Prof. Mearsheimer - Europe is Coming Apart

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John Mearsheimer: It was good that the Europeans did not spend too much money on defense and depended heavily on us for their defense because that gave us coercive leverage over them.

Hi, this is John Mearsheimer. For today's episode, what I'd like to deal with is a subject that I've touched on in some of the other episodes that I'd done, and that is the question of the ongoing fragmentation inside of Europe. I'm very interested, as I'm sure most viewers are, on the whole question of what is the future of Europe? The subject that I want to look at today is the increasing fragmentation, not only inside of Europe, but also in terms of the transatlantic relationship. In other words, the fragmentation that's taking place between the United States on one side and Europe on the other side. And I'd like to start with a story. It involves an article that I published in 1990. The article was published in the Atlantic monthly, and it was also published in International Security in a more scholarly form. The title of the article in The Atlantic was *Why We Will Soon Miss the Cold War*. And the article version in International Security was entitled *Back to the Future*. And as I said, the article was published in the summer of 1990 in both places. And it caused a huge furor for reasons that will become clear when I describe it in a minute. Basically, what I argued in the piece was that if the Soviet Union pulled out of Eastern Europe, in other words, put an end to the Warsaw Pact, and if the United States pulled out Western Europe as the Cold War was ending, which it was in late 1989, that Europe would return to great power politics, that you would have security competition and the ever present danger of war in Europe. And of course, this was a message that people just did not want to hear. Just think about it. The Cold War had ended in the fall of 1989, and here's this guy coming along and saying in the summer of 1990, less than a year before the Cold War had ended, that you're going to have security competition and big trouble in Europe moving forward. That was not a message that people wanted to hear. And of course, since then, you have not had, leaving aside the Ukraine War, serious security competition of any sort among the major powers in Europe. And therefore many people have said that I was wrong and that that prediction was a foolish mistake on my part. But that's not

true. It's very important to understand that my argument was that if the Soviets pulled out of Eastern Europe and put an end to the Warsaw Pact and the United States pulled out of Western Europe and in effect put an end to NATO that you would then go "back to the future". But the United States did not pull out of Western Europe. Indeed, NATO remained intact. And as we all know, NATO expanded eastward. So we never got to test my argument. In other words, to see whether I was right or wrong, not only did the Soviets have to pull out of Eastern Europe, but we had to pull out of Europe too, we, meaning the United States here. And that didn't happen. So there was no way we could tell whether I was right or wrong. The argument, again, was never tested. That's my first point.

The second point is, the reason that we did not pull out Europe, and that NATO remained intact, and in fact NATO remains intact to this day, is because almost everyone in the policymaking community, both in the United States and Europe, understood that I was correct. They understood that if you took the United States away from Europe, you would be removing the American pacifier, and this would not be a good thing. As I've said on a number of occasions in the past, this is why the Soviet Union was in favor of allowing NATO to remain intact and allowing the United States to remain in Europe, because the Soviets understood that we acted as a pacifier. And from the Soviet point of view, this was especially important regarding Germany, because at the end of the Cold War, it was quite clear that Germany would be reunited. And a reunited Germany not only made the Soviets nervous, it made all sorts of other European countries nervous. So keeping the American pacifier in place was seen as a good thing by lots and lots of people. And therefore the United States stayed. Where I was wrong, just to be clear here, is that I predicted the United States would leave Europe. I figured that with no Soviet threat, because the Soviets had pulled out of Eastern Europe and Germany reunified, there would be no need for the United States to remain in Europe for purposes of containing the Soviet Union. That mission had gone away. And I didn't think that the pacifier logic alone would be enough to keep us there. And of course, I was wrong. But the point that I'm making to you that's most important for what we're going to talk about today is that my basic logic, which is that if you took away the American pacifier, you'd go back to security competition and the potential for real war I think was correct, and I think that was a point or an argument that was fully appreciated by lots of people in Europe, in the Soviet Union, and in the United States.

