



# US and UK Elections: Implications for NATO and Northern European Security

Ed Arnold, Max Bergmann, and Karsten Friis

# Acknowledgements



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# Contents

- Introduction.....6**
- The United States Elections.....7**
  - Biden Administration Priorities.....7
  - Trump Administration Priorities.....8
- The United Kingdom elections.....9**
  - Defence and security as an unlikely battleground.....9
  - Implications of a Biden win.....10
  - Implications of a Trump win.....10
  - Continuity.....11
- Norway and Northern Europe.....12**
  - NATO more robust.....12
  - Bilateral agreements with the US.....13
  - US National security interests in the Arctic.....13
  - Defence of the Nordic territories.....14
- Conclusion – is Europe ready?.....15**

## Introduction

Elections on both sides of the Atlantic have highlighted diverging views and increasing tensions over the importance of the security alliance, which celebrates its 75<sup>th</sup> anniversary this year. The most impactful election will undoubtedly take place in the United States, where the two candidates present Europe with remarkably different challenges. The re-election of President Joseph Biden to a second consecutive term in office will largely represent continuity albeit few clear incentives to undertake the transformational changes necessary for Europe to adapt to an increasingly volatile security landscape. On the other hand, if former President Donald Trump secures a second term in the Oval Office, Europeans could see their transatlantic security alliance thrown into turmoil and could be forced to consider difficult and uncomfortable steps to strengthen their own security. Voters will also head to the polls across Europe, including in the highly anticipated European Parliament elections, which will shape the composition of the next iteration of EU institutions. However, most notable for Northern European security will be elections in the United Kingdom on July 4<sup>th</sup>, which could lead to a change in the governing party for the first time in 14 years. A recent commitment by Downing Street to increase defence spending to 2.5 % by 2030 – reaching £87 billion in that year – has upped the ante towards its Labour opposition, which has suggested a similar increase but without providing a specific timeframe.

As the NATO Alliance prepares for a 75<sup>th</sup> anniversary celebration in Washington, DC, questions loom regarding its capacity to deter a potentially emboldened Russia, particularly considering the Kremlin's recent advances in the war in Ukraine, now entering its third year. This analysis assesses the implications of the upcoming elections on both sides of the Atlantic. It combines perspectives from the United States, the United Kingdom, and Norway, and assesses implications for NATO, the ongoing war in Ukraine, and future security in Northern Europe.

## The United States Elections

The two presidential candidates, President Joseph Biden and former President Donald Trump have very different perspectives on NATO. There is more clarity with President Biden's future administration, given he is the current President and had to respond to dramatic events in Europe. Nevertheless, a key challenge will be how President Biden balances the calls from Europeans, now extremely concerned about their security and wanting significantly more US engagement, with the demands caused by a rising China, as well as other global events.

A second Trump administration is more challenging to surmise. Nevertheless, it is likely that a second Trump administration will have a much greater impact on NATO than his first administration. With European security more a focus now and with President Trump now likely having identified several likeminded political appointees that share his scepticism of NATO, US policy will probably go in a dramatically new direction. But will Trump's harsh rhetoric be matched with policy action this time?

### Biden Administration Priorities

President Biden has what can be described as a traditional view of NATO. He views NATO as vital to European security and sees preserving Europe's security as vital to America's security. Biden also sees the need for the United States to play a strong leadership role in Europe and preserving its indispensable role in European security. Yet there is a tension underlining how much attention and therefore resources can be devoted to Europe given other demands, especially China's growing assertiveness in the Indo-Pacific. Thus, with a second Biden administration there exists the potential of the US making strong public commitments to Europe, yet those pronouncements not matching the reality of shifting resources and attention to Asia.

There is an on-going debate in the United States to what extent the US military is overstretched in the world. On the one hand, the US military remains the preeminent military force with tremendous global capacity. On the other hand, US [military spending](#) relative to its GDP has declined and the threat posed by China is more challenging than any other threat to the United States since the Soviet Union. China's military modernization has shown a spotlight on the challenges to the US military and its defence industrial base, particularly in ship building and stockpiles of munitions.

