Quartet Institute

POLICY BRIEF
NOVEMBER 2026

Europe first?

The US–EU hierarchy Romanian foreign policy keeps putting off

Marius Ghincea
Program Director, Foreign & Security Policy

IN BRIEF

For three decades, Romanian foreign policy has rested on three pillars: NATO, the European Union and the strategic partnership with the United States. The order between them was never stated, because there was never a need to choose. The drawdown of US forces, the US National Security Strategy of December 2025 and the Pentagon's review of its force posture in Europe have turned that ambiguity into a risk. This policy brief reviews the tests of 2025–2026, compares three options for Bucharest and argues that Romania should put Europe at the top of the hierarchy and treat European defence integration as a national security priority, while keeping the relationship with Washington. Its recommendations include measures needed under any scenario and a decision policymakers can no longer postpone.

Key points

1. The strategic trinity worked without an explicit hierarchy, through an implicit division of labour: the US for security, the EU for prosperity. That division of labour can no longer be taken for granted.
2. Between October 2025 and July 2026, the US reduced its military presence in Romania, published a strategy that treats Europe as a burden, and launched a posture review that will judge allies by the access they provide. Romania has received no guarantees.
3. Bucharest has three options: Washington first, continuist equidistance between Washington and Brussels, and the reformist hierarchy with Europe at the top. Equidistance is today's default and carries the cost that is hardest to see: it postpones the choice until others make it.
4. A hierarchy with Europe at the top, built through strategic Europeanism, offers the best insurance: national capabilities, dense ties with the emerging European defence core and with regional partners, and an assertive posture in the EU. The relationship with the US remains important, and diplomatic resources shift towards Europe.
5. Some measures are needed under any scenario: reform and funding of the foreign ministry, a professional defence procurement agency, SAFE implementation, a formalised trilateral with Poland and Turkey, and reciprocity with the US pursued in public.

01

A question deferred for three decades

The Snagov consensus tied Romania to three pillars: NATO membership, integration into the European Union and the strategic partnership with the United States. For almost thirty years nobody had to say which of them mattered most. The pillars were complementary and shared the work between them. Washington, through the 1997 strategic partnership, the 2005 defence cooperation agreement and the Deveselu missile defence site, operational since 2016, guaranteed security. Brussels, through accession in 2007, brought the single market, cohesion funds and pressure for the rule of law.

This division of labour allowed elites in Bucharest to answer "both" to any question about priorities. That is the continuist answer: equidistance between Washington and Brussels. The National Defence Strategy for 2025–2030 keeps it. The partnership with the US and European integration remain pillars of national security without an order between them, and the

concept of “solidary independence” describes a Romania that pursues its interests in full solidarity with all its allies.

The “both” answer works as long as the pillars do not collide. In 2026 they collided several times. In February, the Trump administration invited Romania to join its “Board of Peace.” President Nicușor Dan declined full membership, citing Romania’s EU obligations on sanctions (“we cannot sign while breaching an obligation we have already taken on”), and accepted observer status. In March, Romania approved the use of its bases for US operations against Iran, without receiving in return any clarity about the US presence on its own territory. In the negotiations on the EU’s SAFE defence instrument, eastern member states fought for access to American, British and South Korean equipment, while France pushed for “Buy European” clauses.

In each case Bucharest made a choice. It chose case by case, without a public criterion, and sometimes in opposite directions. A hierarchy already exists in practice. It remains unstated, and an unstated hierarchy cannot guide the allocation of resources, cannot be explained to citizens and cannot be anticipated by partners.

02

The tests of 2025–2026

Events over the past year show a change of trend in the transatlantic relationship, and Romania stands in its path.

