role of France's deterrent.

The picture is less clear in terms of greater European self-reliance in defence equipment. Many Europeans say they want to reduce their dependence on US military equipment and the EU has developed a sizeable toolkit to strengthen its defence industry. Promising home-grown defence players focusing on drones and AI, such as Helsing, are emerging. At the same time, as part of the August 2025 EU-US trade deal, Europeans promised to buy more US military equipment, and they are helping to resupply Ukraine with US arms. The overall share of EU arms imports from the US has stabilised at around 50%, with many European countries placing new orders since the start of Trump's second term. For example, Belgium is planning on buying F-35s, while the Netherlands, Italy and Poland are purchasing various kinds of missiles. Many Member States still view purchases from the US as a way to secure advanced equipment and strengthen ties with Washington. Moreover, countries already operating a specific US system – such as the F-35 – cannot afford to change. The road to greater European self-reliance will be long and winding.

## SECURITY IN THE SHADOW OF DOUBT

Transatlantic defence relations are entering an era of lower trust. The broad direction of travel is clear: Europeans will become more self-reliant, and America

will be less involved in European security. But the details remain hazy.

In principle, there is scope for a new transatlantic defence bargain, with the US reducing its involvement as Europeans assume primary responsibility for their security. Such a transition would require extensive transatlantic coordination, as it will take the better part of a decade for Europeans to assume responsibility for conventional deterrence in Europe. Washington would need to set out a timetable for withdrawal and spell out what assets it will maintain in Europe. This would allow Europeans to identify and prioritise critical capability gaps, and to gradually assume greater responsibility for key positions within NATO. Without this active encouragement, many Europeans may continue to be paralysed by the fear that becoming more self-reliant will accelerate US disengagement.

An orderly and coordinated transition ultimately depends on stemming the erosion of transatlantic trust. Much will depend on the choices that the Trump administration makes over the coming year, particularly regarding force reductions in Europe and policy towards Russia and Ukraine. Large and uncoordinated reductions in US forces in Europe or a deal with Moscow perceived by Europeans as increasing the risk of Russian aggression could fatally undermine European confidence in US security guarantees. The result would be an uncoordinated and likely fragmented transition that serves neither American nor European interests.

In this second scenario, the challenge of building up Europe's defences would be of a different order of magnitude, both financially and practically. Deep cuts in American forces could create a dangerously prominent window of vulnerability

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to Russian aggression. A hasty disengagement scenario would severely test Europe's cohesion. Despite the pressure for a rapid and united response, Europeans may struggle to organise their build-up effectively. Some may be unwilling to pay the price of becoming fully self-reliant; others may hope that they can ensure their safety by seeking bilateral deals with the US.

Europeans should seek to maximise the chances of an orderly transition. They are already taking important steps, such as increasing defence investment. Much depends on the degree to which Europe's military expansion is coordinated among Member States and between Member States and non-EU allies like the UK, so that Europeans build up forces that are greater than the sum of their parts. At the same time, Europeans should take ownership of the transition, by pitching a clear plan to Washington that includes specific requests for maintaining critical capabilities within an agreed timeframe. Most of all, an orderly transition depends on whether Europe can shift from a mindset of tactical adjustments to one of genuine strategic adaptation.