Defending Europe Without the United States: Costs and Consequences

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Cover

The 32 flags of the NATO member states at the NATO headquarters building on 4 April 2025 in Brussels, Belgium (photo by Omar Havana via Getty Images)

Executive Summary

The IISS has conducted an independent, open-source assessment of the financial costs and defence industrial requirements for NATO-Europe to defend against a future Russian threat without the United States. Russia's war of aggression against Ukraine, its hybrid war against European states, and demands by the Trump administration for European defence autonomy make it imperative for European decision-makers to consider the military, financial and defence industrial investments needed to reduce dependencies on the US and, *in extremis*, to prepare for a NATO without any US role.

The objective of the study is to inform European policymakers' thinking about the military, financial and defence industrial implications of closing key military gaps.

To inform the European defence policy debate, the study assumes that by mid-2025 the war in Ukraine has ended with a ceasefire agreement and that the US government has indicated that it will begin the process of withdrawing from NATO. Declaring its need to prioritise the Indo-Pacific theatre, the US also commences to remove equipment, stocks, supplies and military personnel from Europe. The IISS does not assume this scenario to be inevitable, but it is a helpful construct to clarify policy and capability decisions for European governments today.

Against this background, the study first assesses Russia's ability to reconstitute its forces after the fighting in Ukraine ends. Our assessment is that challenges notwithstanding, Russia could be in a position to pose a significant military challenge to NATO allies, particularly the Baltic states, as early as 2027. By then, Russia's ground forces could mirror its February 2022 active equipment holdings through a combination of refurbishment and the production of new systems. Moreover, its air and maritime forces have been largely unaffected by the war.

Consequently, were US forces to disengage from the European theatre from mid-2025, Europe's window of vulnerability would open quickly. Not only would European allies need to replace major US military platforms and manpower – the latter estimated at 128,000 troops – but also address shortfalls in space and all-domain intelligence, surveillance and reconnaissance assets. They would also need to replace the significant US contribution to NATO's command and control arrangements and fill many senior military positions in NATO organisations currently occupied by US personnel.

To replace the currently assumed US conventional capabilities assigned to the Euro-Atlantic theatre, European states would need to invest significant resources on top of already existing plans to boost military capacity. The IISS estimates that taking into consideration one-off procurement costs and assuming a 25-year lifecycle, these costs would amount to approximately USD1 trillion.

Unlocking such funding would be possible but would come with considerable challenges for many European states. More radical approaches to defence investment and defence spending levels closer to Cold War levels – where spending 'routinely averaged' over 3% – would be required. On the positive side, several European countries and the European Union have started to pave the way for increased defence spending and a better defence investment environment. But whether the political will to deliver the spending levels necessary will be forthcoming across European nations remains to be seen given the limited fiscal space for many governments.

In addition, European allies face defence industrial challenges. While procurement orders have picked up pace in the land domain, there has been less urgency in the naval and much of the aerospace sector, with little additional investment in more production capacity. This is problematic since the large-scale provision of air and maritime platforms would be a key requirement if Europe had to replace the US military contribution in these domains. Additional defence industrial challenges

relate to contracts, financing, workforce shortages, regulation and security of supply.

Consequently, the IISS estimates that within the next decade, Europe's defence industry would find it difficult to replace many US capabilities, specifically in the air and maritime domain. However, long lead times could be shortened provided significant investment in Europe's industrial capability and the acquisition of complementary uninhabited systems. Faster progress could be made in the land domain, where European industry could produce many of the required systems. European allies, therefore, will face difficult trade-offs in certain capability areas. The more European systems they seek to procure, the longer the lead times and – given Russia's threat – the longer the window of vulnerability will remain open. To fill certain gaps more quickly, buying abroad will thus remain necessary, specifically in areas where at present there is little to no European option available, such as rocket artillery or low-observable fighter aircraft – in turn creating further dependencies. European allies will also need to prioritise investments in systems capable of attacking Russia's anti-access capabilities to reduce vulnerabilities quickly.

Introduction

The urgency for European policymakers to understand the requirements and challenges in relation to defending against a Russian military attack has never been greater. Russia's full-scale invasion of Ukraine since February 2022 has brought war to Europe. While Russian forces have suffered significant losses on the battlefield, the Kremlin has reacted by doubling down on its efforts to destabilise European security. Russia's economy is on a war footing and its defence industry is working around the clock. Whenever the fighting in Ukraine stops, it is highly likely that Russia will recapitalise its forces for potential use against a European NATO ally.[1]

At the same time, European allies can no longer assume that the US will provide the necessary military support to defend the continent against Russian aggression. Even if President Donald Trump may have to seek a Senate majority to formally withdraw from NATO, his sentiments and actions – and the words of close associates – have caused serious concern in Europe over US reliability and commitment to the Alliance.[2] His administration temporarily stopped critical military aid to Ukraine, including withholding vital strategic intelligence, and has made significant concessions to Russia in a bid to achieve a ceasefire. It has done so without much regard for European security or for whether there will be a just or lasting solution to the conflict.[3] Moreover, when addressing the Ukraine Defence Contact Group in February 2025, US Secretary of Defense Pete Hegseth stated that while remaining 'committed to the NATO alliance and to the defense partnership with Europe', the US was now focused on deterring war with China in the Pacific. Washington would therefore 'no longer tolerate an imbalanced relationship which encourages dependency' and instead would 'prioritize empowering Europe to own responsibility for its own security.'[4]

European NATO members, therefore, must redouble focus on building up their capabilities to defend the continent, if necessary, without US support to counter Russian aggression against one or more allies. European leaders have recognised this new reality. For instance, French President Emmanuel Macron stated that France would launch a strategic dialogue on extending its nuclear umbrella to European allies.[5] Germany's new Chancellor Friedrich Merz also stressed the need for Europe to make itself more independent from the US.[6] The German parliament also agreed to lift the constitutional 'debt brake' on defence spending in March, paving the way for potentially significant increases in the country's defence investments.

Defending Europe 2.0: Assumptions and Approach

Against this background, the main objective of this study is to inform European decision-makers' thinking about the military and financial requirements for European autonomy and an empowered Europe owning responsibility for its own security, as governments across the continent consider long-term defence investments to reduce dependencies on the US and, *in extremis*, face a NATO without any US role.[7] It begins by providing an assessment of Russia's ability to reconstitute its forces to pose a threat to NATO-Europe in case of a ceasefire in Ukraine. It then assesses the current US conventional military contribution to NATO in order to identify key capabilities which European allies would need to acquire if US military assistance was not forthcoming in a future crisis. Importantly, these investments would come on top of current European plans to boost their defence capability. The study is based on public knowledge of NATO's war-fighting plans which involve not only European forces, but also American troops based in Europe and the continental US (CONUS).

This study assumes a situation where, in mid-2025, the war in Ukraine has concluded with a ceasefire and the US has indicated that it will begin the process of withdrawing from NATO. Declaring its need to prioritise the Indo-Pacific theatre, the US also begins to remove all equipment, stocks, supplies and military personnel from Europe.

Based on these assumptions, the study models a potential solution of acquisitions by European NATO allies to cover equipment shortfalls left by a US departure from NATO, and estimates the related financial costs. It uses recent real-world procurement contracts to estimate unit costs, and extrapolates these costs to account for the equipment the US currently has either stationed in Europe, or that we consider would be assigned to its defence.

To estimate the implications for European NATO's war-fighting capability, the study has also taken other factors into consideration. One is the readiness of European forces, which has come under scrutiny in NATO states in recent years and is assumed to be at 50%. Another relates to the overall composition of NATO's fighting forces, since member states' security priorities often influence equipment types, volume and availability. A case in point is the significant number of armoured vehicles and artillery pieces, relative to overall NATO European totals, in the inventories of the Greek and Turkish armed forces and the extent to which these countries' security priorities may or may not affect their deployment decisions driven by contingencies elsewhere.