There is already intense [competition for resources](#) between theatres, specifically between EUCOM and INDOPACOM. It is likely, despite Russia's military recapitalization, that INDOPACOM will receive the lion's share of the Pentagon's assets. Moreover, it is clear that the Biden administration overall wants to focus on the Indo-Pacific, as seen through the [U.S. Indo-Pacific Strategy](#), and the implementation and creation of new and enhanced partnerships including the Quad, AUKUS, ASEAN, and more. During the first year of the administration, despite Biden's deep attachment to NATO and European security, the emphasis was on the Indo-Pacific. The administration sought to "park" Russia and shift the alliance's focus to Asia. It also demonstrated that it was willing to dismiss European concerns about the withdrawal from Afghanistan and AUKUS' impact on relations with France.

It is possible that Biden may return to the Obama administration's position on Europe, where Europe was not treated as a priority. President Obama was not seen as having a deep attachment to Europe or European security and was perceived of largely going through the motions in his engagement with Europe. While President Biden, being a product of the Cold War, may have a deeper attachment brought out by the war in Ukraine, most of his team are veterans of the Obama administration and came of age professionally in a post-9/11 environment, where little attention was paid to Europe by Washington.

The war in Ukraine, however, remains a key focus area for the Biden administration. President Biden will likely seek a follow-on supplemental aid package in 2025 for Ukraine. However, the administration may also be open to re-engaging Russia in negotiations should future Ukrainian counteroffensives prove futile. If the war ends with a stalemated ceasefire, the administration's

attention will likely shift significantly from Europe. However, actions by Russia to destabilize Europe, and potentially the United States, may prove impossible to ignore and frustrate the administration's Asia hands who are eager to pivot.

### Trump Administration Priorities

A second Trump administration may prove far different than his first administration. Looking back at the Trump administration's actions on Europe, Europeans should not take solace in the fact that money for European security increased through the European Deterrence Initiative and that the [Trump administration sold](#) lethal anti-tank missiles to Ukraine. Those actions were done either by a Congress that was very different compared to today due to traditional hawks like John McCain, and an administration that had non-partisan stalwarts of American foreign policy, such as General James Mattis as Secretary of Defense.

President Trump's negative views of NATO are deeply held. At the NATO Summit in 2017 and as his first as President, President [Trump refused](#) to commit to Article 5. In 1987, Trump [paid](#) over \$94,000 USD for a [full-page advertisement](#) in The New York Times, disparaging NATO and alliances, saying "Why are these nations not paying the United States for the human lives and billions of dollars we are losing to protect their interests?" Furthermore, unlike his first administration, which did little planning to govern since it did not expect to win, there is significant planning for his second term. Many political appointees are being identified and policy papers are being drafted to align and implement Trump's world view, including pulling back from NATO. One prominent paper, [by Sumantra Maitra](#), calls for "dormant NATO" with the US substantially pulling back from NATO but still offering its nuclear deterrent.

Another main line of argument from Trump-allied scholars asserts that the US military is [overstretched](#) and there is a need to focus almost all US attention on the threat posed by China. Moreover, it is argued, that the only way to make Europe step up and take of its own security, is for the US to step back. Former Trump Pentagon official [Elbridge Colby](#) is one of the most prominent purveyors of this view.

As for Ukraine, it is unlikely that Trump will seek another supplemental aid package and one is not likely to be passed if he is President. Trump did not support the 2024 supplemental but he also did not vigorously oppose its passage.

Nevertheless, Trump continues to have an affinity for Russian President Vladimir Putin and his first impeachment was [the result](#) of President Trump trying to pressure President Volodymyr Zelensky to open up a corruption investigation into then-candidate Biden. Trump has said he would immediately resolve the war; yet has offered no concrete plans to do so. It is unlikely that Trump would take an active interest in the conflict and if his administration does so it will likely be to pressure Ukraine to come to terms with Russia.

This can be a possible starting point for a new Trump administration. But Trump may also not pay much attention to European security and is unlikely to prioritize implementing a new policy towards NATO. It will thus be left to appointees at State and Defense to develop and execute a new NATO policy. They may not care to do so and may drag their feet. Europeans may also proudly point to their increases in defence spending, which may blunt Trump's criticism and demands for change. But a more likely outcome is that Trump's decades-long deep scepticism of NATO, as well as a slew of motivated political appointees that not only strongly back President Trump but also want to move Republican foreign policy in a new direction, push US policy toward NATO in a starkly different direction. This means shifting responsibility for the defence of Europe to Europeans. In response, Europe's best course may be to both take dramatic action and plead for time, given Europe will not be able to fill the void left by an abrupt US pullback anytime soon.

