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COULD NATO'S CURRENT EXISTENTIAL CRISIS BE ITS LAST?

by Gerlinde Niehus

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COULD NATO'S CURRENT EXISTENTIAL CRISIS BE ITS LAST?

Over the course of its 75 years' history, NATO has weathered many storms.

At least two earlier crises were existential – and in each case the US played a key role. The new existential crisis of the transatlantic Alliance, triggered by President Trump, is worse. Europeans need to embrace a strong and determined strategy to assert themselves amidst this new storm, as NATO's former Deputy Director for Defence and Security Operation, **Gerlinde Niehus**, analyses.

During the Suez crisis in 1956, the US under President Eisenhower strongly opposed the use of force by Britain and France to regain control over the Suez Canal, which had been nationalized by Egypt. Britain and France, as the former colonial powers, saw the Suez Canal as crucial to their economic and strategic interests. They believed that the nationalization threatened their influence in the region and decided to take military action, despite U.S. disapproval. At the time, the US forced them to withdraw. More fundamentally, this rift laid bare the lack of political consultations among Allies. In response, NATO developed the famous „Report of Three Wise Men“ which reinforced NATO's political and non-military role, strengthened political consultations, and contributed to broadening the strategic framework of the Alliance.

2003 saw another deep rift in the Alliance, this time linked to Iraq. Many NATO nations including France, Germany, Belgium argued that there was no convincing evidence for the presumed existence of Saddam Hussein's weapons of mass destruction. At the time, these alleged weapons served the US as the main argument to justify an incursion. The US, supported by the UK and Poland nonetheless went ahead with the invasion and toppled Iraq's dictator. While NATO as an organisation was not directly involved, divisions among Allies were so deep and bitter that a break-up of the Alliance was entirely possible. When it transpired in the following that

no weapons of mass destruction could be found, this led to a long-lasting damage of US credibility in NATO.

This time, the crisis caused by Donald Trump and his clan is again existential, and arguably more fundamental for NATO on several fronts:

- With his disdain for democracy, D. Trump is infringing on NATO's shared values and principles as enshrined in the Alliance's 1949 founding treaty, the Washington Treaty. In the preamble Allies commit to “safeguard the freedom, common heritage and civilisations of their people, founded on the principles of democracy, individual liberty and human rights.”
- His neo-imperialistic coercion targeted, inter alia, against two fellow NATO Allies, i.e. Canada and Denmark's self-ruling territory Greenland, over whom he wants to achieve control, is in violation of both the UN Charter and the NATO Treaty.
- By raising doubts if the US would contribute to defending other Allies in case of an armed attack, he is putting into question the bedrock of NATO, the collective defence clause of Article V, Washington Treaty.
- Trump's entire strategic orientation, like his cosyng up with Russia's despot Vladimir Putin, or insulting Ukraine's democratically

elected President as a “dictator” is in blatant contradiction with consecutive NATO Summit decisions. It is symptomatic for a political U-turn away from overarching strategic NATO policies agreed among all Allies including the US, be these the 2019 Military Strategy, the 2020 Concept for the Deterrence and Defence of the Euro-Atlantic Area (DDA) or the 2022 Strategic Concept.

All this has led to an erosion of what is arguably the very foundation of an Alliance: the trust in each other. Donald Trump has handed to Vladimir Putin two major policy gains on a silver tablet: the decoupling of US from European security, and the neutralization, if not destruction, of NATO.

In view of all this, does NATO have a plan how to deal with the multiple assaults? How would NATO cope with a potential US withdrawal from the Alliance?

Perhaps there is something well hidden in NATO Secretary General Rutte's mind, but so far there is little visible or tangible resembling a coherent plan, strategy or policy options. The focus seems to rely on talking to key US interlocutors and activating Rutte's talent as a “Trump whisperer” – which was eventually also one of the main reasons why he got the job as Secretary General. Big parts of NATO seem paralysed or in some state of denial. This concerns not only work on defining a new Russia policy (a tasker from the 2024 Summit), but also other work strands. How can the North Atlantic Council still discuss sensitive matters ranging from cyber security via support to Ukraine or steps to strengthen Allied resilience in view of Russia's intensifying shadow war against all of them, when nations cannot exclude that their positions may well be shared with Moscow? A coherent plan worth that name, or options how to deal with the assaults, are lacking.