Other assets are more difficult to quantify and cost, particularly those relating to the 'connective tissue' capabilities that the US currently provides or significantly contributes to, such as command and control (C2), space and strategic intelligence assets. The costs of nuclear weapons also fall outside the scope of this study. Although they are now firmly on the agenda of Europe's strategic debate, the ability to rapidly build up capability in this area is limited even in the United Kingdom and France, Europe's only nuclear weapons states. One unquantifiable but highly significant factor is the leadership provided by the US, be that the position of Supreme Allied Commander Europe (SACEUR) or through diplomatic coordination between allies. This study, therefore, focuses exclusively on the conventional military requirements for European states in case of a US withdrawal. These are also the 'shortfalls on which most European members have the ability to act.'[8]

Moreover, the study provides a range estimate of the defence industrial timelines within which European powers could achieve autonomy from the US and the potential trade-offs required to reducing the window of vulnerability quickly. While it has been beyond the scope of this paper to conduct a detailed scenario exercise to determine whether replacing US capability would mean Europe would be ready to meet a specific Russian military contingency in the future, the study provides a sober assessment on the financial and defence industrial requirements for a Europe that assumes responsibility for its own security.

1. Estimating Russia's Threat to Europe

Predicting the end of the Ukraine war is difficult, as are the resulting political consequences in Russia. However, Russia is likely to remain the key military threat to European NATO territory, as stated in NATO's 2022 Strategic Concept. The new German coalition agreement in April 2025 shared this assessment.[9] A core task for NATO's European allies is to assess how quickly Russia could reconstitute its forces after the fighting ends.

Assessments vary. The UK chief of defence staff Admiral Tony Radakin, estimated in 2024 that 'it would take Putin five years to reconstitute the Russian Army to where it was in February 2022; and another five years beyond that to rectify the weaknesses that the war has revealed.'[10] Estonia's intelligence service agreed with the ten-year timeline, stating that 'within the next decade, NATO will face a Soviet-style mass army that, while technologically inferior to the allies, poses a significant threat due to its size, firepower and reserves.'[11] Meanwhile, according to Norway's chief of defence, General Eirik Kristoffersen, the Alliance has a 'window of two to three years to prepare before Russia has rebuilt the capacity to carry out a conventional attack.'[12] Finally, in early 2025, Danish Defence Intelligence assessed that within six months after the end of the war Russia could be able to fight a localised war in a bordering state, within two years be ready for a regional war in the Baltic Sea region, and in around five years be able to launch a large-scale war in Europe.[13]

Our own assessment is closer to the Danish assessment. Challenges notwithstanding, Russia could pose a significant military challenge to NATO allies, particularly the Baltic states, as early as 2027. By then, through a combination of further refurbishment work and the production of new systems, Russia's ground forces could mirror its February 2022 active equipment holdings. Moreover, its air and maritime forces have been largely unaffected by the war in Ukraine.

Russia's ability to reconstitute its forces quickly should not be underestimated. Its economy and industry have been put on a war footing, and Moscow has also sourced military equipment abroad. Russia's total military expenditure increased by 41.9% in real terms from 2023 to 2024, outpacing Europe's rate of defence spending growth. In 2024, Russian defence expenditure reached an estimated RUB13.1 trillion (USD145.9bn, or I$ (international dollars) 462bn in purchasing power parity (PPP) terms).[14] This amounted to 6.7% of GDP, more than double the average allocation of 2.8% of GDP in the years prior to the 2022 full-scale invasion of Ukraine. Spending is projected to reach 7.5% of GDP in 2025, although this does not include wider costs borne by industry, local government and private individuals.[15] Moreover, Russia retains a level of state control of the defence sector that is not seen in Europe.

Whether Russia will decrease defence spending once the fighting ends will affect the pace of its military reconstitution and broader equipment recapitalisation. It is prudent to assume that Moscow's defence spending will remain high. After all, the Kremlin has neither abandoned its strategic objectives in Ukraine nor ceased its efforts to destabilise Europe.

Ground Forces

The priority for Russia will be to rebuild its ground forces, given their high losses in Ukraine and the key role they would likely play in any major incursion into a NATO member state. Three years into the war, these forces face significant gaps in their equipment holdings, particularly in the armoured personnel carrier (APC) and infantry fighting vehicle (IFV) fleets, as well as in self-propelled artillery. The IISS estimates that Russia lost 1,400 main battle tanks (MBTs) alone in 2024, for a total of over 4,000 since February 2022.[16] While Russia has deployed numerous obsolete platforms to the frontline, these could either be scrapped when the conflict ceases or returned to storage.

Moreover, Russia's military facilities close to the Baltic states and Finland, including in Kaliningrad, have been stripped of personnel and equipment for

the war effort in Ukraine. A ceasefire would present the opportunity for Russia to replenish both its equipment and personnel there. However, Russia's plans to transform brigades into divisions, and to field additional units in the Leningrad Military District (MD), could delay the date when these units would be fully staffed and equipped to the level set by their tables of organisation and equipment (TOEs).[17] To accelerate expansion to these larger units, Russia may instead opt for a tiered level of equipment and quality, similar to the structures that preceded the 2008 'New Look' military reforms. Under such a system, only a few high-readiness units would have modern equipment and high personnel levels, whereas most other units would be at lower readiness levels with incomplete staffing and older equipment.[18]

Force expansion plans in the Leningrad MD

In the Leningrad MD, which was re-established in 2024, the ground manoeuvre force is being increased from two divisions and six brigades in 2022 to seven divisions and three brigades when current plans are implemented. If the expansion of the 14th Army Corps to Army status is confirmed, this could result in nine divisions and one brigade. However, many units have suffered combat attrition in Ukraine, both to personnel and equipment, and it will take some time for present units and future planned divisions to complete their full TOE.

In the 6th Combined Arms Army, headquartered in St Petersburg, the 69th Motor Rifle Division was formed on the Karelian isthmus in 2024 based on the previous 138th Motor Rifle Brigade. Close to the Baltic states, the 68th Motor Rifle Division was forming from late 2024 on the basis of the 25th Motor Rifle Brigade. The 76th Air Assault Division will remain based at Pskov.

In contrast, the 44th Army Corps in Karelia is an entirely new formation established in 2024, comprising the 72nd Motor Rifle Division and 128th Motor Rifle Brigade.

The 61st Naval Infantry Brigade in Murmansk and 336th Naval Infantry Brigade in Kaliningrad both appear planned for expansion into divisions as part of a naval infantry reorganisation. The 18th Motor Rifle Division will presumably be retained under the 11th Army Corps in Kaliningrad.

Another reconstitution option for Russian ground forces would be to retain the focus on 'mass' that has resurfaced during the war in Ukraine. Despite Moscow's plan to consolidate its ground forces into larger formations, ad hoc reinforced company/battalion-sized assault detachments remained the dominant way of conducting assaults in Ukraine.[19] It remains unclear whether these Russian lessons are a temporary fix for tactical challenges, or whether they herald a deeper change that will alter the structure of the ground forces and their equipment requirements.

However, reconstituting the ground forces' equipment relatively quickly would not be an insurmountable task.[20] Currently, large parts of Russia's land defence industry are dedicated to refurbishing and refitting stored equipment. As the inventory of equipment suitable for refurbishment diminishes, industrial capacity could be redirected towards supporting the manufacture of new equipment.

