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Necessary But Not Sufficient

Germany's Rearmament And The Nuclear Gap At The Heart Of European Security

By Kaya Dupuis



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November 2026

AUTHORED BY

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Cover Image: A Tornado IDS ASSTA 3.0 fighter jet releases a Taurus guided missile over the sea during Exercise Two Oceans in Bredasdorp, South Africa, March 17, 2017.

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About the Author

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A Note on Timing. The analysis reflects the situation as of October 2026. Several of the developments it discusses – the Franco-German nuclear consultations, U.S. force posture in Europe, Germany's defence budget trajectory – are moving quickly, and the argument should be read against that date rather than the date of publication.

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Executive Summary

Since the founding of the Federal Republic, Germany's security has rested on an American guarantee that can no longer be assumed. The United States accounts for roughly two-thirds of NATO's defence spending and supplies the alliance's nuclear umbrella, its strategic airlift and its intelligence architecture. But under the second Trump administration, Washington treats collective defence as negotiable. Russia, meanwhile, has demonstrated both the will and the capacity to wage aggressive war in Europe: it has moved to a war economy, it outproduces the United States and Europe combined in artillery shells, it holds the world's largest nuclear arsenal, and it maintains what Western analysts characterize as an *"escalate to de-escalate"* doctrine – the threat of limited nuclear use to end a conventional war on Moscow's terms. NATO's Secretary General warns that Russia could be ready to attack alliance territory within five years; Germany's foreign intelligence service puts the date at 2030; Estonian and Latvian military chiefs warn that the danger to the Baltic states could peak as early as 2027–28.

This paper asks whether Germany can rationally build sufficient capability to deter Russia without the U.S. guarantee, and if so, through what means. It evaluates the options through a rational choice lens, supplemented by deterrence theory and defensive realism, treating the problem as one of strategy rather than of normative debate. Its central finding is that the conventional rearmament now under way is necessary but categorically insufficient, and that Germany's security future depends on a European nuclear umbrella that neither France nor the United Kingdom has yet committed to providing.

Germany can rearm conventionally, and is doing so. The constitutional and economic questions are settled. The *Grundgesetz* permits defensive buildup, the 2022 *Zeitenwende* created a €100 billion special fund, and the March 2025 reform of the debt brake exempted defence spending above 1% of GDP from the borrowing limit, underpinning €650 billion in planned defence spending between 2025 and 2029.

Conventional armament cannot substitute for extended deterrence within the threat window. Three barriers stand in the way that neither permission nor money can

overcome. Delivery schedules run to 2030 and beyond, readiness is chronically low, and converting budgets into deployable military power takes a decade at minimum. NATO's force goals require some 460,000 personnel against roughly 220,000 today, a gap that voluntary recruitment cannot fill and that a new military service law, voluntary unless parliament votes otherwise, has barely begun to close. At the same time, the roughly 36,000 U.S. personnel in Germany (about 5,000 of them now being withdrawn) bring airlift, command and intelligence architecture that cannot be reproduced in time. Beneath these lies a categorical problem: no number of tanks, aircraft or soldiers changes the asymmetry between a nuclear-armed Russia and a conventionally armed Germany.

A sovereign German bomb is possible in theory but not strategically viable. Germany could leave the NPT under its Article X withdrawal clause, though the Two-Plus-Four Treaty, which has no exit clause and confirms Germany's borders, offers no clear legal route out short of renegotiation. It has latent capacity (the Gronau enrichment plant, world-leading centrifuge technology, restartable reactors, though no plutonium reprocessing) and the money: a program on the French or British scale would absorb roughly 6–12% of the current defence budget. The real barrier is political. Between 64% and 90% of Germans oppose a national bomb, a program would almost certainly be challenged under Article 26 of the Basic Law, and it would risk breaking the non-proliferation regime Germany has spent decades upholding.

A European nuclear umbrella is the most coherent option, and it does not yet exist. Where Germans reject a national bomb, 64% support a European deterrent. France and Britain together hold roughly 515 warheads, comparable to China's and well above the 200–300 that minimum deterrence requires, though Russia's graduated doctrine would demand flexible-response options as well. Europe has the capability. What it lacks is commitment: neither Paris nor London built its deterrent to protect others, and the paradox weakening the American umbrella, that a promise to risk one's own destruction for an ally is inherently hard to believe, applies to them with equal force. Macron's March 2026 offer of "forward deterrence" is politically significant, but it extends no guarantee, and reassurance requires consultation and planning institutions that do not yet exist. The nuclear gap at the heart of European security is a gap of will and institutions, not of warheads.

The implications extend beyond Germany. Europe must formalize a nuclear planning framework independent of U.S. authorization. NATO must confront what it looks like when Europeans carry the primary burden of deterrence, and whether decision-making built for a U.S.-led model can adapt in time. And Canada, sharing a continent with the same unreliable guarantor, should read the German case as a warning: if Europe's largest economy, surrounded by allies, cannot rely on the American umbrella, Canadian assumptions deserve the same scrutiny.

Germany's rearmament is a rational response to an uncertain world, not a revival of militarism. Its lesson is that capability and will are not the same thing, that legal permission and strategic viability are not the same thing, and that Europe's security will be determined by what Europeans are prepared to build for themselves.

Keywords: **European Nuclear Umbrella, Post-American NATO, Zeitenwende, Extended Deterrence, Bundeswehr, Transatlantic Security, NATO**

Section 1

Introduction

The post-Second World War and post-Cold War international security order has expired and faces a time of uncertainty and hostility. The longstanding security guarantee that the United States (U.S.) extends to Europe appears to be weakening, driven by the return of President Donald Trump to U.S. leadership.[1] Geopolitical shifts that undermine and erode the collective foundation of international security force European states, like Germany, to prepare for a future where they are responsible for their own defence. Russia's prolonged invasion of Ukraine has shattered the post-Cold War assumption that might does not make right, and Russia has applied a "strategic deterrence framework," combining conventional and nuclear weapons, towards the North Atlantic Treaty Organization (NATO).[2] This paper argues that, under conditions of strategic uncertainty produced by Russian aggression and eroding U.S. reliability, rational choice and deterrence theory point to a clear conclusion: Germany's conventional armament, while constitutionally permitted and economically feasible, cannot substitute for extended nuclear deterrence within the timeframe the threat demands. Germany's security future therefore depends on a European nuclear umbrella anchored by French and British arsenals – the most strategically coherent option available – though its viability ultimately depends on a French and British commitment that has not yet been made.

[1] Heiko Biehl, Bastian Giegerich, and Alexandra Jonas, eds., *Strategic Cultures in Europe: Security and Defence Policies Across the Continent* (Wiesbaden: Springer VS, 2013), 7, https://doi.org/10.1007/978-3-658-01168-0; Émile Lambert-Deslandes and Stéfanie von Hlatky, "NATO, Nuclear Deterrence and Disarmament in an Age of US Ambivalence," *Defence Studies* 25, no. 3 (2025): 683, https://doi.org/10.1080/14702436.2025.2474061.
[2] Dmitry (Dima) Adamsky, "Quo Vadis, Russian Deterrence? Strategic Culture and Coercion Innovations," *International Security* 49, no. 3 (2025): 50, https://doi.org/10.1162/isec_a_00502.

1.1 The Threat: Russia's Capacity and Timeline

As of 2026, Russia represents a significant security concern for NATO, with NATO's Secretary General Mark Rutte predicting that Russia could be ready to attack NATO territory "within five years."[3] As the deterrence literature acknowledges,[4] official threat assessments can themselves be shaped by institutional incentives (defence establishments have organizational interests in elevated threat perception) and should be read with that caveat in mind alongside the broader intelligence picture. Germany's Federal Intelligence Service (the *Bundesnachrichtendienst*, or BND) has specifically warned that Russia could be militarily ready for a "large-scale conventional war" by 2030.[5] Closer to the front line, Estonia's Defence Forces judged in May 2026 that Russia's combat readiness could be restored by 2027, and Latvia's military chief has warned that Moscow could see a window to act against the Baltic states before the end of 2028.[6] Figure 5 (Section 2.5) sets these assessments against Germany's own rearmament timelines.

Russia has increasingly employed, and been accused of employing, a range of activities below the threshold of open armed conflict to exert pressure on NATO members and test the alliance's response. These include the September 2025 incursions by Russian drones into Polish airspace during attacks on Ukraine, and the subsequent violation of Estonian airspace by three Russian MiG-31 fighter jets. Although both incidents prompted concerns that Moscow was probing NATO's readiness and resolve, the circumstances and possible intent behind each were distinct and should not automatically be treated as evidence of a single coordinated strategy. Separately, European governments and security agencies have attributed a growing number of sabotage operations against critical infrastructure to Russian intelligence or Russia-

[3] Timucin Ibu, "War at Europe's Doorstep: NATO Sounds the Alarm," Beyond the Horizon International Strategic Studies Group (BtH), December 13, 2025, https://behorizon.org/war-at-europes-doorstep-nato-sounds-the-alarm/.

[4] Robert Jervis, review of *Deterrence in American Foreign Policy: Theory and Practice*, by Alexander George and Richard Smoke, *World Politics* 31, no. 2 (1979): 289–324, https://doi.org/10.2307/2009945; Richard Ned Lebow and Janice Gross Stein, "Rational Deterrence Theory: I Think, Therefore I Deter," *World Politics* 41, no. 2 (1989): 208–24, https://doi.org/10.2307/2010408.

[5] Simon Saradzhyan, "Would Russia Attack NATO and, If So, When?" *Russia Matters*, June 5, 2025, https://www.russiamatters.org/blog/would-russia-attack-nato-and-if-so-when.

[6] Estonian Defence Forces commander Andrus Merilo, quoted in ERR News, "Estonian Defense Forces: Russia Could Restore Combat Readiness in 2027," May 5, 2026, https://news.err.ee/1610014348/estonian-defense-forces-russia-could-restore-combat-readiness-in-2027; Latvian commander Kaspars Pudāns, quoted in "Latvia: Russia Could Exploit Superiority in Drones to Threaten the Baltic States by 2028," *Il Sole 24 Ore*, June 4, 2026, https://en.ilsole24ore.com/art/drones-l-alarm-latvia-moscow-could-exploit-technological-advantage-threaten-baltics-by-2028-AIVdJQSD.

linked actors.[7] Putin's aggression is backed by what Western analysts characterize as an "escalate to de-escalate" doctrine, which threatens the limited use of nuclear weapons to avert conventional conflicts and deter NATO intervention.[8] Moscow is reconstituting its forces faster than expected, with its army currently larger than it was at the start of the war.[9]

The ongoing invasion of Ukraine has evolved into the largest conflict in Europe since the Second World War, and the human cost is immense. Between February 2022 and late 2025, Russia is estimated to have suffered approximately 1.2 million casualties.[10] Ukrainian forces have also suffered heavily, with military casualties estimated between 500,000 and 600,000.[11] The toll on civilians has been devastating, with verified records showing at least 14,999 non-combatants killed since the invasion began.[12] The year 2025 was the "deadliest year for civilians since the initial 2022 assault," seeing a 31% increase in casualties as Russia expanded its use of long-range weapons against urban areas.[13] This humanitarian catastrophe has forced 5.9 million Ukrainian refugees to flee the country.[14]

Russia's invasion of Ukraine in 2022 has transformed the security landscape of Europe, creating a consensus within some NATO member states that military investment is now the only way to protect the security of the alliance.[15] Russia currently maintains the world's largest nuclear arsenal, possessing an estimated 5,420

[7] Eric Rosenbach, Carlo Giannone, Slavina Ancheva, Luc Hillion, Ethan Lee, and Lukasz Kolodziej, "Russian Threats to NATO's Eastern Flank: Scenarios, Strategy, and Policy for European Security," The Belfer Center for Science and International Affairs, February 5, 2026, 5, https://www.belfercenter.org/research-analysis/russia-nato-baltics-scenarios-europe-security.
[8] Rosenbach et al., "Russian Threats to NATO's Eastern Flank," 19; Arms Control Association, "Arms Control and Proliferation Profile: Russia," last reviewed July 2025, https://www.armscontrol.org/factsheets/arms-control-and-proliferation-profile-russia.
[9] Saradzhyan, "Would Russia Attack NATO."
[10] PBS News, "4 Years into Russia's Invasion of Ukraine, a Look at the War by the Numbers," *PBS NewsHour*, February 23, 2026, https://www.pbs.org/newshour/world/4-years-into-russias-invasion-of-ukraine-a-look-at-the-war-by-the-numbers.
[11] PBS News, "4 Years into Russia's Invasion."
[12] PBS News, "4 Years into Russia's Invasion."
[13] United Nations Human Rights Monitoring Mission in Ukraine, "Four Years Since the Full-Scale Invasion of Ukraine: Key Facts and Findings," 2026, https://ukraine.ohchr.org/sites/default/files/2026-02/2026-02-16%20HRMMU_Four%20Years%20On_fact%20sheet_1.pdf.
[14] PBS News, "4 Years into Russia's Invasion."
[15] Tytti Erästö and Wilfred Wan, "Risk Reduction Is Urgently Needed amid Rising Tensions in Northern Europe," Stockholm International Peace Research Institute (SIPRI), December 16, 2025, https://www.sipri.org/commentary/essay/2025/risk-reduction-urgently-needed-amid-rising-tensions-northern-europe.

warheads, according to the Federation of American Scientists' 2026 estimates.[16] President Vladimir Putin's arsenal also includes an estimated 1,796 deployed strategic warheads based on land, sea and air delivery systems.[17] These strategic missiles remain on high alert and are capable of being launched within minutes.[18] Russia, in addition, possesses a massive accumulation of up to 2,000 tactical nuclear warheads, which it views as an "offset to NATO's conventional superiority."[19] Moscow is rapidly modernizing its arsenal with the Sarmat (SS-29) heavy intercontinental ballistic missiles (ICBM). Russia also possesses Borei-class nuclear-powered ballistic missile submarines and hypersonic glide vehicles designed to defeat missile defences.[20]

In the context of these threats, Germany must arm because it faces a nuclear-armed adversary that has proven a willingness to invade its neighbours to assert geopolitical control. Despite averaging 1,200 casualties per day in 2025, Russia has successfully transitioned to a total war economy, with almost 40% of its budget put towards military aggression.[21] Fast-paced mobilization allows Russia to produce as many as three times more artillery shells than the U.S. and Europe combined.[22] Simultaneously, the credibility of the U.S. security guarantee has become uncertain, with the Trump administration signalling that it may attach conditions to European defence and encourage Russian aggression against allies who fail to meet spending targets. Consequently, Germany is radically shifting its stance, projecting a defence budget of €152 billion by 2029 – according to current projections, which remain subject to coalition negotiations – as it moves to become a "military anchor."[23]

Russia's 2022 invasion of Ukraine was a watershed moment and a political shock that shattered assumptions about the post-Cold War international security order. In Germany, Russia's aggression was seen as a profound "turning point," which Germans

[16] Hans M. Kristensen, Matt Korda, Eliana Johns, and Mackenzie Knight-Boyle, "Status of World Nuclear Forces," Federation of American Scientists, 2026, https://fas.org/initiative/status-world-nuclear-forces/.
[17] Anya L. Fink, "Defense Primer: Nuclear Command, Control, and Communications (NC3)," CRS In Focus IF11697, Congressional Research Service, 2026, https://www.congress.gov/crs-product/IF11697; Kristensen et al., "Status of World Nuclear Forces."
[18] Hans M. Kristensen, Matt Korda, Eliana Johns, and Mackenzie Knight, "Russian Nuclear Weapons, 2025," *Bulletin of the Atomic Scientists*, May 13, 2025, https://thebulletin.org/premium/2025-05/russian-nuclear-weapons-2025/.
[19] Fink, "Defense Primer."
[20] Arms Control Association, "Arms Control and Proliferation"; Kristensen et al., "Russian Nuclear Weapons, 2025."
[21] Ibu, "War at Europe's Doorstep."
[22] Andrew A. Michta and Joslyn Brodfuehrer, "NATO-Russia Dynamics: Prospects for Reconstitution of Russian Military Power," Atlantic Council, September 19, 2024, https://www.atlanticcouncil.org/in-depth-research-reports/report/nato-russia-dynamics-prospects-for-reconstitution-of-russian-military-power/.
[23] Ibu, "War at Europe's Doorstep."

refer to as a *Zeitenwende*.[24] Russia's full-scale invasion of Ukraine prompted a fundamental reassessment of German security policy, challenging the post-reunification national narrative of a "pacifist culture" and raising questions about its suitability for an increasingly unstable European security environment.[25] As Germany is now experiencing a collapse of security certainty, this paper examines whether Germany can rationally build sufficient capability to deter Russian aggression in a post-U.S. NATO world, and if so, through what means.

1.2 Analytical Framework

This paper evaluates Germany's options through a rational choice lens, complemented by deterrence theory and defensive realism. Rational choice theory treats the state as a unitary actor that selects, among the strategies available to it, the one most likely to secure its preferred outcome under given constraints.[26] The framework is used here evaluatively rather than predictively: it asks what Germany ought rationally to do given the threat (Russia) and the constraint (a possible U.S. withdrawal), not how Berlin's coalition politics will actually bargain their way to an answer. Graham Allison's[27] bureaucratic-politics critique – that divided governments rarely behave as a single calculating mind – is acknowledged here and returned to in Section 2, where the evidence of coalition politics is read as the gap between what rationality recommends and what democratic politics delivers.

Deterrence theory supplies the substantive test. Deterrence succeeds when a state demonstrates the capability to impose unacceptable costs, the credibility to carry out its threat and the ability to communicate both clearly to an adversary.[28] Two debates

[24] Olaf Scholz, "'Zeitenwende': Policy Statement by Chancellor Olaf Scholz (February 27, 2022)," *German History in Documents and Images*, accessed March 17, 2026, https://germanhistorydocs.org/en/a-new-germany-1990-2023/ghdi:document-5373.
[25] Daniel Darling, "Germany Faces Tall Task in Reversing Bundeswehr's Decline," *Defense Security Monitor* (Forecast International), December 8, 2023, https://dsm.forecastinternational.com/2023/12/08/germany-faces-tall-task-in-reversing-bundeswehrs-decline/; Thomas Bagger, "The World According to Germany: Reassessing 1989," *The Washington Quarterly* 41, no. 4 (2018): 59, https://doi.org/10.1080/0163660X.2018.1558609.
[26] Christopher H. Achen and Duncan Snidal, "Rational Deterrence Theory and Comparative Case Studies," *World Politics* 41, no. 2 (1989): 150, https://doi.org/10.2307/2010405; Frank C. Zagare and D. Marc Kilgour, *Perfect Deterrence* (Cambridge: Cambridge University Press, 2000), 39–40, https://doi.org/10.1017/CBO9780511491788.
[27] Graham T. Allison, *Essence of Decision: Explaining the Cuban Missile Crisis* (Boston: Little, Brown, 1971).
[28] Vesna Danilovic, "The Sources of Threat Credibility in Extended Deterrence," *The Journal of Conflict Resolution* 45, no. 3 (2001): 343–44, https://doi.org/10.1177/0022002701045003005; Stephen L.

within that literature matter for Germany. The first concerns arsenal size: Gray and Payne[29] argue that credible deterrence requires enough warheads to survive a first strike and still destroy an adversary's military assets, while the minimum-deterrence school[30] holds that a small, survivable force capable of inflicting unacceptable damage is sufficient. The second concerns credibility itself. Schelling[31] identified the extended-deterrence paradox: a state's threat to fight for its own survival is inherently believable, but its threat to risk its own destruction for an ally – to sacrifice Washington, Paris or London for Berlin – is not, and must be made credible through costly signals that a bluffing state would not send.[32] Critics add that states routinely misperceive threats and fall victim to "motivated distortion" in assessing them,[33] a caution this paper applies to the official threat assessments on which it relies.

Defensive realism frames the cooperative option. Unlike offensive realism, it holds that states under anarchy seek relative security rather than relative power, and that certain forms of cooperation are compatible with self-help rather than a departure from it.[34] Deterrence stability is higher when states credibly signal that they seek security rather than domination.[35] On this reading, a European nuclear umbrella is not naive multilateralism but cooperative self-help.

Quackenbush, "Deterrence Theory: Where Do We Stand?" *Review of International Studies* 37, no. 2 (2011): 742–43, https://doi.org/10.1017/S0260210510000896.

[29] Colin S. Gray and Keith Payne, "Victory Is Possible," *Foreign Policy*, no. 39 (1980): 25, https://doi.org/10.2307/1148409.

[30] James Wood Forsyth Jr., B. Chance Saltzman, and Gary Schaub Jr., "Minimum Deterrence and Its Critics," *Strategic Studies Quarterly* 4, no. 4 (2010): 3–12, http://www.jstor.org/stable/26269812.

[31] Thomas C. Schelling, *Arms and Influence* (New Haven: Yale University Press, 1966).

[32] James D. Fearon, "Signaling Foreign Policy Interests: Tying Hands versus Sinking Costs," *The Journal of Conflict Resolution* 41, no. 1 (1997): 69, https://www.jstor.org/stable/174487.

[33] Jervis, review of *Deterrence in American Foreign Policy*; Lebow and Stein, "Rational Deterrence Theory," 216.

[34] Jeffrey W. Taliaferro, "Security Seeking under Anarchy: Defensive Realism Revisited," *International Security* 25, no. 3 (2000): 128–30.

[35] Charles L. Glaser, *Rational Theory of International Politics: The Logic of Competition and Cooperation* (Princeton: Princeton University Press, 2010), 53, https://doi.org/10.2307/j.ctt7t1j1.

1.3 Current U.S. Security Guarantee in NATO

The architecture of European security since 1949 has rested on one large pillar: the United States. NATO was not designed as a partnership of equals. It was built around U.S. military authority and the reality of the alliance has always reflected this power imbalance. In 2024, the U.S. spent an estimated $997 billion on defence, accounting for roughly 66% of total NATO expenditure across all 32 member states.[36] Other NATO members, by comparison, collectively contributed approximately $507.5 billion, with Germany representing the largest European share at roughly $88 billion.[37] The U.S. provides the alliance's most advanced command infrastructure, its nuclear umbrella, its strategic airlift and logistics networks and its irreplaceable intelligence architecture. European members, including Germany, have for decades structured their defence postures around the assumption that this contribution was permanent, predictable and unconditional. It is not anymore.

