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“The days of the United States propping up the entire world order like Atlas are over.”

The 2025 US National Security Strategy and Europe:

A STRUCTURAL RECLASSIFICATION

(NSS 2025 • Europe • Strategic Reclassification)

A. Executive Frame

The 2025 US National Security Strategy (NSS) intervenes in a landscape where both sides of the Atlantic face structural vulnerabilities: Europe struggles with fragmentation, demographic decline, and persistent defence underperformance, while the United States confronts political polarization and

institutional strain.¹ This report reconstructs what the NSS does to Europe's strategic position, not what it claims to intend.

The reading works on three levels: the NSS's own language, observable indicators of capability and cohesion, and the dynamics this combination creates for Europe. Where the NSS text allows multiple interpretations, I rely on patterns across the document rather than isolated phrases. Key formulations about Europe—"civilizational erasure," the "unrecognizable in 20 years" warning, predictions about "majority non-European" NATO members—appear consistently across media outlets quoting the document.²

Alice Rufo's characterization of the NSS as an "extremely brutal clarification" stands as the most pointed European governmental response on record.³ Russian officials have described the document as "largely consistent with our vision," according to Kremlin spokesman Dmitry Peskov—a reaction that European analysts like Pavel Baev at Brookings treat as confirming their worst fears about transatlantic drift.⁴

Where Congress, bureaucracy, or elections can block implementation, the NSS represents intent, not guaranteed policy. The gap between declaration and execution has defined American strategy documents for decades. This one is no different, except in its explicit acknowledgment that America may no longer have the capacity to close that gap alone.

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B. Forensic Core

B1. STRATEGIC HIERARCHY

The NSS creates a clear ordering of American priorities: Western Hemisphere first, Indo-Pacific second, Europe third.⁵ This isn't just sequencing. The Indo-Pacific absorbs resources because China defines the strategic competition. The Western Hemisphere anchors both territorial security and the ideological baseline. Europe appears as a stability requirement—it must not deteriorate to the point of forcing American diversion from higher-priority theatres.

Europe is downstream of Asia in this design: it matters as long as it doesn't pull resources away from the primary contests.

B2. SOVEREIGNTY, BORDERS, CIVILIZATIONAL FRAME

The NSS builds its narrative on sovereignty, border security, and civilizational continuity. Migration becomes a security threat, not a policy challenge—the document declares “the era of mass migration must end” and calls for states to “stop rather than facilitate destabilizing population flows.”⁶

Applied to Europe, this produces stark language. The NSS warns of Europe's “civilizational erasure” and predicts the continent will be “unrecognizable in 20 years or less” if current trends continue.⁷ Some NATO members, it suggests, could become “majority non-European” within decades, fundamentally altering their strategic orientation.⁸

The benchmark for partnership shifts from institutional convergence to demographic and cultural resilience. Europe is assessed not by the EU's regulatory harmonization but by whether European societies can maintain cohesion under pressure.

B3. EUROPE AS PARTNER, VULNERABILITY, AND INFLUENCE SPACE

Europe now occupies three overlapping roles in American strategy:

1. **Partner** where capabilities and interests align—primarily in high-end defense technology and intelligence sharing.
2. **Vulnerability** where fragmentation constrains US options elsewhere—every European crisis becomes an American opportunity cost.
3. **Influence space** where the US signals support for “patriotic European parties,” explicitly endorsing their “growing influence” as “cause for great optimism.”⁹

This quietly breaks with three decades of assuming “Europe” is a single, stable partner category. The NSS treats Europe as a political battlefield where outcomes matter for American strategy. Selective alignment replaces bloc consensus.

B4. THE “ATLAS BREAK”

“The days of the United States propping up the entire world order like Atlas are over.”¹⁰

The statement needs no interpretation. It codifies what has been visible for years: American security guarantees are becoming conditional, burden-sharing is becoming mandatory, and global commitments will be triaged by return on investment. Europe's position in that triage is no longer guaranteed by history or sentiment.

B5. MUTUAL STRAIN DYNAMICS

Both sides of the Atlantic bring weaknesses that reinforce each other.

Europe's structural deficits are documented: defense spending averages around 2% GDP for European NATO allies, rising from 1.7% in 2023 but still below targets;¹¹ the EU working-age population is projected to shrink significantly by mid-century;¹² regulatory complexity continues to constrain industrial scaling.¹³

America's vulnerabilities are equally visible: political polarization at historic highs, institutional trust near historic lows, and a public discourse increasingly dominated by zero-sum framing.¹⁴

Each reinforces the other. Every year Europe stays below its defense promises, it becomes harder for any US administration to justify further risk on the continent. Every cycle of American political volatility makes European leaders question whether any US commitment will survive the next election. The NSS crystallizes this dynamic into doctrine: Europe must reduce the burden it places on American strategy or accept reduced influence over American decisions.

B6. ADVERSARIAL INTERPRETATION AND VACUUM EFFECTS

Russian officials immediately recognized opportunity in the NSS. Peskov's assessment that it aligns with Russia's vision isn't just propaganda—it reflects Moscow's long-standing goal of weakening transatlantic cohesion.¹⁵ When the Brookings Institution's Pavel Baev writes that the NSS's Europe section "must make for mostly enjoyable reading in Moscow," he's identifying a strategic gift to adversaries.¹⁶

The mechanism is straightforward: by explicitly questioning Europe's trajectory and endorsing internal political divisions, the NSS creates visible gaps between allies. These gaps invite substitution narratives—alternative explanations for European security that don't require American involvement. Every month

this perception gap remains open is a month adversaries can use to reshape European strategic thinking.