Fully equipping an expanded ground force structure would likely only be possible between 2030 and 2035, assuming current financial investments, workforce staffing and shift patterns remain in place and a ceasefire in Ukraine occurs by mid-2025. The largest equipment-platform shortfall in Russia's ground forces is in self-propelled artillery, with an estimated gap of over 1,000 pieces between the active inventory total and the estimated 2025 TOE requirement. This is particularly important given the central role of artillery systems in Russian doctrine. Russia could, in the short term, look for alternative ways of generating this capability, such as utilising towed artillery pieces instead, supplementing rocket and artillery units with one-way-attack uninhabited aerial vehicles (OWA-UAVs) or importing artillery systems from North Korea.[21]

That said, if the war in Ukraine ceases in mid-2025 and Russian industrial production continues at the present pace, by 2027, Russia could field around 3,300 MBTs, 11,000 APCs, IFVs and airborne combat vehicles; 2,000 self-propelled artillery pieces; and 1,300 multiple-rocket launchers, though all of these would be of differing ages and sophistication.[22] Not all of its units would be at high readiness, with modern equipment and full staffing, but they would likely have been able to

Table 1.1: **Estimated Russian equipment deficit numbers, Jan 2022–27**

Equipment type	In active service, Jan 2021 (in store)	Unrecoverable losses, Feb 22–Nov 24	Equipment pressed into active service from storage, Feb 22–Nov 24	New-build equipment, Feb 22–Dec 24	In active service, Nov 2024	Active TO&E full capacity requirement, 2025	Projected total new-build output by 2027
Main battle tanks	3,143 (~8,000)	4,042	~3,540	~210	2,900	~4,200	~300–400
Infantry fighting vehicles, armoured personnel carriers, & airborne combat vehicles	9,648 (~15,500)	8,811	~7,650	~1,350	9,840	~14,000	~900–1,100
Self-propelled artillery	2,341 (~4,260)	1,229	~660	~50	1,805	~3,000	~200
Multiple rocket launchers	1,168 (~1,500)	544	~450	~40	1,206	~1,300	~80

Note: All equipment numbers are Ground Forces, Naval Infantry, and Airborne Forces totals. Revised pre-invasion active and storage numbers. Pre-war active numbers include Donetsk People's Republic and Luhansk People's Republic equipment. In store includes equipment where serviceability is also in doubt. Donated equipment from Belarus is included as refurbished. 'Production' comprises newly built equipment, and vehicles refurbished and modernised from storage and possibly from active service. Artillery and multiple rocket launchers that are pressed into service from storage exclude vehicles that have been cannibalised. Numbers from *The Military Balance 2025* are rounded to nearest 50 or 100. All numbers are estimates from as of early November 2024 and serve as the basis for extrapolating potential Russian equipment numbers in 2027.
Sources: IISS analysis, Military Balance+, milbalplus.iiss.org, Jompy, HighMarsed, Covert Cabal

recuperate, re-equip and train. For the states bordering Russia, particularly the smaller Baltic nations, Moscow would still have first-mover advantage.

Air Forces

In contrast, Russia's aerospace forces (VKS) have suffered relatively little reduction in overall strength, even though they have underperformed in Ukraine, failing to gain air superiority for any sustained period or inflicting crippling damage on Ukraine's critical national infrastructure. Its losses do not equal those of the ground forces, though there has been attrition among some combat aircraft types and most notably in its helicopter fleets.

The largest losses in Ukraine have been among fixed- and rotary-wing ground-attack platforms. As of early 2025, the VKS had lost approximately 32 Su-25 *Frogfoot* ground-attack and 30 Su-34 *Fullback* tactical bomber aircraft, as well as over 50 Kamov Ka-52A *Hokum* B attack helicopters. However, continued production of the Su-34 has offset these combat losses. This has not been the case with the Ka-52, where the scale of attrition – approaching half of the pre-war fleet size – looks to have outpaced production.[23]

However, aircraft manufacturing continues. Russian industry officials in April 2025 indicated an intention to increase the production rate of the Su-35 *Flanker* M multi-role fighter. A similar objective exists for the Su-34 and the Su-57 *Felon* fighter aircraft, although the latter has suffered multiple delays, with only a small number in service. Production of a modernised Tu-160 *Blackjack* bomber has already restarted, providing additional capability for the long-range aviation branch.

The war has exposed an inadequate inventory of modern Russian air-launched air-to-surface weapons. In response, its defence industry has adapted and produced a range of precision-guidance wing-kits for unguided bombs, providing tactical combat aircraft adequate stand-off capability to improve survivability against ground defences. Russia's long-range aviation force, meanwhile, has made extensive use of the Raduga Kh-101 (RS-AS-23A *Kodiak*) land-attack cruise missile, but the relatively low speed and altitude of this type of weapon has highlighted its vulnerability to ground-based air defence.

Russia's mode of employing cruise missiles in waves of attacks during the war in Ukraine has indicated that cruise missile stocks and production capacity may be limited. However, a ceasefire would enable production capacity to be redirected to rebuilding inventory depth. Russia employed cruise-missile attacks in concert with UAVs, such as the Iranian-origin *Shahed* 136, in a bid to saturate air defences and increase the chance of higher-precision missiles reaching their targets. To increase the production of *Shahed*s, Russia built its own production facility in Alabuga, in Tatarstan.[24] A ceasefire would also enable Russia to increase its inventory of UAVs like the *Shahed*. Russia's aerospace forces are already able to pose a considerable challenge to European forces, particularly given

the limited numbers of European air-defence systems, and this capability will grow once Russia is able to direct its munitions production to rebuild its inventory in the wake of a ceasefire.

Maritime Forces

Ukraine's attacks on elements of Russia's Black Sea fleet, and the effective maritime denial to Russia of large parts of the Black Sea, have been a blow for the Kremlin. However, the Black Sea Fleet only represents a fraction of Russia's naval capability and its overall naval capacity remains largely intact.

Some observers, including the Norwegian Intelligence Service, have pointed to the war's indirect impact on the wider navy in terms of readiness, with issues of crewing and maintenance arising as resources have been drawn off for the Ukraine campaign, as well as other calls on the defence-industrial base, plus the impact of sanctions on areas of technology, equipment and component supply.[25]

Russia may invest less in legacy surface platforms and its future naval capability may lie in the submarine service and more modern surface platforms. These include the development of *Yasen*-M-class guided-missile-armed nuclear-powered submarines and *Gorshkov*-class frigates. Indeed, the commissioning of three or four *Yasen*s and five *Gorshkov*s in the next two to three years seems possible.

Moreover, the war has validated the navy's focus on long-range precision conventional strike, including land-attack. This may mean an increased emphasis on newer and higher-performance weapons like the 3M22 *Zircon* high-speed missile, which both the *Yasen*s and the *Gorshkov*s will likely field in increasing numbers if production capacity allows. The advent of other weapons, including possibly the *Poseidon* extra-large uninhabited underwater vehicle or 'super-torpedo', could pose a significant additional challenge to European anti-submarine-warfare forces. Another important lesson for Moscow has been the effectiveness of unconventional and hybrid warfare, especially against critical undersea infrastructure.

Irrespective of the ground forces' losses, Russia's aerospace force and navy remain intact for the most part. On their own, were a ceasefire to occur in Ukraine, they would present a credible threat to Europe.

2. NATO's Plans for Major War in Europe

Even before the arrival of the second Trump administration, European NATO members were clear about the need to increase their forces and pre-positioned equipment committed to NATO's 'forward presence' on the territory of its eastern member states, a key objective of NATO's 2022 Strategic Concept.

SACEUR has developed an updated strategic plan for deterrence and defence of the Euro-Atlantic area, complemented by a family of subordinate plans. The three joint-force commands in Norfolk, Brunssum and Naples have regional plans to conduct an operational-level joint campaign across land, sea, air, space and cyberspace.[26] Each joint-force command has land, sea and air component commands and a logistic command. Supreme Headquarters Allied Powers Europe (SHAPE) has identified the forces to be allocated to these plans and those that would be held in reserve.