For Germany specifically, the U.S. guarantee was the enabling condition of the post-war settlement. It allowed Bonn and later Berlin to rebuild their economies, embrace multilateralism and construct a national identity rooted in restraint rather than military ambition. That arrangement is now in question. Whether the United States will honour its commitments under NATO's Article 5,[38] maintain its forward presence in Europe or preserve the credibility of its nuclear umbrella can no longer be assumed. It is this uncertainty, more than any single policy decision or political statement, that defines the security environment that this paper examines.

1.4 The Question This Paper Asks

The context established above points in one direction. Russia has shattered the post-Cold War assumption that European borders are permanent and durable, replacing it with a military reality that NATO's eastern members are already preparing to absorb. The United States, the alliance's financial and strategic backbone, is withdrawing into a transactional posture that treats collective defence as negotiable rather than a binding obligation. Germany is Europe's largest economy, whose entire post-war

[36] Statista, "Countries with the Highest Military Spending 2024," November 19, 2025, https://www.statista.com/statistics/262742/countries-with-the-highest-military-spending/.
[37] Statista, "Countries with the Highest Military Spending."
[38] North Atlantic Treaty Organization, "Collective Defence and Article 5," updated November 12, 2025, accessed March 17, 2026, https://www.nato.int/en/what-we-do/introduction-to-nato/collective-defence-and-article-5.

security identity was built on guarantees that are no longer reliable. This paper asks whether Germany can rationally build sufficient capability to deter Russian aggression without the U.S. security guarantee; the answer requires examining two connected questions. Section 2 assesses whether conventional armament can substitute for the U.S. security guarantee, evaluating Germany's constitutional authority, economic capacity, procurement capability and the political obstacles that slow every step of the process. Section 3 examines whether nuclear armament is legally, physically, financially and politically viable, analyzing treaty frameworks that currently prohibit armament, the infrastructure that already exists and the emerging European deterrent architecture.

The rational choice framework that structures the analysis is chosen because Germany's situation calls for strategy rather than normative debate. Given the threat Russia poses, given the uncertainty surrounding U.S. commitments and given the tools Germany has available, what does a rational state do? That is the question this paper explores and answers. The argument it builds is direct. Conventional armament is necessary but insufficient and Germany's security future depends on a European nuclear umbrella that neither France nor the UK has yet committed to providing. The window for building that architecture is narrowing and Germany does not have the luxury of deliberating indefinitely. Section 2 begins where the politics end, with the question of whether Germany can deter.

Section 2

Conventional Armament

The security architecture that has guaranteed German sovereignty for over seven decades is collapsing. Since the establishment of the German Armed Forces (*Bundeswehr* in German) in 1955, Germany's military strategy has rested on a fundamental assumption: the United States would serve as Europe's ultimate guarantor against existential threats. This arrangement allowed Germany to maintain a comparatively modest conventional force while benefiting from U.S. nuclear extended deterrence, military infrastructure and forward-deployed troops. The 2022 Russian invasion of Ukraine exposed severe cracks in this model, prompting former Chancellor Olaf Scholz's "turning point" backed by €100 billion in emergency defence funding. Yet the *Zeitenwende* in 2022 assumed a continued U.S. commitment to European defence. That assumption is no longer rational.[39]

This section proceeds in four parts. First, it establishes that U.S. withdrawal from NATO is no longer a hypothetical scenario but a realistic and increasingly likely one. Second, it conducts a comparative assessment of U.S. and German conventional capabilities across infrastructure, personnel, equipment and military expenditure, showing the depth of Germany's dependence on U.S. military presence. Third, it examines the constitutional framework of German armament, demonstrating that while the *Grundgesetz* permits a robust conventional buildup, legal authority and strategic viability are not the same thing. Fourth, it analyzes the political costs of armament, where coalition management, public resistance and the politics of conscription collectively slow every step of the process. The central finding is that Germany can arm conventionally, but it cannot arm fast enough at a sufficient scale or with sufficient nuclear coverage to substitute for the U.S. security guarantee within the timeframe that Russia's threat demands. Constitutional permission and economic capacity exist. What does not exist is the time, the personnel or the political will to close the gap before the window closes. Conventional armament is necessary, but on its own, it is not enough.

[39] Scholz, "'Zeitenwende.'"

2.1 U.S. Withdrawal as a Realistic Scenario

A U.S. withdrawal from NATO is, in this paper's assessment, a realistic scenario that deserves to be taken seriously rather than dismissed as fearmongering. The foundations of the post-Cold War liberal order are crumbling as the U.S. appears to be vacating its role as the primary guarantor of global stability. During his first presidential term, Donald Trump repeatedly challenged the utility of the alliance, calling NATO "obsolete."[40] He adopted a transactional view, reducing security guarantees to a "protection racket"[41] where allies were expected to pay "tribute" for U.S. protection.[42] This tension peaked at the 2018 Brussels summit, where Trump came close to a formal withdrawal over defence spending grievances.[43] Former National Security Advisor John Bolton later said that Trump would likely have withdrawn had he won re-election in 2020.[44] On March 17, 2026, after most allies declined to join the U.S. military operation against Iran, Trump declared on Truth Social that "we no longer 'need,' or desire, the NATO Countries' assistance – WE NEVER DID!", escalating tensions between the Trump administration and NATO member states.[45]

The election of Joe Biden brought a "palpable" sigh of relief across Europe.[46] Many European leaders mistakenly assumed the first Trump presidency was a one-time event and that the U.S. commitment to a rules-based international order would be permanently restored by the Democrats. That sense of false security led to continued European underinvestment in defence. Europeans misread the durability of bipartisan politics between Democrats and Republicans, failing to recognize that growing political polarization had already eroded the domestic consensus underpinning U.S.

[40] Donald Trump, quoted in Patrick Porter, "Why America's Grand Strategy Has Not Changed: Power, Habit, and the U.S. Foreign Policy Establishment," *International Security* 42, no. 4 (2018): 40, https://doi.org/10.1162/isec_a_00311.
[41] Stewart Patrick, *The Sovereignty Wars: Reconciling America with the World* (Washington, DC: Brookings Institution Press, 2018), 145, http://www.jstor.org/stable/10.7864/j.ctt1vjqpvc.
[42] Thomas Wright, "Trump's 19th Century Foreign Policy," *Politico Magazine*, January 20, 2016, https://www.politico.com/magazine/story/2016/01/donald-trump-foreign-policy-213546/.
[43] Giuseppe Spatafora, "The Trump Card: What Could US Abandonment of Europe Look Like?" EUISS Brief, European Union Institute for Security Studies, February 17, 2025, 2, https://www.iss.europa.eu/publications/briefs/trump-card-what-could-us-abandonment-europe-look.
[44] Jens Ringsmose and Sten Rynning, "NATO's Next Strategic Concept: Prioritise or Perish," *Survival* 63, no. 5 (2021): 147–68, https://doi.org/10.1080/00396338.2021.1982203.
[45] Donald J. Trump, post on Truth Social, March 17, 2026, 8:18 a.m., https://truthsocial.com/@realDonaldTrump/posts/116245182325726375.
[46] Rosa Balfour, "Working with the Biden Administration: Opportunities for the EU," Carnegie Europe, January 26, 2021, https://carnegieendowment.org/posts/2021/01/working-with-the-biden-administration-opportunities-for-the-eu.

foreign policy and weakened its institutional safeguards.[47] Returning to office in 2025, the Trump administration moved to fundamentally re-evaluate its purpose in NATO. Whether this re-evaluation constitutes a genuine strategic withdrawal or a coercive bargaining posture remains contested, and this paper treats it as a credible threat rather than a certainty, but one serious enough to plan around. Trump's skepticism towards NATO predated his return to office. In February 2024, while campaigning for re-election, he stated that he would encourage Russia to "do whatever the hell they want" to NATO allies that failed to meet defence spending guidelines.[48] A pattern of aggressive unilateralism has emerged, including threats to annex Greenland[49] and remarks suggesting Canada should become the "51st state."[50] Furthermore, challenges to the territorial integrity of the Panama Canal, the January 2026 U.S. intervention in Venezuela and the 2026 war on Iran signal that the U.S. is now willing to coerce both adversaries and even its closest partners to advance its narrowly defined interests.[51]

That pressure has now reached U.S. force posture in Germany itself. On May 1, 2026, after a public dispute between Trump and Merz over the Iran war, the Pentagon ordered roughly 5,000 of the approximately 36,000 U.S. troops in Germany withdrawn within six to twelve months; a senior official said the move signalled "how important it is for Germany and other allies to take primary responsibility for Europe's defense."[52] Congress has set limits: the National Defense Authorization Act for Fiscal

[47] Daniel W. Drezner, "This Time Is Different: Why U.S. Foreign Policy Will Never Recover," *Foreign Affairs* 98, no. 3 (2019): 10–11, https://www.jstor.org/stable/26798148.
[48] Kate Sullivan, "Trump Says He Would Encourage Russia to 'Do Whatever the Hell They Want' to Any NATO Country That Doesn't Pay Enough," CNN, February 11, 2024, https://www.cnn.com/2024/02/10/politics/trump-russia-nato.
[49] Katya Adler, "Greenland: Europe Is Ditching Its Softly-Softly Approach to Trump," BBC News, January 20, 2026, https://www.bbc.com/news/articles/c0lx7j1lrwro.
[50] Katherine Doyle, Carol E. Lee, Courtney Kube, and Kristen Welker, "Trump's Latest Western Hemisphere Fixation: Canada," *NBC News*, January 18, 2026, https://www.nbcnews.com/politics/white-house/trumps-latest-western-hemisphere-fixation-canada-rcna254552.
[51] Samantha Waldenburg and Michael Rios, "Trump Reiterates Threat to Retake Panama Canal 'or Something Very Powerful' Will Happen," CNN, February 2, 2025, https://www.cnn.com/2025/02/02/americas/panama-china-belt-and-road-initiative-rubio-visits-intl-latam; Anthony Dworkin, Rafael Loss, and Jana Puglierin, "After the Rupture: Middle Powers and the Construction of New Order," Policy Brief, European Council on Foreign Relations, February 12, 2026, https://ecfr.eu/publication/after-the-rupture-middle-powers-and-the-construction-of-new-order/; Elizabeth Melimopoulos, "Iran War: What Is Happening on Day 18 of US-Israel Attacks?" *Al Jazeera*, March 17, 2026, https://www.aljazeera.com/news/2026/3/17/iran-war-what-is-happening-on-day-18-of-us-israel-attacks.
[52] Luis Martinez, "US to Withdraw 5,000 Troops from Germany, Pentagon Announces," ABC News, May 2, 2026, https://abcnews.com/International/us-withdraw-5000-troops-germany/story?id=132587562; Ashley Roque, "Hegseth Orders 5,000 US Troops to Withdraw from Germany," Breaking Defense, May 1, 2026, https://breakingdefense.com/2026/05/hegseth-orders-5000-us-troops-to-withdraw-from-germany/; RFE/RL, "US Announces Withdrawal of 5,000 Troops from Germany," May 2, 2026, republished by GlobalSecurity.org, https://www.globalsecurity.org/military/library/news/2026/05/mil-260502-rferl04.htm.

Year 2026 bars reducing U.S. forces in Europe below 76,000 unless the defense secretary certifies to Congress that the decision was made in coordination with NATO allies.[53] That is a procedural hurdle, not a prohibition. Nor is the signal one-directional: at the Ankara summit on July 7–8, 2026, which Trump attended, allies reaffirmed their commitment to Article 5.[54] The pattern is therefore not an abrupt exit but a drawdown whose end point Washington has not defined, which is precisely the uncertainty Germany must plan against.

U.S. foreign policy under the Trump administration has shifted significantly from that of the Obama and Biden administrations. Today's Republican Party has undergone a total transformation into a "Make America Great Again" organization that views international norms as threats to U.S. sovereignty.[55] By 2016, 57% of Americans believed the U.S. should "deal with its own problems"[56] and let others fend for themselves. While the 2024 National Defense Authorization Act[57] attempts to limit withdrawal, legal experts note that Trump could invoke "broad Article II Commander-in-Chief authority" to bypass Congress.[58] The precedent of withdrawing from the Paris Agreement[59] and the Intermediate-Range Nuclear Forces (INF) Treaty[60] demonstrates the ability of presidential authority to terminate international obligations unilaterally.[61] As the primary host nation for U.S. forces, Germany is uniquely exposed. A withdrawal would leave the status of major U.S. bases and roughly 36,000 active-duty U.S. personnel in total flux.[62] Furthermore, Germany remains challenged by a deep intelligence and logistics dependence on Washington for its basic

[53] Martinez, "US to Withdraw 5,000 Troops."
[54] Anadolu Agency, "NATO Reaffirms Unity, Collective Defense in Ankara Declaration," Yeni Şafak, July 8, 2026, https://en.yenisafak.com/turkiye/nato-reaffirms-unity-collective-defense-in-ankara-declaration-3720587; Anadolu Agency, "Trump Says NATO 'Came a Long Way' at Ankara Summit," Yeni Şafak, July 9, 2026, https://en.yenisafak.com/world/trump-says-nato-came-a-long-way-at-ankara-summit-3720612.
[55] Dworkin et al., "After the Rupture."
[56] John J. Mearsheimer and Stephen M. Walt, "The Case for Offshore Balancing: A Superior U.S. Grand Strategy," *Foreign Affairs* 95, no. 4 (2016): 70, http://www.jstor.org/stable/43946934.
[57] *National Defense Authorization Act for Fiscal Year 2024*, Pub. L. No. 118-31, § 1250A, 137 Stat. 636 (2023), https://www.congress.gov/bill/118th-congress/house-bill/2670.
[58] Callum Sutherland, "Is the U.S. Leaving NATO? Trump's Threats, Examined," *Time*, January 16, 2026, https://time.com/7346819/can-trump-pull-united-states-out-of-nato-legal-experts/.
[59] Elena Lazarou and Gabija Leclerc, *US Withdrawal from the Paris Climate Agreement and from the WHO*, At a Glance, PE 767.230 (Brussels: European Parliamentary Research Service, February 2025).
[60] Arms Control Association, "The Intermediate-Range Nuclear Forces (INF) Treaty at a Glance," last reviewed August 2019, https://www.armscontrol.org/factsheets/intermediate-range-nuclear-forces-inf-treaty-glance.
[61] Patrick, *Sovereignty Wars*, 252.
[62] Spatafora, "Trump Card," 2; Defense Manpower Data Center, "DoD Personnel, Workforce Reports & Publications," 2025, https://dwp.dmdc.osd.mil/dwp/app/dod-data-reports/workforce-reports.

security functions.[63] Because Germany cannot militarily resist U.S. actions, nor would it be rational to try, it therefore faces a choice: rapid armament or strategic hiding.

[63] Spatafora, "Trump Card."

2.2 Comparative Analysis of U.S. and German Conventional Capabilities

Infrastructure

The military infrastructure landscape in Germany reflects an imbalance between U.S. deployment and German domestic capability. The U.S. military maintains a vast and strategically critical network of military and security architecture in Germany, serving as a NATO operating foundation. As of 2025, the U.S. European Command (EUCOM) oversees approximately 31 primary bases and 18 additional sites across Europe, with a high concentration of these sites and assets located in Germany, rooted in regional deterrence and great power dominance.[64] The Cold War era significantly influenced the positioning of these U.S. bases. After the Second World War, the U.S. military occupied the previous Wehrmacht facilities in the former West Germany. Today, those areas remain a prime spot for deterrence and defence.[65]

U.S. command infrastructure in Germany operates at a strategic level that the *Bundeswehr* does not replicate. A central pillar of the U.S. military's operations in Germany is the United States Army Garrison (USAG) Stuttgart, located in southwestern Germany and serving as a "strategic command hub."[66] Stuttgart hosts several high-level headquarters, including U.S. European Command (USEUCOM), U.S. Marine Corps Forces Europe and Africa (MARFOREUR/AF) and the Special Operations Command Europe (SOCEUR). These facilities act as a significant command and control focal point, supporting coordination internal and external to Germany. Another critical base is Ramstein Air Base, which is the main U.S. Air Force (USAF) installation in Europe. Additionally, Ramstein is the focal point for U.S. Air Forces in Europe–Air Forces Africa (USAFE-AFAFRICA).[67] Ramstein is a major transportation and logistics hub and serves as the United States' "Global Gateway" to Europe, Africa and the Middle East.[68] The base is the only location that conducts "airdrop, airlift and aeromedical evacuation operations" for USAFE.[69] Ramstein is also

[64] Mila Tanghe, "Going, Going . . .? The US Base Network in Europe," *Europe's Edge*, Center for European Policy Analysis (CEPA), April 14, 2025, https://cepa.org/article/going-going-the-us-base-network-in-europe/.
[65] The Civil Rights Struggle, "US Military Bases in Germany," accessed October 31, 2025, https://www.aacvr-germany.org/us-military-bases-in-germany.
[66] Tanghe, "Going, Going."
[67] Tanghe, "Going, Going."
[68] Ramstein Air Base, "Ramstein Air Base," 2025, https://www.ramstein.af.mil/.
[69] Ramstein Air Base, "Ramstein Air Base."

a major hub for global U.S. drone operations.[70] Other significant U.S. Army garrisons include USAG Wiesbaden in central Western Germany, the headquarters for U.S. Army Europe and Africa; the USAG Bavaria at Grafenwöhr, which is the largest foreign USAG in the world; USAG Ansbach; and USAG Rheinland-Pfalz. While not a USAG, Spangdahlem Air Base is a permanent USAF fighter jet base in western Germany. The Landstuhl Regional Medical Center (LRMC) is the largest overseas U.S. medical facility and primary evacuation centre for U.S. troops abroad.[71] Figure 1 maps the principal installations.

In contrast, the *Bundeswehr* operates across domestic installations structured around its service branches: the Army (*Heer*), Navy (*Marine*), Air Force (*Luftwaffe*) and the Cyber and Information Domain Service (CIR). The *Heer* is organized into two armoured divisions and a rapid forces division, supported by approximately 180 agencies and 10 branches distributed across the country.[72] The current structure includes multiple armoured and mechanized infantry brigades, often integrated with international partners. The *Marine* is primarily based in coastal regions, organized into flotillas for high seas and coastal operations.[73] The high seas flotilla consists of 11 frigates, while the coastal flotilla includes corvettes, submarines and mine warfare vessels. The *Marine* also maintains an aviation command for maritime surveillance and anti-submarine warfare. The *Luftwaffe* maintains commands for air operations, transport and space, with 21 military airports and six joint-use civil-military airports across Germany.[74] The Air Force's headquarters and major commands are responsible for securing German airspace and providing air transport. The CIR was established in 2017 and is headquartered in Bonn, managing personnel and procurement for itself as Germany's newest military domain.[75] The service operates from 19 different locations and includes 25 departments. Key agencies under its command include the Strategic Reconnaissance Command, the *Bundeswehr* Geoinformation Centre and the Communication and Information Systems Command. These sites are essential for defending *Bundeswehr* networks and performing surveillance in foreign systems.

[70] Tanghe, "Going, Going."
[71] Tanghe, "Going, Going."
[72] Central Intelligence Agency, "Germany," *The World Factbook*, 2023 Archive, last updated December 19, 2023, https://www.cia.gov/the-world-factbook/about/archives/2023/countries/germany/.
[73] Central Intelligence Agency, "Germany."
[74] Central Intelligence Agency, "Germany."
[75] Bundeswehr, "Cyber and Information Domain Service," 2020, https://www.bundeswehr.de/en/organization/the-cyber-and-information-domain-service.

Figure 1: Key U.S. Military Installations in Germany



Source: Created by AIIA · TITAN, based on Tanghe, 2025.

Personnel

The personnel comparison between U.S. forces in Germany and the *Bundeswehr* itself reveals the extent of Germany's reliance on U.S. military presence. The U.S. military presence in Germany has seen significant fluctuations since the Cold War. During the peak of the Cold War, the U.S. stationed roughly 250,000 soldiers in West Germany.[76] By 1995, this number fell to 94,000. In 2000, it stood at approximately 71,000 soldiers. However, as of September 2025, the number of active-duty U.S. personnel assigned to Germany is approximately 36,436, with a grand total (including civilians and reserves) of more than 49,000.[77] In addition to active-duty personnel, Germany hosts 11,535 Department of Defense civilians and approximately 1,451 National Guard and Reserve members.[78] The Kaiserslautern Military Community alone supports over 16,200 military and civilian personnel.[79]

The *Bundeswehr* has undergone an even more dramatic reduction since the 1980s, when it maintained nearly 500,000 personnel. Following the end of the Cold War, the force shrank by more than 60%. In 2025, the Bundeswehr maintained approximately 185,000 active-duty personnel.[80] The personnel strength across the various branches includes: the *Heer* with approximately 62,000; the *Luftwaffe* with approximately 27,000–28,000; the *Marine* with approximately 16,000; the CIR with roughly 14,000 to 16,000 including civilians; and other central support staff and the armed medical service with an estimated total of 65,000.[81] Germany also maintains a reserve force of approximately 34,000 troops.[82] Women have been eligible for all branches since 2001 and accounted for approximately 12% of the active-duty force in 2023.[83]

Equipment and Capabilities

The comparison of military equipment reveals both the scale of U.S. capabilities stationed in Germany and the *Bundeswehr's* steep decline from Cold War strength. The United States possesses the largest inventory of main battle tanks in NATO, with approximately 4,640 units across its entire inventory, only a small fraction of which is

[76] The Civil Rights Struggle, "US Military Bases."
[77] Defense Manpower Data Center, "DoD Personnel, Workforce Reports."
[78] Defense Manpower Data Center, "DoD Personnel, Workforce Reports."
[79] Tanghe, "Going, Going."
[80] Central Intelligence Agency, "Germany."
[81] Central Intelligence Agency, "Germany."
[82] Ulrich Franke and Florian Hubert, "Germany," in *The Palgrave Geopolitical Atlas*, ed. Brian C. H. Fong (Singapore: Palgrave Macmillan, 2025), 108, https://doi.org/10.1007/978-981-95-1507-3_7.
[83] Central Intelligence Agency, "Germany."

stationed in Germany.[84] The U.S. Air Force in Germany operates high-tech transport and mission aircraft, particularly at Ramstein Air Base, such as the C-21 and C-37A twin-turbofan transports and the C-130J Super Hercules.[85] Furthermore, as part of NATO's nuclear sharing arrangement (which will be discussed in Section 3), up to 20 U.S. nuclear weapons are believed to be stored at Germany's Büchel Air Base.[86]

The *Heer's* heavy armour includes approximately 300 Leopard 2 main battle tanks in several variants, the most modern being the A7V. Additionally, the force operates roughly 2,300 armoured combat vehicles.[87] At the height of the Cold War, Germany possessed over 7,000 tanks, meaning the current inventory represents a reduction of over 90%.[88] The *Marine* operates 62 naval and auxiliary vessels. Key assets include: 11 frigates; six corvettes; six Type 212A submarines; and 51 aircraft, including helicopters for naval surveillance and submarine warfare. Germany has also acquired the P-8A Poseidon maritime patrol aircraft from the U.S. to modernize its naval aviation capabilities. The *Luftwaffe* operates approximately 380 aircraft and helicopters. The core combat fleet includes roughly 220 combat-capable aircraft, notably 138 Eurofighter Typhoons and 68 Tornado jets. The transport and rotary-wing fleet includes over 80 helicopters of various types. Like the tank inventory, the air fleet has shrunk by about 80% since the 1980s.[89] Figures 2.1–2.3 summarize the main equipment holdings of each service.

