

North Atlantic Crosscurrents: The Tidal Forces Underlying NATO's European Shift

Introduction

Centrifugal forces are at play in the international security landscape. They set continental drifts in motion, producing tectonic shifts often irrespective of national boundaries. These forces can simultaneously rip deep rifts into the Eurasian continent, raise building chilling alpine-high walls between neighbors, and incept mid-ocean ridges into the Transatlantic. Pressure accumulates beneath the surface and can break out suddenly, causing political earthquakes before many expert seismographs detect them. Like networks following a deep-seated logic, they cause local hotspots to break out like volcanoes, often triggered by seemingly unrelated shifts elsewhere.

More than an apt analogy, the shifts that push and pull allies and adversaries are observable in today's most pressing international challenges: eruptions like Russia's full-scale invasion of Ukraine or the United States withdrawal from its traditional concessions to its allies has caused the weights within NATO to redirect increasingly to Europe in all their inertia (and their heavy machinery). Singular events, like the U.S. election or the invasion, may appear as sudden bursts of tension that precipitate catastrophe. But shifts of such magnitude more often build up from years of pressure much like underlying, unsuspecting long-term continental dynamics, they are rather inflection points, results of long-term strategies and years of military buildup.

The dynamics that made the US and Europe move away from each other in defense policy is similarly a result of changes of strategies and the global playing field: This essay identifies the dynamics, diplomatic relations and transforming defense industrial capacity that have, over the years, made NATO more European, and analyses what this means for an alliance in motion.

The Question of The Hour

Recent incidents have underlined just how high the stakes for European security have become. On September 10, 21 Russian drones entered Polish airspace.¹ Little more than a week later, Russian jets enter Estonian Airspace for a relatively long ten minutes: part of Russia's grey-zone and hybrid warfare pushes, these unprecedented maneuvers forced NATO to actually firing at its eastern border.²

1 Alan Charlish, Lidia Kelly, and Barbara Erling, "Poland Downs Drones in Its Airspace, Becoming First NATO Member to Fire During War in Ukraine," *Reuters*, September 10, 2025, <https://www.reuters.com/business/aerospace-defense/poland-downs-drones-its-airspace-becoming-first-nato-member-fire-during-war-2025-09-10/>.

2 Steven Erlanger, "Russian Fighter Jets Enter Airspace of Estonia, a NATO Member," *The New York Times*, September 19, 2025, <https://www.nytimes.com/2025/09/19/world/europe/russian-fighter-jets-estonia-nato.html>

While the war on Ukraine has undoubtedly reshuffled the way the domain of security and defense is viewed across Europe, the continents prolonged fears of an actual spillover from the war in Ukraine to open conflicts between Europe and Russia have rarely been triggered this bluntly. At the same time, many have identified a different, if related and even mutually exacerbating, *Zeitwende*: the one of Transatlantic relations. Beyond strategic considerations of an actual confrontation with Russia, this shift opens questions about power within one of the most solid and successful security guarantees for Europe. When it is not the confrontation with the adversary who poses the threat, but the trust in the ally, then ultimate question for 21st-century Europe is: Do Europeans want to become an independent pole? Or will they remain junior partners of United States and the collective West, whose future is uncertain?³

Concrete steps have been made to confronting this question more directly since 2022, forcing a concrete recalculation about the density of deterrence and the presence of credible capabilities on NATO's eastern flank. When this year, Washington urged European allies to dedicate five percent of their GDP to defense, with 3.5 percent specifically allocated to essential military equipment⁴, European states responded with substantial increases in defense spending while and upped weapons deliveries to Ukraine. Yet beyond the "bottom-line"-metric of defense spending as a share of GDP, NATO's evolving shift toward a more from a hegemon- to European-centered alliance reaches far deeper.

How Alliances Change

When discussing alliances shifting in their center of gravity, one usually speaks of concrete changes in policy emphasis, burden sharing, diplomacy and public communication, or legal and institutional practice that alter how collective defense is organized, sustained, and projected. With countries and their politics being in constant motion, there can be varying internal causes to such changes: accession of new members, abandonment of previous ones or an unrelated shift in weight balance within the countries, like sudden redirection of budgets or demographic developments. However, also external circumstances can force changes, such as the appearance new, overlapping alliances, supranational and intergovernmental organization, and of course, new threats and security challenges, that may affect one alliance partner more or in a different way than the other.