- **2025.** The US rescinds Romania’s inclusion in the Visa Waiver Program, announced in January. In July 2026, the interim foreign minister said readmission depends on the Trump administration.
- **29 October 2025.** The Pentagon announces it will not replace the US brigade rotating through Romania. About a thousand US troops remain.
- **December 2025.** The US National Security Strategy describes Europe as a continent facing “civilizational erasure.” A longer version reported by Defense One names four European states Washington would like to pull away from the EU. Romania is not among them.
- **11 March 2026.** The Supreme Council of National Defence and Parliament approve the temporary deployment of US refuelling aircraft and communications equipment for operations against Iran.
- **May 2026.** Romania signs its €16.68 billion SAFE agreement, the second-largest allocation in the EU after Poland’s. On 19 May, the Pentagon cuts the number of brigade combat teams in Europe from four to three.
- **7–8 July 2026.** The NATO summit in Ankara reaffirms Article 5, and the European allies and Canada take on greater responsibility for the Alliance’s defence. President Dan names keeping US troops and increasing US investment in Romania as his priorities.
- **Late July 2026.** The Pentagon launches its review of US force posture in Europe, scheduled to take up to six months. Defense Secretary Pete Hegseth says it will consider which countries align with US priorities and provide base access and overflight rights during operations. On 29 July, Under Secretary Elbridge Colby meets the Romanian president’s national security adviser. No guarantee on troops or bases has been made public.

The pattern repeats itself. The United States remains in NATO, redistributes its effort and treats allies transactionally. Romania is asked to provide access, while reciprocity stays vague. The posture review may reward the March decision, and Bucharest should use that

argument. Nothing in the past year suggests, however, that loyalty will be enough to stop a trend with structural roots: competition with China, a turn towards the Western Hemisphere and American fatigue with European commitments.

03

The European menu

Europeans have begun to respond, and their debate has crystallised around three visions for the future of European defence.

Consolidation, backed mainly by Eastern Flank states and by NATO Secretary General Mark Rutte, proposes that Europe spend more inside NATO, with the US as its anchor, so that staying is worthwhile for Washington. Its logic assumes that a US withdrawal would be a cost-benefit calculation that incentives can change. If the real driver is a strategic pivot to the Indo-Pacific, European effort may not change the outcome.

Complementarity, backed by Berlin and the European Commission, proposes a European pillar within NATO, built through the European Defence Fund, PESCO and SAFE, able to act autonomously in the neighbourhood and to rely on the US as a last resort. Its risk is military redundancy without the necessary political will and trust, plus the suspicion that it serves Franco-German industrial protectionism, on which eastern states depend asymmetrically.

Substitution, backed by France, starts from the premise that the transatlantic era is over and proposes that Europe prepare to replace the US: sovereign command and control, its own satellite intelligence and, possibly, a Europeanised nuclear deterrent under French command. It asks eastern states for a leap of faith, and building the capabilities would take around two decades, while Russia is rearming now.

The likeliest outcome is a blend: consolidation in the short term, complementarity in the medium term and substitution in the long term. The question for Bucharest is how to prepare for all three, in the order in which they will come.

04

Three options for Bucharest

OPTION A

Washington first

The logic. The US remains the only credible guarantor, through its nuclear umbrella, the enablers Europeans lack and its conventional forces. Romania should make staying as attractive as possible for Washington: buy American, host troops, grant base access and avoid any rhetoric that could become a pretext for leaving. The EU remains the second pillar, for the economy.

Who supports it. This is the traditional hierarchy of Romanian Atlanticism. Today it is stated explicitly mainly by part of the radical right, through Dan Dungaciu's bilateralism, which treats the EU as a constraint. The priorities the president set out in Ankara follow this logic.

Advantages. It covers short-term risks and fits the criteria of the US review.

Costs. It depends on a variable Romania does not control. Reciprocity over the past year has been weak, and an exclusive priority for Washington could marginalise Romania in the build-up of Europe's defence industry, just as it receives the most resources.

OPTION B

Equidistance between Washington and Brussels

The logic. Romania treats the US and the EU as equal pillars, avoids ranking them and decides case by case, while preserving EU unity. Robert Lupițu describes it as a pendulum between a functioning alliance with the main global partner, the capacity to act independently and the unity of the Union.

Who supports it. The continuist current, the Defence Strategy for 2025–2030 and most of the establishment. It has been de facto policy over the past year.

Advantages. Flexibility, and no open conflict with either partner.

Costs. Without a criterion, decisions stay reactive, resources are spread thin and partners cannot anticipate Romania's behaviour. When the pillars collide, the choice is made under pressure and often by others.