With his disdain for democracy, Trump is infringing on NATO's shared values and a rules-based international order.

A first immediate step for NATO must be to realise that remaining in the defensive vis-à-vis Trump, like an anxious little rabbit imploring the snake not to hurt it, is probably a recipe to be swallowed. Instead, courageous Allies should take the initiative, as a coalition of the willing, and ask the US to clarify whether or not they still abide by a whole range of key strategic documents constituting NATO's acquis and political agenda. These include the NATO Treaty, the 2022 Strategic Concept, the 2019 Military Strategy to name but the most foundational ones. All these were, of course, also agreed by the US. Depending on the answer received, Allies should either demand the US to honour commitments made, or invite the US to suspend its membership. If anything, this process would signal to D. Trump that he cannot bully fellow Allies into submission and capitulation in view of the threats.

While the key function of any NATO Secretary General is to keep the Alliance together and therefore the US in NATO, there is no guarantee whatsoever that this is achievable this time round. Marc Rutte would therefore be well advised to pursue in parallel other options and scenarios. This requires much more strategic-level co-operation with the EU and the fostering of new forms of collaboration, starting with coalitions of the willing.

The days of Europe's childhood, the decades of geopolitical outsourcing are over.

Considering the US disregard for Europeans in NATO and the EU, the logical focus of these efforts must be Europe, with the overarching goal to become a serious geostrategic player. The days of Europe's childhood are over. The decades of geopolitical outsourcing are over. It is high time to grow up and behave like an adult.

The following reflections and recommendations are based on the so far most likely scenario of an enduring Russian threat to our security, an immediate to mid-term phasing out of US support to Ukraine, and the substantive rebalancing of the transatlantic relationship towards a more reduced US role and more European strategic responsibility. This would require the creation of a "coalition of the willing" as an ad hoc solution, the Europeanisation of NATO in conjunction with strengthening the EU as a more capable actor in the realm of security and defence. Key priorities for Europeans (and Canadians) would include the following:

• Prepare a robust and substantial support package for Ukraine

Defeating Russia in Ukraine is the most effective and efficient investment in European security. European defence begins in Ukraine. To match Russia's resources on the battlefield, just 0.2% of the GDP of European NATO member would be needed, according to new research from the Tony Blair Institute. That is a feasible amount, especially when considering that in the event of a Russian victory in Ukraine, European NATO members would have to move to some 5% of GDP on defence.

For delivering on a potential future peace keeping or reassurance mission, leaders from both EU and NATO need to agree on a new enabling framework, based on a "coalition of the willing" – as the unanimity principle of both institutions would otherwise paralyse them. This effort is already taking shape, with so far France and the UK in the driving seat. In perspective, and especially if the new mission moves from planning to implementation, the political lead could come from a Quintet consisting of France, UK, Poland, Italy, and Germany. The operational lead could come via the UK-lead Joint Expeditionary Forces (JEF) which would have to be enlarged to also include at least also France, Poland, Germany, Italy and ideally more nations such as Canada.

• Boost combat capable troops and work towards joint defence planning in Europe

On paper, European armies have a total of 1.9 million military personnel, with 1.33 million in the EU alone. But effectiveness is hampered by a myriad of issues. These range from lack of equipment including most strategic enablers, via lack of training and to lack of unified command. In essence, European armies are so far not set up to fight without US support. A recent analysis from Bruegel concludes that an increase in European capacities equivalent to the fighting capacity of 300 000 US troops would be needed for Europe to defend itself against Russia as the most direct and imminent threat. NATO European Allies should agree within NATO's defence planning process to a military level of ambition for European strategic responsibility.

• Align defence investment with strategic needs

In view of these huge deficits, Europeans and Canada should commit to raise defence spending to a new baseline of 3.5% of GDP – which was pretty much the norm during the decades of the Cold War in European countries. Ahead of the Summit in June 2025, NATO Secretary General Rutte has now in fact proposed that NATO members raise defence spending by 2032 to 3.5% of their GDP, and a further 1.5% on broader security-related items such as infrastructure, mobility or cyber security to meet US President Donald Trump's demand for a 5% target. The Summit therefore seems to become a one-topic event, eclipsing all broader strategic issues, with the overarching aim to appease D. Trump.