Now, let me switch gears and talk a little bit about pacifier logic. What exactly is going on there? The key point is that the United States is so powerful relative to its European allies. That it makes it impossible for those allies to fight with each other. It even removes the incentive for those allies to engage in security competition with each other. And the best example of this during the Cold War, and even in the post-Cold War period, is relations between Germany on one hand and France on the other hand. Of course, they had fought a war in 1870, the famous Franco-Prussian War. And then in World War I, the Germans and the French fought each other again. And then, in World War II, the Germans and the French fought each other, again. But during the Cold War and during the unipolar moment, this is the period after the Cold War ends, the French and the Germans simply did not engage in security competition with each other much less fight a war with each. So you see, the United States,

because it was so powerful, relative to all its allies, was in a position to keep the peace, to serve in effect as a night watchman. Another point you want to keep in mind about pacifier logic, which dovetails with the point that I just made to you, is that the United States has a vested interest in having weak allies. Pacifier logic only works if the other members of the alliance are weak and the United States is in a position to coerce them, to push them around. One interesting issue that you want to keep in mind is that for many years people have complained that the Europeans don't spend enough money on defense and that they depend too heavily on the United States. I actually believe that we subtly understood that it was good that the Europeans did not spend too much money on defense and depended heavily on us for their defense, because that gave us coercive leverage over them. To take this a step further, a lot of people say that the United States made a huge mistake when the Cold War ended in not inviting Russia to join NATO, to not become part of the Alliance. My view on that is that there's no way the United States would ever tolerate Russia becoming a member of the Alliance because Russia is a very powerful state. And the United States does not want powerful states inside of NATO because it can't dictate to those powerful states the way it dictates to weaker states. So there was no way that the United States was ever going to accept a Russian membership in NATO. The United States wanted to run an alliance that it dominated. And to dominate, you have to be far stronger than all the other members. And of course, that was the case. And again, going back to my first point, that is what allowed the United States to keep the peace.

Another point, which I'm sure many of you have heard me make before, but is worth iterating here. Is that the European Union was a very successful institution, in large part because it was allowed to flourish in a secure security environment. In other words, NATO, and here we're talking about the American pacifier in effect, the American pacifier provided security in Europe, it provided a security umbrella under which the EU could flourish. And of course the EU did flourish in all those years. And again, my argument is that that is in large part, not completely, but in large part because of NATO's success, because of the success of the American pacifier. Another point you want to keep in mind, and I'll talk more about this later, is that in an alliance like NATO, what the United States is able to do is solve collective action problems among the members. There's no question that the European states, if you look at them one by one, they have some common interests for sure, but they also have some significant differences. And the question is, how do you get a bunch of states, a group of states that have some important differences on a particular issue to come together, to cooperate, to coordinate, and come up with a meaningful solution for dealing with the issue at hand? This is the collective action problem. And the fact is that one of the best ways to solve collective action problems is to have one especially powerful state in the collectivity that can coerce the other states to reach a meaningful agreement that, in a sense, satisfies all the members. It's not the ideal solution for each of the members, but it's a good enough solution for each of the members. All this is to say that the United States, because it was so powerful, not only protected these European states, it not only allowed them to flourish economically through the EU, but it solved all sorts of collective action problems. And that was a net benefit that the European states really appreciated. And of course, the Americans appreciated it as well.

So what does this all add up to? What it all adds up to is a situation where you can almost talk about Europe as if it were a unified political entity. The Europeans actually worked together quite closely, and again, a lot of this has to do with the fact that the pacifier is sitting on top of them. But it's possible in those circumstances to talk about Europe as if it were a single political entity. And furthermore, and this is of enormous importance as well, you had this transatlantic relationship that was very close, it was not perfect by any means, but you had a very close relationship between Europe and the United States, where the two of them acted as a tag team. They were almost always in sync. Not always, but almost always in sync, and there were no sort of profound differences on the two sides of the Atlantic that threatened to tear the alliance apart. So you have this situation, as long as the pacifier is in place, where it is possible to think of Europe as a single entity and where it's possible to think of the United States and the Europeans as being tied together at the hip.

But things have changed in recent years. And much of the change has to do with the fact that the pacifier is moving away from Europe. You're seeing all sorts of burden shifting taking place here. Basically, we're now in a situation where the United States wants the Europeans to provide for their own security in very important ways and the United States wants to reduce its commitment to Europe and the amount of heavy lifting that it does in Europe. It seems quite clear that the Trump administration at least is not enamored with pacifier logic and is interested in moving away from it. Just unpack this a bit more. Probably the best example of this phenomenon is what's happening with regard to Ukraine. If you think about how the United States and the Europeans have approached the issue of Ukraine since 2014, when the crisis first broke out, and even in the first few years after the war broke out in February of 2022, you see that the Europeans and the Americans were on the same page with regard to how to deal with Ukraine. And both the Europeans and the Americans were providing huge amounts of financial assistance to Ukraine and they were shipping weapons to Ukraine and there simply was not much daylight between the two sides in terms of their assistance to Ukraine, that has all changed, especially with the coming of the Trump administration. And in fact, the United States is unwilling to pay any more money to Ukraine and it insists that the Europeans bear the burden of supporting Ukraine financially moving forward. The United States is still willing to provide weaponry to Ukraine, but it insists that the Europeans pay for that. It's quite clear that the United States wants the Europeans to deal with Ukraine and really would like to wash its hands of the Ukraine war as much as possible.

