

ARTICLE

NATO Burden-sharing in the COVID-19 Era: A Diminishing U.S. Appetite for Security Guarantees for Europe?

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Abstract

Burden-sharing is not a new area of contention among NATO members. In the post-Cold War period, due to changes in the international conjuncture, burden-sharing has continued to be on NATO's agenda through various periods and with different intensities. Among the various differences in attitudes and interests regarding NATO policies between the U.S. and European members, U.S. governments have raised the issue of burden-sharing in particular to emphasize that the U.S. spends more on defending Europe's security than do the European allies themselves. This article evaluates the burden-sharing issue, explains why it is constantly being raised by the U.S. and suggests concepts and policies with which to solve it. The article also discusses the effects of the COVID-19 pandemic on NATO, arguing that the most important challenge will be the pandemic's effect on the global economy. Relatedly, COVID-19's impact may also affect the success of NATO's policies and the U.S.'s influence on its European NATO allies in regard to its policies toward China. This suggests that burden-sharing will continue to occupy NATO's agenda in the years ahead.

Keywords

NATO, burden-sharing, U.S. foreign policy, European security, smart defense, COVID-19

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Introduction

The COVID-19 pandemic has emerged in an international conjuncture in which the concept of security and security perceptions have changed in relation to international actors. COVID-19 has once again reminded us that security cannot be approached solely from a state-oriented and military-strength perspective; rather, health is also a security issue, with pandemics posing a security threat to international actors. Due to international political and economic crises in various regions since the 1990s, a new discourse has been developed against the security discourse centered on the state and threats to the state that can only be responded to by armed force. This new discourse focuses on individuals and unconventional threats from economic and environmental factors, such as economic instability, political pressure, domestic conflicts, pandemics, smuggling, trafficking and migration. This change of discourse has introduced new concepts, such as the responsibility to protect, humanitarian interventions and human security. These concepts are based on the idea that the international community should take special measures to protect the security of people, not just states. Changes in the subjects to which security threats are directed have made a comprehensive concept of human security necessary, one that anticipates and eliminates the political, economic, environmental and social

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threats that hinder human well-being and happiness. This conceptualization has become widely used and discussed in the international relations literature.¹

Ensuring human security has also come onto NATO's agenda. Since the Cold War, NATO has been transforming itself from a regional collective defense organization into a global security organization. However, its human security agenda has been limited

to humanitarian intervention, which reflects the human security approach within NATO.² Although NATO's latest strategic concept, published in 2010, accepted health risks as a security threat, the COVID-19 pandemic has shown that NATO, like other international organizations, is not prepared enough.³ The pandemic has emerged as a non-military, human security problem that transcends borders and threatens everyone, regardless of status. This indicates that, strategically, the health sector is a component of the security sector. Thus, NATO needs to strengthen its resilience against

different types of threats, including pandemics. The COVID-19 pandemic has also changed states' financial and economic priorities, which may reduce defense expenditure in the medium to long term. Even before the pandemic, the argument that the Europeans need to spend more on defense to better share NATO's security and defense burden with the Americans was already tenuous in most European states.⁴ European governments' already dubious appetite for increasing their NATO spending to a level commensurate with that of the U.S. will become even more difficult to sustain post crisis, because the general economic depression that will follow the pandemic will considerably constrain public spending. Indeed, the "more-money-for-defense" narrative will lack credibility in any public debate in which other human security-related priorities have emerged.⁵ This trend will also affect NATO's longstanding burden-sharing debate.