[84] Statista, "Number of Main Battle Tanks in NATO 2026, by Country," March 3, 2026, https://www.statista.com/statistics/1294391/nato-tank-strength-country/.
[85] Ramstein Air Base, "Ramstein Air Base."
[86] Ben Knight, "US Troops in Germany: What You Need to Know," Inquirer.Net, January 12, 2026, https://globalnation.inquirer.net/305146/us-troops-in-germany-what-you-need-to-know.
[87] Franke and Hubert, "Germany," 108.
[88] Central Intelligence Agency, "Germany."
[89] Bundeswehr, "The Mission of the German Air Force," 2025, https://www.bundeswehr.de/en/organization/german-air-force/the-mission-of-the-german-air-force; Franke and Hubert, "Germany"; Central Intelligence Agency, "Germany."

FIGURE 2.1:

German Army (Heer) Selected Equipment Stockpiles

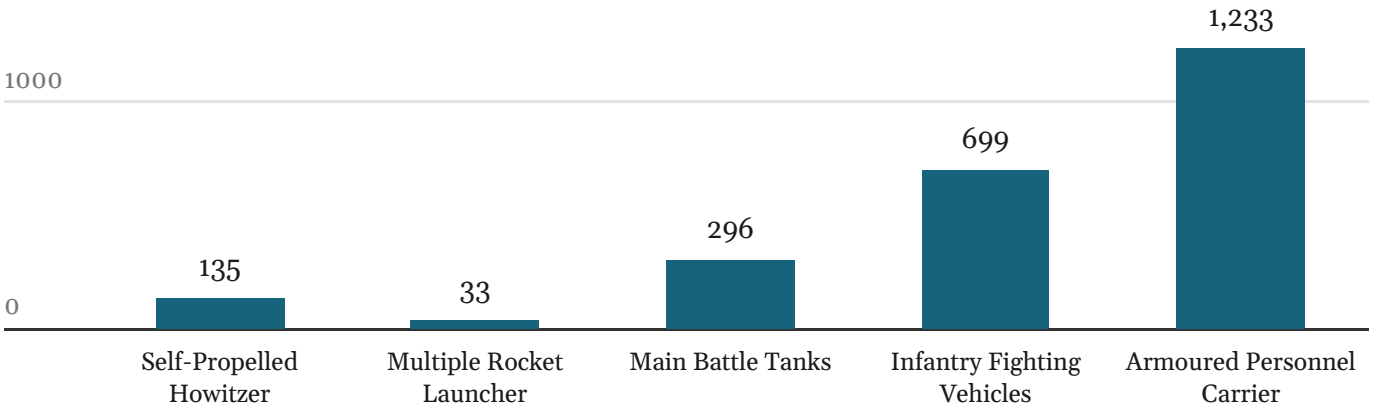


Chart: AIIA · TITAN • Source: OSINT

FIGURE 2.2:

German Air Force (Luftwaffe) Selected Aircraft Fleet

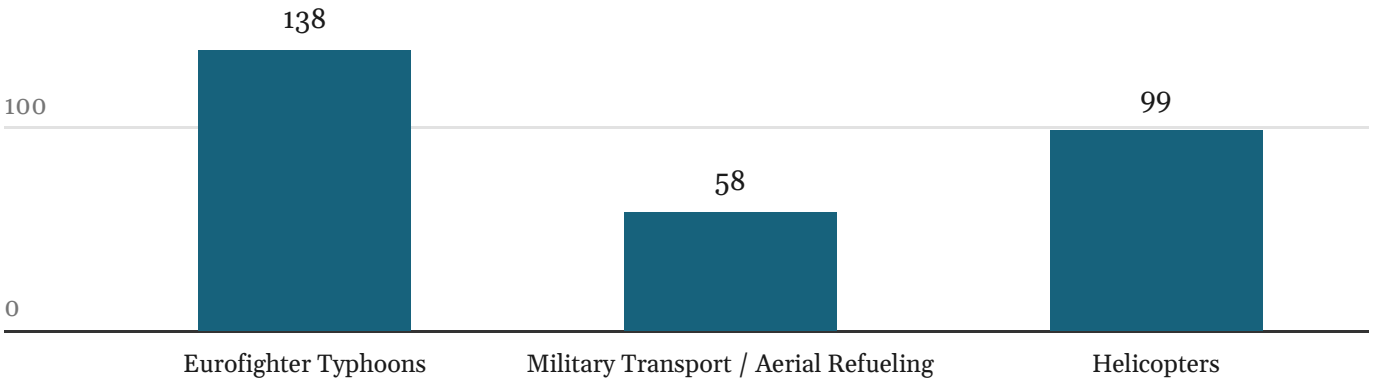


Chart: AIIA · TITAN • Source: OSINT

FIGURE 2.3:

German Navy (Deutsche Marine) Selected Vessels

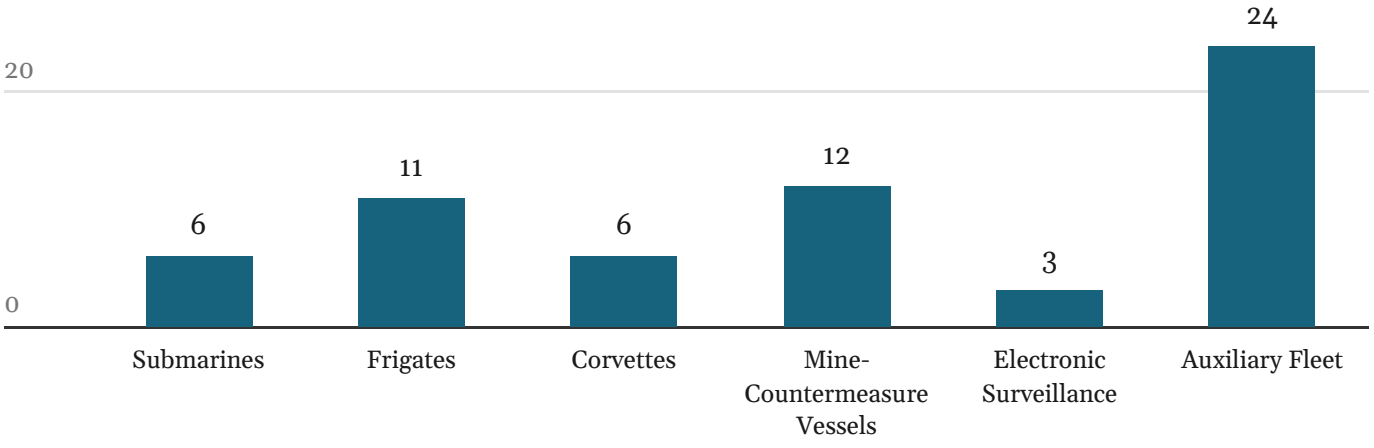


Chart: AIIA · TITAN • Source: OSINT

Military Expenditure

The economic dimensions of military capacity reveal both Germany's potential and its historical underinvestment. The U.S. military presence provides substantial financial incentives to German communities. The U.S. Army employs approximately 8,700 local nationals in Europe who work at installations in Germany.[90] In some areas, such as the Kaiserslautern Military Community, the U.S. military is a dominant economic force.[91] Because the U.S. military has historically not provided sufficient on-base housing for all troops, many soldiers live by renting homes in German towns and integrating into local life. However, the German state also helps with the costs of hosting foreign forces. In 2020, Germany granted $116 million to support foreign allied troops in its country.[92] Base closures can have a devastating impact on local economies.

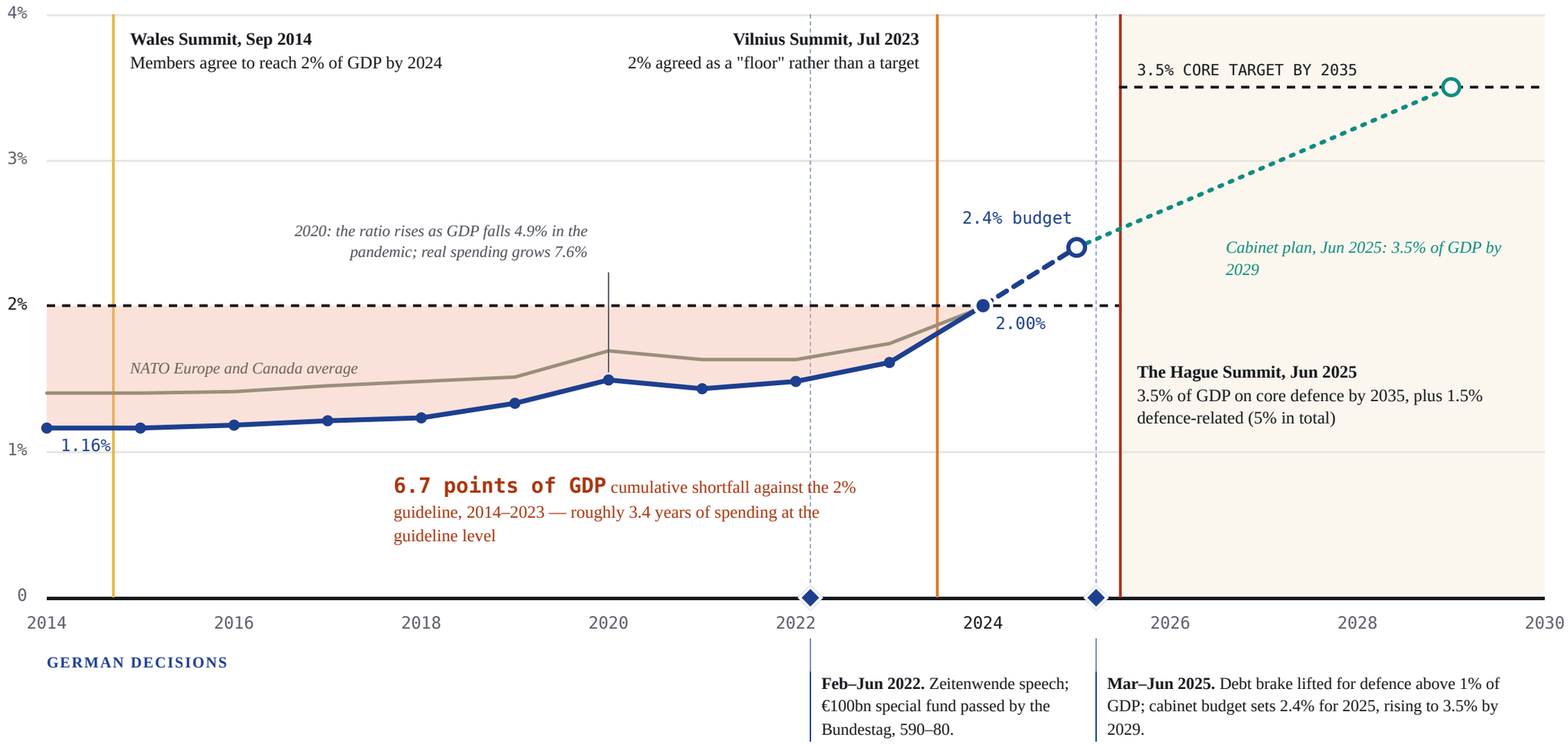
Germany possesses a leading export-driven economy and is one of the world's leading arms exporters. In 2024, the German government approved roughly €13 billion worth of military equipment exports, up from €12.13 billion in 2023.[93] Domestically, defence spending has seen a historic shift (Figure 3). For decades, spending remained below 1.5% of Gross Domestic Product (GDP), although it had reached more than 4% in the 1960s.[94] After the 2022 invasion of Ukraine, Germany created a €100 billion special fund (*Sondervermögen*) to re-equip the Bundeswehr.[95] By 2023, expenditures reached 1.6% of GDP.[96] At the 2025 NATO Summit in The Hague, Germany committed to a new target of 5% of GDP by 2035: 3.5% for core defence and 1.5% for defence-related spending.[97] The March 2025 reform of the constitutional debt brake went further still: defence spending above 1% of GDP is now exempt from the borrowing limit, alongside a separate €500 billion fund for infrastructure, underpinning a planned €650 billion in cumulative defence spending between 2025 and 2029.[98]

[90] U.S. Army Europe and Africa Public Affairs Office, "U.S. Army Europe and Africa – By the Numbers," fact sheet, December 20, 2024, https://www.europeafrica.army.mil/Portals/19/documents/Fact%20Sheets/USAREURAF%20Fact%20Sheet%2020241220.pdf?ver=P51lCcWrtMIXNqzadhLFiQ%3D%3D.
[91] Tanghe, "Going, Going."
[92] Knight, "US Troops in Germany."
[93] Franke and Hubert, "Germany," 107.
[94] Franke and Hubert, "Germany," 107.
[95] Franke and Hubert, "Germany," 107.
[96] Central Intelligence Agency, "Germany."
[97] Franke and Hubert, "Germany," 106.
[98] Franke and Hubert, "Germany," 113; Tamar Jacoby, "Germany's Rearmament Is Stunning," *Washington Monthly*, January 7, 2026, https://washingtonmonthly.com/2026/01/07/germany-rearmament-bundeswehr/.

Figure 3: German Defence Expenditure as a Share of GDP, 2014–2029

A Decade Below the Allied Average, Then a Plan to Overtake It

Germany trailed both the 2% guideline and the NATO Europe and Canada average until 2024. Solid vertical lines are NATO summits; dashed blue lines are German decisions, dated on the axis and described beneath it.



Sources: NATO, *Defence Expenditure of NATO Countries (2014–2025)*, 28 Aug 2025, Table 3, 2021 prices, for Germany 2014–2024e, NATO Europe and Canada 2014–2024e (NATO estimates the average at 2.27% for 2025), and Germany's 2020 real growth; Germany's 2025 cell is blank in that table, so the 2025 point is the federal cabinet's draft budget of 24 Jun 2025 (€86bn, 2.4% of GDP; Defense News, 26 Jun 2025), which also sets the 3.5%-by-2029 path. GDP 2020: Destatis press release 081, 24 Feb 2021 (−4.9%). Wales Summit Declaration, 5 Sep 2014; Vilnius Summit Communiqué, 11 Jul 2023; The Hague Summit Declaration, 25 Jun 2025. Zeitenwende speech: Bundestag, 27 Feb 2022. Sondervermögen: Bundestag, 3 Jun 2022. Debt-brake reform: Bundestag 18 Mar 2025, Bundesrat 21 Mar 2025 (Euronews). Cumulative shortfall is the author's sum of (2% − actual) over 2014–2023 from the NATO series.

Source: Created by AIIA · TITAN

2.3 Constitutional Limitations

Germany's capacity to conventionally arm is constitutionally permitted and currently embedded in its national security policy, provided efforts align with the strictly defensive and multilateral mandate of the German Basic Law (*Grundgesetz*).[99] The original 1949 *Grundgesetz*[100] was written based on a demilitarized security policy due to Allied directives after the Second World War.[101] The German government was given the authority to criminalize and penalize any action that would be considered a preparation for a "war of aggression."[102] Today, the constitutional framework within the Grundgesetz for armament rests on two pillars: Article 87a, "The Federation shall establish Armed Forces for purposes of defence," and Article 24(2), "With a view to maintaining peace, the Federation may enter into a system of mutual collective security." Essentially, Germany is constitutionally permitted to conventionally arm against a possible threat, like Russia, through an alliance such as NATO.

The Bonn and Paris Agreements of 1952–1954 established the legal and political framework for the rearmament of former West Germany and paved the way for its accession to NATO in 1955. The constitutional basis for establishing the Bundeswehr was subsequently introduced through amendments to Germany's Basic Law (Grundgesetz) in March 1956. Article 87a(1) stipulates that the Federation shall establish armed forces for purposes of defence, while Article 87a(2) restricts their deployment beyond defensive purposes to circumstances expressly permitted by the Basic Law. Furthermore, the Grundgesetz establishes the Bundeswehr as a parliamentary army (Parlamentsarmee), meaning that the Bundestag exercises democratic oversight through its budgetary powers, parliamentary scrutiny and, as a general rule, its authority to approve military deployments abroad.[103] This constitutional framework, together with the Federal Constitutional Court's 1994 ruling

[99] Basic Law for the Federal Republic of Germany (*Grundgesetz*), May 23, 1949, as amended, https://www.gesetze-im-internet.de/englisch_gg/.
[100] Basic Law (Germany).
[101] Russell A. Miller, "Germany's Basic Law and the Use of Force," *Indiana Journal of Global Legal Studies* 17, no. 2 (2010): 197, https://doi.org/10.2979/gls.2010.17.2.197; Felix Lange, "A Constitutional Framework for Bundeswehr Operations Abroad Based on International Law," *Verfassungsblog*, April 1, 2022, https://verfassungsblog.de/a-constitutional-framework-for-bundeswehr-operations-abroad-based-on-international-law/.
[102] Basic Law (Germany), art. 26(1); Miller, "Germany's Basic Law," 199.
[103] Frank Schorkopf, "Bonn and Paris Agreements on Germany (1952 and 1954)," in *Max Planck Encyclopedia of Public International Law*, ed. Rüdiger Wolfrum (Oxford: Oxford University Press, 2019), https://opil.ouplaw.com/display/10.1093/law:epil/9780199231690/law-9780199231690-e254; Anne Peters, "Between Military Deployment and Democracy: Use of Force under the German Constitution," *Journal on the Use of Force and International Law* 5, no. 2 (2018): 246–47.

that deployments abroad within systems of collective security are permissible with the Bundestag's consent, allowed Germany to move away from military restraint towards international collective defence where it shares the burdens of global security with its allies.[104]

The *Zeitenwende* has seen further constitutional reinforcement of conventional armament. Article 87a(1a) of the *Grundgesetz*[105] was amended: "For the purpose of strengthening its ability to honour its alliance obligations and its defence capability, Germany may establish a special fund with its own credit authorization for a single amount of up to 100 billion euros." This amendment authorized the €100 billion *Sondervermögen*[106] to modernize the *Bundeswehr*.[107] The special fund is explicitly designed to override standard constitutional debt limits to rebuild strong warfighting capabilities. Evidence of this armament in practice is seen in major procurement projects authorized by the *Bundestag*. In 2025, German lawmakers approved over €50 billion in defence contracts, including the acquisition of self-propelled howitzers and F-35 fighter jets.[108] These investments reflect a shift in Germany's military doctrine toward highly mobile systems designed for deterrence. The Defence Ministry's 2023 Defence Policy Guidelines redefined the "guiding principle" for German soldiers as *Kriegstüchtigkeit* (warfighting capability in German).[109]

Furthermore, conscription remains a constitutional tool for conventional armament. Compulsory military service was suspended in 2011 to transition to a professional military.[110] However, Article 12a[111] of the *Grundgesetz* was never abolished: "Men who

[104] Karl-Heinz Börner, "Germany's Constitutional Court and Future German Combat Operations Outside of Europe," Air University, Air and Space Power Journal, accessed March 21, 2026, https://www.airuniversity.af.edu/Portals/10/ASPJ/journals/Chronicles/borner.pdf; Miller, "Germany's Basic Law."
[105] Basic Law (Germany), art. 87a(1a).
[106] Die Bundesregierung, "Investitionsoffensive für das ganze Land," March 2, 2026, https://www.bundesregierung.de/breg-de/aktuelles/sondervermoegen-2356240.
[107] Lange, "Constitutional Framework for Bundeswehr."
[108] "Germany Orders 84 RCH 155 Boxer Howitzers in €1.2 Billion Push to Reinforce Artillery Capabilities," *The Defense News*, December 19, 2025, https://www.thedefensenews.com/news-details/Germany-Orders-84-RCH-155-Boxer-Howitzers-in-12-Billion-Push-to-Reinforce-Artillery-Capabilities/; Johanna Urbancik, "German Government Accepts Proposal to Encourage Voluntary Military Service," *Euronews*, August 27, 2025, https://www.euronews.com/2025/08/27/german-government-accepts-proposal-to-encourage-voluntary-military-service.
[109] Ben Schreer, "Germany's New Defence-Policy Guidelines," IISS, November 14, 2023, https://www.iiss.org/online-analysis/online-analysis/2023/11/germanys-new-defence-policy-guidelines/.
[110] Jenny Gesley, "60 Year Anniversary of the German Compulsory Military Service Act," *In Custodia Legis*, Law Library of Congress, July 21, 2016, https://blogs.loc.gov/law/2016/07/60-year-anniversary-of-the-german-compulsory-military-service-act/.
[111] Basic Law (Germany), art. 12a.

have attained the age of eighteen may be required to serve in the Armed Forces, in the Federal Border Police, or in a civil defence organization." Under Article 80a(1),[112] compulsory service revives once the Bundestag declares a "state of tension" or a "state of defence," and parliament can also reinstate it at any time by ordinary statute, without a constitutional amendment. Despite this broad authority, armament is constrained by Article 26(1),[113] which renders "acts tending to and undertaken with intent to disturb the peaceful relations between nations, especially to prepare for a war of aggression," unconstitutional and criminal. German constitutional practice requires embedded multilateral collective security frameworks.[114] Germany can arm conventionally and is doing so, with a constitutional mandate that has evolved from a total ban to a robust requirement for collective deterrence. The current constitutional regime ensures that while Germany builds a "warfighting-capable" force,[115] that force remains subject to democratic oversight and the pursuit of international peace.