NATO military staff developed 'National Capability Targets' based on SACEUR's military capability requirements, which were issued to member states in July 2024. While the specific details remain classified, the total number of NATO forces to execute the new deterrence and defence plans is assumed to be 30–50% larger than those required before 2022. A May 2024 review of the new NATO Force Model noted that the size of the ground-force component would ultimately require '11 corps headquarters' to command the future subordinate divisions and brigades.[27]

However, given the evolving situation, new military capability targets are likely to be agreed upon at the upcoming NATO ministerial meeting in June 2025.[28] In March 2025, Admiral Pierre Vandier, NATO's supreme allied commander transformation, suggested that these targets might represent a 30% increase from the earlier commitments.[29] However, reflecting the challenge NATO states have in meeting any expanded capability targets, he also stated that there was a 'huge hole' given that allies were 'already 30% behind in delivering on existing capability targets'.[30]

2025: The US Role in NATO's European Planning

No official data is available on the size of a potential US military commitment to NATO in the event of a large-scale war-fighting contingency. While the peacetime US European Command (EUCOM) force posture and the reinforced presence in place since early 2022 would undoubtedly form the initial basis of such a force, SACEUR could also seek reinforcement by US conventional forces based in CONUS. Outside of conventional capabilities in the three traditional war-fighting domains, the US commitment to NATO also includes Washington's extensive strategic intelligence, military space and cyber capabilities as well as its substantial arsenal of nuclear weapons.

Assessments of the size and shape of the US commitment can be derived from open-source estimates of US force-planning requirements,[31] as well as the total number of CONUS-based formations and equipment platforms in relevant capability categories, bar those likely to be earmarked for operations in other theatres.

For a large-scale conventional war in Europe, the US Army contribution would most likely involve a full heavy corps deployed in central and eastern Europe, comprising three armoured divisions and supporting enablers under the control of the recently re-established US V Corps headquarters, forward elements of which have been based in Poland since 2022. A light-role rapid-reaction division would likely also be fielded by combining Europe-based formations with high-readiness units deployed from CONUS. Such a force would require the deployment of considerable numbers of CONUS-based formations: including three more divisional headquarters, five Armored Brigade Combat Teams, one *Stryker* Brigade Combat Team and one high-readiness air-manoeuvre Brigade Combat Team.

From the US Navy and Marine Corps, two of the four aircraft carrier strike groups (CSGs) and two of the four Amphibious Ready Groups assigned to the East Coast-based 2nd Fleet could either be deployed to Europe on

Table 2.1: **Estimated US force allocations for a European NATO contingency**

Formation or platform	European Command (EUCOM)	Possible continental US (CONUS) allocation to Europe	EUCOM + ~50% CONUS*	US force requirement for NATO contingency in Europe**
Armoured brigade combat teams	2	14	9	7
Stryker brigade combat teams	1	7	4	2
Airborne/air assault brigade combat teams	1	6	4	3
Long-range artillery brigades	1	3	2	2
Theatre air-defence brigades	1	4	3	2
Short-range air defence battalions	1	2	2	3
Army aviation brigades	1	10	6	4
Attack submarines	0	26	13	10
Aircraft carriers***	0	4	4	2
Cruisers, destroyers & frigates	5	43	26	26
Principal amphibious ships***	0	14	7	6
Air Force bomber squadrons	0	7	3	2
Air Force fighter squadrons	7	34	24	24
Air Force airborne early warning aircraft	0	12	6	6
Air Force electronic intelligence aircraft	2	20	12	8

*Based on estimates of readiness/availability for individual units and possible allocations for other contingencies or theatre commands. **Requirement based on unit allocations to higher formations, such as an Armored Brigade Combat Team within a heavy division. ***Aircraft carriers and principal amphibious ships also include an extensive group of combat aircraft and enablers.

Source: IISS analysis

rotation or be earmarked to arrive after the outbreak of hostilities. These, along with their accompanying surface escorts and supporting submarines, embarked aircraft and support vessels, would likely comprise the bulk of the deployed US maritime component.

The US Air Force (USAF), including its reserve components, would likely be able to provide 20–30 tactical fighter squadrons (between 250 and 350 aircraft in total), as well as elements of CONUS-based bomber, airborne early-warning (AEW) and airborne signals intelligence (SIGINT) collection squadrons.[32] The USAF would also probably provide a number of uninhabited aerial vehicle (UAV) orbits for intelligence, surveillance and reconnaissance missions, including low-observable UAVs designed for operations in contested airspace.

Based on these assumptions, a potential large-scale US NATO contribution for conventional operations in Europe against Russian aggression could consist of the following assets with a combined force estimate of 128,000 troops:

US Army:

- 1 x corps HQ
- 4 x division HQs
- 7 x Armored Brigade Combat Teams
- 2 x *Stryker* Brigade Combat Teams
- 3 x Airborne/Air Assault Brigade Combat Teams
- 4 x army aviation brigades
- 2 x Long-range artillery brigades
- 1 x Multi-domain Task Force
- 2 x theatre air-defence brigades
- 3 x short-range air-defence battalions
- 2 x military intelligence brigades
- 4 x divisional support brigades

US Navy:

- 10 x *Los Angeles*- or *Virginia*-class nuclear-powered submarines
- 2 x aircraft carriers with associated carrier air wings (CVWs)
- 20 x *Ticonderoga*-class cruisers or *Arleigh Burke*-class destroyers
- 6 x *Independence*-class frigates[33]
- 2 x *Wasp*-class amphibious assault ships (LHDs)
- 2 x *San Antonio*-class landing platform docks
- 2 x *Whidbey Island*-class landing ship docks
- 8 x F/A-18E/F combat aircraft squadrons in CVW
- 2 x EA-18G suppression of enemy air defence (SEAD) squadrons in CVW
- 2 x E-2D airborne early warning squadrons in CVW

- 2 x expeditionary EA-18G SEAD squadrons
- 3 x P-8A maritime-patrol squadrons
- US Marine Corps:
- 2 x Marine Expeditionary Units
- 1 x F-35B fighter-squadron equivalent split between LHDs

US Air Force:

- 5 x B-1/B-2/B-52 bomber flights
- 10 x F-16 fighter squadrons
- 3 x F-15E fighter squadrons
- 6 x F-35A fighter squadrons
- 1 x F-22A fighter squadrons
- 4 x A-10C ground-attack squadrons
- 6 x E-3G airborne early warning aircraft
- 8 x RC-135 signals intelligence aircraft
- 16 x MQ-9A/RQ-4 UAV orbits
- 3 x RQ-170/RQ-180 UAV orbits

Combined personnel estimate: 128,000

3. US Withdrawal From Europe: Consequences and Costs

The practical logistics of a US withdrawal from Europe and from NATO, such as redeployments to the US or elsewhere, would be significant and time-consuming. So would be the political and strategic consequences. Nonetheless, for the purpose of this study, the assumption is that such a withdrawal takes place.

The paper also assumes that current US bases, training areas and other military infrastructure in Europe could be sold to the host nation or to a commercial bidder, while surplus ammunition or spare parts could be made available to European armed forces. European states would have to replace the infrastructure, training teams and training aids currently provided by the US at its advanced training facilities in Europe. They would also have to replace the administrative and organisational mass and capability that the US currently brings to NATO's C2 arrangements and architecture. European members would also have to fill many senior military and administrative positions in NATO organisations currently occupied by US personnel.

The US would also draw down the provision of intelligence to NATO-Europe, exposing the shortfalls in Europe's space and all-domain intelligence, surveillance and reconnaissance assets, and greatly reducing its ability to detect early indicators of a Russian attack and to understand Russian plans once an attack was launched.

The US decision would require the Alliance to adapt its policy, strategy, military planning and command structure. Political leadership under the secretary general and North Atlantic Council would continue, as would the military committee and the role of its chairman, but the position of SACEUR would transfer to a European officer. Moreover, NATO's military strategic HQ, Allied Command Operations (ACO), would now also be commanded by a European. ACO would retain the three standing Joint Force Commands (JFCs), though the command currently located in Norfolk, Virginia, would relocate to Europe. This latter command would also need a revised role if it were retained, given that it was largely constituted to take on the protection of transatlantic reinforcement.

