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Munich and what next?: the prospect of a reduced US presence in Europe

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The Munich Security Conference highlighted an imminent radical shift in US policy towards Europe, particularly regarding European security and support for Ukraine. Representatives of the US administration clearly emphasised a medium- and long-term reduction in US military engagement on the continent and did not rule out a short-term partial withdrawal of US forces as part of negotiations with Russia to end the war in Ukraine.

Although the United States is expected to lead efforts to negotiate peace in Ukraine, these discussions are set to exclude European countries. At the same time, Europe is expected to assume responsibility for continued military support for Kyiv and to provide security guarantees after the war ends. Europe is unprepared for such a shift and is only beginning to discuss joint planning for the conditions of ending the conflict, increasing aid, and offering guarantees. The outcome of talks with the new US administration has heightened Kyiv's concerns about the future of US support and provoked fears that a possible agreement between Donald Trump and Vladimir Putin could be reached without Ukraine's involvement. Kyiv will not accept any settlement without its participation in the peace negotiations and is relying on Europe to reinforce its commitment to continued support.

The message from Washington has also sparked intense discussions about strengthening Europe's own defence capabilities, which will largely depend on the willingness of European countries to substantially increase their military expenditure.

The US in Munich: shifts in its course towards Europe

The main objective of the US delegation's visit to the Munich Security Conference was to signal a shift in US policy toward Europe – both ideologically, in relation to the war in Ukraine, and concerning defence and deterrence on the continent. The US delegation included Vice President J.D. Vance, Secretary of State Marco Rubio, and the President's Special Envoy for Russia and Ukraine, General Keith Kellogg. A key moment was Vance's controversial speech on 14 February, in which he emphasised that the primary threats to European countries are internal – specifically, the uncontrolled influx of immigrants, attempts to restrict freedom of speech, and challenges to democratic processes. Vance focussed particularly on the annulment of the presidential election results in Romania and the exclusion of radical parties, such as the AfD, from forming ruling coalitions in various European countries. Although he also stressed the need for increased defence spending by European states, military security and the threat from Russia were only briefly mentioned in his address.

The Vice President's speech was met with largely negative reactions across Europe. In Germany, his calls for the inclusion of radical parties in government and his meeting with AfD leader Alice Weidel were seen as interference in the campaign ahead of the Bundestag election on February 23. Vance's remarks were interpreted as an endorsement of the German far right by the US administration. The most notable response in Germany came from Defence Minister Boris Pistorius (SPD), who stated that Europe must "be able to defend itself against extremists who seek to destroy it". The Vice President's speech in Munich underscores that the new administration's foreign policy includes efforts to challenge the European liberal mainstream from a right-wing perspective. The new leadership in Washington appears determined to weaken the dominant political forces in Europe and to support ideologically aligned radical parties.

Ukraine: America's priority to end the war and Europe's responsibility for peace

The US president's Special Envoy for Russia and Ukraine, General Kellogg, was the only representative of Trump's team, apart from Vice President Vance, to speak publicly during the conference. He explicitly stated that the administration is focused on ending the war as swiftly as possible. Kellogg outlined a dual-track approach, advocating for separate negotiations with Russia and Ukraine positioning himself as a mediator between the two sides. He ruled out Europe's participation in the talks but assured that it would be consulted both before and during the negotiations. At the same time, he emphasised that the US would not support a settlement similar to the Minsk II agreement. Europe is expected to ensure peace in Ukraine following the cessation of hostilities, despite the absence of American security guarantees, the cancellation of the prospect of Ukraine's NATO membership (at least in the short term), and the lack of a NATO mission in the country. Kellogg will not be part of the delegation leading the negotiations with Russia, which are scheduled to commence in Saudi Arabia on 18 February. His primary role will be to consult with Kyiv and European allies. However, given the administration's priority on talks with Moscow, his influence may be less significant than that of Secretary of State Rubio, National Security Advisor Michael Waltz, or the President's Special Envoy for the Middle East, Steven Witkoff, all of whom will meet with Russian officials in Riyadh.