3 Ross, Jacob. "Merz in Toulon: Das europäische Frankreich stärken." German Council on Foreign Relations. August 2025. <https://dgap.org/de/forschung/publikationen/merz-toulon-das-europaeische-frankreich-staerken>

4 Dalibor Rohac and Eduardo Castellet Nogués, "Funding Europe's Firepower: How the EU Can Funnel Its Wealth Into Its Defense," *Foreign Affairs*, September 19, 2025, <https://www.foreignaffairs.com/europe/funding-europes-firepower>.

Many of these motions, with varying causalities to each other, have been observable with NATO in the past five years, and have had concrete impact on the „Europeanness“ of the organization. NATO’s expansion from 16 members a quarter-century ago to 32 at present⁵, most recently with Sweden’s and Finland’s accession, increased the overall share of European member states. Moreover, when the Eastern European flank and Ukraine emerged as the central battleground for the alliance, the most immediate threat to NATO has shifted closer to Europe, positioning the region as the primary arena for potential direct confrontations involving the alliance. Most importantly, however, the shift in power relations and diplomacy between the US and Europe represents the starkest shift.

Washington’s evolving NATO strategy

To identify the broader shift means to understand the American view and the role NATO has played in its strategy up to now. When NATO was founded after the Second World War, the US was arguably no more subject to proximate threats from surrounding neighbors as it is now. Rather, comfortable in its position as a Maritime power⁶ that helped it win the Second World War, it was determined to respond to the Soviet Union’s expanding influence in Eastern Europe. Thanks to its geography and strength, the US maintained trade and commerce with European partners and through NATO, it consequently took steps to protect that mutually beneficial relationship from undermining the sovereignty through Russia. While at times tolerating or supporting authoritarian regimes if they were anti-communist, the US foreign policy priority was the protection of sovereignty of other countries it promoted free market with, enabling it to capitalize on that success well into the Cold War. Throughout that time, the clearly defined Soviet challenge and the largely stable international balance of power ensured that NATO remained largely unchanged for more than forty years. With the Cold War’s conclusion, however, the original justification and unified threat for NATO dissolved, causing meaning and stability to be contested and increasingly flexible.⁷

When Russia reemerged as a military force once again decades later, this time under Putin’s tight grip, the geopolitical reality and national security priorities of the US had already shifted, with

5 Pszczel, Robert. “How NATO Has Changed Since 1999.” Polski Instytut Spraw Międzynarodowych (PISM), August 1, 2024. <https://www.pism.pl/publications/how-nato-has-changed-since-1999>.

6 S. C. M. Paine, “By Land or by Sea: Continental Power, Maritime Power, and the Fight for a New World Order,” *Foreign Affairs* September/October 2025. August 19, 2025.

7 Walt, S. M. (1997). Why alliances endure or collapse. *Survival*, 39(1), 156–179. <https://doi.org/10.1080/00396339708442901>

foreign economic interests no longer depending as much on sovereignty as before. In a globalized world in which the economic security through data and resources is much less easy to centralize, but even more securitized, a shift towards China and the Indo-Pacific theatre was unavoidable, though challenging, for Washington. Underscoring urgency, policymakers in Washington across party lines see the possibility of a military confrontation with Beijing. Slowly, security priorities that used to center around Russia, and consequently Europe, shifted.

Russia on the other hand, as a continental revisionist power, exercises its threats through hard power and military conquest. Its economic expansions, such as supply chains, oil and gas exports and, other modern instruments of coercion are being utilized to directly support continental military offenses, rather than mutually profitable exchanges with other countries.⁸

The Trump Administration and Europe's reckoning

President Trump has long expressed skepticism about NATO. After all, he does not subscribe to a world view in which Russia is a key strategic enemy for myriad reasons that span from autocratic and great power restructuring and "America First"-Isolationism to prioritizing perceived personal sympathies. During his previous term, he claimed to have warned allied leaders that he might "encourage" Russia to act freely against countries not meeting their defense spending commitments. He repeatedly raised doubts about whether the United States should uphold NATO's mutual-defense obligation under Article 5 if allies failed to fulfill their financial responsibilities.⁹

Even before Trump's reelection, analysts saw US retrenchment and the concomitant emergence of a security vacuum in Europe would be a real possibility. Now, he has tied ongoing U.S. participation in NATO to European countries contributing what he considers their "fair share," at times suggesting they increase defense spending to as much as five percent of GDP.¹⁰

Rising debt levels, a weakened defense industrial base, and growing public resistance to overseas commitments suggest that the United States will need to allocate its resources far more

⁸ S. C. M. Paine, "By Land or by Sea: Continental Power, Maritime Power, and the Fight for a New World Order," *Foreign Affairs* September/October 2025. August 19, 2025.