A US withdrawal would certainly lead to a reformulation of NATO's military plans for Europe. NATO would need to prioritise requirements for additional capability in those critical areas where NATO-Europe currently has the biggest gaps. Building on intelligence assessments and the existing NATO strategic and operational plans, the Alliance would lead the planning to set the military capability requirement to fill the gaps created by US withdrawal. This would set priorities for the five military domains and also the roles of the new forces and the area of their employment.

This would require European NATO allies to make choices, including on:

- The relative priorities of domains, regions and capabilities, and the balance between forward-deployed forces and those held in reserve.
- Judgement on sequencing and timing. For example, a judgement of relative short-term weakness in one region or domain, leading to prioritised short-term measures to fill that gap.
- Requirements for the size of ammunition stockpiles, spare parts and other logistic supplies, based on an assumed duration of any war.
- The relative priority of increased training to strengthen deterrence, versus minimising depletion of stockpiles of ammunition and spare parts in order to build up these stockpiles more quickly.

NATO would then issue short-, medium- and long-term priorities and additional capability requirements to nations. The challenge of coordinating these plans and their implementation between NATO and the EU would be considerable, but without it, there would be a risk of building new forces that do not match NATO's operational plans.

Costing the Withdrawal Scenario

Using the US force structure set out here, it is possible to provide a general estimate of the cost for European states to replace these capabilities. The study assumes that US military formations are fully equipped in line with their TOE requirement. For example, for our costing exercise, each of the seven US Armored Brigade Combat Teams (BCTs) consists of 87 MBTs, 100 tracked infantry fighting vehicles, 130 armoured personnel carriers, 300 armoured utility vehicles and 18 155mm self-propelled howitzers. Likewise, each expeditionary USAF fighter squadron consists of 12 multirole combat aircraft, whilst aircraft carriers deploy with their standard air wings (44 multirole combat aircraft, five electronic warfare aircraft, four airborne early warning aircraft and 19 helicopters). Weapons stocks, particularly for guided munitions, include not just an initial war-load, but also sufficient magazine depth to sustain a three-month conflict, enabling wartime resupply in case of a prolonged fight.

To be sure, in seeking to replace US capability, European states might choose to pursue alternative force structures with different balances of investment between land, maritime and air capabilities. For simplicity, however, the costs have been calculated based on an like-for-like replacement for the US capabilities described above as close as possible. Some exceptions have been made for those requirements which would be filled by a more capable replacement, such as choosing wheeled- over towed-artillery and acquiring modern rather than legacy combat aircraft.

Table 3.1 displays the distribution of these cost estimates per domain, with two numbers posited: costs associated with the cheapest and most expensive piece of equipment in each category. Our study estimates that the total cost to replace the conventional US capabilities listed above ranges between USD226bn and USD344bn for new weapon systems and platforms alone.

Closing other critical European military dependencies on the US, such as intelligence, space, cyber and nuclear capabilities, would further increase these costs substantially.

Table 3.1: **Cost overview by domain**

Domain	Low (USD billions)	High (USD billions)
Land	51.2	93.7
Maritime	86.68	125.48
Air	88.17	125.26
Total	**226.05**	**344.44**

Sources: Military Balance+, press releases, budget documentation, media reports

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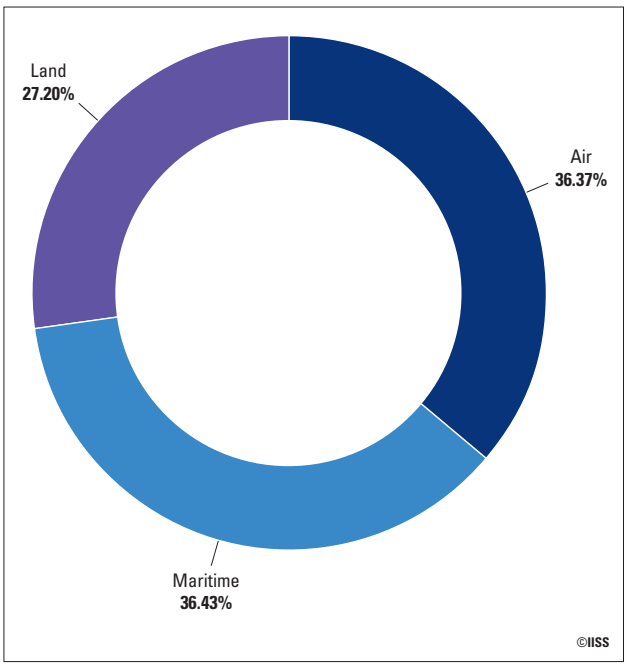
Moreover, while these figures include cost estimates for key munitions, they do not factor in additional life-cycle costs, as well as the sustained costs of associated personnel and supporting infrastructure. A generally accepted 'rule of thumb' is that life-cycle costs would be at least double the procurement cost, making the challenge for European governments even starker.

While there is significant potential cost variation for some equipment items, the most expensive additional capabilities that Europe would need to acquire are in the aerospace domain, closely followed by naval capabilities.

The most expensive single line item would be the acquisition of 400 additional tactical combat aircraft, were European states to choose to invest in this capability, making up just under 20% of the total value

Figure 3.1: **Higher estimates – breakdown per domain**



Sources: Military Balance+, press releases, budget documentation, media reports

Table 3.2: **Top ten most expensive equipment shortfalls (USD millions)**

Platform type	Example	Requirement	Unit cost, low	Unit cost, high	Total costs, low	Total costs, high	Percentage of total (high)	Note
Fighter/ground-attack aircraft	*Eurofighter*; F-15; F-16; F-35; *Gripen*; *Rafale*	400	120	160	48,000	64,000	18.58%	Estimate based on values published in last seven years
Destroyer	DDG-51; *Horizon*; KDD-III; *Maya*; LC-Fregatten; Type 45	20	2,000	2,500	40,000	50,000	14.52%	Estimate based on values published in last 20 years
Long-range surface-to-air missile (SAM) battery	*Patriot*; SAMP/T	24	500	1,000	12,000	24,000	6.97%	Estimate based on values published in last five years
Nuclear-powered attack submarine	*Astute*; *Suffren*	10	2,000	2,200	20,000	22,000	6.39%	Estimate based on values published in last five years. Other larger designs more expensive
Main battle tank	K2 *Black Panther*; *Leopard* 2A8; M1A2 *Abrams*;	600	20	30	12,000	18,000	5.23%	Estimate based on values in last five years
Naval long-range SAM	*Aster* 30; SM-2/-6	2,700	2	6	5,400	16,200	4.70%	Estimate based on values in last eight years
Tracked infantry fighting vehicle	ASCOD; CV90; *Lynx*; *Puma*	800	10	15	8,000	12,000	3.48%	Estimate based on contract values in last five years
Attack helicopter	AH-1Z *Viper*; AH-64E *Apache*; T129B	200	40	60	8,000	12,000	3.48%	Estimate based on contract values published in last five years
Frigate	ASWF; *Constellation*; FDI; FREMM; F126; Type 26; Type 31 and *Arrowhead* 140 exports	6	600	1,700	3,600	10,200	2.96%	Estimate based on values published in last ten years. Cost variance due to different size, weapons and sensor package of different designs
Aircraft carrier	*Queen Elizabeth*	2	4,000	5,000	8,000	10,000	2.9%	Cost based on inflation-adjusted procurement cost of QE-class

Sources: Military Balance+, press releases, budget documentation, media reports

in Table 3.2. The costs to cover for 20 US destroyers would absorb just under 15% of the total expenses, while the third most expensive investment would be a significant number of land-based long-range surface-to-air missiles (LR SAM). The cost to replace the estimated 128,000 US personnel that we assess could be earmarked for a NATO contingency in Europe would, the IISS evaluates, come to an additional USD12.3bn annually.