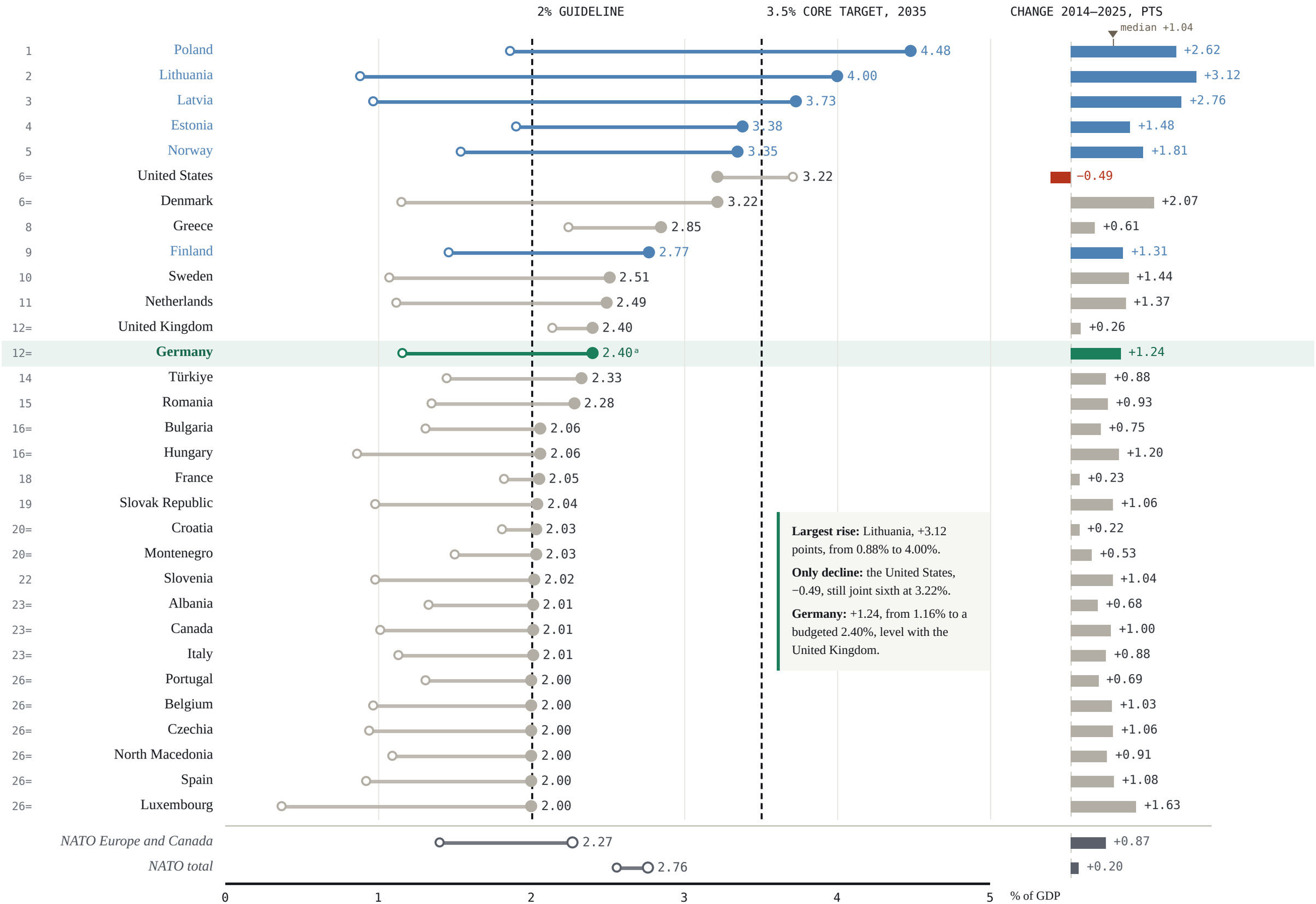
2.4 Political Costs

While Germany possesses the constitutional authority to arm itself and even reinstate conscription, the political will to do so remains a significant roadblock. Since 2025, however, the nature of that roadblock has shifted. Money is no longer the binding constraint: in March 2025 the Bundestag amended the constitutional debt brake so that spending on defence, civil protection, intelligence and cybersecurity above 1% of GDP can be financed through new borrowing.[116] Democratic politics nonetheless creates constant friction between the strategic necessity of deterring Russian aggression and the reality of sustaining that deterrence. This tension manifests in three primary political costs: coalition management and the rise of the AfD, public opinion on personal sacrifice, and the risks of reviving conscription.

[112] Basic Law (Germany), art. 80a(1).
[113] Basic Law (Germany), art. 26(1).
[114] Peters, "Between Military Deployment."
[115] Bundeswehr, "Mission and Tasks," 2025, https://www.bundeswehr.de/en/mission-and-tasks.
[116] Clarissa Dann, "Germany Update: Breaking from the Brake," *flow*, Deutsche Bank, accessed October 31, 2026, https://flow.db.com/Topics/macro-and-markets/germany-update-breaking-from-the-brake; dpa, "German Spending Package Clears Final Hurdle as President Signs Law," Yahoo News, March 22, 2025, https://www.yahoo.com/news/german-spending-package-clears-final-103827900.html.

Figure 4: NATO Allies' Defence Expenditure as a Share of GDP, 2014 and 2025

Germany Doubled Its Share, as Half of Allies Did; Three Frontline States Did Far More



2014 · 2025 estimate · Germany · Bordering Russia or Belarus · Alliance aggregate · NATO guideline / target · Decline

Sources: NATO, *Defence Expenditure of NATO Countries (2014–2025)*, 28 Aug 2025, Table 3, defence expenditure as a share of GDP, 2021 prices; 2025 figures are NATO estimates, including the two aggregate rows. Iceland has no armed forces and is not listed. ᵃ NATO's table gives no 2025 estimate for Germany; 2.4% is the Federal Ministry of Finance's figure under the NATO definition (press release, 24 Jun 2025). Targets: Wales Summit Declaration, 5 Sep 2014 (2% of GDP); The Hague Summit Declaration, 25 Jun 2025 (at least 3.5% of GDP on core defence by 2035, plus up to 1.5% defence-related). "Bordering Russia or Belarus": allies with a land border with either state. Allies at 2% in 2023 (10) per NATO, 28 Aug 2025. Median change computed by the author from the NATO series.

Source: Created by AIIA · TITAN

Armament remains a volatile topic in German party politics. The SPD–Green–FDP coalition that oversaw Olaf Scholz's Zeitenwende collapsed in late 2024, and after the snap election of February 2025 a CDU/CSU–SPD coalition under Chancellor Friedrich Merz took office.[117] Under the previous government, FDP Finance Minister Christian Lindner had used the debt brake to limit defence budget increases, while the Greens, despite Robert Habeck's call to spend 3.5% of GDP, lacked full party support for such ambitions. Merz removed that fiscal obstacle before even taking office, using the outgoing Bundestag in March 2025 to relax the debt brake for defence and create a separate €500 billion infrastructure fund.[118] The results are striking: the 2026 budget raised defence spending to around €108 billion, the highest level since the end of the Cold War, and NATO-defined defence spending is planned to rise from 2.83% of GDP in 2026 to 3.56% by 2029.[119] Germany has also committed to NATO's 2025 Hague target of 5% of GDP on defence and security-related spending by 2035, of which at least 3.5% is core defence; Figure 4 shows how far each ally had moved by 2025.[120] Yet the political cost has not disappeared; it has moved. The SPD remains torn between its pacifist roots and its role as junior partner in a rearming government, with Boris Pistorius the only SPD minister retained from Scholz's cabinet.[121] From 2028, procurement will depend entirely on exemption borrowing that the Bundestag must authorize budget by budget, turning every annual budget into a fresh vote on defence.[122] The trade-off with social spending, healthcare and pensions is therefore no longer an immediate zero-sum choice but a question of rising debt and future interest costs, and Finance Minister Lars Klingbeil (SPD) has had to seek room under EU fiscal rules as well as domestic ones.[123] Complicating matters further is the Alternative for Germany (AfD), which combines a pro-sovereignty stance with hostility to NATO and

[117] Tom Pugh, "Military Service 'Could Be Made Mandatory' Says German Defence Minister," The Local, May 26, 2025, https://www.thelocal.de/20250526/military-service-could-be-made-mandatory-in-germany-says-defence-minister.
[118] dpa, "German Spending Package Clears Final Hurdle."
[119] Centre for Eastern Studies (OSW), "Germany: The 2026 Budget and Rising Debt," OSW Analyses, December 5, 2025, https://www.osw.waw.pl/en/publikacje/analyses/2025-12-05/germany-2026-budget-and-rising-debt.
[120] Rebecca Draeger, "Germany Considers Reinstating the Draft amid War Fears," *The American Conservative*, November 25, 2025, https://www.theamericanconservative.com/germany-considers-reinstating-the-draft-amid-war-fears/.
[121] Lisa Haseldine, "Germany Can't Avoid Conscription for Ever," *The Spectator Australia*, June 5, 2025, https://www.spectator.com.au/?p=10875554.
[122] Großwald, "German 2027 Budget: EUR 110bn Defence, EUR 56bn Procurement, EUR 85bn Outside the Debt Brake," September 8, 2026, https://www.grosswald.org/germany-2027-budget-defence-109-7-billion-procurement-55-8-billion-85-4-billion-outside-debt-brake/.
[123] dpa, "Germany Counting on Exemption from EU Debt Rules for Defence Boost," Yahoo News, June 13, 2025, https://www.yahoo.com/news/germany-counting-exemption-eu-debt-163223487.html.

sympathy towards Russia. Its strength in eastern Germany is no longer a regional footnote: in September 2026 it won 43.8% of the vote in the Saxony-Anhalt state election, a result that increased pressure on the governing coalition and weakened Merz personally.[124]

Public support for armament is broad but shallow where personal sacrifice is involved. Support for higher defence spending reached a record 59% in 2022.[125] Debt financing has since spared the government from testing that support against tax rises or spending cuts, and it has held up: a YouGov poll for the Süddeutsche Zeitung found 45% in favour of spending 5% of GDP on defence and 37% opposed.[126] Attitudes become far more divided when the cost is service rather than money. A Bielefeld University survey in October 2025 found 52% support for reintroducing compulsory military service and 31% opposition, with voluntary service within a general civic-service scheme the most popular single option.[127] A sharp generational divide persists, however: in a March 2025 survey, 61% of 18–29-year-olds, the group who would actually serve, opposed conscription.[128] Germany's post-Cold War culture of the peace dividend remains a powerful normative force, reinforced by a deep-seated fear of militarization and historical guilt, which leaves many young people unconvinced that a strong military is necessary. One analyst has warned that imposing obligatory service on a skeptical population could push young people towards the far right and far left.[129]

The revival of conscription is where these pressures converge. The Military Service Modernization Act (Wehrdienst-Modernisierungsgesetz), passed by the Bundestag in December 2025 by 323 votes to 272,[130] took effect on January 1, 2026. It requires young men to complete a questionnaire and to undergo a medical examination

[124] Centre for Eastern Studies (OSW), "Germany: AfD Scores Landslide Victory in Saxony-Anhalt," OSW Analyses, September 7, 2026, https://www.osw.waw.pl/en/publikacje/analyses/2026-09-07/germany-afd-scores-landslide-victory-saxony-anhalt.
[125] Markus Steinbrecher, "Stability, Change, and External Shocks: Selected Results for German Public Opinion on Foreign and Security Policy," *GESIS Blog*, July 10, 2024, https://blog.gesis.org/stability-change-and-external-shocks-selected-results-for-german-public-opinion-on-foreign-and-security-policy.
[126] dpa, "45% Germans for 5% of GDP on Defence," StratPost, June 24, 2025, https://stratpost.com/45-germans-for-5-of-gdp-on-defence/ (reporting a YouGov poll for the *Süddeutsche Zeitung*).
[127] Bielefeld University, "Bevölkerung uneins über Wehrdienst," October 22, 2025, https://aktuell.uni-bielefeld.de/2025/10/22/bevoelkerung-uneins-ueber-wehrdienst/.
[128] Haseldine, "Germany Can't Avoid Conscription."
[129] Minna Ålander, quoted in Sophie Tanno, "Germany Wants to Build Europe's Strongest Army – A New Conscription Bill Is Moving That Closer," CNN, November 23, 2025, republished by WTOP, https://wtop.com/world/2025/11/germany-wants-to-build-europes-strongest-army-a-new-conscription-bill-is-moving-that-closer/.
[130] JURIST, "Germany Parliament Passes Military Service Law amid Tensions with Russia," December 5, 2025, https://www.jurist.org/news/?p=299976.

(phased in during 2026 and universal from July 2027), while military service itself remains voluntary.[131] Compulsory, needs-based conscription can be activated only through a further vote in parliament,[132] so the most politically costly decision has been deferred rather than resolved. The gap between need and supply is considerable: to meet NATO's new capability targets, Germany is aiming for a force of around 460,000 soldiers, including 260,000 in the active force and 200,000 reservists.[133] Although Bundeswehr personnel reached the government's 2026 target range of 186,000 to 190,000 by August,[134] this remains far short of the wartime requirement. Resistance is already visible. A provision requiring men aged 17 to 45 to seek Bundeswehr approval for stays abroad of more than three months provoked controversy in spring 2026 and was suspended by ministerial exemption in April;[135] more than 45,000 students walked out of class in September 2026 in protest against the new service regime;[136] and over 12,000 applications for conscientious objection had been filed by the end of August 2026, more than three times the total for 2025.[137] For a coalition already losing ground to the AfD, a parliamentary vote to activate compulsory service would carry a heavy electoral price. That is why political will, rather than legal authority or money, remains the decisive constraint on German rearmament.

This pattern, in which the coalition legislates what it can and defers what is politically costly, maps directly onto Allison's[138] bureaucratic-politics critique of the unitary actor model introduced in Section 1. The rational choice framework used does not deny this fragmentation; it brackets it. Rational choice theory (RCT) evaluates the rationality of

[131] Rachel Loxton, "German Parliament Passes Military Service Law as School Students Protest," The Local, December 5, 2025, https://www.thelocal.de/20251205/german-parliament-passes-military-service-law-as-school-students-protest.
[132] Linus Höller, "German Parliament Approves Conscription Scheme to Boost the Bundeswehr," *Defense News*, December 5, 2025, https://www.defensenews.com/global/europe/2025/12/05/german-parliament-approves-conscription-scheme-to-boost-the-bundeswehr/.
[133] Sabine Siebold, "Germany Unveils Military Strategy but Sticks to Troop Target," Reuters, April 22, 2026, https://www.internazionale.it/ultime-notizie-reuters/2026/04/22/germany-unveils-military-strategy-but-sticks-to-troop-target.
[134] Giulia Bernacchi, "German Military Expands to Largest Force in 13 Years with 186,700 Troops," The Defense Post, August 19, 2026, https://thedefensepost.com/2026/08/19/german-military-expands-force/.
[135] Diana Resnik, "New German Conscription Law: Eligible Men May Now Need Approval for Trips Abroad," Euronews, April 4, 2026, https://www.euronews.com/2026/04/04/conscription-law-men-now-need-approval-for-trips-abroad; Bernd Müller, "Wehrpflicht: Musterungsbriefe kommen, Anträge auf Verweigerung auch," Telepolis, April 27, 2026, https://www.heise.de/-11273814.
[136] Ayhan Şimşek, "German Students Take to the Streets against Compulsory Military Service Plans," Anadolu Ajansı, September 25, 2026, https://aa.com.tr/en/europe/german-students-take-to-the-streets-against-compulsory-military-service-plans/4069445.
[137] Ayhan Şimşek, "Germany Sees Sharp Rise in Requests to Refuse Military Service," Anadolu Ajansı, October 6, 2026, https://aa.com.tr/en/europe/germany-sees-sharp-rise-in-requests-to-refuse-military-service/4080186.
[138] Allison, *Essence of Decision*.

the outcome – whether Germany's armament is the strategically optimal response to a given threat – rather than modelling the bargaining process that produces policy. The framework treats Germany as a unitary rational actor by design, as a methodological simplification that allows the capability assessment to proceed. The political costs documented in this section are precisely the evidence that makes the assumption productive, as they reveal the gap between what rationality recommends and what democratic politics delivers.

Even with funding, institutional dysfunction slows progress. The procurement process has been described by former officials as "clumsy and overly bureaucratic," often failing to spend allocated funds due to contract design issues and industrial delays.[139] Furthermore, the concept of the *Parlamentsarmee* means the executive "lacks the speed" to respond to security challenges, as every major decision becomes a "domestic political balancing act."[140] Cultural resistance also exists within the civil bureaucracy, where many Germans remain wary of a *kriegstauglich* ("fit for war") mentality.[141] Germany possesses the economic capacity and clear constitutional authority to arm, yet political will remains the ultimate roadblock. Democratic constraints are features of the German system designed to prevent past atrocities, but they now create a strategic vulnerability by making armament slower and more limited than the current threat environment requires. If political resistance continues to prevent an adequate conventional buildup, Germany risks its security and credibility within the NATO alliance.

2.5 Necessary But Not Sufficient

This section has assessed Germany's capacity to achieve security through conventional military armament in the face of eroding U.S. security guarantees. The evidence reveals a troubling reality: while Germany possesses both the constitutional authority and economic resources necessary for armament, it faces constraints that prevent conventional forces from substituting for the lost U.S. extended deterrence within any relevant timeframe. Constitutionally, Germany can arm. The *Grundgesetz* permits

[139] Michael Rühle, "German Musings about a European Nuclear Deterrent," Information Series no. 571, National Institute for Public Policy, January 3, 2024, 5, https://nipp.org/information_series/michael-ruhle-german-musings-about-a-european-nuclear-deterrent-no-571-january-3-2024/.
[140] Rühle, "German Musings," 3–4.
[141] Rühle, "German Musings," 2–3.

defensive military buildup through Article 87a,[142] and the 2022 *Zeitenwende*[143] amendments explicitly authorize defence spending via the €100 billion *Sondervermögen*.[144] Article 12a preserves the legal mechanism for conscription revival without requiring constitutional amendment.[145] Economically, Germany's position as Europe's largest economy provides fiscal capacity that surpasses most NATO allies. Defence spending commitments of 5% of GDP, while politically contentious, remain within Germany's economic reach.[146] The constitutional framework and the fiscal capacity exist, but the problem lies elsewhere.

Germany faces three critical barriers that constitutional permission and economic capacity cannot overcome: the timeline problem, the scale problem and the political problem. Ongoing procurement includes numerous tanks, fighter jets and artillery systems, but delivery timelines extend to the year 2030, based on current contract schedules, which have historically slipped.[147] Rheinmetall's new plant at Unterlüß targets 350,000 artillery rounds annually; however, Ukraine has demonstrated that modern peer conflict consumes munitions at rates that outstrip such capacity.[148] The *Bundeswehr's* equipment readiness rates remain chronically low, with only a fraction of existing equipment being operationally available at any given time. Converting financial commitments into deployable military power requires a decade, minimum, and Russia is unlikely to wait that long. Figure 5 sets these timelines against official assessments of when Russia could be ready to attack.

Meeting NATO's force requirements demands 460,000 active and reserve personnel.[149] Germany currently has about 186,000 active personnel and 34,000 reservists, which is a gap of about 240,000 that voluntary recruitment cannot realistically fill.[150] Conscription offers the most feasible mechanism for rapid

[142] Basic Law (Germany), art. 87a.
[143] Scholz, "'Zeitenwende.'"
[144] Die Bundesregierung, "Investitionsoffensive für das ganze Land"; Lange, "Constitutional Framework for Bundeswehr."
[145] Gesley, "60 Year Anniversary."
[146] Franke and Hubert, "Germany," 106.
[147] Großwald, "Germany's Accelerated Military Procurement: What Went Well and What Not," March 28, 2025, https://www.grosswald.org/germanys-accelerated-military-procurement-what-went-well-and-what-not/; Urbancik, "German Government Accepts Proposal."
[148] Till Eckert, "The New German War Machine," *CORRECTIV*, December 19, 2025, https://correctiv.org/en/latest-stories/2025/12/19/the-new-german-war-machine-military-bundeswehr-army/.
[149] Christian Frick and Martin P. Haese, "Back to Conscription: A Difficult Path for the Bundeswehr," *The Defence Horizon Journal*, September 18, 2025, https://tdhj.org/blog/post/conscription-bundeswehr/.
[150] Central Intelligence Agency, "Germany"; Franke and Hubert, "Germany," 108; Bernacchi, "German Military Expands."

expansion, yet activating compulsory service remains politically costly. Although around half of Germans support military service in principle, most young people, the cohort who would actually serve, reject it: 57% of 16–25-year-olds did so in an October 2025 survey.[151] Support in principle also does not mean readiness to fight: in 2024–25 polling, only 11–17% of Germans said they would take up arms to defend their country.[152] The democratic constraints that exist to ensure "never again" now create strategic vulnerability by making armament slower and more limited than the threat requires.

What does Germany lose under a complete U.S. withdrawal from NATO? The 36,436 U.S. active-duty personnel currently stationed in Germany provide irreplaceable capabilities.[153] Ramstein Air Base, the only U.S. Air Forces in Europe hub for "airdrop, airlift and aeromedical evacuation," will lose its U.S. units.[154] USEUCOM headquarters in Stuttgart, coordinating all U.S. military operations across Europe, will cease to function.[155] Intelligence networks, logistics infrastructure and command-and-control systems developed over seventy years will vanish quickly. Germany possesses no equivalent capabilities and cannot develop them within the relevant timeframe. The *Bundeswehr* operates 180 agencies across four service branches, but absorbing former U.S. functions would require expansion beyond current capacity.[156] Germany would be left scrambling to fill gaps it cannot close.