In raising defence spending, political leaders need to be upfront with their populations explaining that peace and security are investments in our prosperity. In fact, they should also reinforce the message that defence investments translate into more public revenues, more gross value added, and more jobs!

Defence production across Europe so far is too small, too fragmented, and too slow. A sense of urgency has largely been missing.

In parallel, Europeans must also work towards common funding at EU levels. The EU has mobilized a massive multi-tier support package of ca. € 3.2 trillion in total fiscal response in the wake of the Covid-19 pandemic. Today's security challenges are far greater. There is no justification other than political inertia to not embrace an ambitious and robust approach now.

• Turbo-charge European defence production

Defence production across Europe so far is too small, too fragmented, and too slow. A sense of urgency has largely been missing. Russia is producing in three months what the whole of NATO produces in one year! Europeans must swiftly close key gaps in air and missile defence, or deep-strike systems, and develop the strategic enablers such as air-to-air refuelling, or intelligence, surveillance and reconnaissance (ISR) systems which over past decades have largely been provided by the US. Europeans should also consider NATO's upcoming report on capability gaps – which is expected to call for 49 new brigades, 1500 tanks and 1000 artillery pieces – as a guide for the EU's industrial spending priorities. As new big money for defence does not automatically translate into bigger capabilities, the EU needs to use its regulatory power to expedite the reform of the industrial policy framework.

• Continue reinforcing Europe's Eastern flank by redeploying forces and prepositioning equipment

This will reinforce Europe's deterrence and defence posture vis-a-vis Russia as the biggest threat to peace and security. Polish Prime Minister Tusk's recent proposals to strengthen both NATO air-policing in the Baltics and the "Baltic Sentry" operation for enhancing the protection of critical infrastructure are steps in the right direction. The continuing hurdles with military mobility, e.g. lack of adequate infrastructure like roads or railways, lack of standardized procedures akin to a (non-existing) „Military Schengen“, and the abundance of red tape imply that any move of large forces is slow and cumbersome. Important facilities such as the Long-Term Equipment Storage and Maintenance Complex opened in 2023 in Poland are vital for credible deterrence and defence. Military planners have to strike a balance between the current real costs of forward deploying forces and prepositioning equipment, with the future potential costs of losing a potential crisis or conflict on the Eastern flank which arguably would be much higher. Altogether, getting ahead of the curve before any potential conflict erupts, seems a logical move.

- **Foster synergies with other like-minded partners across the globe**

With Donald Trump's neo-imperialism and unwillingness to behave like a trustworthy Ally, it is important to forge ties with those countries that share the fundamental values and interest of both NATO and EU in upholding a rules-based international order. These include capable partners in the Indo-Pacific like Japan, Australia, or South Korea, but should be extended to other partners in Latin America, Africa, and Asia.

Prepare for the unthinkable: A conventional US withdrawal from NATO and the “nuclear option”

NATO's founding treaty from 1949 envisages in Article 13 the possibility of any party of the treaty to “cease to be a Party one year after its notice of denunciation has been given to the Government of the United States of America”. While so far this clause has never been used, considering the intergovernmental nature of NATO, membership is, by definition, voluntary. This also applies to the US.

A full conventional withdrawal of the United States from NATO, assuming it would not be stopped in the US Congress, would fundamentally transform the Alliance, requiring unprecedented adaptation across political, military, financial, and organizational dimensions. This may well result in transforming or transitioning NATO into a new European Defence Alliance or Organisation, or broader, a Western Defence Alliance, which could also integrate the EU's portion of defence capabilities.

The sudden absence of critical military capabilities that European NATO members currently

lack in sufficient quantities would likely be exploited by Russia to assert greater influence, coerce NATO and EU members, or even undertake (limited) incursions. Much will depend on how rapidly remaining members would be able to fill gaps in strategic enablers including air refuelling, tactical intelligence, battlefield command and control, and ammunition stockpiles.

A full conventional US withdrawal from NATO would represent the most significant transformation of European security architecture since the Alliance's founding. It would in essence be the end of NATO as we know it, and would require a fundamental reconceptualization of its strategic outlook and posture. Every aspect of NATO's core tasks (deterrence and defence, crisis prevention and management, and cooperative security) and the related military strategies and plans would need comprehensive revision.

