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Renegotiating the Transatlantic Bargain

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The end of 2025 and the beginning of 2026 have showcased the foreign policy and defence approach of the second Trump administration, not only in words, such as the releases of the National Security Strategy and National Defense Strategy, but also in actions. The European NATO allies are being confronted with a US administration that disregards international law, designates the entire Western Hemisphere as its own sphere of influence, and frequently uses calibrated military power to safeguard its perceived security interests. European NATO allies should renegotiate the Transatlantic bargain with the US to ensure the continuation of a rebalanced alliance and pursue three broad priorities, namely ideological coexistence, gradual conventional substitution, and strengthening extended nuclear deterrence.

FROM THE US PIVOT TO ASIA TO THE PIVOT TO THE WESTERN HEMISPHERE

The US has long warned its European NATO allies that it would increasingly shift its focus to the Indo-Pacific region to counterbalance the Chinese rise in power. The US reorientation towards Asia started mutely under President George W. Bush in the mid-2000 and was dubbed the ‘pivot to Asia’ in 2011 under the Obama administration. According to [Silove](#), the US pivot consisted of three elements, namely “internal balancing” or the reallocation of US military capabilities to the Indo-Pacific, “external balancing” or strengthening allied military capabilities and cooperation, and “expanded

engagement” or increasing diplomatic engagement with China and other Asian states and institutions.

Despite the efforts of consecutive administrations, the pivot to Asia has not yet been completed. This was partly due to other events, such as the lingering Global War on Terror and the 2022 Russian invasion of Ukraine. Under the first Trump administration, the US pivot to Asia shifted, according to [Mastro](#), towards a more “confrontational stance” vis-à-vis China. Yet it simultaneously undermined US extended deterrence commitments in the region by threatening to decrease the level of US troops in Japan and South Korea if these allies did not pay more for the US regional military presence. Biden attempted to reassure the US allies in the Indo-Pacific but also kept a more confrontational position on China. Nonetheless, as Mastro stated, Biden’s “attention has been diverted by Russia’s invasion of Ukraine and the Israel-Hamas war”.

The pivot to the Western Hemisphere, in contrast, is more of a surprise. Foreign powers such as China were steadily [increasing](#) their foothold in South America, however, not to such an extent that the current shift in prioritisation would warrant. Concerning Greenland, the US is already militarily and economically present. While the pivot to Asia was thus strategically driven, the pivot to the Western Hemisphere appears to be more ideologically driven, merging drug trafficking, migration, access to minerals and fossil energy with contrived geopolitical narratives to justify the ongoing shift.

While the pivot to the Western Hemisphere is clearly visible, the US has not (yet) withdrawn from other

regions in the world. On the contrary, US President Donald J. Trump frequently mentions the number of conflicts he claims to have resolved peacefully, and the US has also conducted military strikes in the Middle East and Africa.

THE IMPLICATIONS OF THE NATIONAL SECURITY STRATEGY FOR EUROPEAN NATO

The November [2025 National Security Strategy](#) (NSS) stated on this pivot to the Western Hemisphere that the “Trump Corollary” to the Monroe Doctrine is driven by national security interests and calls the Americas “our Hemisphere”. In other words, the NSS designated the Western Hemisphere as the exclusive US sphere of influence. This was later dubbed the “[Donroe Doctrine](#)”.

As the NSS mentions, the pivot to the Western Hemisphere has implications for the global military presence of the US, and thus potentially for the US’s defence posture in Europe. In the NSS, Europe itself has become the third most important region after the Western Hemisphere and Asia. Two important themes in the section on Europe were, first, reestablishing strategic stability with Russia and mitigating the “risk of conflict” between Russia and European states. Second, Europe is seen through an ideological lens, which resulted in descriptions of Europe facing “economic decline” and “civilisational erasure”. Nonetheless, the NSS stressed that “Europe remains strategically and culturally vital to the United States.”

Sven [Biscop](#) remarked, however, that the principle of “non-interventionism” described in the NSS, “does not apply to Europe”, signalling a willingness to reshape European politics and support “patriotic” parties that align with Trump’s nation-state centric agenda. The antagonistic language vis-à-vis the European Union also indicated an opposition against “European integration”. A united and strong Europe – an erstwhile objective of US foreign policy – is now seen as a threat.

Max [Bergmann](#), an analyst at the Center for Strategic & International Studies (CSIS), argued that the NSS could even “trigger a major collision and potentially the

end of the alliance”. The Danish Prime Minister Mette [Frederiksen](#) warned on 5 January that a US military takeover of Greenland would be “the end of the NATO military alliance”. At the World Economic Forum in Davos on 21 January, [Trump](#) ruled out the use of force to take over Greenland and [agreed](#) on a “framework of a future deal”. Nonetheless, the radical change in US rhetoric and actions, since the return to power of Trump, created a significant erosion of trust in NATO.