## The United Kingdom elections

The UK will hold a nationwide General Election on 4 July 2024. Although less consequential than the US elections for European security, the result will be significant for NATO, Russia policy, Ukraine, and Northern Europe in particular.

Unlike in the US, there is no transitional period between governments. Therefore, a new government needs to be ready on day one and there is no shortage of defence and security priorities to deal with. The Labour Party is strong favourites to win the election. [Politico's poll of polls](#) has had Labour leading the Conservatives since 30 November 2021. The choice of a July election means that the new government will have five months to “bed in” before having to manage with the aftermath of a hugely divisive US election and the destabilizing prospect of a second Trump Presidency.

This will be an incredibly busy time for the US and the UK and as such it will be very difficult for incoming Ministers and officials to strike up strong relationships to become key interlocutors between governments. This will be a challenge for both parties as Labour has a shadow cabinet with little prior ministerial experience (currently only the shadow Foreign Secretary, shadow Defence Secretary, and shadow Home Secretary have previous cabinet experience) and many Conservative ministers and ex-ministers with cabinet experience are [standing down](#) at this election.

### Defence and security as an unlikely battleground

It has long been a truism of UK politics that there “are no votes in defence”. However, in [a more dangerous, more volatile, and more confrontational world](#), where domestic pressures, such as the cost of living crisis which can be directly linked to international affairs, especially Russia's war on Ukraine. Therefore, defence and security will likely feature more prominently in the campaign, even though it is unlikely to be a decisive electoral issue.

Despite this tradition, there is an emerging election strategy of the incumbent Conservative government to make defence and security a clear dividing line between the parties. On 13 May 2024, the UK Prime Minister, Rishi Sunak, delivered a major international affairs speech where he declared “[So the question we face today is this: Who has the clear plan and bold ideas to deliver a secure future for you and your family?](#)” The implication was that it was the conservatives, not Labour, that can be trusted with the UK's security. Moreover, the direct reference to “family” suggests that there is a desire to link the argument directly to the electorate, rather than as an elite policy discussion. This speech was supported only a day later by the UK Defence Secretary, Grant Shapps, which articulated the [increased investments being made](#). Both major interventions follow successful lobbying by the Defence Secretary in January which led to the April announcement by the PM that the UK will increase defence spending to 2.5 % of GDP on defence by 2030, messaged as a “[turning point](#)” in European security. Thus far, Labour has declined to meet this target, instead describing it as an [aspiration](#), while arguing that the financial mechanisms underpinning it are unrealistic and not fully costed. Finally, and most significantly, just two days after announcing the General election, the Prime Minister announced that a future Conservative government would reintroduce [mandatory National Service](#) for 18 year olds – a policy that was discontinued in 1960.

As the election approaches, Labour is also announcing more details of its defence and security policies in several areas.

First, on the same day as the PM's latest security speech, Shadow Foreign Secretary David Lammy and Shadow Defence Secretary John Healey met with Ukrainian Defence Minister Rustem Umerov on a surprise visit to Kyiv. They both reaffirmed Labour support for the government's multi-year financial aid settlement and “[ironclad](#)” [commitment to Ukraine](#). Indeed, support to Ukraine has seen a very high degree of political alignment between all major UK parties since 2022 and will be an area of continuity. Second, David Lammy has outlined the “[case for progressive realism](#)” as Labour's approach to foreign policy, where European security will be the absolute priority. The shadow Foreign Secretary has also visited the US this spring to strengthen connections in DC ahead of the elections.

Third, both Lammy and Healey have talked up a “wide ranging and ambitious” UK-EU defence and security pact as a foreign policy priority. The former has also declared reconnecting with the EU as a [top foreign policy priority](#) for a Labour-led government. While relations between the EU and UK have improved since the start of the war in Ukraine due to practical cooperation on sanctions policy, these proposals would make improving the UK’s relations with Europe a point of difference. In conjunction with this ambition, the Labour Party seek a [bilateral defence and security treaty with Germany](#) – a key EU player – within the first six months which will help get a wider EU agreement across the line.

Labour, under more pressure due to the Conservative security push and a deteriorating security environment – especially in Ukraine – are expediting their plans. The party has committed to a [“security sprint” national security review](#) of the threats the country faces. Previously these policies were to be fully articulated in a comprehensive Strategic Defence and Security Review (SDSR) within the first 12 months of government.