Burden-sharing means acting collectively for a common purpose, so creating and maintaining an alliance concerns how burdens are shared. Inequitable burden-sharing in alliances where the military and economic strengths of its members differ significantly may pose a problem within the alliance. The burden-sharing issue within NATO has been discussed in terms of its different dimensions in the literature. This debate has been dominated by the economic theory of alliances, which interprets "security" (output) as a pure public good or an impure public good.⁶ This literature emerged in 1966 with an article by Mancur Olson and Richard Zeckhauser, "An Economic Theory of Alliances", in which the authors examine NATO as a military alliance in terms of its economic aspect.⁷ Assuming that defense within the alliance is a public property, they develop their economic theory of the military alliance and aim to explore how burden-sharing works within alliances. Reasoning that Gross Domestic Product (GDP) is a good measure of the benefits derived from collective security, they found a significant positive correlation between military expenditure and GDP. According to them, the pure publicness of NATO deterrence results in an "exploitation hypothesis", whereby larger and richer allies shoulder a disproportionately large defense burden in terms of military expenditure/GDP compared to small and poorer allies. This means that the latter countries can attempt to freeride on the larger, wealthier members to maximize their benefits while minimizing their own support.⁸ In sum, the pure public good of deterrence, which is provided by the richest country, results in the other alliance members freeriding on the commitments of the richest member. This line of reasoning became part of a theory of organizations known as "collective action".

Critics, however, contradicted Olson and Zeckhauser's conclusion by arguing that alliance-based security is an impure public good. That is, larger powers retain the ability to resort to intra-alliance threats about providing security as well as various diplomatic and economic disciplinary instruments to make the smaller powers fear abandonment and marginalization.⁹ Overall then, we can accept that freeriding or burden-shifting incentives are an inevitable component of alliance politics. Numerous further studies have investigated NATO burden-sharing in different time periods, and explored burden-sharing measures.¹⁰ The overall conclusion is that changes in NATO's strategic doctrine, weapons technology, membership and perceived threats affect the mix of public, impure public and private (ally-specific) benefits derived from the allies' military expenditure, thereby influencing burden-sharing.¹¹

Burden-sharing here refers to the distribution of the costs and risks of accomplishing NATO activities equitably among member states. The worry about burden-sharing and freeriding dates back to the years following NATO's foundation. Discussions of burden-sharing within NATO on the American side argue that its allies in Europe are freeriding on its military protection. They believe the U.S. should be wary of supporting wealthy European nations that do not want to spend as much on their militaries.¹² The European side has often responded by pointing out that much of the U.S. spending included in NATO's published burden-sharing comparisons was for forces required for European missions that were not authorized by NATO, and to which European states were often opposed.¹³ While the American side tends to see issue in military terms, Europeans tend to see it as increasingly multi-dimensional. From time to time, the U.S. Congress in particular has taken the initiative of calling for increased European contributions. In the post-Cold War period, due to the changes in the international conjuncture, burden-sharing issues have remained on NATO's agenda during various periods and with different intensities. The Trump Administration in particular extended its concerns about an unfair and unsustainable burden-sharing arrangement.

Taking a historical perspective by exploring NATO burden-sharing since the 1950s, this article evaluates the issue, explains why it is constantly being raised by the U.S. and suggests concepts and policies with which to resolve it. The article also evaluates the possible implications of the COVID-19 pandemic for burden-sharing in NATO. In the COVID-19 era, the most important challenge will be the pandemic's effect on the global economy. Its impact may affect the success of NATO's policies and U.S.

influence over its European NATO allies in its policies toward China. This suggests that burden-sharing will continue to occupy NATO's agenda.

The Burden-Sharing Issue: A Longstanding Debate

In the early 1950s, U.S. political and military leaders expressed concerns about European dependence on the U.S. security presence in Europe, as they considered this as leaving the U.S. with an unfair share of the responsibility for European security. To develop a more balanced and sustainable sharing of the transatlantic security burden, U.S. leaders focused most often on seeking to compel European allies to increase their national defense budgets. Throughout the Cold War years, the issue was overwhelmingly measured in terms of GDP assigned to defense. In the late 1960s and early 1970s, America's pressure on its European allies was most forcefully conveyed in the "Mansfield Resolutions". Expressing opposition to the U.S. presence in Europe, Senator Mike Mansfield introduced a series of resolutions calling for a substantial reduction in the number of U.S. troops in Europe. Although the resolutions failed to be adopted and were not legally binding, they did put continued pressure on the Administration and served as a warning sign to the European Allies.¹⁴ In the 1980s, for instance, the U.S. Congress enacted legislation to cap U.S. force strength in Europe if the allies did not grow their national defense budgets annually by 3% more than inflation.¹⁵ According to former Defense Secretary Casper Weinberger's report, only the U.S., Canada and Luxembourg had met these conditions each year since 1980.¹⁶ These kinds of solutions are still being proposed. More recently, for example, NATO leaders agreed to ensure that every member country spend 2% of its GDP on defense by 2024 (given its details below).