THE IMPLICATIONS OF THE NATIONAL DEFENSE STRATEGY FOR EUROPEAN NATO

On 23 January 2026, the Department of War released the accompanying [National Defense Strategy](#) (NDS), which, according to the Trump administration, is guided by a “flexible, practical realism”. The document stresses the need to prioritise and states that defending the US homeland and achieving a balance of power in the Indo-Pacific are the two main priorities. Regarding allies, the NDS emphasises the importance of increasing burden-sharing and “In Europe and other theaters, allies will take the lead against threats that are less severe for us but more so for them”. The 5% of GDP defence spending goal, agreed at the NATO Summit in The Hague in June 2025, is seen as a “new global standard for defence spending” for all US allies and partners.

Russia is not seen as a major threat to the US. Russia is, however, described as a “persistent but manageable threat to NATO’s eastern members for the foreseeable future” – thus not even for the whole of NATO. Nonetheless, the NDS does recognise the enduring threat to the US homeland emanating from the “world’s largest nuclear arsenal”, an arsenal that Russia is continuing to modernise and diversify. Subsequently, the document instructs that US forces should be able to defend against this threat. Therefore, the ‘Golden Dome for America’ missile defence shield needs to “cost-effectively defeat large missile barrages and other advanced aerial attacks”. In other words, the US is decreasing its reliance on mutual vulnerability to ensure strategic stability with Russia and will increasingly rely more on deterrence-by-denial.



The NDS further states that “Department will also continue to play a vital role in NATO itself, even as we calibrate U.S. force posture and activities in the European theater to better account for the Russian threat to American interests as well as our allies’ own capabilities.” The US will thus continue their engagement in Europe but also adds that “we must—and will—prioritize defending the U.S. Homeland and deterring China.” As a result, the NDS repeats the call upon the other NATO allies to take “primary responsibility for Europe’s conventional defence”. The US will, however, continue to provide “critical but more limited” support.

The defence strategy pays attention to the so-called simultaneity problem, whereby “one or more potential opponents might act together in a coordinated or opportunistic fashion across multiple theaters.” This is presented as a strategic argument to urge allies and partners to “shoulder their fair share of the burden of our collective defense”. Furthermore, the multilateral and bilateral alliances and partnerships that the US has developed since the Cold War are described as a “defensive perimeter around Eurasia.”

Consequently, the US asks its allies to be more capable and decrease their reliance on US military power. European NATO allies should thus, finally, build out a European pillar in NATO. The European allies should be able to field the bulk of the conventional capabilities to independently deter and defend against a range of threats from hybrid to full-scale multi-domain war. A stronger set of conventional European forces will move the balance of power in NATO in favour of the Europeans, strengthening their agency and means of [control](#) over the security situation on the continent. It is crucial, however, that the substitution of conventional US military capabilities happens gradually. Otherwise, there is a risk that gaps could emerge in the conventional deterrence and defence of European NATO. Gaps that could be exploited by Russia.

SAFEGUARDING EXTENDED NUCLEAR DETERRENCE IS IN THE INTEREST OF ALL

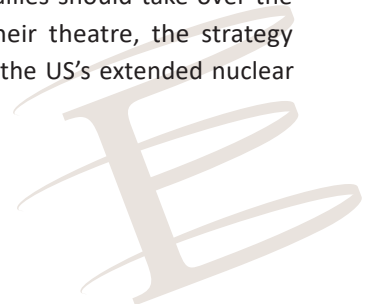
Since the beginning of the 2020s, the US pivot to Asia had an increasingly important nuclear dimension due to the Chinese decision to start a rapid and opaque nuclear modernisation and expansion programme. This has led to the ‘two-nuclear peer challenge’ as the US will need to deter both Russia and China as [nuclear-armed peer competitors](#). Moreover, North Korea has also continued developing its nuclear and ballistic programmes.

Subsequently, the US and its allies and partners in the Indo-Pacific region want to bolster regional nuclear deterrence capabilities and credibility. A US nuclear pivot to Asia has, nonetheless, also potential implications for NATO. Alexander [Mattelaer](#) argues that “China’s nuclear expansion challenges European security by complicating NATO’s deterrence posture, raising concerns about extended deterrence and necessitating a strategic recalibration by NATO nuclear powers.”

In contrast, the US pivot to the Western Hemisphere has very little to no implications regarding its extended nuclear deterrence commitments to NATO and other allies and partners – apart from some dual-use capabilities that could be primarily assigned to support US military missions in the Western Hemisphere.