### **Implications of a Biden win**

Given the central tenets of UK defence and security policy – the bilateral relationship with the US and NATO as a power maximiser – a Biden win would be inherently preferable for the UK. The sense of continuity and stability will be comforting, as will his traditionalist view of NATO, the leadership role in Europe the US has played under Biden and US support for Ukraine. This will allow largely seamless policy continuity after both the US and UK election. Indeed, if Labour wins the election, then the NATO Washington Summit will be Sir Keir Starmer’s first trip as Prime Minister and due to the alphabetical seating arrangements, will be next to President Biden throughout. This could be the beginning of a strong Democrat – Labour pairing and a corresponding strong Biden – Starmer relationship, increasing Washington engagement with the UK on a wider set of policy. However, there will still be hard choices for the UK to make, especially around resourcing its global aspirations between the two priority “strategic arenas” – the Euro-Atlantic and Indo-Pacific respectively. Here, it is highly likely that the UK will follow the US lead and gain agreement on where UK diplomatic, technological and military assets can best support US global aspirations between Europe and the Indo-Pacific, and between the threats and challenges posed by Russia and China, individually and collectively.

### **Implications of a Trump win**

A second Trump Presidency would be far more difficult for the UK to weather than the first. The security environment has rapidly deteriorated in the intervening four years and stability and predictability are important traits in international affairs. There are several immediate implications for [the possible Trump effect on UK national security](#).

First, Trump’s NATO policy and its unpredictability would be incredibly difficult for the UK, given its role within the Alliance and its absolute centrality to defence policy. As such, any serious Trump-induced NATO crisis will require a strong, and perhaps bold, response from the UK, and working with its network of European allies to stabilise the situation. Moreover, the UK would have to step up in Europe to mitigate the impacts of any US drawdown, especially in specialist capabilities such as Intelligence, Surveillance and Reconnaissance (ISR) and Anti-Submarine Warfare (ASW). A potential drawdown of US assets within the UK would be minimal, given the strong nuclear and intelligence relationship and joint working which would largely be sheltered from political changes. Therefore, any such crisis is also an opportunity for the UK to re-state its European leadership credentials.

Second, AUKUS is a strategic infrastructure and technology transfer programme with a significant diplomatic component. It requires stability and predictability. There will be concern in the UK over what advice Trump might be getting on the deal, and whether he can strike a better one for the US. Moreover, questions continue to be raised over whether the US has the capacity to provide the allotted Virginia Class submarines to Australia under Pillar 1 of the pact. If Pillar 1 falters, then Pillar 2 – the most ambitious and valuable – would be placed in serious jeopardy.

Finally, both the bilateral US-UK intelligence relationship and the 5EYES intelligence relationship between the US, UK, Canada, Australia, and New Zealand might be subjected to strain given the revelations in 2023 that hundreds of classified documents were found in Trump’s Mar-a-Lago resort, including details of allies’ defence capabilities and potential vulnerabilities,

### **Continuity**

If a Labour government comes to power, the next UK SDSR will be the first written by the party in 27 years. There will be understandable political pressure to put a Labour stamp on UK foreign, security and defence policy. However, these are likely to be rhetorical, with terms such as “Global Britain’ and Indo-Pacific tilt” – long associated with Brexit and the Conservative government – dropped entirely for newer slogans. Behind such rebranding, it is difficult to see any true substantive changes. In both the [Integrated Review 2021](#) and its [2023 “refreshed” document](#), the Euro-Atlantic was already the UK’s priority, despite the messaging of the “tilt”, and Russia identified as the most acute threat. Moreover, the refresh committed the UK to [“lead and galvanise where we have most value to add, giving particular priority ... to the contribution we can make in northern Europe as a security actor”](#). This prioritisation of Northern Europe has been a [natural evolution of UK policy](#) over the last decade and there are strong drivers for an increased role for the UK in the region, as part of NATO, as a leading nation of the Joint Expeditionary Force, or bilaterally with its closest allies in the Baltic Sea Region. As such, it is very unlikely that this strategy would be changed.

## Norway and Northern Europe

Norway, like most other European allies, would most likely be more comfortable with a Biden administration than a Trump administration from 2025 on. The current presidency has made international partnership and integrated deterrence a cornerstone of its security policy, but this is unlikely to be emphasised in the same way by a new Trump administration, given his more transactional approach to international relations. Furthermore, the unpredictability which follows Trump's political style creates unease among allies. That said, most observers seem to agree that also a Democratic-led US will prioritize Asia-Pacific over Europe over time. In other words, Norway and its Nordic and European neighbours must prepare for a reduced American footprint in Europe. The question is rather how quickly or abruptly it will happen and how far such a drawdown in Europe eventually will go.