Another example of the American pacifier moving away from Europe has to do with NATO summits. For many years now, there's been an annual NATO summit, sometimes in the United States, sometimes in a European state. I believe that this year, 2026, it was held in Turkey. And next year, it was supposed to be held in Albania. But much to my surprise, the Trump administration has forced NATO to cancel next year's NATO summit. And it's not clear that there will be another NATO summit, and this is all indicative of the weakening that is taking place in NATO these days. And when you talk about the weakening of NATO, you're really talking about the weakening of the American pacifier. To take this all a step further it's important to understand that the United States has reduced the number of troops that it has in Europe over the past two years from about 90,000 down to 78,000. And the

United States is thinking now about even more significant reductions moving forward. So it's not clear what the American military footprint in Europe will look like over time. And of course, these reduction in US troop levels in Europe makes sense if you're interested in shifting the burden of providing security in Europe for the European states onto the shoulders of the Europeans themselves and getting the Americans out of the business of providing the security for the Europeans. And of course this is the direction that the United States has been moving in since President Trump moved back into the White House on January 20th, 2025. And there's no evidence, by the way, that this process is going to slow down anytime soon.

So the question is, why is this happening? Why is there a weakening of the role of the American pacifier in Europe? Why does it look like NATO is beginning to come apart at the seams? And I don't want to overstate the case here. I'm not arguing that NATO has been ruined and is in tatters. That's not the case at all. But there's no question that NATO is in deep trouble, and much damage has been done to it. And the future does not look bright. Now, I think there are three reasons for this. The first is structural. As all of you know with the coming of multipolarity in roughly 2017, the United States was confronted with a situation where China is now the main country on the planet that the United State worries about from a security perspective. The United States is deeply committed to containing China. And to do that, we have pivoted to Asia. And it was Hillary Clinton who first said in 2011 when she was Secretary of State that we were going to pivot to Asia. We didn't do that really until Trump's first term in 2017 when he got serious about pivoting to Asia and the United States has been pivoting to Asia in large part since 2017. And in large part because China is the principal threat to the United States. That's certainly the way the Pentagon looks at the threat environment that the United States faces. And of course, if you pivot to Asia, you have to pivot away from another area and that area that we're pivoting away from is Europe. And this structural change that is taking place accounts in good part for the weakening of the American pacifier in Europe.

Another factor that matters is the Ukraine war. The fact is that the United States and its European allies got into a war with Russia that they're not going to win. The Russians are going to this war. As I've argued many times, it'll be an ugly victory, but nevertheless, it will be a devastating blow to NATO. And just by saying that it'll be a devastating blow to NATO to lose this war, you can see some evidence that this is going to weaken the alliance. But furthermore, there are now significant differences between the United States and the Europeans over how to deal with the Ukraine war. This has been a front page story for, I was going to say many months now, but actually for a few years now. The fact is that the Europeans and the Americans have very different views about what to do vis-à-vis the Ukraine war. And this is helping to weaken the fabric of NATO. This is pushing the American pacifier to move away from Europe. So I think you can't underestimate the damage that's being done by the great work. And I might even add, and I don't want to get into this in any detail, that the Iran war hasn't helped here either. Because as I'm sure most viewers remember, President Trump wanted the Europeans to help the United States to fight the war against Iran and the Europeans wisely refused to do that. This of course enraged Trump and didn't do anything to help relations between the United States and Europe. So my first point

has to do with the structural change that's taking place in the international system involving the rise of China. My second point has to do with the damage being done by the Ukraine War and to a lesser extent the Iran war.

And then my final point is Trump himself. There's no question about it that Trump is, first of all, a unilateralist par excellence. He does not like institutions. Because institutions by definition are multilateral and a unilateralist like him is not going to like a multilateral institution like NATO or like the EU for that matter. So he has little use for NATO. And furthermore, it's quite clear that President Trump, for whatever reason, has lots of contempt for the Europeans themselves. So I think if he had his druthers, he would have no problem doing away with NATO and almost completely reducing the American commitment to Europe. Of course, he's not in a position to do that, but he can do significant damage to the alliance. And I believe he has already done significant damage and he's likely to do more damage moving forward. I might add that if President Trump does not finish out his term in office, let's say he has significant health problems and has to step down, his replacement would be JD Vance. And as we know from JD Vance's, a famous or infamous, depending on your viewpoint, talk at the Munich security conference in February of 2025, he might even be more contemptuous of the Europeans than President Trump. So as far as the Republican leadership goes these days, it's hard to paint a rosy picture moving forward. May I add just one final point here, President Trump has over two years left in the White House, and he can do a lot of damage in those remaining two years.