It is worth separating two distinct problems embedded in this conclusion. The first is a timing problem: Germany cannot build sufficient conventional capability fast enough to deter Russia within the relevant threat window. This issue is, in principle, solvable; given enough time and sustained political will, Germany's industrial and economic capacity could close the gap. The second is a categorical problem: even a fully built-out conventional force cannot address nuclear coercion. No number of tanks, aircraft or personnel changes the fundamental asymmetry between a nuclear-armed Russia and a conventionally armed Germany. The first problem motivates urgency; the second motivates Section 3.

[151] Felix Gasper and Prannavan Surendran, "Pretence or Preparedness? Germany's New Military Service," Commentary, International Centre for Defence and Security, December 11, 2025, https://icds.ee/en/pretence-or-preparedness-germanys-new-military-service/.
[152] Jacoby, "Germany's Rearmament Is Stunning."
[153] Defense Manpower Data Center, "DoD Personnel, Workforce Reports."
[154] Ramstein Air Base, "Ramstein Air Base."
[155] Tanghe, "Going, Going."
[156] Central Intelligence Agency, "Germany."

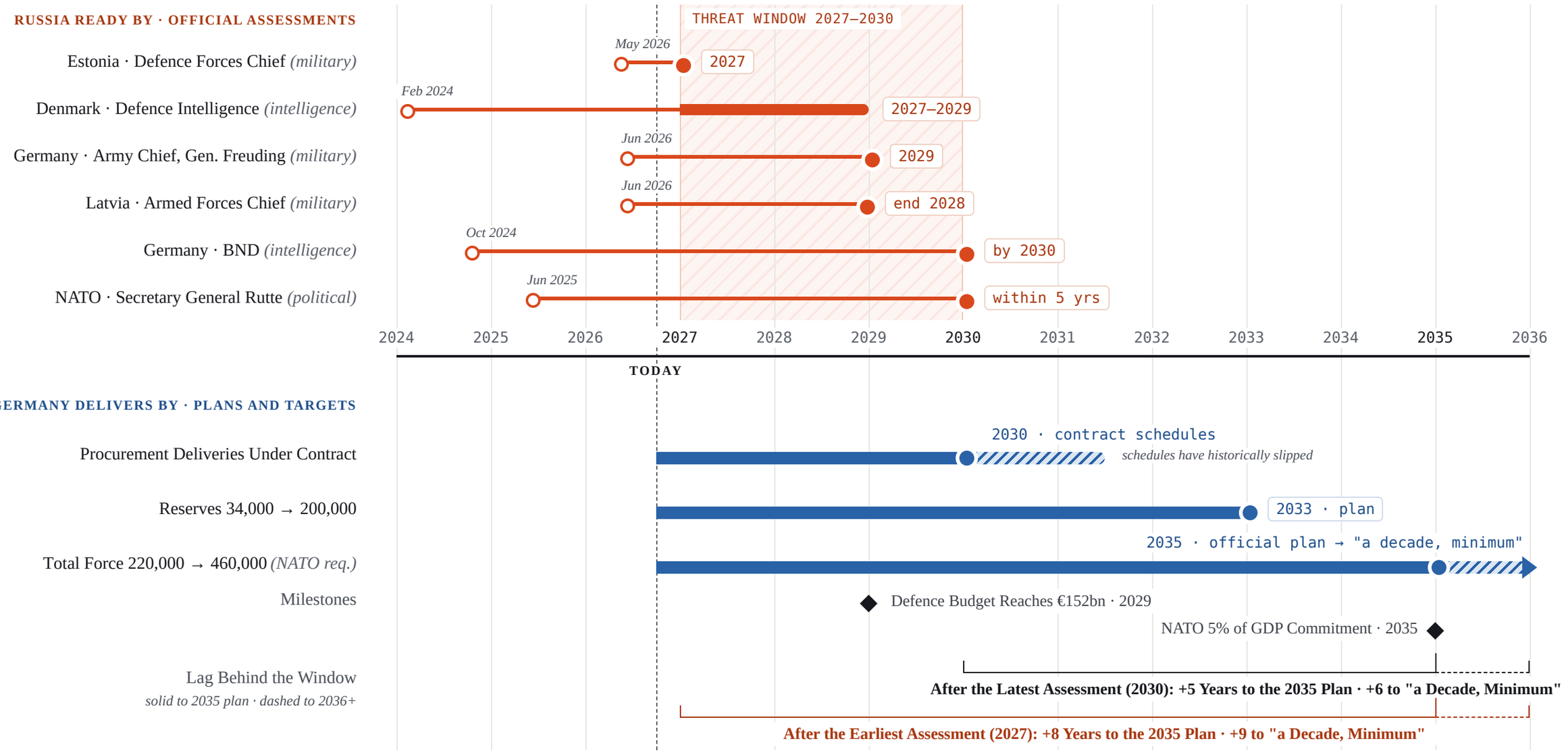
Most importantly, the U.S. nuclear weapons stored at Büchel Air Base under NATO's nuclear sharing arrangement would likely depart with U.S. forces.[157] Germany would lose its only direct connection to nuclear deterrence. Against a nuclear-armed Russia possessing an estimated 5,420 warheads,[158] conventional forces cannot provide ultimate security. Conventional armament offers no protection against Russia's nuclear coercion. Historical experience confirms this reality: non-nuclear states facing nuclear-armed adversaries exist in a vulnerability that conventional military power cannot fix. This vulnerability is the fundamental inadequacy of Germany's position. If the United States withdraws its security guarantee, which increasingly appears to be a material possibility, Germany must secure itself through other means. Conventional armament, while necessary, proves insufficient on its own. The timeline is too long, the scale too great, the political resistance too deep and the fundamental flaws in conventional forces against nuclear threats are too severe. If conventional armament cannot provide security and if the U.S. nuclear umbrella disappears, then Germany confronts a question it has avoided for decades: can it remain secure without nuclear weapons of its own?

[157] Knight, "US Troops in Germany."
[158] Kristensen et al., "Status of World Nuclear Forces."

Figure 5: Russian Threat Window vs. German Conventional Buildup, 2024–2036

Russia's Projected Threat Window Closes Years Before Germany's Buildup Lands

Six official assessments place Russian readiness for war with NATO between 2027 and 2030. Germany's contracted deliveries run to 2030; its plan to reach NATO's 460,000-strong force requirement runs to 2035, and the paper judges a decade the minimum.



Sources: Rutte, “within five years,” Chatham House, 9 Jun 2025; BND President Kahl, Bundestag, 14 Oct 2024; Danish Defence Intelligence Service, Feb 2024; Lt. Gen. Freuding, Inspector of the German Army, interview with Politico, 11 Jun 2026; Gen. Merilo, Estonian Defence Forces yearbook, 5 May 2026; Maj. Gen. Pudāns, 4 Jun 2026; €152bn defence budget by 2029 (federal budget plan); NATO Hague Summit commitment, 25 Jun 2025; deliveries to 2030 under current contracts; 186,000 active + 34,000 reserve (2026); Bundeswehr Military Strategy, Apr 2026 (460,000 total, including 260,000 active by 2035 and 200,000 reserve by 2033; the gap exceeds 200,000 on any basis); “a decade, minimum” is the paper’s own judgement (Section 2.5).

Source: Created by AIIA · TITAN

Section 3

Nuclear Armament

Germany's nuclear renunciation, enshrined in both the Nuclear Non-Proliferation Treaty (NPT)[159] and the Two-Plus-Four Treaty,[160] was never an unconditional moral commitment. Rather, it was a carefully negotiated *quid pro quo*: Germany would forgo independent nuclear weapons in exchange for the protection of the U.S. nuclear umbrella through NATO. For decades, this arrangement appeared unchanging. The United States guaranteed European security and Germany, freed from the burden of nuclear deterrence, could rebuild its economy and embrace a post-war identity rooted in pacifism and multilateralism. Yet this foundational premise, the permanence of U.S. protection, is now under serious question.

President Donald Trump's public questioning of NATO's Article 5 collective defence guarantee, together with threats of U.S. withdrawal from the alliance, opens a possible legal argument under the NPT. Article X permits withdrawal where "extraordinary events, related to the subject matter of this Treaty," have jeopardized a party's supreme interests,[161] and Germany could argue that the collapse of the U.S. nuclear guarantee meets that test.[162] As discussed below, however, a feared future abandonment is unlikely to suffice; the argument would require an actual withdrawal of the U.S. commitment. If that occurred, Germany's options would range from continued reliance on its existing treaty obligations, through a European nuclear arrangement built on French and British arsenals, to an independent deterrent as the most drastic choice. Given the growing unpredictability of U.S. policy, that last option warrants serious analysis. This section therefore examines whether Germany has the constitutional, physical, financial and political capacity to pursue nuclear armament should the security architecture underpinning its non-nuclear status collapse.

[159] Treaty on the Non-Proliferation of Nuclear Weapons, opened for signature July 1, 1968, 729 U.N.T.S. 161.
[160] Treaty on the Final Settlement with Respect to Germany (Two-Plus-Four Treaty), September 12, 1990, 1696 U.N.T.S. 115.
[161] Lambert-Deslandes and von Hlatky, "NATO, Nuclear Deterrence," 682.
[162] Lambert-Deslandes and von Hlatky, "NATO, Nuclear Deterrence," 682.

The analysis proceeds in seven parts. First, Section 3.1 defines what a European nuclear umbrella would involve and sets out Germany's obligations under the NPT and the Two-Plus-Four Treaty.[163] Neither treaty makes Germany's renunciation conditional on U.S. protection, but the American guarantee was the political premise on which Bonn accepted both. Any legal pathway must therefore rest on the treaties' own terms, and the section assesses each separately: the NPT's Article X withdrawal clause,[164] and, for Two-Plus-Four, which has no withdrawal clause, the doctrine of rebus sic stantibus (fundamental change of circumstances), which is arguably unavailable for a treaty that settles borders.[165] Second, the Constitutional Limitations section examines the domestic legal barriers in the Basic Law and the NATO nuclear sharing arrangement that leaves Germany dependent on U.S. authorization.[166]

Third, the Physical Capacity section assesses Germany's existing nuclear infrastructure, including the Urenco enrichment facility at Gronau and dormant reactor sites, demonstrating that Germany possesses significant latent nuclear capability. Fourth, the Financial Capabilities section estimates the costs of a German nuclear program by comparing French and British spending, concluding that while financially feasible, nuclear armament would require diverting roughly 6–12% of annual defence spending. Fifth, the Political Costs section analyzes the domestic political landscape, revealing that most Germans support a European nuclear umbrella while rejecting an independent German bomb. Sixth, the Comparative Analysis section examines France's *Force de Frappe* (its nuclear deterrence program) and Britain's Trident nuclear program, arguing that Germany would not need a massive arsenal and that 200–300 warheads would provide sufficient minimum deterrence. Finally, Section 3.7 draws these findings together. The central finding is that while Germany possesses the latent capacity to build a nuclear arsenal, a sovereign German bomb is neither the fastest nor the most strategically coherent response to U.S. withdrawal. The more rational path is a European nuclear umbrella anchored by the French and British arsenals – though, as this section shows, that option inherits a credibility problem of its own and depends on a commitment Paris and London have not yet made.

[163] Treaty on the Final Settlement.
[164] Treaty on the Non-Proliferation of Nuclear Weapons, art. X.
[165] Vienna Convention on the Law of Treaties, May 23, 1969, 1155 U.N.T.S. 331, art. 62.
[166] Basic Law (Germany), art. 25.

3.1 Treaty Obligations and the Umbrella Option

It is worth clarifying what a "European nuclear umbrella" means, since the term encompasses several distinct institutional arrangements. The weakest form is a consultative mechanism, where France and the UK agree to regular nuclear planning consultations with Germany, without any formal commitment to act. A stronger form involves forward deployment, where French or British weapons are stationed in Germany under a sharing arrangement comparable to current NATO nuclear sharing with the U.S. The strongest form is a full extended-deterrence guarantee, involving a binding pledge that French or British nuclear forces would respond to an attack on Germany. These forms differ substantially in feasibility, credibility and the institutional architecture they require. Where this paper references the umbrella option, it primarily envisions the consultative and forward-deployment forms as near-term possibilities, while acknowledging that a full extended guarantee remains the most credible but least politically achievable version. France's March 2026 offer of "forward deterrence" (Section 3.6) is a first step toward the first two forms.

The NPT is frequently described as a "grand bargain."[167] Non-nuclear-weapon states (NNWS) formally renounced the acquisition of nuclear weapons in exchange for access to peaceful nuclear technology and a commitment from nuclear-weapon states (NWS) toward disarmament.[168] For Germany, this renunciation was not unconditional; it was a *quid pro quo* exchange for the protection of the U.S. nuclear umbrella.[169] First, under Article II of the NPT,[170] Germany is committed as an NNWS, where it does not receive, manufacture or acquire nuclear weapons or nuclear explosive devices. Historically, security alliances like NATO served as a "transmission belt" that allowed an NNWS to forgo independent arsenals while maintaining deterrence through the protection of larger states.[171] Yet the NPT is not an irrevocable commitment because Article X[172] provides an explicit withdrawal clause. The Treaty states that a party may withdraw if

[167] Jonathan L. Black-Branch and Dieter Fleck, eds., *Nuclear Non-Proliferation in International Law*, vol. 6, *Nuclear Disarmament and Security at Risk – Legal Challenges in a Shifting Nuclear World* (The Hague: T.M.C. Asser Press, 2021), 367, https://doi.org/10.1007/978-94-6265-463-1.
[168] Paul Meyer, "The Nuclear Nonproliferation Treaty: Fin de Régime?" *Arms Control Today* 47, no. 3 (2017): 16, https://www.jstor.org/stable/90005216.
[169] George Bunn, "The Nuclear Nonproliferation Regime and Its History," in *U.S. Nuclear Weapons Policy: Confronting Today's Threats*, ed. George Bunn and Christopher F. Chyba (Washington, DC: Brookings Institution Press, 2006), 87–88, http://www.jstor.org/stable/10.7864/j.ctt6wpfwh.7.
[170] Treaty on the Non-Proliferation of Nuclear Weapons, art. II.
[171] Black-Branch and Fleck, *Nuclear Non-Proliferation in International Law*, 57.
[172] Treaty on the Non-Proliferation of Nuclear Weapons, art. X.

it decides that "extraordinary events, related to the subject matter of this Treaty, have jeopardized the supreme interests of its country." While this right is an exercise of national sovereignty, it requires three months' notice to all other Treaty members and the UN Security Council, including a statement of the "extraordinary events" justifying the move. However, the right to withdraw is qualified and intended to be used under circumstances of extreme geostrategic upheaval.[173]

The Two-Plus-Four Treaty (1990),[174] which paved the way for reunification, is legally more complex: it contains an explicit renunciation of nuclear weapons but no withdrawal clause. In Article 3 of the Two-Plus-Four Treaty,[175] the governments of the Federal Republic of Germany (West Germany) and the German Democratic Republic (East Germany) reaffirmed their "renunciation of the manufacture and possession of and control over nuclear, biological and chemical weapons." Germany's renunciation of nuclear weapons is regarded as a definitive contribution to peace and stability in Europe. However, under the 1969 Vienna Convention on the Law of Treaties,[176] a state can in principle invoke the doctrine of *rebus sic stantibus*, or a fundamental change of circumstances. These pathways must be assessed separately. Withdrawal from the NPT under Article X would not release Germany from Two-Plus-Four; indeed, Article 3(1) of that treaty provides that NPT obligations continue to apply to united Germany, so NPT withdrawal could itself breach it. Germany could argue that continued U.S. military presence in Europe was an "essential basis of the consent" to Two-Plus-Four, but the claim is weak: it is doubtful this was true for all parties, including the Soviet Union, and Article 62 excludes treaties establishing a boundary, which Two-Plus-Four does. Short of renegotiation with the other parties, Germany has no clear legal route out of its Two-Plus-Four commitments.[177]

There are limited historical instances to guide what constitutes an "extraordinary event," with North Korea being the only state to have attempted withdrawal.[178] North Korea announced its withdrawal under Article X in 2003, although some states still

[173] George Bunn and Roland Timerbaev, "The Right to Withdraw from the Nuclear Non-Proliferation Treaty (NPT): The Views of Two NPT Negotiators," *Yaderny Kontrol (Nuclear Control)* Digest 10, nos. 1–2 (Fall 2005): 20, https://www.files.ethz.ch/isn/123371/2005_Right_to_Withdraw_from_NPT.pdf.
[174] Treaty on the Final Settlement.
[175] Treaty on the Final Settlement, art. 3.
[176] Vienna Convention on the Law of Treaties, art. 62.
[177] Oliver J. Lissitzyn, "Treaties and Changed Circumstances (Rebus Sic Stantibus)," *The American Journal of International Law* 61, no. 4 (1967): 898, https://doi.org/10.2307/2197343.
[178] Yangmo Ku, "Spear versus Shield? North Korea's Nuclear Path and Challenges to the NPT System," in *North Korea and Nuclear Weapons: Entering the New Era of Deterrence*, ed. Sung Chull Kim and Michael D. Cohen (Washington, DC: Georgetown University Press, 2017), 179, https://doi.org/10.2307/j.ctt1ps318b.15.

question whether it took legal effect.[179] While the UN Security Council is responsible for analyzing any statement of reasons for withdrawal, the assessment is largely subjective and left to the withdrawing state.[180] It is also important to mention that an "extraordinary event" must have already occurred and a withdrawal from the NPT cannot be based on a fear or threat.[181] During the original NPT negotiations, the dissolution of NATO was specifically mentioned by U.S. and Soviet negotiators as a hypothetical event that would allow West Germany or Italy to reconsider their non-nuclear status.[182] However, the United Nations Security Council's ability to prevent a German withdrawal is unclear, particularly since both the U.S. and Russia are permanent members of the Security Council[183] and a U.S. veto could shield Germany from any collective enforcement action.[184] China's shielding of North Korea after its withdrawal shows how such a precedent could repeat.[185]

The critical question is whether these treaties remain valid if the security architecture they were built upon collapses. If the "community of fate"[186] between the U.S. and Europe dissolves, the underlying rationale for German nuclear abstinence (security provided by a distant protector) could potentially render the original agreement inequitable and strategically flawed. For a state like Germany, the total withdrawal of its primary security guarantor, the U.S., could logically be framed in NPT language as a "supreme interest" being "jeopardized," as it would fundamentally alter the balance of power and security in Europe. Germany cannot currently arm under its existing nuclear treaty obligations; however, these obligations are predicated on a security architecture that may no longer exist if the U.S. drops its longstanding security guarantee. Even if Germany left the NPT under Article X,[187] it would remain bound by Two-Plus-Four, and its government would still face a strategic choice: pursue a European nuclear umbrella built on British and French forces, or prioritize

[179] Treaty on the Non-Proliferation of Nuclear Weapons, art. X; Ku, "Spear versus Shield?"
[180] Emmanuelle Maitre, "Withdrawing from the NPT: Legal and Strategic Considerations," Note de la FRS (Paris: Fondation pour la Recherche Stratégique, 2023), 3, https://www.frstrategie.org/en/publications/notes/withdrawing-npt-legal-and-strategic-considerations-2023.
[181] Maitre, "Withdrawing from the NPT," 3.
[182] Maitre, "Withdrawing from the NPT," 3.
[183] United Nations Security Council, "Current Members," accessed February 18, 2026, https://main.un.org/securitycouncil/en/content/current-members.
[184] Black-Branch and Fleck, *Nuclear Non-Proliferation in International Law*, 321–22.
[185] Bunn, "Nuclear Nonproliferation Regime," 101–2.
[186] The phrase is used in the transatlantic debate to describe the idea that American and European security are indivisible.
[187] Treaty on the Non-Proliferation of Nuclear Weapons, art. X.

conventional deterrence. Is nuclear armament strategically necessary in a post-U.S. NATO world? If Germany is legally allowed to arm, is it capable of doing so?