The problems of collaboration and burden-sharing within NATO have been discussed in different dimensions in the academic literature since the 1950s, and burden-sharing issues have appeared on NATO's agenda in various periods and with varying intensities depending on changes in the international conjuncture, particularly in the post-Cold War period.¹⁷ The breakup of Yugoslavia and its effects on European security were among the most important issues affecting the debate after the Cold War's end. During the Cold War, solutions had been sought for issues related to European security under U.S. and NATO leadership. The conflicts in Yugoslavia created a perception among European countries that this situation could be changed in favor of Europe. As Jacques F. Poos, former President of

the Council of the EU and former Deputy Prime Minister of Luxembourg noted, “Now, it is the hour of Europe, not the hour of the Americans” regarding whether to intervene in the Yugoslavia crisis. This comment may be interpreted as the European Community considering this crisis as an opportunity to prove itself to the U.S. regarding European security.¹⁸ Indeed, the U.S. did not show interest in the region after the crisis in Yugoslavia first erupted. Instead, viewing the problem as an internal European issue, it left the solution to the European states.

Under these conditions, it was a natural development for the U.S. to ask its European allies to take on a greater burden regarding European security. NATO then decided to develop a European Security Defense Identity (ESDI) to enable NATO members, with the 1991 Rome Summit and its strategic concept, to use their means and capabilities to ensure their own security for operations in Europe in which non-European allies did not wish to participate. According to the strategic concept, as part of developing a European security identity, NATO’s European members would assume a greater degree of responsibility for Europe’s defense.¹⁹ On January 10–11, 1994, the ESDI initiative was adopted to accomplish a more balanced burden-sharing within NATO. To this end, the Combined Joint Task Forces, “separable but not separate”, were developed to enable European allies to carry out operations using NATO means and capabilities in the absence of the U.S.²⁰ Arrangements regarding the Joint Common Task Forces were agreed upon at NATO’s 1996 Council of Ministers in Berlin. NATO-EU cooperation, which was developed with the Berlin Plus regulations at the end of 2002 and in early 2003, could not play a significant role in solving this problem. Despite these arrangements, however, transatlantic discussions over burden-sharing continued, because EU member states kept their defense expenditures low and refrained from increasing them to contribute to Europe’s defense.

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During the military transformation that took place during the post-Cold War period, various reports were published and activities were carried out within NATO to resolve the burden-sharing issue. “The Defence Capabilities Initiative”, adopted in 1999, and “the Prague Capabilities Commitment”, published at the Prague Summit in 2002 were documents reflecting the

will to work together and share the burden among NATO members. One example of this approach is the Strategic Airlift Interim Solution (SALIS) developed since 2006 by ten NATO member states (Bulgaria, Estonia, Hungary, Lithuania, the Netherlands, Norway, Poland, Romania, Slovenia and the U.S.) and two Partnership for Peace (PfP) member countries (Finland and Sweden) to improve air transport capabilities.²¹

As soon as the Soviet threat receded, the U.S. reduced its defense budget and military power allocated to NATO and decreased defense expenditure from 9 percent of GDP in 1989 to 3 percent in 2000. European countries also reduced their defense budgets.²² The active role of the U.S. in NATO-led operations in the Balkans following the disintegration of Yugoslavia highlighted the continued dependence of European allies on the U.S. in terms of carrying out military operations. After the September 11 attacks, American foreign policy multilateralism was replaced by unilateralism. The most tangible effect of this shift was that European allies did not contribute to the Afghanistan operation to the extent desired by the U.S., although it was carried out under NATO leadership.²³ These developments meant that the issue of NATO burden-sharing remained unresolved during the presidency of George W. Bush from 2001 to 2009.