For Norway and the other Nordic states, NATO membership is primarily an alliance with the United States, secondarily with the major European military powers, and thirdly with each other. Strengthening (and joining) NATO has been a means to achieve all three ends, as it institutionalises and operationalises the commitments of the armed forces. Denmark, Finland, Norway and Sweden, have all also established a host of bilateral collaborative defence agreements with the US, UK, Germany, France and other allies, in addition to their multilateral Nordic Defence Cooperation. Several joint defence industrial projects with industrial partners within the region and beyond, also reinforce security ties. The question is if all these initiatives are robust enough to secure continued deterrence and defence of Northern Europe, even if the United States draws down its engagement in Europe.

### NATO more robust

The allies have over the last decade or so made NATO more relevant and robust to face the main security challenges facing both the American and European continents. Russia, terrorism and China are all listed in NATO's Strategic Concept and in recent Summit declarations, but there is little doubt that is the Russian aggression against Ukraine which has shaped the concrete reform of NATO since 2014. This includes new defence plans, new response forces, and a shared political commitment to stop cutting defence budgets and rather increase them to 2 % of GDP. Much of the political focus has been on the 2 % target and burden-sharing, but with likely more than 20 allies reaching this target in 2024, the political risk associated with burden-sharing may be reduced. All the Nordic allies have declared they will reach the 2 % in 2024. On the other hand, there is already pressure within the alliance to continue the increases up towards 2.5 % and beyond, so one cannot rule out that a future US administration will emphasise improved burden-sharing also in the future.

NATO has simultaneously done a tremendous job at reorienting itself to address the new threat landscape. This work has been progressing more or less irrespective of presidential administrations in the US, or political leadership in other allied countries for that matter. The newest suite of defence plans, based on the 2020 concept for Deterrence and Defence of the Euro-Atlantic Area (DDA), combined with a new force model designed to fulfil these plans, and a revised command structure, NATO is about to become more prepared for collective defence than it has been since the Cold War. What remains is the implementation of the planned increases in European defence spending. It will take several years before these investments materialise in a substantially stronger Europe which is less dependent upon the US. But through the defence plans the requirements will be clearly spelled out. These requirements also apply to the two new NATO members, Finland and Sweden, which need to both fill positions in NATO headquarters and strengthen their own forces. As argued [elsewhere](#), the formal membership is only the beginning. In short, this effort to transform NATO and improve the burden-sharing both increases the chances of continued US commitment and strengthens the European's ability to take more responsibility in a concerted way.

## Bilateral agreements with the US

The US has signed bilateral Defence Cooperation Agreements (DCA) with all the Nordic countries. These agreements envisage US investments in multiple (48 altogether) military bases across the Nordics to facilitate swift movements of US troops and equipment between countries. However, thus far few concrete investments have been made. Other bilateral defence agreements, such as the US Marine Corps Prepositioning Program-Norway (MCPN), also exist. If a future US administration will deploy fewer troops to Europe, the need for these investments and facilities could also be reduced. On the other hand, if the US seeks to keep contributing to conventional deterrence in Europe even with fewer troops permanently stationed here, the calculus could be different. Having invested in bases and facilities to which one can quickly deploy from the US in case of crisis, could be of higher importance. With Finland and Sweden in NATO, their territories (as well as Denmark's and Norway's) would be of increased importance also to support allies' ability to reinforce the Baltics.

Nonetheless, a reduced American footprint in Northern Europe would most likely negatively impact US participation in exercise activity in the Baltic Sea and Nordic countries. Exercising enhances situational awareness, familiarity with the terrain, and experience with cold weather operations – all important elements to maintain to be able to operate in the north. Hence, the absence of such training could over time erode the credibility of the US deterrence in Northern Europe.

Another important US bi- and multilateral activity is the Bomber Task Force (BTF), which is the deployment of American B-1B, B-2 or B52 bombers to Europe about four times per year. It is a very potent signal of US commitment to collective defence in Europe, both conventional and nuclear. The BTF has regularly operated in the Nordic region, including in the Arctic and most recently in [Sweden](#). This activity could also in principle be reduced or cancelled by a new US administration. On the other hand, the BTF was initiated during the Trump presidency (in 2019), and since it does not imply the permanent stationing of troops or equipment in Europe, it may not be the first to be slashed in case of a draw-down.