3.2 Constitutional Limitations

Germany's ability to arm is restricted by international treaties, notably the NPT and the Two-Plus-Four Treaty, and shaped by specific articles of the Grundgesetz. Collectively, these legal aspects establish a framework that currently prohibits the German state from independent "manufacture, possession or control of nuclear weapons."[188]

While the Grundgesetz contains no explicit ban on nuclear weapons, several articles bear on the question. Article 25 of the *Grundgesetz* specifies that the general rules of international law are an integral part of federal law and take precedence over federal statutes.[189] Treaties such as the NPT and the Two-Plus-Four Treaty do not fall under this provision: they were incorporated by statute under Article 59(2) and rank as ordinary federal law.[190] Article 26 of the *Grundgesetz* declares that acts "undertaken with intent to disturb the peaceful relations between nations, especially to prepare for a war of aggression, shall be unconstitutional" and "shall be made a criminal offence."[191] Article 73 of the *Grundgesetz* declares that Germany has exclusive legislative power over the production and utilization of nuclear energy, but specifies it is for "peaceful purposes."[192]

Germany currently participates in NATO nuclear sharing, which allows for the stationing of U.S. nuclear weapons. Up to 20 U.S. B61 nuclear bombs are believed to be stationed at Büchel Air Base.[193] Under the nuclear sharing arrangement, Germany provides dual-capable aircraft, such as the PA-200 Tornado, and trained pilots to deliver these weapons in the event of a war.[194] However, the nuclear sharing arrangement is entirely dependent on the United States' willingness to continue the

[188] Nuclear Sharing, "Nuclear Sharing in Germany," March 30, 2023, https://nuclearsharing.eu/en/.
[189] Basic Law (Germany), art. 25.
[190] Basic Law (Germany), art. 59(2).
[191] Basic Law (Germany), art. 26.
[192] Basic Law (Germany), art. 73.
[193] Nuclear Sharing, "Nuclear Sharing in Germany."
[194] North Atlantic Treaty Organization, "NATO's Nuclear Deterrence Policy and Forces," 2025, https://www.nato.int/en/what-we-do/deterrence-and-defence/natos-nuclear-deterrence-policy-and-forces; Nuclear Sharing, "Nuclear Sharing in Germany."

relationship. NATO and the *Bundestag* maintain that the nuclear sharing arrangement is consistent with the NPT because the weapons remain under absolute U.S. custody and control during peacetime.[195] The U.S. President has the sole authority to release them. While German pilots practise these missions, the German Chancellor serves as the commander-in-chief in a state of defence and could theoretically prevent an operation, but cannot independently initiate one.[196] Essentially, if the U.S. withdraws from NATO or removes its nuclear weapons from Europe, Germany would be left without any nuclear deterrent capability stationed on its soil. NATO nuclear sharing rests on a U.S. interpretation of NPT Articles I and II: no transfer of control occurs unless war breaks out, at which point the treaty no longer applies. Not all NPT parties accept this reading, and any move towards German control would make it openly contested.[197] Domestically, the Basic Law contains no explicit nuclear ban; Germany's renunciation rests on its treaty obligations, notably Article 3 of the Two-Plus-Four Treaty.[198]

An independent German arsenal would raise three separate legal questions. First, NPT withdrawal requires no one's permission: under Article X, a party may withdraw on three months' notice to the other parties and the UN Security Council if it decides that extraordinary events have jeopardized its supreme interests.[199] Second, the Two-Plus-Four Treaty has no withdrawal clause, so Germany could leave it only by agreement with the other four parties or by claiming a fundamental change of circumstances. That route is arguably closed because the treaty confirms Germany's borders, and boundary treaties are excluded from it.[200] Third, the Basic Law contains no explicit nuclear ban, so replacing the constitution under Article 146 would be unnecessary. The relevant test is Article 26, which prohibits acts intended to disturb peaceful relations between nations. A program framed as defensive deterrence would not clearly meet that intent requirement, though it would almost certainly be challenged before the Federal

[195] North Atlantic Treaty Organization, "NATO and the Non-Proliferation Treaty," 2017, https://www.nato.int/content/dam/nato/legacy-wcm/media_pdf/pdf_2017_03/20170323_170323-npt-factsheet.pdf.
[196] Nuclear Sharing, "Nuclear Sharing in Germany."
[197] Berlin Information-center for Transatlantic Security (BITS), "NATO Nuclear Sharing and the NPT: Questions to Be Answered," BASIC-BITS-CESD-ASPR Research Note 97.3, June 1997, https://www.bits.de/public/researchnote/rn97-3.htm.
[198] Treaty on the Final Settlement, art. 3.
[199] Treaty on the Non-Proliferation of Nuclear Weapons, art. X(1).
[200] Treaty on the Final Settlement, art. 1; Vienna Convention on the Law of Treaties, arts. 56 and 62(2)(a).

Constitutional Court.[201] Even if these legal obstacles could be overcome, a further question remains: could Germany arm in the material sense?

3.3 Physical Capacity

Germany possesses a comprehensive portfolio of physical infrastructure and technical expertise that would be relevant to any nuclear program, although its current focus is exclusively on civil applications and decommissioning.[202] While Germany completed its nuclear power phase-out in April 2023, it maintains significant capabilities in uranium enrichment, fuel fabrication and "advanced nuclear research."[203] Germany shut down its last three operational reactors in 2023, but the physical infrastructure for high-capacity nuclear power remains largely intact at several sites. For example, Restart Class 1 reactors like Brokdorf and Emsland have not yet undergone significant dismantling and could theoretically be returned to operational status within one to three years.[204] Restart Class 1 and 2 sites retain their grid transmission infrastructure, with estimated restart times ranging from one to eight years, which is a critical physical requirement for delivering substantial amounts of electricity. Furthermore, Germany's marginal cost of operation was historically low and experts estimate that the "German Six" (the most recently closed reactors) could be refurbished for long-term operation, reflecting the 80-year lifespans of similar reactors in the U.S.[205]

A primary physical pillar of nuclear capability is uranium enrichment: increasing the proportion of the fissile isotope uranium-235 from about 0.7% in natural uranium to the 3–5% used in reactor fuel. The same process, taken to around 90%, produces weapons-grade material. Gronau, operated by Urenco Deutschland, has a production capacity of 3,700 tonnes of separative work units (a measurement of the effort required to enrich uranium), which accounts for approximately 17.5% of European enrichment capacity. The Urenco Deutschland plant utilizes advanced nuclear technology, which was originally developed in Germany and is maintained by

[201] Basic Law (Germany), art. 26(1).
[202] KernD (Kerntechnik Deutschland e.V.), "Kerntechnische Kompetenz in Deutschland," October 29, 2024, https://kernd.de/en/nuclear-expertise-in-germany/.
[203] Radiant Energy Group, "Restarting Germany's Reactors: Feasibility and Schedule," May 20, 2025, 7, https://www.radiantenergygroup.com/reports/restarting-germanys-reactors-feasibility-and-schedule; KernD, "Kerntechnische Kompetenz in Deutschland."
[204] Radiant Energy Group, "Restarting Germany's Reactors," 9.
[205] Radiant Energy Group, "Restarting Germany's Reactors," 12–13.

Enrichment Technology Company Limited (ETC) Germany.[206] Germany's enrichment capability is essential because it provides the physical means to increase the concentration of the fissile isotope U-235, which fuels power reactors and, at far higher enrichment levels, nuclear weapons.[207] Additionally, the Advanced Nuclear Fuels plant in Lingen can process around 650 tonnes of uranium a year into fuel elements for light-water reactors, the most common reactor type, which uses ordinary water to cool the reactor and sustain the chain reaction. This represents 18.3% of European fuel fabrication capacity for such reactors.[208] The site also develops specialized products such as chromium-doped fuel pellets and maintains industrial expertise across the nuclear fuel front end, the stages that turn mined uranium into finished reactor fuel.

Germany's industrial base remains a global leader in nuclear component manufacturing and engineering, where major international firms like Framatome and Westinghouse maintain significant German sites that export technology worldwide.[209] German sites specialize in the design and installation of complex reactor control systems, such as Teleperm XS, a digital reactor protection and control system originally developed by Siemens and installed in nuclear plants around the world.[210] German sites also produce main coolant pumps, which circulate coolant through a reactor's primary circuit, and bolt-tensioning systems, both used in international projects in France and China.[211] Germany is also a central player in fusion research, supplying systems and materials for international projects.[212]

The primary physical gap in Germany's nuclear fuel cycle is the absence of an operational reprocessing plant. France is the only European Union member state that operates reprocessing plants to separate plutonium and uranium from used nuclear fuel.[213] Germany has not used this technology commercially since the closure in 1990 of the Karlsruhe pilot reprocessing plant (Wiederaufarbeitungsanlage Karlsruhe, WAK).[214] At present, any recycling of material into fuel would require using French

[206] KernD, "Kerntechnische Kompetenz in Deutschland."
[207] Eurostat, "Nuclear Energy Statistics," *Statistics Explained*, European Commission, last modified 2025, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Nuclear_energy_statistics.
[208] KernD, "Kerntechnische Kompetenz in Deutschland."
[209] KernD, "Kerntechnische Kompetenz in Deutschland."
[210] Radiant Energy Group, "Restarting Germany's Reactors," 15.
[211] KernD, "Kerntechnische Kompetenz in Deutschland."
[212] KernD, "Kerntechnische Kompetenz in Deutschland."
[213] Eurostat, "Nuclear Energy Statistics."
[214] World Nuclear Association, "Nuclear Power in Germany," 2024, https://world-nuclear.org/information-library/country-profiles/countries-g-n/germany.

reprocessing infrastructure.[215] However, German companies like Kraftanlagen Heidelberg retain "unique expertise" in technologies for high-level waste, demonstrating that the underlying technical knowledge for waste processing is still present in the German domestic economy.[216]

3.4 Financial Capabilities

Determining whether Germany has the financial capability to arm requires an examination of its current expenditures on nuclear sharing, its industrial stakes in existing nuclear programs and the projected costs of establishing an independent deterrent based on the budgets of its neighbours. To begin, Germany would not, financially, be starting from zero regarding nuclear capabilities. As it currently participates in NATO nuclear sharing, Germany hosts up to 20 U.S. B61 nuclear gravity bombs at Büchel Air Base.[217] To maintain this role, the German government is making significant capital investments. In 2022, Germany ordered 35 F-35A Lightning II stealth fighters, which are certified to carry nuclear weapons, at a cost of €10 billion. The modernization of Büchel Air Base to accommodate these new jets was initially estimated at €525 million but has expanded to an expected €1.2 billion due to cost overruns. These figures demonstrate that Germany already possesses the financial and budgetary mechanisms to support nuclear-related military infrastructure and delivery systems.[218]

Germany maintains a significant financial stake in the industrial complex that produces nuclear weapons for other nations. The German government owns 10.84% of Airbus.[219] Airbus, in turn, holds 37.5% of MBDA and 50% of ArianeGroup.[220] MBDA is the nuclear missile contractor for French air-launched nuclear weapons, while ArianeGroup is the prime contractor for the French M51 submarine-launched ballistic missiles. Additionally, France, Germany and Spain had been jointly developing the Future Combat Air System, a sixth-generation fighter jet fleet intended to be "nuclear-

[215] Radiant Energy Group, "Restarting Germany's Reactors," 16.
[216] KernD, "Kerntechnische Kompetenz in Deutschland."
[217] International Campaign to Abolish Nuclear Weapons, "Which Countries Have Nuclear Weapons?" accessed January 21, 2026, 18–19, https://www.icanw.org/nuclear_arsenals.
[218] International Campaign to Abolish Nuclear Weapons, "Which Countries Have Nuclear Weapons?" 19–21.
[219] International Campaign to Abolish Nuclear Weapons, "Surge: 2023 Global Nuclear Weapons Spending," 2024, 22, https://www.icanw.org/surge_2023_global_nuclear_weapons_spending.
[220] International Campaign to Abolish Nuclear Weapons, "Surge," 22.

capable" by the 2040s.[221] In June 2026, however, France and Germany cancelled its centrepiece, the New Generation Fighter, after Dassault and Airbus failed to agree on who would lead it.[222] These assets illustrate that financially, Germany is already a stakeholder in the development and maintenance of the French nuclear arsenal, technically providing a possible starting point for a domestic program.

To transition from a nuclear host to a sovereign nuclear power, Germany would face the immense costs seen in the French and British programs. France allocated €6.6 billion to nuclear deterrence in 2024, representing approximately 14% of its total defence budget.[223] In the United Kingdom, the wider Defence Nuclear Enterprise cost £10.9 billion in 2024/25, which equates to roughly 18% of the total UK defence budget.[224] The UK's Dreadnought-class submarine program is estimated to cost £31 billion, with an additional £10 billion contingency fund set aside.[225] These shares cannot simply be transferred to Germany's larger budget. In absolute terms, matching France's annual spending (€6.6 billion) or the UK's wider enterprise (about €12.8 billion) would take roughly 6–12% of Germany's 2026 defence budget of around €108 billion, before the start-up cost of facilities Germany does not yet have, a shift that would require significant economic and political will but is within the scale of its national economy.

Likely the most daunting financial obstacle is the establishment of the infrastructure required to manufacture plutonium pits, the fissile cores at the heart of modern nuclear weapons.[226] The U.S. nuclear program highlights the complex and possibly expensive nature of German nuclear armament. The U.S. National Nuclear Security Administration has estimated at least $18 billion to $24 billion in possible expenses just to establish an 80-pit-per-year capability.[227] Individual facility costs are equally

[221] Claire Mills, "The French Nuclear Deterrent," House of Commons Library Briefing Paper 4079, 2020, 17, https://commonslibrary.parliament.uk/research-briefings/sn04079/.
[222] dpa, "France and Germany Scrap FCAS Joint Fighter Jet Project, Say Sources," Qatar Tribune, June 9, 2026, https://www.qatar-tribune.com/article/238151/world/france-and-germany-scrap-fcas-joint-fighter-jet-project-say-sources; Stefano D'Urso, "France and Germany Set to End Future Combat Air System Program," The Aviationist, June 8, 2026, https://theaviationist.com/2026/06/08/france-germany-end-fcas/.
[223] Aleksander Olech, "France: Too Few Warheads for Effective Nuclear Deterrence?" Defence24, June 5, 2025, https://defence24.com/geopolitics/france-too-few-warheads-for-effective-nuclear-deterrence.
[224] Claire Mills and Esme Kirk-Wade, "The Cost of the UK's Strategic Nuclear Deterrent," House of Commons Library Briefing Paper 8166, 2025, 21, https://commonslibrary.parliament.uk/research-briefings/cbp-8166/.
[225] Claire Mills, "Replacing the UK's Nuclear Deterrent: Progress of the Dreadnought Class," House of Commons Library Briefing Paper 8010, 2025, 24, https://commonslibrary.parliament.uk/research-briefings/cbp-8010/.
[226] Government Accountability Office, *Nuclear Weapons: NNSA Does Not Have a Comprehensive Schedule or Cost Estimate for Pit Production Capability*, GAO-23-104661 (Washington, DC: U.S. Government Accountability Office, January 12, 2023), https://www.gao.gov/products/gao-23-104661.
[227] Government Accountability Office, *Nuclear Weapons*, 50–51.

staggering. For example, the Savannah River Plutonium Processing Facility has seen its construction budget grow from $3 billion to an estimated $11 billion.[228] However, Germany may be able to learn from the U.S. experience and produce a more efficient program.

Germany has the financial capacity to arm, as evidenced by its ability to absorb multi-billion-euro costs for F-35 procurements and base modernizations. However, the transition to a sovereign arsenal would require a massive increase in long-term defence obligations. Beyond the annual multi-billion-euro operating costs borne by France and the UK, the initial capital required to build its own nuclear warhead production infrastructure would likely demand an upfront investment exceeding €20 billion, based on current U.S. infrastructure estimates.[229] While the German economy can technically support such a burden, it would necessitate a permanent and substantial increase in the share of the national budget dedicated to defence.

3.5 Political Costs of Nuclear Armament

The question of German nuclear armament has moved from the fringes of political discourse to the centre of a "perfect storm" in Berlin.[230] In a strictly political sense, Germany previously stated that it cannot and will not pursue an independent national nuclear arsenal, a position reaffirmed by German Chancellor Friedrich Merz.[231] However, the political landscape is shifting toward a deterrent to counter growing uncertainty regarding U.S. security guarantees. Politically, a national nuclear arsenal is considered impossible due to deep legal and historical constraints. Merz has explicitly stated that Germany "has unequivocally renounced the right to possess nuclear weapons" and remains bound by at least two international treaties: the NPT and the Two-Plus-Four Treaty.[232] Despite these legal and political commitments,

[228] Brad Dress, "Plutonium Pit 'Panic' Threatens America's Nuclear Ambitions," *The Hill*, March 6, 2024, https://thehill.com/policy/defense/4510010-plutonium-pits-us-nuclear-ambitions-sentinel/.
[229] Government Accountability Office, *Nuclear Weapons.*
[230] Ulrich Kühn, "Germany Debates Nuclear Weapons, Again. But Now It's Different," *Bulletin of the Atomic Scientists*, March 15, 2024, https://thebulletin.org/2024/03/germany-debates-nuclear-weapons-again-but-now-its-different/.
[231] Ayhan Şimşek, "Germany Rules Out Own Nukes but Open to European Nuclear Deterrence," Anadolu Ajansı, January 29, 2026, https://www.aa.com.tr/en/europe/germany-rules-out-own-nukes-but-open-to-european-nuclear-deterrence/3814521.
[232] EurAsia Daily, "'The Situation Has Changed Dramatically': Friedrich Merz Started Talking about Nuclear Weapons," March 10, 2025, https://eadaily.com/en/news/2025/03/10/the-situation-has-changed-dramatically-friedrich-merz-started-talking-about-nuclear-weapons.

Trump's presidential decisions have fostered a debate about strategic self-reliance. The fear of U.S. abandonment has led to calls for a European nuclear deterrent based on French and British arsenals.[233] While Chancellor Merz advocates for these discussions, significant strategic and logistical obstacles remain. Neither France nor the UK has a doctrine currently compatible with extending its umbrella to other countries.[234]

The German political landscape reflects an abrupt shift yet remains divided by ideologies. The Christian Democratic Union (Chancellor Merz's party) and its Bavarian sister party, the Christian Social Union, are conservative and the most committed to armament. Chancellor Merz has broken traditional fiscal conventions by pushing to amend the constitutional debt brake to fund a massive €650 billion in cumulative defence spending between 2025 and 2029,[235] and has actively supported exploring nuclear sharing with France and the UK. Once rooted in pacifism, the Greens have shifted significantly, now seeing NATO as "indispensable"[236] and supporting Ukraine with "heavy weapons"[237] and "stronger deterrence."[238] The Social Democratic Party is deeply divided between "hawks and doves":[239] while significant politicians like Sigmar Gabriel have discussed nuclear alternatives,[240] voices like Ralf Stegner warn that defence increases will cut into social programs, potentially fuelling the far right.[241] At both populist ends of the spectrum, the right-wing AfD and the left-wing Die Linke generally oppose armament.[242] As noted in Section 2.4, the AfD, which has led national polls in 2026 at around 28%,[243] rejects NATO's eastward expansion, calls for lifting sanctions on Russia and halting arms deliveries to Ukraine. It backs better funding for

[233] Astrid Chevreuil and Doreen Horschig, "Can France and the United Kingdom Replace the U.S. Nuclear Umbrella?" Center for Strategic and International Studies, March 4, 2025, https://www.csis.org/analysis/can-france-and-united-kingdom-replace-us-nuclear-umbrella.
[234] Chevreuil and Horschig, "Can France and the United Kingdom."
[235] Jacoby, "Germany's Rearmament Is Stunning."
[236] Thorsten Benner, "German Greens' Reality Check: Why a Green Government Will Frustrate the Country's Allies on Security," Global Public Policy Institute (GPPi), April 23, 2021, https://gppi.net/2021/04/23/german-greens-reality-check.
[237] Philip Oltermann, "Ready to Govern? How Germany's Green Party Transformed Its Reputation," *The Guardian*, December 31, 2022, https://www.theguardian.com/world/2022/dec/31/germany-green-party-nuclear-ukraine-die-grunen.
[238] Jacoby, "Germany's Rearmament Is Stunning."
[239] Jacoby, "Germany's Rearmament Is Stunning."
[240] Kühn, "Germany Debates Nuclear Weapons."
[241] Jacoby, "Germany's Rearmament Is Stunning."
[242] Molly O'Neal, "German Leaders Miscalculated Popular Will for War Spending," Responsible Statecraft, April 3, 2025, https://responsiblestatecraft.org/germany-defense-increase/.
[243] dpa, "«Politbarometer» sieht AfD bei 28 Prozent," t-online, June 19, 2026, https://www.t-online.de/nachrichten/deutschland/id_101303822/-politbarometer-sieht-afd-bei-28-prozent.html.

the Bundeswehr but opposes financing rearmament through debt, setting it against Merz's buildup. On conscription it is divided: its program supports reinstatement, yet it opposed the 2025 military service law.[244]

The political cost of nuclear armament is multifaceted. Decades of post-war pacifism are being erased, creating a significant shift in German national identity that many citizens still struggle to grasp. Sustaining a 3.5% or 5% of GDP defence spend will, once borrowing room narrows, likely require cutting social expenditure or raising taxes, which risks alienating voters and providing political capital to the far right. Any shift in Europe's nuclear posture, such as stationing French weapons in Germany, could strain the NPT and potentially trigger regional proliferation or an arms race.

German sentiment is characterized by a "rare convergence"[245] on European solutions but continued resistance to national ones. Polling has shown that 64% of Germans support a European nuclear deterrent independent of the U.S.[246] Conversely, different polls suggest that 64% to 90% reject the idea of a national German bomb.[247] Approximately 74% of Germans are concerned about a war in Europe in the coming years[248] and about 63% believe Trump's election has created an unstable global atmosphere.[249] Nearly 75% of Germans are supportive of increased military expenditure among European Union member states.[250] However, personal willingness to serve remains low, with only 11% of adults under 50 eager to enlist in the *Bundeswehr* to defend Germany.[251] While Germany is politically divided about becoming a nuclear power on its own, it is aggressively pursuing a leading role in a unified "European defence community."[252] The political cost of the *Zeitenwende* is a

[244] Jacoby, "Germany's Rearmament Is Stunning"; O'Neal, "German Leaders Miscalculated."
[245] DEFCROS News, "Majority of Germans Support Establishing a European Nuclear Deterrent, According to Recent Poll," June 23, 2025, https://news.defcros.com/majority-of-germans-support-establishing/.
[246] Linus Höller, "Most Germans Want Europe to Have Its Own Nuclear Umbrella, Poll Finds," *Defense News*, June 23, 2025, https://www.defensenews.com/global/europe/2025/06/23/most-germans-want-europe-to-have-its-own-nuclear-umbrella-poll-finds/.
[247] DEFCROS News, "Majority of Germans Support"; Kühn, "Germany Debates Nuclear Weapons."
[248] Jacoby, "Germany's Rearmament Is Stunning."
[249] Groupe d'études géopolitiques, "In the Face of War and Trump, Taking the Measure of European Public Opinion: 10 Points on Our Exclusive Eurobazooka Survey," March 20, 2025, https://geopolitique.eu/en/2025/03/20/in-the-face-of-war-and-trump-taking-the-measure-of-european-public-opinion-10-points-on-our-exclusive-eurobazooka-survey/.
[250] DEFCROS News, "Majority of Germans Support."
[251] Jacoby, "Germany's Rearmament Is Stunning."
[252] Joseph de Weck and Shahin Vallée, "Germans Back Merz' 'Whatever It Takes' on Debt and Defense," *Internationale Politik Quarterly*, March 24, 2025, https://ip-quarterly.com/en/germans-back-merz-whatever-it-takes-debt-and-defense.

permanent shift away from Germany's post-war identity, requiring sustained public backing to overcome deep ambivalence.