During Barack Obama's presidency (2009–2017), the U.S. called more intensively for equitable burden-sharing in NATO. However, European members still did not increase their budgets to the level the U.S. wanted. During Obama's presidency, NATO's Libya operation was a crucial factor in the debate, as it exposed the ability gap between the European allies and the U.S. Although NATO members unanimously endorsed the war in Libya, fewer than half participated and less than one third carried out strike missions. According to former U.S. Secretary of Defense Robert Gates, this situation and the transatlantic gap in defense spending could consign NATO to "military irrelevance" in a "dim if not dismal" future unless the allies met their responsibilities.²⁴ Thus, the reliance of European allies on the power and capabilities of the U.S. during NATO's Libya operation once again raised the burden-sharing issue. To find a solution, NATO Secretary General Anders Fogh Rasmussen called on European allies to spend more on "smart defense" by pooling resources and cooperating more effectively, as explained below.

More recently, U.S. President Donald Trump criticized NATO's European members on various occasions during and after his election campaign, using undiplomatic language and keeping the issue on the agenda. Trump not only repeatedly complained about the unfair fiscal burden carried by the

U.S. compared with its European allies, but even suggested that the transatlantic alliance is obsolete.²⁵ Trump's view on the issues was clear from his statements about "America first" in transatlantic relations, describing NATO as "an outdated organization" and referring to Germany as one of the NATO members that "need to pay their debts on defense spending."²⁶ Trump consistently criticized the low defense spending of NATO's European members and questioned why the U.S. should continue to protect "free riders" if they do not significantly increase their defense spending.²⁷ Trump reportedly even considered withdrawing the U.S. from NATO altogether.²⁸ Successive U.S. administrations have raised the issue to emphasize their argument that the U.S. spends more on European security than European states themselves, especially given the differences in attitudes and interests between the U.S. and European NATO members regarding alliance policies. Especially during Donald Trump's presidency, the U.S. administration has tried to prioritize the debate. As Nye highlights, Trump's foreign and security policy placed much greater emphasis on unilateralism, with a dismaying zero-sum tone to Trump's pronouncements, while the U.S.'s hegemonic leadership has been replaced with a much more transactional approach toward allies and partners.²⁹ The European allies responded to these accusations; for example, German Chancellor Angela Merkel stated that it was "no longer the case that the United States will simply just protect us," and continued by asserting that Europe should take its destiny into its own hands.³⁰ Similarly, French President Emmanuel Macron supported the idea that Europe could not rely purely on the U.S. for its security: "It's up to us to meet our responsibilities and guarantee our security, and therefore European sovereignty."³¹ However, European members also emphasize that it is unfair to evaluate a country's contribution to NATO's common security only through the criterion of defense expenditure.

Despite these debates and the negative atmosphere that surrounds the issue, Schreer is sure that "neither is a U.S. withdrawal from NATO on the cards any time soon, nor are European countries serious about developing strategic autonomy from the U.S."³² Although the relationship between the U.S. and its European allies is expected to fluctuate in the future, this is not expected to seriously damage NATO's solidarity principle.

It is useful here to characterize the structure of the international conjuncture. Specifically, the international system today is evolving toward multipolarity. According to Mearsheimer, the world became multipolar in or close to 2016. This shift away from unipolarity to a new international order is a death sentence for the liberal international order, while the U.S. and

China will lead bounded orders in competition with each other economically and militarily.³³ These developments are making the existing differences in threat perceptions and divergences of interest within NATO more visible. Moreover, the European allies do not even agree on security among themselves. For example, Western European countries, such as the UK, France, Belgium, the Netherlands and Germany, believe that security cooperation should focus on sharing intelligence regarding international terrorism, whereas Eastern European countries, such as Poland and the Baltic Republics, prioritize regarding NATO as a means of deterring Russia.³⁴ In such a conjuncture, it is unrealistic to wait for an issue like burden-sharing to be solved quickly as it is directly related to the defense planning policies of NATO member countries. In short, the burden-sharing issue is constantly kept on NATO's agenda, especially by the U.S., and particularly during periods of political disagreement and differences of interests between the U.S. and its European allies.