Over the last few years, we have also witnessed an intensified trilateral defence cooperation between the US, the UK, and Norway in the north. F-35s, P8 MPAs, Marines, UAVs, Navy, and other units are exercising and cooperating very closely. This is cost-effective, increases interoperability, and draws the countries closer to each other on both the operational and the political levels. This activity could of course also suffer from a potential US draw-down, but as long as it also serves US national interests, it is likely to continue.

## US National security interests in the Arctic

The United States has significant national security interests in the Arctic and the North Atlantic. In other words, American attention to these regions is not only a result of the security guarantee enshrined in NATO. Rather, it is first and foremost driven by the presence of the Russian strategic nuclear submarines (SSBNs) in the Arctic. Nuclear ballistic missiles launched from these submarines represent a direct threat to the North American continent. More recently, new Russian hypersonic missiles and other Emerging and Disruptive Technologies (EDT) have been tested in the Arctic. As a result, the US has a significant national interest – as an extended homeland defence – to detect, deter and prevent the use of these weapons in case of war. This remains unchanged since the Cold War and will continue to be so irrespective of American policy towards NATO and the rest of Europe. Several American military commands, such as Northcom, Norad, 2<sup>nd</sup> Fleet, and 6<sup>th</sup> Fleet all have an eye on the Russian nuclear and EDT activities in the Arctic. Sub-sea activity, aerial maritime patrols, space activity, sensors, and intelligence collection in the north are all associated with this. Hence, the broad bilateral intelligence cooperation with Norway will continue irrespective of who is President in the White House. Recent new initiatives, such as the joint US-Norwegian satellite station at Andøya Space Center is also likely to continue. This new establishment will support the infrastructure of the US Space Force and is “intended to increase situational awareness; command, control and tracking; and create a resilient meshwork of sensors and effectors”, and “is particularly designed for the use of long-range precision weapons and air defense against cruise missiles”, according to media [reporting](#).

### **Defence of the Nordic territories**

Despite the likely continuation of the American attention to the Russian strategic weapons, it is not a given that the US commitment to reinforcement and forward defence in the Nordic region will continue as before. It is for instance not necessarily certain that control of the land domain is a military prerequisite for the US' tracking of the Russian strategic submarines. If so, the US Army and Marine Corps may not prioritise the European northern flank in their planning. A future more restrained US engagement in Europe could therefore imply that the Nordics would have to defend the northern flank with significantly reduction in US' support. The Nordics are advancing plans for closer integration of their air forces under a joint command, and the land forces are deliberating something similar. But allied (European) support will continue to be necessary in case of a protracted conflict in the north. The UK is likely to continue its engagement but is also stretched between commitments to the Baltics/Estonia through the Enhanced Forward Presence, and the Nordics, including the Arctic. But few other European powers do have a surplus of ground forces which realistically could be deployed in the north.

## Conclusion – is Europe ready?

In most scenarios for future transatlantic security relations, it is assumed that the United States will expect its European allies to carry an increased share and the main burden of European defence. As defence budgets are rising in most European countries – they have increased by [43 % since 2014](#) – this message appears to be well-received in European capitals. Nevertheless, Europe continues to get surprisingly little “bang for the buck”, given the fact that the combined European defence spending is 17 % of the global total, amounting to \$407bn in 2023. This is primarily because the European armed forces continue to be primarily nationally organized. As a result, there are numerous parallel structures, as each country tends to insist on retaining everything from staff colleges to defence industries under national control. To increase efficiency and operational effect, Europe needs to integrate more, even if it is politically challenging. This also applies to the Nordics.

Northern Europe must in any case be prepared for change: potentially abruptly in a Trump administration or more gradually in a second term with Biden. While the American military footprint in Europe is likely to be reduced, the Putin regime in Moscow will remain a challenge and a danger to Europe as long as it is in power. Europe must therefore be prepared to stand up against this risk alone or with reduced American assistance. For the smaller Nordic allies this is potentially more dangerous than for the UK and other larger Europeans. A strong European pillar in NATO, combined with solid plans, command & control and regular exercising, is therefore a prerequisite for a secure Europe irrespective of who is holding office in the White House.

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