3.6 Comparative Analysis of the French and British Nuclear Programs

Analyzing the two existing European nuclear models is essential to understanding a potential German program. The French and British models are fundamentally different in their levels of independence and integration. France maintains its *Force de Frappe*,[253] an independent nuclear deterrent, born from General de Gaulle's desire for "strategic autonomy."[254] The French program and its delivery systems are entirely sovereign; France spends roughly 13–14% of its defence budget,[255] over €6 billion annually, to maintain roughly 290 warheads.[256] France's model includes four *Le Triomphant*-class submarines carrying 16 M51 ballistic missiles and Rafale B fighters carrying ASMPA-R cruise missiles.[257] The British program, Trident, is operationally sovereign but technically integrated with the U.S.,[258] because the UK draws its Trident missiles from a pool shared with the U.S. and relies on its designs for its warheads.[259] Britain spends about 6% of its defence budget running the deterrent itself, and roughly 18% on its wider Defence Nuclear Enterprise, which includes warhead and submarine

[253] Clement Charpentreau, "France May Deploy Nuclear Weapons in Europe, but Only on Macron's Terms," *AeroTime*, May 14, 2025, https://www.aerotime.aero/articles/macron-french-nuclear-weapons-europe-deployment.
[254] Bruno Tertrais, *French Nuclear Deterrence Policy, Forces, and Future: A Handbook* (Paris: Fondation pour la Recherche Stratégique, 2020), 12, https://www.frstrategie.org/sites/default/files/documents/publications/recherches-et-documents/2020/202004.pdf.
[255] Charpentreau, "France May Deploy Nuclear Weapons."
[256] Hans M. Kristensen, Matt Korda, and Eliana Johns, "Nuclear Notebook: French Nuclear Weapons, 2023," *Bulletin of the Atomic Scientists*, July 17, 2023, https://thebulletin.org/premium/2023-07/nuclear-notebook-french-nuclear-weapons-2023/.
[257] Charpentreau, "France May Deploy Nuclear Weapons"; Emmanuelle Maitre, "The French Nuclear Deterrent in a Changing Strategic Environment," Note de la FRS 4/2025 (Paris: Fondation pour la Recherche Stratégique, March 11, 2025), 3, https://www.frstrategie.org/en/publications/notes/french-nuclear-deterrent-changing-strategic-environment-2025.
[258] Ian Davis, *The British Bomb and NATO: Six Decades of Contributing to NATO's Strategic Nuclear Deterrent* (Stockholm: Stockholm International Peace Research Institute, 2015), 12, https://www.sipri.org/sites/default/files/files/misc/NATO-Trident-Report-15_11.pdf.
[259] Campaign for Nuclear Disarmament, "Trident: The US Connection," accessed January 29, 2026, https://cnduk.org/resources/trident-us-connection/.

renewal (Section 3.4).[260] Its deterrent is currently sea-based, consisting of four *Vanguard*-class submarines,[261] which will be replaced by the *Dreadnought* class.[262]

Historically, neither France nor the UK built nuclear weapons to protect others; Paris and London built them for themselves.[263] De Gaulle saw them as an instrument of national self-determination, ensuring France would not be drawn into "any quarrel which would not be her own."[264] This is Schelling's extended-deterrence paradox applied to the proposed solution rather than the problem: the *Force de Frappe* rested on the premise that France would not risk itself for others, which is the opposite of extended deterrence. Britain adds a further complication, because its deterrent is technically integrated with the United States and relies on U.S.-leased missiles and warhead designs. If U.S. unreliability is the problem, how much of it simply transfers to London?

Multiple independent decision-making centres do raise Moscow's uncertainty even without full credibility, as an aggressor must calculate the possibility that one of several states will respond, which is strategically valuable. However, this benefit only materializes with real institutional follow-through: standing consultation mechanisms, publicly stated trigger thresholds and compatible command structures. Without them, multiple centres of ambiguity are as likely to produce paralysis as deterrence. While both nations now acknowledge a "European dimension" to their vital interests,[265] the final authority to launch remains strictly with their heads of state. Strategically, a German program would likely mirror the centralized command structure of its neighbours, with launch authority vested in a single head of government.

A German nuclear deterrent would not need to match the size of the U.S. or Russian arsenals to be effective. Minimum deterrence theory argues that large arsenals offer "diminishing returns,"[266] meaning that after a certain point, adding more will reap smaller benefits and cost more. Even a few survivable weapons can exert a powerful

[260] Mills, "French Nuclear Deterrent," 5; Mills and Kirk-Wade, "Cost of the UK's Strategic Nuclear Deterrent," 21.
[261] Mills, "Replacing the UK's Nuclear Deterrent," 8.
[262] Ministry of Defence, "The UK's Nuclear Deterrent: The National Endeavour Explained," GOV.UK, 2025, https://www.gov.uk/government/publications/uk-nuclear-deterrence-factsheet/the-uks-nuclear-deterrent-the-national-endeavour-explained.
[263] Tertrais, *French Nuclear Deterrence Policy*, 7–8.
[264] Charles de Gaulle, quoted in Tertrais, *French Nuclear Deterrence Policy*, 8.
[265] Emmanuel Macron, quoted in Charpentreau, "France May Deploy Nuclear Weapons."
[266] Forsyth et al., "Minimum Deterrence," 3.

deterrent effect. Forsyth et al. argue that as few as two weapons, one to be targeted and one to survive for a second strike, could theoretically function as a deterrent.[267] Consequently, a German program of 200–300 warheads, similar to those of France or the UK, could suffice to impose unacceptable retaliatory costs. Germany already possesses the dual-capable aircraft and trained pilots necessary for such a mission, though it currently lacks its own warheads and sovereign missiles.[268]

The Gray and Payne vs. Forsyth debate from Section 1.2 should be reopened rather than resolved by default in favour of minimum deterrence. Russia's "escalate to de-escalate" doctrine involves limited nuclear signalling designed to achieve political coercion short of mass destruction.[269] A force built purely for assured destruction, capable of devastating cities but not calibrated for a graduated response, may lack credibility precisely in the scenarios Russia is most likely to exploit. A more robust European deterrent posture would pair a survivable strategic force with a flexible-response component: dual-capable aircraft and shorter-range delivery systems capable of signalling proportionate resolve. Germany's existing F-35A purchase is already relevant here as a delivery capability that exists independently of who owns the warheads.[270]

In combination, France and Britain (and potentially Germany) could constitute a new, multi-centred European nuclear umbrella capable of deterring Russia. Having separate centres of decision-making complicates an adversary's calculations. An aggressor, like Russia, would have to wonder if a strike against one state might trigger a response from another.[271] The combined French and British inventory of roughly 515 warheads is already comparable to China's estimated 620 warheads (Figure 6).[272] The version of the European umbrella under discussion here is primarily the consultative and forward-deployment forms: a formal planning body and potentially French or British weapons stationed in Germany. While much smaller than Russia's 5,420 warheads, European forces would be sufficient to endure a first strike and cause catastrophic destruction. Germany does not need a huge program to be a deterrent: a

[267] Forsyth et al., "Minimum Deterrence," 6.
[268] Lawrence Freedman, "Europe's Nuclear Deterrent: The Here and Now," *Survival* 67, no. 3 (2025): 15, https://doi.org/10.1080/00396338.2025.2508078; Ministry of Defence, "UK's Nuclear Deterrent."
[269] Rosenbach et al., "Russian Threats to NATO's Eastern Flank," 19.
[270] International Campaign to Abolish Nuclear Weapons, "Which Countries Have Nuclear Weapons?" 20–21.
[271] Davis, *British Bomb and NATO*, 8.
[272] Freedman, "Europe's Nuclear Deterrent," 15; Alexander Sorg, "Force de l'Europe: How Realistic Is a French Nuclear Umbrella?" War on the Rocks, March 24, 2025, https://warontherocks.com/2025/03/force-de-leurope-how-realistic-is-a-french-nuclear-umbrella/.

single warhead of around 300 kilotons could devastate central London.[273] A full extended-deterrence guarantee, a binding pledge, would be more credible, but it is the least politically achievable of the three forms and should not be assumed as the baseline. A coordinated European force would be a deterrent that no Russian leader could overlook, even in the absence of a U.S. security guarantee.

Section 2's three questions about German conventional armament apply equally to the European umbrella. On timeline, some institutional groundwork exists. The July 2025 Northwood Declaration created a UK–France Nuclear Steering Group, which first met in December 2025,[274] and France and Germany established a high-ranking nuclear steering group in March 2026.[275] These are, however, two bilateral channels running through Paris rather than a trilateral framework, and their remit is doctrinal dialogue and strategic coordination, not shared decision-making. The elements that would give a European umbrella operational meaning (joint consultation on use, compatible command structures and agreed trigger thresholds) remain unbuilt. France's insistence that the final decision rests with its president alone also limits how far these groups can move toward them.[276] On political will, the question is whether governments will build such an arrangement, not whether they would ever use it. Macron's March 2026 offer of "forward deterrence", set out below, goes beyond talks but stops short of a commitment, and French and British domestic politics are not automatically more permissive than Germany's.

The most concrete offer so far is Macron's speech at the Île Longue submarine base on March 2, 2026, which set out a doctrine of "forward deterrence" (*dissuasion avancée*). France will increase its warhead stockpile, hold nuclear exercises with interested allies and allow "circumstantial deployments" of nuclear-capable aircraft to eight European countries, including Germany, Poland and the United Kingdom, while partners strengthen the early-warning, air-defence and deep-strike capabilities that support French forces.[277] Mapped onto the three forms set out in Section 3.1, France has now

[273] Forsyth et al., "Minimum Deterrence," 6.
[274] Cabinet Office, "New UK-France Nuclear Steering Group Meets to Advance Cooperation under Northwood Declaration," GOV.UK, December 18, 2025, https://www.gov.uk/government/news/new-uk-france-nuclear-steering-group-meets-to-advance-cooperation-under-northwood-declaration.
[275] Linus Höller, "France, Germany Create Panel to Advance Shared Nuclear Deterrence Plans," *Defense News*, March 5, 2026, https://www.defensenews.com/global/europe/2026/03/05/france-germany-create-panel-to-advance-shared-nuclear-deterrence-plans/.
[276] Charpentreau, "France May Deploy Nuclear Weapons."
[277] Al Jazeera, "France to Increase Nuclear Warheads, Lend Nuclear Aircraft to Europe Allies," March 2, 2026, https://www.aljazeera.com/news/2026/3/2/france-to-increase-nuclear-warheads-lend-nuclear-aircraft-to-europe-allies; Marianne Paire and July Decarpentrie, "Macron Adds European Flavour to French Deterrence,"

offered the first, consultation, and a partial and temporary version of the second, forward deployment, while ruling out the third: the decision to use French weapons remains the president's alone, and no guarantee is extended.[278] The speech therefore confirms rather than undercuts this paper's argument. Europe is building the weaker forms of an umbrella faster than expected, but the form that could substitute for the U.S. guarantee remains off the table.

On credibility, four often-conflated questions should be kept apart: whether European nuclear forces possess adequate destructive capability; whether they would survive an adversary's first strike; whether the governments controlling them would actually use them in another state's defence; and whether Russia would believe they would. The first two are largely material, and comparatively reassuring. France and Britain maintain continuous at-sea deterrence, so a retaliatory capability would likely survive, even if small arsenals limit options below the strategic level.[279] The last two are where Section 1's extended-deterrence paradox bites, and where the umbrella option is weakest: its deficit lies in will and perception rather than hardware. None of this justifies discarding the option, still the most coherent available, but it should not be treated as solved.

International Centre for Defence and Security, March 5, 2026, https://icds.ee/en/macron-adds-european-flavour-to-french-deterrence/.

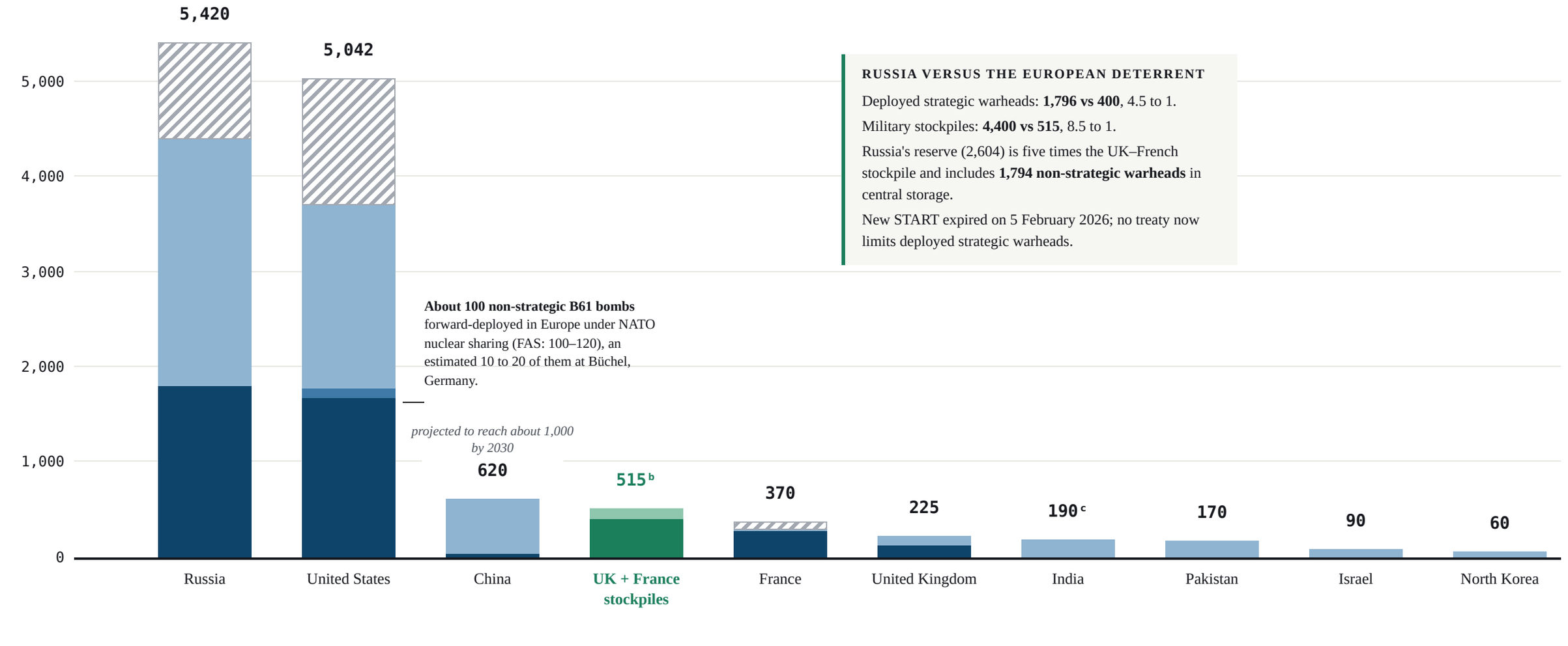
[278] Névine Schepers, "Europe's Changing Nuclear Landscape: French Forward Deterrence," Center for Security Studies, ETH Zurich, July 1, 2026, https://css.ethz.ch/en/center/CSS-news/2026/07/europes-changing-nuclear-landscape-french-forward-deterrence.html; Paire and Decarpentrie, "Macron Adds European Flavour."

[279] Ministry of Defence, "UK's Nuclear Deterrent"; Tertrais, *French Nuclear Deterrence Policy*.

Figure 6: Estimated Global Nuclear Warhead Inventories, 2026

One European Warhead for Every Eight and a Half in Russia's Usable Stockpile

Total inventories[a] by status. Solid segments are the usable military stockpile; hatched segments are retired warheads awaiting dismantlement.



Source: Hans M. Kristensen, Matt Korda, Eliana Johns and Mackenzie Knight-Boyle, *Status of World Nuclear Forces*, Federation of American Scientists, 2026 (estimates). [a] Total inventory = military stockpile plus retired warheads awaiting dismantlement (Russia 1,020; United States 1,342; France 80). [b] UK + France combined *military stockpiles* (225 + 290), excluding France's 80 retired warheads; the French column shows France's total inventory of 370. [c] India: FAS gives a stockpile of 190 with 178 listed as reserve; the balance is not broken down. FAS reports deployed non-strategic warheads for the United States only, 'some 100–120 B61 bombs … at six–seven bases in five–six countries', tabulated as 100; the Büchel estimate is 10–15 (FAS, *United States nuclear weapons, 2025*) to 10–20 (NTI, Sep 2025). New START expired on 5 Feb 2026 without extension (Arms Control Association). Russia's non-strategic warheads and the New START status are as described by FAS; China's 2030 projection is the US Department of Defense estimate cited by FAS. Ratios computed by the author. France announced an undisclosed increase to its stockpile in March 2026 and will no longer publish its numbers, so its 290 is a minimum.

Source: Created by AIIA · TITAN

3.7 Capability Without Commitment

Legally, Germany could withdraw from the NPT under Article X's "extraordinary events" clause, and the NPT's original negotiators explicitly acknowledged NATO's dissolution as grounds for reconsidering German non-nuclear status. The Two-Plus-Four Treaty is the harder obstacle: it has no withdrawal clause, and as a treaty confirming Germany's borders it is arguably beyond the reach of the *rebus sic stantibus* doctrine, leaving renegotiation with the other parties as the only clear route. Domestically, the Basic Law contains no explicit nuclear ban, but any sovereign program would face challenges under Article 26's peace mandate and risk international condemnation that could destabilize the broader non-proliferation regime.

Physically, Germany retains substantial nuclear infrastructure despite its 2023 reactor phase-out. The Urenco enrichment facility at Gronau provides 17.5% of European enrichment capacity, dormant reactors could be restarted within one to eight years and German firms maintain global leadership in centrifuge technology. The critical gaps are plutonium reprocessing, which would require French cooperation or new facilities, and pit and warhead production, whose infrastructure alone could cost more than €20 billion. Financially, Germany has already invested €10 billion in F-35 fighters and €1.2 billion in Büchel Air Base modernization for NATO nuclear sharing. Scaling to an independent program comparable to France (€6.6 billion annually for 290 warheads) or the UK (£10.9 billion a year for its wider Defence Nuclear Enterprise, including submarine construction, for 225 warheads) would require diverting roughly 6–12% of a German defence budget that reached €108 billion in 2026. Armament is economically feasible but politically contentious.

The fundamental barrier is political will. While 64% of Germans support a European nuclear umbrella, between 64% and 90% oppose an independent German bomb. The public distinguishes sharply between collective European deterrence and sovereign German capability, reflecting deep-seated post-war pacifist identity. Chancellor Merz's push for a €650 billion five-year military buildup demonstrates growing acceptance of armament, but nuclear weapons remain politically toxic. The comparative analysis of the French and British programs reveals a path forward. Minimum deterrence theory suggests 200–300 survivable warheads would suffice, and the roughly 515 French and British warheads, potentially combined with German

delivery capabilities, are comparable to China's arsenal and could deter Russia without U.S. participation, provided they are paired with flexible-response options.

Germany's capacity to arm exists in theory but faces formidable obstacles in practice. Germany possesses latent nuclear capability across four critical dimensions: a legal pathway out of the NPT (though not clearly out of Two-Plus-Four); physical infrastructure capable of supporting a weapons program; sufficient financial resources to fund development; and an emerging political discourse that has normalized nuclear discussions. Yet capability alone does not constitute strategic viability. Ultimately, Germany can arm in a post-U.S. NATO world, but the more strategically rational and politically palatable option is a European nuclear umbrella. Whether France and the United Kingdom would extend their deterrents to protect Germany remains the critical unanswered question, one that defines Europe's security future in an era of U.S. unreliability.

Section 4

Conclusion

Among Germany's Western partners, its armament is no longer controversial, because the world that made it controversial is passing. The post-war consensus that restrained German military ambition was built on a specific set of conditions: a stable U.S. security guarantee, a rules-based international order and a shared European commitment to collective defence over unilateral power; all three of those conditions are now eroding simultaneously. Russia's full-scale invasion of Ukraine in 2022, the return of transactional U.S. foreign policy under the Trump administration and the collapse of post-Cold War security assumptions have fundamentally transformed the strategic environment in which Germany operates. In this context, armament is not a revival of German militarism but a rational response to an uncertain world.

This paper asked whether Germany can rationally build sufficient capability to deter Russian aggression in a post-U.S. NATO world, and if so, through what means. The answer lies in rational deterrence theory under conditions of strategic uncertainty. When a state faces a nuclear-armed adversary that has demonstrated both the willingness and the capacity to wage aggressive war, and when its primary security guarantor becomes unreliable, self-defence is a necessity. Germany's *Zeitenwende*,[280] its turning point, represents precisely this calculation playing out in real time. Here lies an instrumental shift: Germany is arming because the alternative (strategic indifference in the face of an existential threat) is no longer a rational option.

Yet the central finding of this paper is that conventional armament, while necessary, is categorically insufficient. Germany cannot close the capability gap left by a potential U.S. withdrawal from NATO through tanks, aircraft and personnel alone. The timeline required to build a credible conventional force extends well beyond the window in which Russia is projected to deliver its peak threat. NATO's Secretary General has warned of a possible Russian attack on alliance territory within five years,[281] while Germany's foreign intelligence service (the BND) has warned that Moscow could be ready for a large-scale conventional war by 2030.[282] Against this timeline,

[280] Scholz, "'Zeitenwende.'"
[281] Ibu, "War at Europe's Doorstep."
[282] Saradzhyan, "Would Russia Attack NATO."

procurement schedules, personnel shortfalls and institutional issues make conventional deterrence alone a dangerously inadequate answer.

What this paper ultimately argues is that Germany's security future is inseparable from a broader European nuclear architecture. A coordinated deterrent combining existing French and British arsenals, potentially extended to incorporate German participation, represents the most strategically coherent path to filling the void left by U.S. abandonment – though, as Section 3 established, its viability depends on a French and British commitment that does not yet exist. Minimum deterrence theory supports the broad shape of this conclusion: a small, survivable force capable of inflicting catastrophic retaliation is sufficient to deter a rational adversary,[283] though, as Section 3 also argued, deterring Russia's graduated "escalate to de-escalate" doctrine likely requires pairing that survivable force with a flexible-response capability rather than relying on minimum deterrence alone. Europe already possesses the combined ability to achieve this threshold. Germany needs a European umbrella that is credible, coordinated and politically committed to collective defence.