The [NDS](#) contains a paragraph on the importance of modernising and adapting US nuclear forces to avoid US vulnerability to “nuclear blackmail”. It does, as already mentioned, refer to the Russian nuclear threat to the US homeland. Additionally, the document mentions the growth in “size and sophistication” of the North Korean nuclear forces that pose a threat to South Korea, Japan, but also to the US homeland. Lastly, the strategy affirms that “Iran will not be allowed to acquire nuclear weapons” and that Operation Midnight Hammer (June 2025) “obliterated Iran’s nuclear program”.

While the NDS states that allies should take over the conventional defence in their theatre, the strategy does not explicitly reaffirm the US’s extended nuclear



deterrence commitments but speaks only about “critical” support. This seems a missed opportunity because a public reaffirmation of the US nuclear umbrella in the NDS would mitigate abandonment fears. The [NSS](#), however, did mention the administration’s desire to have “the world’s most robust, credible, and modern nuclear deterrent, plus next-generation missile defenses—including a Golden Dome for the American homeland—to protect the American people, American assets overseas, and American allies.” A future Nuclear Posture Review could set the record straight, but at the time of writing, it is unclear whether such a document is being drafted.

Avoiding so-called ‘friendly’ proliferation amongst allies aligns with both US and European interests. Countering non-proliferation has been a longstanding and bipartisan international security policy goal of the US because, as Mariano-Florentino Cuéllar, Ernest J. Moniz, and Meghan L. O’Sullivan wrote in [Foreign Affairs](#), “if even a handful of governments pursue the bomb, the world will be more volatile and dangerous.” Nonetheless, there are also voices in the US that are in favour of “selective proliferation”, such as Moritz S. Graefrath and Mark A. Raymond, [arguing](#) that Canada, Germany, and Japan should “go nuclear”, but this remains a minority opinion.

On the [European side](#), different national or collective proliferation scenarios – the Eurobomb or Eurodeterrent debate – have been proposed. Nonetheless, these are often risky from a military perspective, given the chance of a pre-emptive attack by Russia on a nascent and thus vulnerable national nuclear weapon programme. They are also risky from an international legal perspective, given the implications certain scenarios would have on the Treaty on the Non-Proliferation of Nuclear Weapons (NPT). Any additional European nuclear power would also change the intra-European balance of power.

Lastly, while technologically feasible for several European countries, a nuclear weapon programme would be a costly project in parallel to – and arguably to the detriment of – the ongoing conventional buildup. In other words, there are significant challenges. The UK and

France, NATO Europe’s two nuclear powers, have, with the [Northwood Declaration](#) of 10 July 2025, signalled that they want to strengthen European nuclear deterrence, but these efforts remain complementary to the US nuclear umbrella.

To counter credibility issues – especially considering the potential of ideological antagonism between the US and European allies – the physical presence of the US forward-deployed nuclear capabilities is even more crucial. Nuclear sharing then changes from a symbol of the Transatlantic bond to an assurance or understanding that, despite ideological differences, deterring nuclear threats to the European allies and avoiding proliferation is in the interests of both parties.

RENEGOTIATING THE TRANSATLANTIC BARGAIN: IDEOLOGICAL COEXISTENCE, CONVENTIONAL SUBSTITUTION, AND STRONGER EXTENDED NUCLEAR DETERRENCE

The implications of the shifts in US foreign and defence policies on NATO are thus profound. In 1958, Hans J. [Morgenthau](#) stressed that, next to having a “community of interests”, “ideological solidarity” within an alliance was also important. In the case of NATO during the Cold War, this amounted to opposing communist authoritarianism.

After the terrorist attacks of 9/11, Islamist terrorism became the ideological opponent. Under the previous Biden administration, a shift occurred towards again opposing revisionist authoritarianism. Nonetheless, the “ideological solidarity” within the Alliance is under pressure between, on the one hand, illiberal populist views on democracy, and on the other hand, liberal views on democracy. Subsequently, NATO allies should find a new ‘modus vivendi’ to ensure the continuation of the strongest alliance in history.

Therefore, the European NATO allies should be guided by the following three priorities to renegotiate the Transatlantic bargain:



1. Convince the US administration of the value of ideological coexistence to avoid domestic political interference. In the context of the Greenland discussion, Belgian Prime Minister Bart de Wever said that “there’s no point in being soft anymore”. Subsequently, European states should, when necessary, credibly deter unwanted US interference with costly political and economic measures.
2. Agree on a gradual approach to substitute US military presence in Europe to balance in the conventional realm against the Russian threat, preferably with continuing critical support from the US, but alone if necessary.
3. Preserve and strengthen the US nuclear umbrella over NATO to balance in the nuclear realm against the Russian threat and to avoid proliferation amongst allies. Nonetheless, to hedge against US abandonment, France and the UK – the two European nuclear powers – should start exploring together with other European allies the possibilities to adapt and expand their set of nuclear weapon capabilities.

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