OPTION C

Europe at the top of the hierarchy: strategic Europeanism

The logic. Romania reduces its dependence on a single node for its security and builds a safety net that holds even if one node gives way. The option has three dimensions. The foundation is national military capability, a defence industry and societal resilience. The architecture combines vertical ties with the emerging European defence core and horizontal ties with Poland, Turkey, the United Kingdom, the Baltic states, Israel and the Indo-Pacific democracies. The political posture is one of initiative in the EU, treated as a multiplier of Romanian power. US engagement remains welcome as long as it does not become harmful.

Who supports it. The reformist current, including the author of this brief.

Advantages. Insurance against a structural US retrenchment, and full use of the European resources available now.

Costs. A European defence union is a project, and European strategic autonomy will take at least a decade. Convergence with horizontal partners may weaken, and the option requires a state able to spend efficiently and manage complex projects.

05

Our assessment

We recommend a hierarchy with Europe at the top, built through strategic Europeanism. Our reading of the past year is that the US retrenchment from Europe is a structural trend, which began before the Trump administration and will continue after it. If that reading is correct, an exclusive priority for Washington becomes the riskiest strategy, and equidistance merely postpones the moment when Romania discovers it has no alternative ready. If the reading is wrong, the cost of strategic Europeanism is small: Romania will have built capabilities and partnerships it needs anyway.

Strategic Europeanism is compatible with the short-term measures of Option A. Romania can keep buying American equipment where interoperability requires it, host US troops and use the posture review to make the case for its usefulness. The difference lies in where scarce diplomatic resources go. If the priority is keeping the US engaged, effort goes to Washington and European integration stays secondary. If the priority is European integration, effort goes to Brussels, Berlin, Paris and Warsaw, and the relationship with Washington remains important without being the only safety net.

The option has three limits, which we acknowledge. It depends on the EU becoming a credible security provider, which is not guaranteed. It depends on converging interests with regional partners: a Poland with special status in Washington or a United Kingdom absorbed by domestic problems may become less interested in eastern European solidarity. And it depends on the Romanian state's capacity to absorb funds and manage complex procurement. A larger defence budget is worth nothing if the money is wasted.

06

Recommendations

The first measures are needed under any scenario. The last is the decision on which all the others depend.

01 **Reform and fund the foreign ministry in the 2027 budget.**

A bigger budget for diplomacy, competitive and transparent recruitment, fewer secondments, predictable promotions and training in areas such as cybersecurity, energy and artificial intelligence. The ministry's analytical capacity should be strengthened through cooperation with universities and think tanks.

02 **A professional defence procurement agency.**

Higher defence spending only makes sense if the money becomes interoperable capability. An agency insulated from clientelist influence and able to manage long-term projects is the condition for SAFE and national budgets to deliver.

03 **SAFE and European infrastructure on the Eastern Flank.**

Romania should take an active part in European defence initiatives, from Eastern Flank Watch to joint counter-drone defence, argue for moving the centre of gravity of European defence eastwards and propose, in the negotiations on the next multiannual financial framework, permanent European military infrastructure on its territory.

04 **A formalised horizontal network.**

The Romania–Poland–Turkey trilateral needs a permanent secretariat and regular ministerial meetings. The Bucharest Nine format should be able to work even without states that block its consensus. The security relationship with the United Kingdom should be deepened.

05 **Reciprocity with the US, pursued in public.**

In the posture review, Bucharest should put its requests on the table explicitly, from the presence at Mihail Kogălniceanu and Deveselu to investment, and link future access decisions to genuine consultation. The Visa Waiver should be treated as a political priority, and Parliament should be properly informed.

06 **Channels for procedural criticism.**

An annual parliamentary hearing on foreign policy performance and genuine consultative mechanisms with academia and think tanks, so that dissatisfaction with diplomatic performance feeds into decision-making.

07 **A public decision on the hierarchy.**

The president and the government should set out, after consulting Parliament, experts and civil society, an explicit order of priorities between the partnership with the US and European integration, in a public foreign policy guidance document. The exact shape of the hierarchy is a legitimate political choice. Its existence is the condition for everything else: without it, the other measures remain ad hoc.