The implications of this paper extend well beyond Germany. If the central argument holds, that conventional armament is insufficient and that a European nuclear umbrella represents the most strategically coherent alternative to U.S. extended deterrence, then the burden of that conclusion falls on every NATO member navigating the same crisis of U.S. (un)reliability, although that route remains contingent on French and British commitment. The paper offers recommendations at three levels: Europe, NATO as an institution and Canada.

For Europe, the most urgent recommendation is to turn the existing bilateral channels into a European nuclear planning and consultation framework. France's recent willingness to discuss the "European dimension" of its deterrent is politically significant, but strategic reassurance requires institutional architecture, not rhetorical openness.[284] The UK–France Nuclear Steering Group and the Franco-German steering group described in Section 3.6 are the starting point: Paris, London and Berlin should merge them into a standing trilateral body, modelled loosely on NATO's Nuclear Planning Group but able to operate independently of U.S. authorization, which would begin building the compatibility that currently does not exist between French, British and potentially German nuclear programs. Neither France nor the UK

[283] Forsyth et al., "Minimum Deterrence."
[284] Emmanuel Macron, quoted in Charpentreau, "France May Deploy Nuclear Weapons."

designed its arsenal to protect other states, and that gap between political rhetoric and strategy is where European deterrence remains most fragile.[285] Future research should examine precisely what institutional arrangements would be required to make extended European deterrence credible in practice.

For NATO as an institution, this paper raises a deeper structural question that the alliance has not yet seriously confronted in public. NATO was designed around the assumption of U.S. power, and almost every element of its command structure, logistics network, intelligence architecture and nuclear posture reflects that assumption. If U.S. commitment becomes genuinely conditional, the alliance faces a structural problem. Future research into this topic should examine what a reconfigured NATO looks like when European states bear the primary burden of both conventional and nuclear deterrence, and whether the alliance's existing decision-making structures, built for a U.S.-led model, can adapt quickly enough to remain relevant. The risk is that European states acting independently out of strategic necessity indirectly recreate the kind of fragmented, competitive security environment that the alliance was originally designed to prevent.

Canada occupies a particularly uncomfortable position in this emerging landscape. As a NATO member sharing the North American continent with a neighbour that is becoming increasingly unreliable and unfriendly, Canada faces a version of Germany's dilemma in a different geographic setting. The Trump administration's coercive rhetoric toward Canada, including suggestions of annexation and economic pressure,[286] signals that proximity to the U.S. is no longer a guarantee of protection. Canada has historically sheltered under U.S. strategic power while investing minimally in its own defence, a strategy that is rapidly becoming untenable. This paper recommends that Canadian defence policy research apply the framework used here to Germany and urgently examine the implications of a conditional U.S. security guarantee for Canada's own deterrence posture, its Arctic sovereignty and its obligations within security alliances. If Germany, Europe's largest economy and a country surrounded by NATO allies, cannot rely on the U.S. umbrella, Canada's assumptions deserve equal scrutiny.

The most important unanswered question that this paper surfaces is whether France and the United Kingdom will extend their deterrents to cover Germany and, by

[285] Tertrais, *French Nuclear Deterrence Policy*, 7–8.
[286] Doyle et al., "Trump's Latest Western Hemisphere Fixation."

extension, Europe. It is fundamentally a question of political will, alliance solidarity and the kind of long-term strategic commitment that democracies find genuinely difficult to make.

More broadly, this paper joins a growing body of analysis that takes seriously the possibility that the post-Cold War international order is over, as Canadian Prime Minister Mark Carney argued in his speech at the World Economic Forum in January 2026.[287] The return of great power competition, the weaponization of nuclear uncertainty and the erosion of alliance credibility are not temporary disruptions to a stable system. Aggressive, unfair and unreliable great power competition is the new system. Germany's armament debate is a case study in how middle powers adapt when the architecture of their security dissolves beneath them. The lesson this paper offers is that capability and will are not the same thing, that legal permission and strategic viability are not the same thing and that in an era of U.S. retrenchment, Europe's security future will be determined by what Europeans are prepared to build for themselves.

[287] Mark Carney, "Special Address by Mark Carney, Prime Minister of Canada" (speech, World Economic Forum Annual Meeting, Davos, January 20, 2026), World Economic Forum, https://www.weforum.org/stories/2026/01/davos-2026-special-address-by-mark-carney-prime-minister-of-canada/.

Appendix A

What Deterrence Theory Says About a European Nuclear Umbrella

When Friedrich Merz and Emmanuel Macron began discussing a "European dimension" to French nuclear deterrence in 2025, the proposal was treated as the answer to a political problem: an American guarantee that could no longer be relied upon. It is also a problem in theory, and the theory is not reassuring. The same body of work that explains why the U.S. umbrella is fraying – rational choice, deterrence theory and defensive realism – predicts that a European replacement will be harder to make credible than its advocates assume, for reasons that have nothing to do with which capital holds the weapons. This appendix sets out that body of work in more detail than the main paper allows. It is organized around three questions the theory answers: what counts as a rational response to Germany's situation, what makes a nuclear threat credible, and whether multilateral nuclear cooperation is a form of self-help or a departure from it.

Rational Choice Theory as a Theoretical Approach

This paper uses a rational choice approach as its analytical foundation, though it is not a purely theoretical study. The analysis is question-driven rather than theory-driven, drawing on rational choice principles to evaluate Germany's armament options under conditions of strategic uncertainty. The theoretical framework integrates three complementary traditions: rational choice theory as the core analytical lens, deterrence theory as the substantive test and defensive realism as a way to understand multilateral cooperation as a rational strategic choice.

Rational choice theory (RCT) provides a foundational framework for understanding collective behaviour by combining individual values into social choices. Kenneth Arrow[288] established that rational actors are goal-oriented, choosing strategies to maximize preferred outcomes under specific constraints. Elster emphasizes what

[288] Kenneth J. Arrow, *Social Choice and Individual Values* (New Haven: Yale University Press, 1951).

actors "ought to do" rather than what they ought to be when pursuing specific goals or means to an end.[289] This "instrumental rationality," as defined by Luce and Raiffa,[290] assumes that an actor, when faced with options, selects the one leading to the most favoured outcome. An action-based approach distinguishes rational choice from normative theories of ideal state behaviour or constructivist approaches centred on identity. Scholars working in the RCT tradition have identified common assumptions that characterize rational choice as an analytical framework. In security studies, Achen and Snidal treat states as unitary rational actors,[291] focusing on how a state optimizes preferences in light of an opponent's options. States, as actors in the international system, possess external inclinations and strategic options, which they pursue while accounting for the inclinations and likely responses of other actors.[292] In this context, Achen and Snidal describe the state as a "unitary rational actor":[293] an assumption that focuses analysis on the state as one entity rather than on internal issues or individual decision-makers.

However, the application of rationality to security studies requires some qualification because rationality is often subjective and context-dependent. Actors make choices based on probabilistic knowledge and their own unique evaluations rather than perfect information. Achen observes that under these conditions, rationality is best understood as the subjective and deliberate pursuit of state security, often excluding other objectives like economic growth or ideological expansion.[294] This security-centric definition reflects the existential stakes of military threats in an anarchic international order. As Zagare and Kilgour[295] emphasize, the theory analyzes the concrete choice between options. RCT is about predicting behaviour as if actors performed mathematical calculations rather than the internal process of choice itself. The RCT approach emphasizes the connection between goals and "actual choice"[296] rather than focusing on deliberative processes or the psychology of decision-making.[297]

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[289] Jon Elster, quoted in Elinor Ostrom, "Rational Choice Theory and Institutional Analysis: Toward Complementarity," *American Political Science Review* 85, no. 1 (1991): 238.
[290] R. Duncan Luce and Howard Raiffa, quoted in Zagare and Kilgour, *Perfect Deterrence*, 39.
[291] Achen and Snidal, "Rational Deterrence Theory."
[292] Achen and Snidal, "Rational Deterrence Theory," 150.
[293] Achen and Snidal, "Rational Deterrence Theory," 150.
[294] Christopher H. Achen, "Realism and Rationality," *Critical Review* 36, no. 4 (2024): 543, https://doi.org/10.1080/08913811.2024.2440198.
[295] Zagare and Kilgour, *Perfect Deterrence.*
[296] Zagare and Kilgour, *Perfect Deterrence*, 39–40.
[297] Achen, "Realism and Rationality," 546.

Some critiques of RCT highlight its limitations. The assumption of clear preference is often challenged when domestic governments are divided. Graham Allison notes that bureaucratic politics and organizational issues frequently undermine the unitary actor model.[298] Alexander Wendt provides a constructivist critique,[299] asserting that RCT ignores how identities and interests are socially constructed through culture and interaction rather than being externally given. Germany's post-war pacifist identity, for example, reflects deep cultural trauma and normative commitments. While these limitations are acknowledged, rational choice provides the most efficient framework for analyzing Germany's armament: given threat (Russia), given constraint (possible U.S. withdrawal), what ought Germany rationally to do?

The implication for Berlin is methodological but consequential. The question is not whether a European umbrella is desirable, but whether, given the threat and the constraint, it is the option that best secures Germany – and the answer has to survive the fact that Germany's own coalition politics will not deliberate as a single rational mind.

Deterrence Theory

The rational choice framework has proven particularly influential in the development of deterrence theory. As Quackenbush highlights, rational choice is central to what some scholars now call "rational deterrence theory,"[300] which has dominated strategic studies since the start of the nuclear age. Deterrence as an idea predates the nuclear age; an early expression appears in the work of Thucydides, who articulated the power dynamics of the 5th century BCE. Thucydides' *History of the Peloponnesian War* established the realist logic that the "strong do what they can and the weak suffer what they must."[301] The History of the Peloponnesian War laid the foundation for the balance of power diplomacy that dominated European statecraft in the 18th and 19th centuries. The nuclear age brought a fundamental shift in military purpose. Bernard Brodie argued in 1946 that while military establishments once focused on winning

[298] Allison, *Essence of Decision*.
[299] Alexander Wendt, "Four Sociologies of International Politics," in *Social Theory of International Politics* (Cambridge: Cambridge University Press, 1999), 1–44.
[300] Quackenbush, "Deterrence Theory," 742.
[301] Thucydides, *The History of the Peloponnesian War*, trans. Richard Crawley (Project Gutenberg, 2003), 5.89, https://www.gutenberg.org/files/7142/7142-h/7142-h.htm.

wars, their primary purpose was now to avert them.[302] Thomas Schelling expanded Brodie's argument by understanding deterrence as a "threat that leaves something to chance,"[303] emphasizing that credibility is built through commitment mechanisms that restrict a leader's future options. Herman Kahn explored escalation ladders and the possibility of limited nuclear war,[304] arguing that deterrence required a plausible capability to fight at various levels of intensity.

The deterrence literature defines the concept as the use of threats (explicit or implicit) to persuade a potential adversary that the costs of aggression will far outweigh any possible gains.[305] The literature distinguishes two primary mechanisms: deterrence by denial, which convinces an adversary that they cannot physically achieve their military objectives, and deterrence by punishment, which threatens retaliation so severe that the costs become unbearable regardless of military success. As a defensive state, Germany leans toward the former. Lieberman's work further refines deterrence theory by explaining the concept of "successful denial," which compels an attacker to conclude that the costs of aggression outweigh any potential benefits.[306] In Lieberman's account, demonstrating that the offensive state will lose or fail to achieve its objectives makes the attack irrational from the start. For deterrence to succeed, a state must demonstrate capability and credibility and ensure that the threat is clearly communicated to the challenger. The defender must possess both the ability to impose serious consequences on an attacker and the political will to carry out threatened retaliation.[307]

A central debate concerns the necessary size of a nuclear arsenal to maintain credible deterrence. Gray and Payne argue that states must possess enough warheads to survive an initial strike and still destroy an adversary's military assets, necessitating large arsenals for "damage limitation" and warfighting capability.[308] In contrast, the minimum deterrence perspective, illustrated by Forsyth et al.,[309] suggests that a small, survivable force capable of inflicting "unacceptable damage" on a few key targets is

[302] Bernard Brodie, ed., *The Absolute Weapon: Atomic Power and World Order* (New York: Harcourt, Brace, 1946), 76.
[303] Thomas C. Schelling, *The Strategy of Conflict* (Cambridge, MA: Harvard University Press, 1960), 217.
[304] Herman Kahn, *On Escalation: Metaphors and Scenarios* (New York: Praeger, 1965).
[305] Patrick M. Morgan, "General Deterrence," in *Deterrence Now* (Cambridge: Cambridge University Press, 2003), 44; Elli Lieberman, "The Rational Deterrence Theory Debate: Is the Dependent Variable Elusive?" *Security Studies* 3, no. 3 (1994): 384–427, https://doi.org/10.1080/09636419409347556.
[306] Lieberman, "Rational Deterrence Theory Debate," 385.
[307] Danilovic, "Sources of Threat Credibility," 343–44; Quackenbush, "Deterrence Theory," 742–43.
[308] Gray and Payne, "Victory Is Possible," 25.
[309] Forsyth et al., "Minimum Deterrence."

sufficient to deter rational adversaries. This debate hinges on competing assumptions about adversary rationality and whether deterrence requires the capacity to fight and win a nuclear war or merely the credible threat of unacceptable retaliation.

Another debate focuses on the rationality assumption underlying deterrence theory. Optimists like Schelling[310] and Powell[311] argue that deterrence works because states are inherently rational actors who calculate costs and benefits when contemplating aggression. Pessimists, such as Jervis[312] and Lebow and Stein,[313] claim that states frequently misperceive threats, overestimate their own abilities or fall victim to "motivated distortion" that skews threat assessment. Van Evera points to the "1914 problem,"[314] where rigid alliance commitments intended to deter caused war through entrapment and spiralling defence activities. The extended-deterrence paradox remains the most significant challenge for Germany's security planning and represents the core puzzle that this paper addresses. While a state is likely to fight for its own survival (homeland deterrence is inherently credible), it is inherently harder to persuade an adversary that a state will risk its own destruction (sacrificing London or Paris) to save an ally like Warsaw or Berlin. Schelling identified this dilemma as the fundamental problem of extended deterrence:[315] how to make incredible threats credible. However, credibility is fragile and can erode quickly. Rhetoric such as "America First" or Trump's explicit questioning of NATO's Article 5 undermines decades of commitment built through costly investments and crisis behaviour. As Fearon notes,[316] credibility requires costly signals: actions that a state would not take if it were bluffing.

For a European umbrella the implication is uncomfortable. Every element that makes Washington's guarantee hard to believe – the asymmetry between defending one's own cities and risking them for someone else's, the fragility of credibility, the need for costly signals – applies with equal force to Paris and London. Changing the guarantor does not change the paradox; it only changes who must solve it.

[310] Schelling, *Arms and Influence*.
[311] Robert Powell, *Nuclear Deterrence Theory: The Search for Credibility* (Cambridge: Cambridge University Press, 1990).
[312] Jervis, review of *Deterrence in American Foreign Policy*.
[313] Lebow and Stein, "Rational Deterrence Theory," 216.
[314] Stephen Van Evera, "The Cult of the Offensive and the Origins of the First World War," *International Security* 9, no. 1 (1984): 58–107, https://doi.org/10.2307/2538636.
[315] Schelling, *Arms and Influence.*
[316] Fearon, "Signaling Foreign Policy Interests," 69.

Defensive Realism

Rational deterrence theory aligns closely with defensive realism, a structural theory operating within the broader rationalist school. Taliaferro argues that defensive realism rests on the premise that states seek to expand relative security rather than relative power.[317] The defensive realist argument stands in sharp contrast to offensive realism, which argues that states pursue power maximization relative to other states, often leading them to threaten or attack.[318] Both variants of realism share the core assumption that states operate under conditions of international anarchy, where survival depends on self-help rather than reliable external guarantees. This anarchic structure produces a security dilemma: one state's defensive measures can appear threatening to others, causing other states to fixate on relative power positions and potentially triggering arms races even among security-seeking actors.[319]

Yet defensive realism offers a more nuanced view of cooperation possibilities under anarchy. While accepting the reality of international anarchy as a structural constraint, defensive realism views certain forms of state cooperation as compatible with self-help rather than contradicting it.[320] This theoretical insight proves particularly relevant for analyzing Germany's strategic options, as a European nuclear umbrella might represent cooperative self-help rather than naive multilateralism. Glaser's research demonstrates that deterrence stability tends to be higher when states credibly signal that they seek security rather than power maximization and that they aim to avoid spiralling conflicts through clear communication of defence.[321] For Germany, defensive realism suggests that pursuing armament through multilateral European cooperation rather than independent national programs might prove both more credible and less destabilizing to regional security.

The theoretical framework, combining rational choice with deterrence theory's focus on credible capability and defensive realism's insights on security-seeking cooperation, provides the foundation for examining Germany's armament options. The question is not whether Germany should arm in some abstract normative sense,

[317] Taliaferro, "Security Seeking under Anarchy," 159.
[318] Taliaferro, "Security Seeking under Anarchy," 128.
[319] Taliaferro, "Security Seeking under Anarchy," 129.
[320] Taliaferro, "Security Seeking under Anarchy," 130.
[321] Glaser, *Rational Theory of International Politics*, 53.

but whether it can rationally build sufficient capability to deter Russian aggression in a post-U.S. NATO world, and if so, through what means.

Defensive realism therefore supplies the case for the umbrella that deterrence theory withholds. A coordinated European deterrent can be read as security-seeking cooperation rather than power-seeking, and is more stabilizing than a sovereign German bomb would be. But it supplies that case on a condition – that the cooperation is institutionalized deeply enough to be credible – and that condition is exactly what deterrence theory says is hard. Read together, the theory does not reject the European umbrella. It says the umbrella will be worth only as much as the commitment Paris and London put into it, and that commitment is the one thing the current discussions have not yet produced.

Abbreviations, Acronyms and Initialisms

AfD	Alternative für Deutschland (Alternative for Germany)
AIIA	Atlas Institute for International Affairs
ASMPA-R	Air-Sol Moyenne Portée Amélioré – Rénové (Improved Medium-Range Air-to-Surface Missile, Renovated)
B61	B61 Thermonuclear Gravity Bomb (United States)
BAe	British Aerospace
BITS	Berlin Information-center for Transatlantic Security
BND	Bundesnachrichtendienst (Federal Intelligence Service)
BtH	Beyond the Horizon International Strategic Studies Group
Bundestag	Federal Parliament of Germany
Bundeswehr	German Armed Forces
CDU	Christlich Demokratische Union Deutschlands (Christian Democratic Union)
CEPA	Center for European Policy Analysis
CIR	Cyber- und Informationsraum (Cyber and Information Domain Service)
CRS	Congressional Research Service
CSU	Christlich-Soziale Union in Bayern (Christian Social Union in Bavaria)
Die Linke	The Left (German political party)
dpa	Deutsche Presse-Agentur (German Press Agency)
DoD	Department of Defense (United States)

ERR	Eesti Rahvusringhääling (Estonian Public Broadcasting)
ETC	Enrichment Technology Company
EU	European Union
EUCOM	United States European Command (also USEUCOM)
EUISS	European Union Institute for Security Studies
FDP	Freie Demokratische Partei (Free Democratic Party)
Force de Frappe	French Nuclear Deterrent Force (lit. “Strike Force”)
FRS	Fondation pour la Recherche Stratégique (Foundation for Strategic Research)
GAO	Government Accountability Office (United States)
GDP	Gross Domestic Product
GPPi	Global Public Policy Institute
Grundgesetz	Basic Law (Constitution of the Federal Republic of Germany)
Heer	German Army
ICBM	Intercontinental Ballistic Missile
IISS	International Institute for Strategic Studies
INF	Intermediate-Range Nuclear Forces (Treaty)
JCURA	Jamie Cassels Undergraduate Research Award
kriegstauglich	Fit for War
Kriegstüchtigkeit	War-readiness; Warfighting Capability
LRMC	Landstuhl Regional Medical Center
Luftwaffe	German Air Force

M51	M51 Submarine-launched Ballistic Missile (France)
MARFOREUR/AF	United States Marine Corps Forces Europe and Africa
Marine	German Navy
MBDA	MBDA (missile manufacturer; originally Matra BAe Dynamics Alenia)
NAOC	NATO Association of Canada
NATO	North Atlantic Treaty Organization
NC3	Nuclear Command, Control and Communications
NNSA	National Nuclear Security Administration (United States)
NNWS	Non-nuclear-Weapon State
NPT	Treaty on the Non-Proliferation of Nuclear Weapons
NWS	Nuclear-weapon State
OSW	Ośrodek Studiów Wschodnich (Centre for Eastern Studies)
Parlamentsarmee	Parliamentary Army
Pub. L.	Public Law (United States)
Quid Pro Quo	Something given in exchange for something else
RCT	Rational Choice Theory
Rebus Sic Stantibus	“Things standing thus”: the doctrine that a fundamental change of circumstances may end treaty obligations
SIPRI	Stockholm International Peace Research Institute
SOCEUR	Special Operations Command Europe
Sondervermögen	Special (off-budget) Fund
SPD	Sozialdemokratische Partei Deutschlands (Social Democratic Party of Germany)

SS-29	NATO designation for the Russian RS-28 Sarmat intercontinental ballistic missile
Stat.	United States Statutes at Large
Teleperm XS	Digital Reactor Instrumentation and Control System (Siemens / Framatome)
UK	United Kingdom
UN	United Nations
U.N.T.S.	United Nations Treaty Series
U.S.	United States
USAF	United States Air Force
USAFE-AFAFRICA	United States Air Forces in Europe – Air Forces Africa
USAG	United States Army Garrison
USEUCOM	United States European Command (also EUCOM)
WAK	Wiederaufarbeitungsanlage Karlsruhe (Karlsruhe Reprocessing Plant)
WHO	World Health Organization
Zeitenwende	“Turning point”: Chancellor Olaf Scholz’s February 2022 shift in German security policy

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