The IISS estimates that, taking into account these one-off procurement costs and assuming a 25-year lifecycle, the cost for European allies to replace the current US contribution to the collective defence of NATO, would amount to approximately USD1 trillion.

Table 3.3: **Land requirements cost (USD millions)**

Platform type	Examples	Requirement	Unit cost, low	Unit cost, high	Total costs, low	Total costs, high	Note
Main battle tank	K2 *Black Panther*; *Leopard* 2A8; M1A2 *Abrams*;	600	20	30	12,000	18,000	Estimate based on contract values in last five years
Tracked infantry fighting vehicle (IFV)	ASCOD; CV90; *Lynx*; *Puma*	800	10	15	8,000	12,000	Estimate based on contract values in last five years
Wheeled IFV	AMV; *Boxer*; *Freccia*; *Piranha*; *Rosomak*	250	5	15	1,250	3,750	Estimate based on contract values in last seven years
Tracked armoured personnel carrier (APC)	AMPV; ASCOD	900	5	7	4,500	6,300	Estimate based on contract values in last seven years; lighter-armoured platforms excluded
Wheeled APC	*Boxer*; CAVS; *Pandur*; *Piranha*; *Stryker*	450	1.5	7	675	3,150	Estimate based on contract values in last six years
Protected mobility vehicle	*Bushmaster*; *Dingo* 2; *Eagle* V; *Hawkei*; *Hizir*; JLTV; NSM; SISU GTP; TAPV; VBMR-L *Serval*	4,200	0.5	1.5	2,100	6,300	Estimate based on contract values in last 15 years
Amphibious assault vehicle	AAV-7A1; ACV	30	4	10	120	300	Estimate based on contract values in last ten years
Wheeled howitzer	*Archer*; ATMOS 2000; CAESAR	100	4	7	400	700	Estimate based on contract values in last seven years
Tracked howitzer	K9; *Krab*; PzH 2000	100	12	22	1,200	2,200	Estimate based on values published in last seven years
Multiple rocket launcher	*Chunmoo*; HIMARS; PULS	100	15	30	1,500	3,000	Estimate based on values published in last five years
Short-range ballistic missile	ATACMS; CTM-290; PrSM; *Predator Hawk*	400	1	4	400	1,600	Estimate based on values published in last seven years and analyst cost estimates
Ground-launched cruise missile	Assumes same base missile cost of MdCN & *Tomahawk*	20	3	5	60	100	Cost estimates for missile based on likely value of naval variants and not including extra costs for infrastructure and battery equipment
Theatre missile defence	*Aegis Ashore*; THAAD	3	2,000	3,000	6,000	9,000	Estimate based on values published in last 15 years
Long-range surface-to-air missile battery	*Patriot*; SAMP/T	24	500	1,000	12,000	24,000	Estimate based on values published in last five years
Self-propelled anti-aircraft gun and missile system	*Skyranger*; *Stryker* SGT STOUT	110	9	30	990	3,300	Estimate based on values published in last five years. Other systems available for mobile point-defence highly likely less expensive but insufficient data to include in cost estimates

All costs assume inclusion of some training, spare parts, ammunition and initial in-service support rather than 'flyaway' unit cost.
Sources: Military Balance+, milbalplus.iiss.org, press releases, budget documentation, media reports

Table 3.4: **Maritime requirements cost (USD millions)**

Platform type	Example	Requirement	Unit cost, low	Unit cost, high	Total costs, low	Total costs, high	Note
Nuclear-powered attack submarine	*Astute*; *Suffren*	10	2,000	2,200	20,000	22,000	Estimate based on values published in last five years. Other larger designs more expensive
Aircraft carrier	*Queen Elizabeth*	2	4,000	5,000	8,000	10,000	Cost based on inflation-adjusted procurement cost of QE-class
STOVL aircraft carrier/ amphibious assault ship	*Anadolu*; *Izumo*; *Trieste*	2	1,000	1,800	2,000	3,600	Estimate based on values published in last 15 years
Landing platform dock	*Albion*; *Johann de Witt*; *Makassar*	4	400	1,000	1,600	4,000	Estimate based on values published in last 25 years with inflation adjustments
Destroyer	*Arleigh Burke*; *Horizon*; KDD-III; *Maya*; LC-Fregatten; Type 45	20	2,000	2,500	40,000	50,000	Estimate based on values published in last 20 years
Frigate	ASWF; *Constellation*; FDI; FREMM; F126; Type 26; Type 31 and *Arrowhead* 140 exports	6	600	1,700	3,600	10,200	Estimate based on values published in last ten years. Cost variance due to different size, weapons and sensor package of different designs
Land-attack cruise missile	MdCN; *Tomahawk*	1,200	3	5	3,600	6,000	Based on inflation adjusted MdCN cost from 2014 and US budget materials
Naval ballistic missile defence surface-to-air missile (SAM)	SM-3 Block IB	100	8	12	800	1,200	Estimate based on US budget materials from last ten years
Naval long-range SAM	*Aster* 30; SM-2/6	2,700	2	6	5,400	16,200	Estimate based on official and reported values in last eight years
Naval medium-range SAM	*Aster* 15; ESSM	700	1.5	2	1,050	1,400	Estimate based on official and reported values in last five years
Heavyweight torpedo	F21; DM2A4; Mk 48	250	2.5	3.5	625	875	Estimate based on values given in contract notifications and budget documents in last ten years

Note: All costs assume inclusion of some training, spare parts, ammunition and initial in-service support rather than 'flyaway' unit cost; maritime munitions totals include one full reload per vessel.
Sources: Military Balance+, milbalplus.iiss.org, press releases, budget documentation, media reports

Table 3.5: **Air requirements cost (USD millions)**

Platform type	Example	Requirement	Unit cost, low	Unit cost, high	Total costs, low	Total costs, high	Note
Fighter/ground-attack aircraft	*Eurofighter*; F-15; F-16; F-35; *Gripen*; *Rafale*	400	120	160	48,000	64,000	Estimate based on values published in last seven years
Blue water fixed-wing anti-submarine warfare (ASW) aircraft	P-1; P-8A *Poseidon*	15	250	320	3,750	4,800	Estimate based on contract values and budget materials in last ten years
Airborne early warning and control	E-2D *Hawkeye*; E-7A *Wedgetail*; *Globaleye*	6	320	700	1,920	4,200	Estimate based on contract values published in last 25 years
Electronic intelligence/signals intelligence	*Archange*; PEGASUS; *Rivet Joint*	8	500	600	4,000	4,800	Estimate based on contract values published in last 15 years
Attack helicopter	AH-1Z *Viper*; AH-64E *Apache*; T129B	200	40	60	8,000	12,000	Estimate based on contract values published in last five years
ASW helicopter	AW101; AW159 *Wildcat*; MH-60R *Seahawk*; NH90 NFH	35	40	60	1,400	2,100	Estimate based on contract values published in last five years
Heavy transport helicopter	CH-47; H225M	50	40	100	2,000	5,000	Estimate based on contract values published in last ten years
Medium transport helicopter	NH90 TTH; UH-60M *Black Hawk*	200	30	45	6,000	9,000	Estimate based on contract values published in last 15 years
Medium-altitude long-endurance combat intelligence surveillance and reconnaissance uninhabited aerial vehicle	*Anka*-S; MQ-9A/B	50	30	60	1,500	3,000	Estimate based on contract values published in last ten years
Imaging infrared air-to-air missile (AAM)	AIM-9X *Sidewinder*; ASRAAM; IRIS-T; *Mica*	1,200	0.5	0.8	600	960	Estimate based on official and reported values published in last ten years
Active radar homing AAM	AIM-120 AMRAAM; *Meteor*	2,500	1	2	2,500	5,000	Estimate based on official and reported values published in last five years
Anti-ship cruise missile	*Exocet*; LRASM; NSM	200	2	3	400	600	Estimate based on official and reported values published in last five years
Anti-radiation missile	AARGM-ER; SIAW	400	1.5	2	600	800	Estimate based on official and reported values published in last five years
Land-attack cruise missile	AGM-158 JASSM; *Storm Shadow*/SCALP; *Taurus* KEPD 350	3,000	2.5	3	7,500	9,000	Estimate based on official and reported values published in last 12 years

Sources: Military Balance+, milbalplus.iiss.org, press releases, budget documentation, media reports

4. Addressing Europe's Shortfalls

European defence budgets have already increased in recent years to implement existing defence investment plans, but replacing the current US contribution to NATO would require significant additional funding. Even if such funding was made available, Europe's current industrial production capacity would face significant limitations in filling the gaps.