SHORT TERM

Keep the US engaged by making the case for access and usefulness in the posture review.

MEDIUM TERM

A European pillar of NATO in which Romania matters, through SAFE, infrastructure and regional networks.

LONG TERM

A security architecture that works even without the US guarantee.

07

Conclusions

The US strategy of December 2025 called into question the edifice on which Romania built its foreign policy after 1995: the bet on Euro-Atlantic integration, the belief that Article 5 is a sufficient guarantee and the expectation that loyalty to Washington will be rewarded. What do we do when these certainties are no longer certain?

We can protest, we can hope things return to normal, or we can accept the verdict and start building the alternatives. The 2026 government crisis consumed six months. The US posture review concludes in early 2027, and negotiations on the next EU budget are under way. The window in which Romania can choose its own hierarchy is short. We propose to use it.

References

Atlas News (2026). "The U.S. Redraws Its Military Posture in Europe. Romania Fights to Keep Its Strategic Place in the New 'NATO 3.0'". atlasnews.ro

Business Forum (2026). "Romania secures €16.68 billion EU defence funding deal", 22 May 2026. businessforum.ro

Clifford Chance (2026). "The NATO Summit in Ankara: strengthening NATO's defence and industrial base", July 2026.

Defense One (2025). Excerpts from the longer version of the US National Security Strategy, 9 December 2025, as reported by *Notes from Poland*, 10 December 2025.

Digi24 (2026). "Nicușor Dan explică de ce România nu va adera pentru moment la Consiliul pentru Pace al lui Trump", 17 February 2026. digi24.ro

Ghincea, M. (2025). "România fără America? Pentru un europenism strategic românesc". *Contributors.ro*, 15 December 2025.

Ghincea, M. (2026a). "Iranul, SUA și consensul de politică externă de la București". *Contributors.ro*, 23 March 2026.

Ghincea, M. (2026b). "Trei viziuni pentru un NATO european". *Contributors.ro*, 6 July 2026.

Ghincea, M. (2026c). *Mapping the Romanian Foreign Policy Debate: Revolutionaries, Continuists and Reformists in 2026*. Policy brief. Bucharest: Quartet Institute.

Kyiv Post (2026). "Pentagon Reportedly Halted Hegseth's Plan for Deeper US Troop Cuts in Europe", 3 July 2026, citing *The Wall Street Journal*.

Romanian Parliament (2025). Decision approving the National Defence Strategy for 2025–2030, 26 November 2025.

Romania Insider (2026). “Romania to host US refueling aircraft and military equipment, president says after Defense Council meeting”, 11 March 2026.

Stars and Stripes (2026). “Pentagon launches review that could reshape US military presence in Europe”, 28 July 2026.

The White House (2025). *National Security Strategy of the United States of America*. Washington, DC, December 2025.

ABOUT THE AUTHOR

Marius Ghincea is a co-founder of the Quartet Institute and leads its Foreign & Security Policy programme. He is a postdoctoral researcher at ETH Zurich and holds a PhD in Political and Social Sciences from the European University Institute in Florence. His research covers EU foreign and security policy, Black Sea security and the domestic politics of foreign policy.

ABOUT THE QUARTET INSTITUTE

The Quartet Institute is an independent think tank in Bucharest that produces and debates actionable ideas on important public policy problems. We believe good public policy rests on open dialogue and on ideas that practitioners and institutions can put into practice. We take a regional perspective, specialising in Central and Eastern Europe broadly understood, including the Western Balkans and the Black Sea region.

HOW TO CITE

Ghincea, M. (2026). *Europe First? The US–EU Hierarchy Romanian Foreign Policy Keeps Putting Off*. Policy brief. Bucharest: Quartet Institute.

This policy brief draws on and updates arguments the author published on Contributors.ro in December 2025, March 2026 and July 2026. Quotations from Romanian sources are the author's translations. The views expressed are those of the author and do not necessarily represent the position of the Quartet Institute.

Quartet Institute

quartet.ro
office@quartet.ro
© 2026 Quartet Institute