This brings us to what is in many ways the big question, because I think everybody understands that the United States' role in Europe is going to be significantly reduced, how much is hard to say, but it's going to be significantly reduced. And then the question is: Will the Europeans step up to the plate and come together and act in good part as a unified whole moving forward, or absent the pacifier, will you get fragmentation? Will the European states act pretty much on their own? I mean, there'll obviously be some coordination and there'll be some alliances, but nothing like NATO. And which one of those futures are we likely to get? My view, again, many of you know, is that you're going to get fragmentation, that the Europeans are not going to come together and form a NATO equivalent type of alliance that's going to be as effective as NATO was during the Cold War. There's been some talk that maybe the EU can become a powerful security institution as well as a powerful economic institution and the EU can work to bring all these European states together and get them to act in ways that NATO acted from roughly 1949 when it was created until recently. But my argument is that that's not going to happen. You're going to get fragmentation. And what does this mean?

Fragmentation means that the European states are going to have to provide for their own security. They're going to have the arm individually. And this gets back to the story that I told in *Back to the Future* or *Why We Will Soon Miss the Cold War*, the article that I was telling you about at the start of this episode. My argument then was that if the United States pulled out of Western Europe and the Soviet Union pulled out of Eastern Europe, countries like Germany would be on their own. They'd have to provide for their own security. It's just very

important to understand that since the Cold War, since the early days of the Cold War, the United States has provided security for Germany. And very importantly, the US nuclear umbrella has been over Germany's head. So Germany has had no incentive to acquire nuclear weapons of its own. When I wrote *Back to the Future* or *Why We Will Soon Miss the Cold War,* I talked about the fact that Germany would need nuclear weapons absent the American pacifier. And this was an argument that enraged people. In fact, one could say that that argument is what made my two articles so controversial more than anything else; the idea that I was proposing that Germany would need to acquire nuclear weapons. But it just makes common sense. If Germany has to provide for its own security. And by the way, when I wrote those two articles, the Soviet Union still existed. The Cold War had just ended less than a year before those articles appeared. So in that situation where Germany is confronting the Soviet Union, even if it is a weakened Soviet Union in 1990, the fact is the Germans are going to think long and hard about getting nuclear weapons. And the same thing is true moving forward from today. The Germans will think about having a nuclear deterrent. France has a nuclear deterrent, Britain has a nuclear deterrent, Russia has a nuclear deterrent, the United States has a nuclear deterrent. All these countries have nuclear deterrence for good reasons. It's not because they're evil states. And with regard to Germany, why wouldn't Germany, which is not that far away from Russia, not that far away from Ukraine, believes there's a Russian threat, rightly or wrongly, not want to acquire nuclear weapons? And in fact, it will think long and hard about acquiring nuclear weapons for good strategic reasons. So what I'm saying here is to take away the American pacifier, Germany will provide for its own security, as will other countries as well. And you can rest assured that if Germany begins to rearm in a serious way, countries like Poland, countries like France, and all sorts of smaller countries in Europe will begin to worry in very serious ways. Because again, the American pacifier will not be there. This is all a way of saying that the various states in Europe will worry about each other in ways they have not in the presence of an American pacifier.

Third point you want to keep in mind here is that given the fallout from the Ukraine war, relations between Russia on one side and the European states on the other side are going to be poisonous for as far as the eye can see. And in this poisonous security environment in Europe, involving the Russians and the European states, the incentives for the European states to arm in a serious way and worry about how to deal with Russia is going to be very great. And that's going to make Europe look very different than it has since 1949 when NATO was created. Another point you want to keep in mind here is the collective action problem. Again, these European states have interests of their own, and sometimes those interests clash. And what the American pacifier did, not in every case, but in most cases, was go to great lengths to facilitate cooperation among the European states, despite the fact that they often had interests that clashed somewhat. The United States was in a position, given its awesome power to coerce those states into reaching agreement on issues, even if they were not wildly optimistic about where the agreement would lead. They nevertheless followed Uncle Sam in very important ways.