Revitalising the Defence Industrial Base

While European defence companies have started to increase capacity through more assembly lines, mergers and acquisitions, the pace remains uneven, and several issues would need to be addressed. For instance, overall European military shipbuilding capacity has reduced in recent years, as the UK closed some facilities after the construction of its two *Queen Elizabeth*-class aircraft carriers. If European allies wanted to invest in additional carriers and other highly complex platforms, such as nuclear-powered attack submarines (SSNs), delivering these additional platforms would be a major challenge. Meeting a requirement for additional destroyers and frigates would be slightly easier, because of greater numbers of more suitable yards, though improving the pace of production would not only require significant funding support, but also the political will to overcome bureaucratic or legislative impediments.

At least in the short term, the provision of the required volume of additional armoured vehicles would be difficult for European producers, considering their currently limited manufacturing capabilities. European nations would thus not only need to significantly invest in expanding defence industrial capabilities related to land systems, including repurposing facilities currently active in other sectors, but also place orders with longstanding suppliers in Canada and the US, in addition to engaging other non-European suppliers of armour and artillery.[34]

That said, there are structural factors impeding Europe's current defence industrial expansion plans, including issues relating to contracts, financing, the workforce, regulation and security of supply. Some firms have self-funded development and production, but others have had to wait for governments to issue production contracts, complicating their early investment in production capacity or components.[35] Moreover, defence companies face supply chain problems and compete for skilled workers with the private sector and other countries which offer higher wages and more attractive conditions. In many European countries, the number of science, technology, engineering and mathematics (STEM) graduates entering the workforce each year is insufficient to even meet the needs of a peacetime economy.

Aside from hiring skilled workers from abroad, companies are exploring new production technologies, including greater use of additive manufacturing and automation, in a bid to increase production flexibility.[36] However, most defence procurement in Europe is largely conducted on a national basis, so procurement contracts tend to be far smaller in scale than those placed in the US. Defence companies in Europe would have more certainty, in turn encouraging upfront investment in production capability, if governments would order equipment in larger volumes, including through international cooperation. In 2024, the European Union's European Defence Industrial Strategy (EDIS) set a non-binding target for member states to procure 40% of their defence equipment through cooperation.

Collaborative procurement and production are nothing new, but several European countries have in recent years agreed to jointly acquire equipment using new mechanisms. One example is Patria's armoured 6x6 vehicle, developed under the Common Armoured Vehicle System (CAVS) project launched in 2020. Denmark, Finland, Germany, Latvia and Sweden have jointly ordered over 800 vehicles through the Finnish-led project. Similarly, Sweden joined an Austrian-Netherlands initiative to acquire KC-390 tactical airlifters from Embraer, while Bulgaria, Estonia, Latvia and Slovenia have jointly placed orders to procure Diehl's IRIS-T SLM SAM system through the German-led European

Sky Shield Initiative. Such collaboration increases scale, lowers costs and reduces bureaucratic duplication.

Procurement orders have picked up pace largely in the land sector. There has been less urgency in the naval and much of the aerospace sector, with little additional investment in, for instance, more production capacity. This poses a particular challenge considering that the large-scale provision of air and maritime platforms is a key requirement if Europe wants to replace the US military contribution to NATO.

Addressing these problems will take time but could be accelerated. Potential measures include increased funding for companies to invest in production capacity, government or industry-led initiatives to encourage non-defence companies to enter the sector, greater coordination between defence bureaucracies and industry in signposting defence requirements to encourage investment, incentives for young people to study STEM subjects or take apprenticeships in the defence industry, as well as reforms of procurement processes, including requirements and certification, and changes to business regulations.

Still, buying abroad will remain necessary in capability areas where at present there is little to no European option available, such as rocket artillery or low-observable fighter aircraft. To fill the 'US gap' more quickly, European policymakers will also need to prioritise investments in systems capable of attacking Russia's anti-access capabilities, such as its air defences, and defeating its surface-to-surface strike capabilities. They would need to place orders for more air and missile defence, air-launched precision-strike systems, rocket artillery and ground-launched precision strike, area-denial systems, and electronic warfare and command-and-control capabilities. Increasing production to the volume required would be difficult enough for these, but for other capability needs – such as the large numbers of aircraft, ships and armoured vehicles we have identified – Europe would likely have to wait even longer.

Crucially, IISS data showed in 2024 that since 2022, 52% of the value of European defence procurement contracts already had been directed at European supplies rather than those sourced from the US and elsewhere.[37] As Europe invests in greater defence autonomy, procurements sourced from European producers will likely grow in relation to procurements from the US and elsewhere.

That said, how quickly European defence industry could deliver the capabilities needed to replace the US in European defence would depend on the complexity of the equipment, industrial capacity and current order books. US SSNs would be most difficult to replace. Even with substantial investment, both French and British SSN manufacturers would be unable to meet this demand within the next decade. Long-lead times also exist for other naval procurements, complex aerospace platforms and associated subsystems and weaponry. However, these could be shortened provided there was significant investment in industrial capability and the acquisition of complementary uninhabited systems. The fastest progress could be made in the land domain, where, in our assessment, European industry could produce many of the required systems within a decade, contingent on continued investment in production capacity and conversion of civil sector plants.

Increased Defence Spending: Possible but Challenging

Defence spending growth in Europe reached a record 11.8% in real terms in 2024, up from 5.2% in 2023 and 2.8% in 2022. Funding had increased in response to the war in Ukraine and because of the pressure on allies to meet NATO's 2% of GDP benchmark by the 2024 deadline. Moreover, pressure to increase spending further grew in early 2025 as European concern increased over the reliability of the US as an ally. Several countries announced spending uplifts, including Belgium, Denmark, Germany and the UK.[38] These were accompanied by major initiatives at the EU level, including the European Commission's 'ReArm Europe' programme, or 'Readiness 2030', that seeks to mobilise up to EUR800bn (USD878bn) in extra funding for European defence.[39]

Further increases in defence spending are possible but come with significant challenges. The IMF estimated in late 2024 that for advanced European economies, increasing defence funding, when combined with ageing-related health and social spending and the investment required to fulfil climate change mitigation

goals, could amount to costs reaching 5.7% of GDP annually by 2050. For the region's emerging economies, the estimate was 8.1% of GDP.[40] These estimates will increase if European states commit to additional funding for defence.

European states will likely use a mix of policy- and funding-instruments to finance their defence ambitions and to avoid placing too much pressure on public finances. These measures could involve adjusting fiscal rules to allow increased borrowing and debt, establishing more off-budget defence funds paid for by issuing bonds or extending loans, increasing taxation, implementing cuts to other areas of public spending in favour of defence, or mobilising the potential of private sector financing – or indeed some combination of these. Other collective moves could include the establishment of a multilateral financing instrument like the Defence, Security and Resilience Bank.[41]

Progress to Date

Sustaining some of these spending increases, however, could be challenging given the limited fiscal space for many European governments. To be sure, since 2023, the EU has been co-financing the defence industrial acceleration and joint procurement such as the Act in Support of Ammunition Production (ASAP) and the European Defence Industry Reinforcement through common Procurement Act (EDIRPA). These instruments are supposed to be extended until the end of 2027 through the European Defence Industry Programme (EDIP), which remains under negotiation at the member-state level. Furthermore, 'ReArm Europe' proposed to activate the national escape clause of the Stability and Growth Pact to allow member states to significantly increase their defence expenditures without triggering the 'Excessive Deficit Procedure'. The president of the European Commission, Ursula von der Leyen, stated that if member states increased their defence spending by 1.5% of GDP on average, this could create 'fiscal space' of almost EUR650 bn (USD713bn) over a period of four years. The easing of the fiscal rules will be available for a period of four years to give countries time to make the transition to higher defence spending through the re-orientation of public finances.