The significance of the Munich talks for Ukraine was evident in the composition of its delegation. Alongside Volodymyr Zelensky, the conference was attended by Andriy Yermak, Head of the President's Office, and ministers from key government departments. The discussions heightened Kyiv's concerns about continued US support and raised fears that a possible Trump-Putin agreement could be reached without Ukraine's involvement. Before the conference, Ukrainian leaders' attempts to link potential US security guarantees and continued military aid to American participation in the extraction of Ukraine's natural resources had failed. Washington had proposed that the United States receive half of the shares in resource extraction as compensation exclusively for the assistance already provided. Zelensky rejected the proposal, describing it as "insufficiently prepared". With no prospects for a favourable agreement with the US, the Ukrainian President sought to rally European countries in Munich to bolster their support for Kyiv. In his official speech, he called for the creation of a European army and for Europe to reduce its dependence on the United States. He emphasised that Ukraine would not accept any agreements made without its participation in peace negotiations and advocated for the inclusion of European representatives in the talks.

There is still no specific European plan for ending the war, as discussions are only just beginning on a common position regarding the forthcoming US-Russia negotiations and how to respond to their outcomes. Key topics include increasing Europe's military support for Kyiv and determining its funding formula, responding to a potential lifting of US sanctions on Russia, defining the approach to restoring political relations with Moscow, and providing Ukraine with future security guarantees. Debate over the possible deployment of European peacekeeping forces to Ukraine as a means of deterring further Russian aggression is gaining momentum. On 17 February, President Emmanuel Macron convened a summit in Paris with selected European leaders (from Germany, Poland, the United Kingdom, Italy, Spain, and Denmark), along with the President of the European Council, the President of the European Commission, and the NATO Secretary-General. The meeting aimed to facilitate discussions on Europe's role in resolving the conflict and ways to enhance European security. Before the summit, British Prime Minister Keir Starmer announced the UK's willingness to deploy troops to Ukraine, echoing earlier statements from France. Germany has not ruled out deploying forces but remains sceptical, particularly ahead of the Bundestag election. CDU leader and Chancellor candidate Friedrich Merz stressed the need for a clear international legal mandate for deploying such forces, preferably with Russia's agreement. Sweden, Estonia, and Lithuania have also signalled potential participation in a European mission. However, publicly, these discussions remain at a very early stage.

The prospect of reduced US engagement in Europe and European responses

Another key topic of discussion at the Munich conference involved the future of the US military presence in Europe. Ahead of the event, US Secretary of Defence Pete Hegseth visited Europe, meeting with United States European Command (EUCOM) and United States Africa Command (AFRICOM) based in Germany, attending meetings of NATO defence ministers and the Ukraine Defence Contact Group (Ramstein format) in Brussels, and visiting Poland. Hegseth urged European allies to increase defence spending to a target of 5% of GDP and to develop their own armed forces and industrial base in light of the possible reduction in the US military presence in Europe. At the same time, he reaffirmed the US commitment to collective defence and both conventional and nuclear deterrence against Russia. He repeatedly cited Poland as a model ally. Despite speculation about whether the US presence in Europe might become a subject of negotiations with Russia, there is currently no indication of an imminent reduction in US forces in the region.

The American message has fuelled European discussions on increasing defence spending to at least 3% of GDP. In his speech at the conference, Chancellor Olaf Scholz emphasised the need to increase Germany's defence spending, advocating for its exemption from the national debt brake rule and for EU exemptions from the excessive deficit procedure for spending above 2% of GDP. Friedrich Merz was more cautious in specifying a target level for defence spending, stressing the need for all allies to agree on this at the forthcoming NATO summit in The Hague. Germany acknowledges the necessity of preparing for a post-Cold War Europe in which the United States will no longer serve as the primary security guarantor. However, for the time being, due to the lack of an immediate alternative, Berlin continues to regard its relationship with Washington as crucial to European security. At the same time, Germany perceives the US, under the Trump administration, as a country that could pose significant economic and political challenges.

In France, discussions regarding a reduced US military presence in Europe align with President Macron's vision of Europeans being compelled to achieve greater strategic autonomy in the sphere of security. This is to be accomplished through the development of independent military capabilities, strengthening the defence industry, ending arms purchases from the US, and incurring joint defence-related debt within the EU. During the Munich Security Conference, the French Foreign Minister reiterated that increased military spending would only gain public acceptance across the continent if it resulted in job creation within the EU. Thus far, debates have not called for transforming the European Union into a defence alliance but rather for strengthening European military capabilities within NATO. While EU officials continue to advocate the long-term goal of a so-called European Defence Union, their primary focus remains on encouraging member states to raise their military spending and enhance their armed forces through joint procurement within the European defence industry, which is also receiving additional financial support.