Another point you want to keep in mind here has to do with the European Union. As I've emphasized, I think a lot of the European Union's success has to do with the fact that it came

into being and it flourished in a secure Europe. And that Europe was secure because of the American pacifier. You take away the American pacifier and you get security competition involving the European great powers, not only among themselves, but with regard to Russia. And I think the EU will begin to run into serious problems. So all of this is just a way of saying that Europe is likely to fragment even more in the future than it has fragmented already. Now, let me conclude by saying that I think the logic that I'm laying out here is fully understood by virtually every European leader. I think there's little question that European elites understand pacifier logic. I think the Russians understand pacifier logic and there are many Americans who do as well. But I think that this process is impossible to turn around. I think it's impossible to turn around for a variety of reasons, the most important of which is the structural reason. I think there's no question that the United States, over time, will pivot to Asia in a serious way. As long as China continues to grow economically and militarily, and that is likely to happen, it's not axiomatic, but it's likely to happen, and as long as that happens, the pressure on the United States to focus on East Asia from a security point of view will be great. And that will make it very difficult for the United States to maintain a powerful NATO.

Second point that I would make, as I've emphasized before, is that the Ukraine war has done a great deal of damage to NATO, and it has done a lot to poison relations between the United States and the Europeans. And when you bring in the third factor, which is President Trump, who has, as said before, over two years left in office, it's hard to see how the relationship between Europe and the United States doesn't get worse, if not much worse in the two years moving forward. So let me conclude by saying that although this is not a rosy picture for sure, I do not see any way of reversing the trends that I've described in this episode. I hope everyone found this discussion helpful for understanding what's going on in Europe because this is a subject of enormous importance today and it will be a subject of enormous importance moving forward.

In today's video, toward the end, I talked about the fact that absent the American pacifier, the Europeans are going to face significant collective action problems, which, of course, I emphasized were greatly ameliorated when the United States was acting as the pacifier. And I thought it just might make some sense to give you some evidence that we already see of these collective action problems. You want to remember that the Russians these days emphasized that when they're encouraged to talk to Europe, the big problem they face is, who are they supposed to talk to? If you call Europe, who do you end up calling on the telephone? Who speaks for Europe is the question at hand. And the answer is that it's not clear. In the old days, it was really the United States, because the United States and Europe worked together. So the United States would coordinate with the Europeans and the United States would basically speak for the Europeans and the United States; this was what NATO or the transatlantic relationship was all about. But today, if you take away the Americans and you then ask yourself, who is in charge in Europe, it is not clear at all. And we saw this in a recent meeting of the European countries in Dublin. This took place on November 13th in Ireland. And the question was: Who in Europe is going to be responsible for dealing with the Russians? And this has to do with the Ukraine War, of course. And what the Europeans decided is that the

British, the French, the Germans, the Poles and the Italians, plus the European Union would all work together to come up with a common position that they could then present to the Russians. But you see there is no single leader here. There's no one country that's in charge. It's not like you talk to President Trump or you talk to President Biden or whoever is lighting up the United States, who speaks for both Europe and the United States. There is no European leader, and this is a real problem, and it's just evidence of the collective action problem, how you get these various actors in Europe to work together when you don't have a single leader.

Another good example of this that's worth taking into account is that it's quite clear that Ukraine will need a huge slug of money next year. In addition to the money that's already been allocated to it for 2027, the estimates are that they'll need another $81 billion from the Europeans. And the problem that the Europeans face is that the Bulgarians, the Czechs, the Slovakians, and the Hungarians are unwilling to ante up more money. They're opposed to giving Ukraine more money in the future. Now the question is, who's going to deal with those four countries? And it appears that it's the Germans who are acting in a way that's designed to coerce those four countries into either agreeing to ante up money to Ukraine or at least allowing the other European countries to ante up the necessary $81 billion in aid. But what you have going on here is a situation where you have a collective action problem. You have four countries that don't want to go along with all the other countries. And then the question becomes who solves the collective action problem? And the collective problem in this case is going to be solved, or at least it's attempted, at least Germany is going to attempt to solve the problem, and the question is: Do you really want a situation in Europe where you have collective action problems, where Germany solves them? Is this a viable solution for moving forward? And I think the answer is basically no. There may be one or two instances where the Germans can solve a collective action problem, but that will never be the same as the United States solving a collective action problem, given the history of Europe and given the fact that Germany is just not that powerful relative to all of the other European states. It's certainly not as powerful relative to other European states as the United States was. So it's very hard to see how you get around the collective action problem in Europe moving forward. That concludes my remarks in this episode. Again, thank you very much for listening, and I look forward to our next episode together.

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