However, it is unclear whether, after the four-year limit, countries would need to reduce spending if deficit rules were reapplied. Thus, the short time frame might enable increased funding to address urgent capability gaps, but if the aim is to provide long-term investment in defence, security in demand and support the development of the European defence industrial base, a longer time frame would be needed.

Other measures in the plan, including a dedicated EU funding instrument, further mobilisation of private capital, and directing more of the EU budget towards defence-related investment, would raise the remaining EUR150bn (USD165bn, to reach the ReArm upper estimate of EUR800bn (USD878bn)). However, the defence loan proposal has reportedly met with resistance.[42] France, Spain and Italy, for example, are concerned about extending debt levels by taking out loans, preferring the issuance of defence bonds or joint borrowing instead.

Indeed, there is a limit to what the European Commission can do.[43] Enabling greater private investment and lowering regulatory barriers is crucial but the onus is on EU member states to use them. Ad hoc approaches by governments to bolster investment at pace risk flooding the market, increasing competition and further fragmenting the industrial base.

European powers could also make greater use of private investment in defence. Although the potential levels of investment are usually lower than government defence spending, targeted funds that encourage more start-ups and small and medium-sized enterprises to enter the defence market could foster innovation, research and development and industrial collaboration and, therefore, help European defence industrial resilience.

'ReArm Europe' includes the option to direct more funding within the EU budget towards defence-related investment and to mobilise private capital. The European Commission argued in January 2024 that an 'overly stringent and cautious interpretation' of Environmental, Social and Governance (ESG) criteria meant that EU banks and investment funds were avoiding defence investments.[44] In December 2024, NATO Secretary General Mark Rutte declared that banks and pension funds should be told by the citizens of member

countries that 'it is simply unacceptable that they refuse to invest in the defence industry'.[45]

The barrier presented by ESG standards is therefore likely to be lower moving forward. But the lack of long-term defence investment plans by many European governments still needs to be addressed to further de-risk investment.

In sum, European nations are likely to struggle to find the money required to fund the current level of US military capability provided to NATO. To meet this challenge, they would need to redouble efforts to generate new funding instruments or significantly adjust government spending priorities.

Conclusion: Implications for Europe's Defence

NATO's European members would face significant challenges if the US ceased its defence commitments to the continent. Our analysis shows that Europe would face a considerable 'window of vulnerability' without US support. In such a scenario, there may not be much time to prepare for a Russian threat to allied territory if it reconstitutes its ground forces by 2027 after a ceasefire in Ukraine. If the US were to completely remove itself from NATO, European states would face a wide range of capability gaps and stark choices as to how to fill these gaps. They could choose to replace units and formations like-for-like, for example, by generating a complete corps to replace the US V Corps. Alternatively, they could generate capability in other ways, for example, by boosting the availability of their existing military equipment and personnel by investing in readiness.

But even if governments placed armed forces and defence industries on a 'war footing', funding, industrial capacity and recruiting and training pipeline constraints would limit the speed at which military capability could be increased. In particular, developing the required defence-industrial capacity in a relatively short time frame would be very difficult. Not only would Europe's current defence-industrial capacity struggle to ramp up production to meet these additional requirements quickly, but so too would defence suppliers outside Europe. For example, European attempts to source an additional 400 aircraft would be a tall order, with many of the world's aerospace production lines already at high capacity. And this is to say nothing of the requirement for subsystem suppliers, munitions and crewing and training demands. The same could be said for land and maritime requirements, with the latter taking perhaps longer given the infrastructure investments needed in shipyards across Europe. Closing the window of vulnerability in the short term without a US presence would thus be very challenging.

However, rebuilding European defence capacity in the medium term would not be an impossible task. For instance, if every European NATO state had invested 2% of GDP in 2024, they would have had an additional USD62bn available to spend on their armed forces. Moving forward, more radical approaches to defence investment and defence spending levels closer to Cold War levels (where spending 'routinely averaged' over 3%) would be required, though these would depend foremost on political will.[46]

In addition, aside from providing defence industries with greater certainty in terms of long-term investments and investing in readiness, in the short- to medium-term, European NATO allies could decide not to fill the entire 'US gap' directly, and instead invest in selected capability areas, such as those judged most likely to hold Moscow's forces at risk, deny Russian forces freedom of movement, and defeat its reconnaissance-strike complex. European politicians could also attempt to negotiate a delay in any US drawdown.

Collective or coordinated orders among European allies for military equipment in large numbers would create economies of scale for defence industries. These systems could include area denial systems, such as rocket artillery, one-way attack UAVs and mines and fortifications.[47] Increased European investments in air and missile defence systems capable of contesting Russian attempts to achieve air dominance and reducing the effect of its land-attack missiles would also be a sensible option, with the added benefit of increasing protection for manoeuvre forces, fixed installations and civilian industry and populations.

Long-range precision strike could be another area of investment. These systems would be vital for European states looking to threaten Russian forces at range, as well as developing systems capable of engaging Russian area denial systems, including its air defences. European states have already looked overseas for ground-launched systems.[48] Germany and the US announced in 2024 that US *Tomahawk* ground-launched cruise missiles (GLCM) would be based in the country from 2026 as part of the deployment of

Map 1: **Ranges of selected European-operated or planned cruise missiles**

JASSM = Joint Air-to-Surface Standoff Missile; **FC/ASW** = Future Cruise/Anti-Ship Weapon; **MdCN/NCM** = Missile de Croisière Naval/Naval Cruise Missile.
Missile ranges are IISS estimates
Source: IISS analysis

a Multi-Doman Task Force (MDTF).[49] It has not been publicly disclosed whether Germany's doubts over US commitment extend to the MDTF deployment plan, but Berlin is also engaged alongside France, Italy and Poland in the European Long-range Strike Approach (ELSA) initiative intended to deliver a GLCM with a 1,000-2,000 km range. However, it remains unclear when ELSA will be delivered.

Air-launched stand-off strike systems could also feature in a focused European capability acquisition plan. Here, Europe has existing industrial production capacity, with the Anglo-French *Storm Shadow*/SCALP manufactured in the UK and France, France's MdCN naval cruise missile and also with the German/Swedish *Taurus* KEPD 350. Greater investment would be needed, however, to shorten further the production time for complex weapons like these. They would, however, offer additional capability to engage targets in Russia's west, including in locations where Russia's military forces are based.

Other focused European investments could include maritime and air systems to protect critical infrastructure and enable sea control, including additional anti-submarine warfare and missile defence-capable vessels, space systems, and SIGINT, electronic warfare and C2 capabilities. Indeed, as the commander of US European Command, General Christopher Cavoli testified before the US Senate Armed Services Committee in April 2025, the latter are vital systems which Europe was 'least capable of replacing right now'.[50]

Closing Europe's 'window of vulnerability' quickly is a critical task for European governments. It will require a mature debate on defence and security needs to persuade Europe's societies about the requirement for financial and other sacrifices. It will also call for more movement in financial and industrial policy than has been seen to date. It could make purchasing off-the-shelf equipment and from abroad more important, at least in the short term, as well as measures including the realistic prioritisation of public spending, rapidly adopting new policy and funding instruments, bringing in higher volumes of private finance, and prioritising equipment acquisitions to focus on key capability areas most likely capable of holding Russia's armed forces at risk.

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