⁹ Michael E. O'Hanlon, "NATO Is Doing Just Fine, Thank You," *The New York Times*, June 19, 2025, <https://www.nytimes.com/2025/06/19/opinion/nato-is-doing-just-fine-thank-you.html>

¹⁰ Johannes Thimm, "NATO: US Strategic Dominance and Unequal Burden-Sharing Are Two Sides of the Same Coin," *Stiftung Wissenschaft und Politik (SWP)*, September 4, 2018, <https://www.swp-berlin.org/en/publication/nato-us-strategic-dominance-and-unequal-burden-sharing>.

selectively than in previous decades.¹¹ The long-term commitment of the United States therefore already seemed questionable, with a Trump-like populist figure being able to gain hefty popular capital from a new framing: European “vassal” states are unfairly carried by United States with its own major defense budgets. Vice-president Vance later concretized these sentiments into a sufficiently coherent foreign policy view. In truth, most policymakers in the United States are fully aware that there are more structural reasons American defense-budget dominance within NATO:

Not only did from a historic soft- and hard power interest America had in European continent, but also from geographically unrelated military entanglement. Arguing that the US would be free to spend less if only Europe spent more obscures the fact that the US plans its defense budgets strictly on its own terms—European defense spending has only a minor influence when Congress approves the annual U.S. defense budget.¹² Since over the decades, different foreign policy operations and subsequent investments have made the US’ defense sector so strong, one could hardly blame European lethargy for this.

Trump-Proofing Europe

Many European observers see the European reckoning as long overdue, and the ignorance of seeing the resulting strategic vulnerabilities coming as unacceptable. It should have been in European interest to invest militarily for its own sake for a long time, regardless of who occupies the White House. After all, overreliance on the United States undermines a long-term strategic positioning that gives Europe more strategic autonomy.

When analysts and even politicians say that NATO is becoming more European, they usually describe a sentiment that results from the many fast paced developments currently facing the alliance to the observable shift in diplomacy, including bombshell speeches from US administration and diplomatic meetings that are unusually symbolically telling at face value. Still, the power of an industrial built-up will outlast an electoral cycle in the US more sustainably than a public statement. Substantive steps have been made, with tangible boosts having pushed NATO to increase the budget commitment to 5 percent, that a just a few years back would have been unimaginable, and most European NATO countries manage to live up to the pledge as of now.

11 Leonard Schütte, “Remedy for Longevity: A European Burden-Seizing Initiative for NATO to Age Well,” *Munich Security Opinion 2* (Munich Security Conference, July 2024), <https://doi.org/10.47342/GEGG7367>.

12 Johannes Thimm, “NATO: US Strategic Dominance and Unequal Burden-Sharing Are Two Sides of the Same Coin,” *Stiftung Wissenschaft und Politik (SWP)*, September 4, 2018, <https://www.swp-berlin.org/en/publication/nato-us-strategic-dominance-and-unequal-burden-sharing>.

Still, spending does not equal capabilities: If Europe is merely purchasing more American defense technology, is NATO becoming more European, or are dependencies are just shifting from a diplomatic to an economic dimension?

Buying additional U.S. defense systems may also satisfy the current US administration, but it is neither the most effective nor the wisest path towards a credibly resilient Europe. The American defense industry currently experience long production delays, with a new Patriot missile defense system taking around seven years to deliver. Dependence on a foreign industrial base also carries strategic risks: if the United States became engaged in another major conflict less connected to the current European outlook, European forces would hardly be at the top of the list for timely support and maintenance of U.S.-built systems.¹³

13 Dalibor Rohac and Eduardo Castellet Nogués, "Funding Europe's Firepower: How the EU Can Funnel Its Wealth Into Its Defense," Foreign Affairs, September 19, 2025, <https://www.foreignaffairs.com/europe/funding-europes-firepower>.

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