NATO National Defense Spending Criteria: The 2% and 20% Spending Targets

Within NATO, the consensus regarding burden sharing is that the member states' defense spending should not fall below a certain percentage of their GDP. The Defense Ministers Meeting held before the Riga Summit in 2006 discussed whether member states should increase their defense spending to 2% of GDP.³⁵ At the 2014 Wales Summit, NATO leaders agreed formally to aim to spend at least 2% of GDP on annual national defense budgets, of which at least 20% should be devoted to major equipment and related research and development by 2024. In a period when the international security conjuncture changed, it is no coincidence that these decisions were taken at the Wales Summit, where the focal point was the future of relations with Russia, given the crisis in Ukraine and the necessity of securing NATO's Eastern border. NATO leaders saw these goals as evidence of the Alliance's deterrence capability.

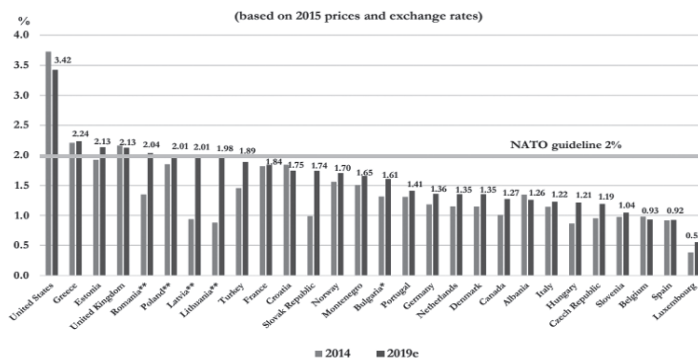
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According to the NATO data shown in Graph 1, seven countries had complied with the commitment to allocate 2% of GDP to defense expenditure by 2019, and all the other member countries have increased their defense

spending since 2014. However, it should be remembered that when this commitment was formalized in 2014, only four states were meeting this commitment.³⁶ As Graph 2 shows, 16 countries committed to devoting 20% of defense spending on equipment in 2019, compared to four countries in 2013. This indicates that the member countries have tried to meet these commitments. As Graph 3 shows, from 2013 to 2019, non-U.S. NATO countries increased the defense outlays from \$252 to \$302 billion, while U.S. defense spending decreased from \$696 billion to \$685 billion. In all, NATO members' total defense investment could top \$1 trillion in 2020.

There are some problems in calculating the ratio of defense spending to GDP. The lack of a common definition of military expenditure makes it difficult to determine which items to consider within this category. NATO data reveal that although staff pensions are considered a military expenditure, it is debatable how much this actually serves the security of the country and the alliance. Another problem is calculating expenditures in countries where exchange rates fluctuate but military expenditure is indexed to the U.S. dollar. Some analysts even see the 2% and 20% spending targets as a completely meaningless discussion. In their view, these targets neither address NATO's real needs nor contribute to NATO's deterrence power. According to Cordesman, NATO needs to scrap these targets and focus on developing an effective strategy to deter Russia.³⁷ Although most analysts agree that these targets do not represent any type of critical threshold in terms of defense capabilities,³⁸ they are considered symbolically important political tools for keeping the Alliance together.

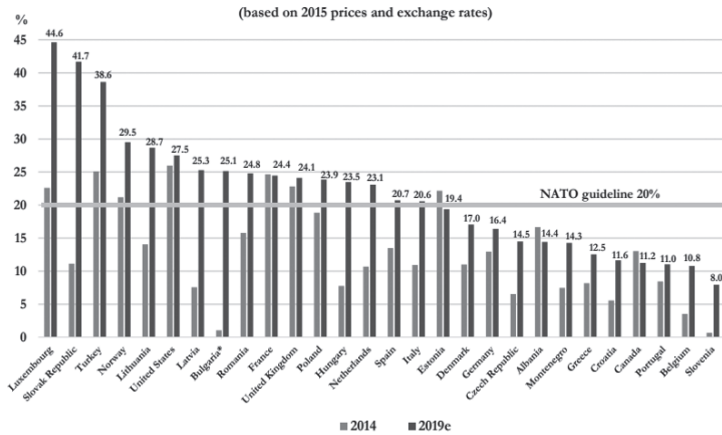
Graph I: Defense Expenditure of NATO Countries as a Share of GDP (%)



Notes: Figures for 2019 are estimates.
 * Defence expenditure does not include pensions.
 ** These Allies have national laws and political agreements which call for 2% of GDP to be spent on defence annually; consequently estimates are expected to change accordingly. For the past years, Allies' defence spending was based on the then available GDP data and Allies may, therefore, have met the 2% guideline when using those figures (In 2018, Lithuania met 2% using November 2018 GDP figures).