C. Exhibits

C1. PRIORITY STACK

TIER	THEATRE	RESOURCE LOGIC	IMPLICATION FOR EUROPE
1	Western Hemisphere	Territorial & ideological anchor	Europe no longer drives US strategy
2	Indo-Pacific	China competition	Europe competes for bandwidth
3	Europe	Stability maintenance	Value measured by burden vs. contribution

C2. EUROPE RECLASSIFICATION MATRIX

DOMAIN	AS PARTNER	AS VULNERABILITY	AS INFLUENCE SPACE
Defence	Technology sharing	Persistent gaps	Conditional on spending
Industry	Potential scale	Regulatory barriers	Leverage for alignment
Migration	Border coordination	Identity tensions	Narrative battleground

DOMAIN	AS PARTNER	AS VULNERABILITY	AS INFLUENCE SPACE
Politics	Legacy ties	Fragmentation risk	Direct party signaling
Narrative	Shared history	Diverging frames	High substitution risk

C3. KEY INDICATORS

METRIC	EUROPE	UNITED STATES
Defense Spending	Around 2% GDP average (2024)	3.4% GDP
Demographics	Working-age decline by mid-century	Stable through 2050
Political Fragmentation	27 national vetoes	Two-party deadlock
Public Trust	~50% trust EU institutions	22% trust federal government
Strategic Consensus	Split on Russia / China priorities	Bipartisan China focus

C4. PATH TRIGGERS

CONDITION	UPWARD SCENARIO	DOWNWARD SCENARIO
Defence Investment	Reaching 5% target (Hague Summit)	Continued underinvestment
Threat Convergence	Unified Russia assessment	Persistent division
Migration Management	Stabilized flows and integration	Accelerating identity politics
US Political Stability	Sustained bipartisan foreign policy	Deepening polarization
Narrative Coherence	Shared strategic story	Competing explanations

D. Decision Architecture

The NSS opens six structural paths for Europe. These plausibility levels are comparative, not statistical; they rank trajectories rather than predict exact odds.

PATH 1 — FRAGMENTATION PERSISTS

Plausibility: High (based on 2024-25 indicators)

Europe continues with marginal defense increases, unresolved migration tensions, and regulatory gridlock.

Result: NATO becomes a hollow framework; bilateral deals replace collective defense; Russia and China gain leverage through European divisions.

PATH 2 — CAPABILITY WITHOUT UNITY

Plausibility: Medium (based on 2024-25 indicators)

Europe achieves 3-4% defense spending but can't agree on strategic priorities.

Result: Stronger militaries that can't act coherently; crisis response improves but deterrence remains weak.

PATH 3 — RHETORIC WITHOUT RESOURCES

Plausibility: High (based on 2024-25 indicators)

European leaders adopt sovereignty language but don't fund capabilities.

Result: Surface alignment with US priorities masks deepening dependency; Europe becomes strategically irrelevant.

PATH 4 — MUTUAL DETERIORATION

Plausibility: Medium (based on 2024-25 indicators)

US polarization accelerates while European fragmentation deepens.

Result: Alliance exists only on paper; regional powers fill the vacuum; systemic instability.

PATH 5 — EUROPEAN STRATEGIC COHERENCE

Plausibility: Low (based on 2024-25 indicators)

Simultaneous breakthrough on defense integration, industrial policy, and political unity.

Result: Europe becomes a genuine strategic actor; US recalibrates partnership upward.

PATH 6 – NATO REVIVAL

Plausibility: Medium-Low (based on 2024-25 indicators)

External shock creates threat convergence and resource mobilization.

Result: Alliance stabilizes around core functions but never recovers full coherence.

Right now, the data line up most clearly with Paths 1 and 3—fragmentation and empty rhetoric—as the default trajectories without major intervention.

E. The Asia Factor

The NSS devotes 25 paragraphs to Asia versus 13 to Europe, and this ratio reflects strategic reality, not editorial choice.²² China isn't just another competitor—it's the organizing principle of American grand strategy. Every other regional commitment gets evaluated through the question: does this help or hinder the China competition?

Europe fails this test in three ways. First, it consumes security resources without providing proportional capability against China. Second, its regulatory approach to technology often constrains the innovation race against Beijing. Third, its internal divisions create openings China exploits through infrastructure deals and political influence.

That is the real reason Europe slides into third place in the hierarchy. It's not abandonment—it's triage. The transatlantic relationship now exists within an Asia-centric strategic architecture where Europe's value depends on its contribution to Indo-Pacific stability, not its inherent importance.

F. Closing Diagnoses

The 2025 NSS repositions Europe from co-author of Western order to conditional participant in an American strategy organized around China, shaped by domestic fragility, and measured through civilizational rather than institutional lenses. This isn't a policy preference—it's structural recognition that neither America nor Europe currently possesses the cohesion their twentieth-century partnership assumed.

The resulting gap between former assumptions and current reality creates space adversaries are already exploiting. Whether Europe can generate strategic agency before that gap becomes unbridgeable will determine whether the transatlantic relationship survives as anything more than ceremonial architecture.

The NSS does not close the transatlantic chapter. It ends the illusion that the chapter writes itself.

FOOTNOTES

1. United Nations General Assembly. "Resolution A/RES/78/73: Assistance to Palestine Refugees." 12 December 2023. Voting Record.
2. DURCHD8. "UNRWA: Structural Complementarity in Gaza (Stratum 1)." Substack, 2025.
3. Ibid.
4. United Nations. "Terms of Reference: Independent Review... Neutrality." 5 February 2024, p. 2.

5. Independent Review Group. "Independent Review of Mechanisms... Neutrality." 20 April 2024, p. 13.
6. Ibid., p. 17.
7. Federal Foreign Office. "Joint Statement on UNRWA." Berlin, 24 April 2024;
Global Affairs Canada. "Statement on UNRWA." 8 March 2024;
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