The resulting to-do list for NATO would be daunting. To name but a few:

- reorganizing command structures,
- addressing critical capability gaps,
- increasing and coordinating defence spending,
- developing European defence industries,
- fostering interoperability
- articulating a new strategic vision

Success would require unprecedented levels of political will and cooperation among European members, unified by the recognition that collective security remains essential in the face of persistent threats from the east.

As if this would not be bad or daunting enough, there is still, at least in theory, the “nuclear option”, i.e. the US also withdrawing its nuclear umbrella. This would be an even more dramatic game changer. Currently, “the strategic nuclear forces of the Alliance, particularly those of the United States, are the supreme guarantee of the security of the Alliance” (NATO Strategic Concept, para 29).

A potential withdrawal would not only further weaken NATO Europe's deterrence and defence, and its credibility and capacity, it would also be an open invitation to Russia for more coercion, shadow war or even outright military aggression.

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Developing the existing nuclear forces of the UK and France to a new European nuclear umbrella would not only be immensely costly, it would also take time, be this for political decision making, development of doctrine, or mobilisation of funds, production, deployment, maintenance etc. In addition, nuclear proliferation in Europe may well meet opposition, including in the US, where so far the overarching strategic orientation has been to curtail it, be this in Europe or elsewhere. Russia could justify pre-emptive strikes against new European nuclear infrastructure with the argument to prevent proliferation – and refer as justification to pre-emptive Israeli strikes on Iraq or Syria.

Still, intensifying the analysis, at best with an in-depth cost-benefit study, has merits. It fosters Europe's so far lacking strategic culture and helps to correct the old stereotype that "Americans are from Mars, Europeans from Venus". It would also serve as strategic messaging, complicating decision-making in Russia or the US. At this stage, that is useful in its own right.

Altogether, Europeans should pursue a three-pronged strategy to regain the initiative and become a serious geopolitical actor.

1. As an immediate and urgent need, largely driven by the imperative to support Ukraine, work on establishing a "coalition of the willing" must be expedited as an ad-hoc solution. This approach allows Europeans to deliver, since spoilers like Hungary or Slovakia cannot block decision making and implementation.
2. On a second track, they must reinforce the Europeanisation of NATO in conjunction with boosting the EU as a more capable actor in the realm of defence and security. Europeans have a vital self-interest to deliver expeditiously

on more European strategic responsibility, also to keep the US engaged at least mid-term, e.g. with its forces and the nuclear umbrella in Europe. This also buys them some time to build the capabilities they need to better look after their defence and security.

3. On track three Europeans also need to envision a potential worst-case scenario of "NATO minus US". While the NATO Founding Treaty from 1949 would not become obsolete in case of a potential US withdrawal, the political dynamics caused by such a major "divorce" may well lead to the creation of a new European Defence Alliance (or Organisation), or a Western Defence Alliance, as a new body and based on a coalition of the willing. Such a new institution could merge the rump NATO with the defence and security capabilities developed under the EU umbrella. Setting up such a new institution could also be a useful move to reinforce European capability to act. If based on a coalition of the willing, it could include Canada, and it would avoid the notorious blockages from Russia's Trojan Horses like Orban and Fico. At the same time, a new institution could include Ukraine which arguably has the most capable and combat experienced armed forces in Europe, hardened by defending the country against a major power, i.e. Russia. This would be a formidable asset. Thinking on all this must start now. The ad hoc "coalition of the willing" forged to deliver European support to Ukraine could be a useful testbed or precursor.

The good news is that NATO survived earlier crises. Thus, there is hope that also this time it will have the drive and determination to reinvent itself - or be reborn as something new. The jury is out there whether NATO Secretary General Rutte will play any meaningful role in these endeavours. So far, his vision and strategy seem, at best, limited.

The good news is also that Europeans, with a GDP ten times bigger than Russia's, have the resources to become a serious geostrategic actor. With the right leadership, courage and commitment they can become a formidable force for good.



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Zentrum Liberale Moderne
Reinhardtstraße 15
10117 Berlin
Germany

+49 (0)30 - 13 89 36 33
info@libmod.de

www.libmod.de