Source: “Defense Expenditure of NATO Countries (2013–2019),” *NATO*, November 29, 2019, p. 3, https://www.nato.int/nato_static_fl2014/assets/pdf/pdf_2019_11/20191129_pr-2019-123-en.pdf (Accessed January 22, 2020).

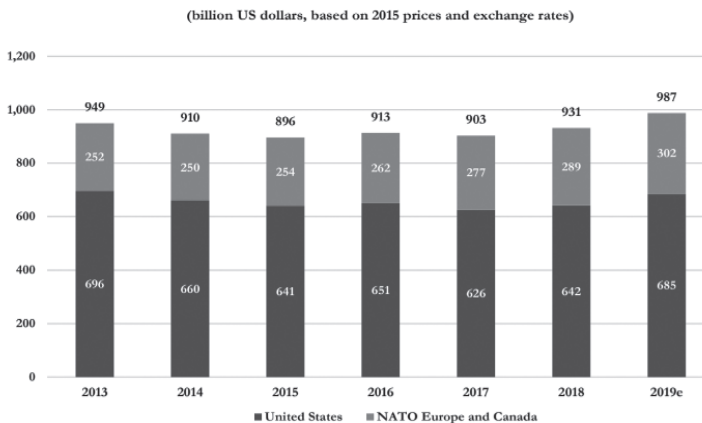
Graph II: Equipment Expenditure of NATO Countries as a Share of Defense Expenditure (%)



Notes: Figures for 2019 are estimates.
 * Defence expenditure does not include pensions.
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Source: “Defense Expenditure of NATO Countries (2013–2019),” *NATO*, November 29, 2019, p. 3, https://www.nato.int/nato_static_fl2014/assets/pdf/pdf_2019_11/20191129_pr-2019-123-en.pdf (Accessed January 22, 2020).

Graph III: Defense Expenditure in Billion USD.



Notes: Figures for 2019 are estimates. The NATO Europe and Canada aggregate from 2017 onwards includes Montenegro, which became an Ally on 5 June 2017.

Source: “Defense Expenditure of NATO Countries (2012–2019),” *NATO*, June 25, 2019, p. 4, https://www.nato.int/nato_static_fl2014/assets/pdf/pdf_2019_11/20191129_pr-2019-123-en.pdf (Accessed January 22, 2020).

Smart Defense as a Solution to the Recurring Burden-Sharing Issue

One attempt to solve the burden-sharing issue within NATO has been by means of activities carried out in smart defense since 2011. Smart defense was introduced to the international public in a speech by then NATO Secretary General Anders Fogh Rasmussen at the Munich Security Conference in February 2011. Smart defense, which is a new expression of the common idea of “achieving maximum impact with limited resources allocated to defense,” formally become a part of NATO defense strategy at the Chicago Summit on May 20–21, 2012. Smart defense then became a fundamental element of NATO’s defense planning policy in decisions taken at the Wales Summit on September 4–5, 2014 to approve the NATO Framework Nations Concept, which supports smart defense. This called for willing NATO countries to come together under the coordination of one country to develop various capabilities, with joint projects initiated under the leadership of Germany, the U.K. and Italy.³⁹ There are currently about 40 multinational smart defense projects that will deliver improved operational effectiveness, economies of scale and connectivity among member states’ national forces. These projects range from the NATO Universal Armament Interface, which aims to enable fighter jets to use munitions from various sources and nations, to Women Leaders in Security and Defense, which aims to integrate diversity and gender perspectives into strategic planning, development of capabilities and force preparedness.

The beginning of the process of establishing the concept of smart defense goes back to the discussions about NATO’s function in the early post-Cold War period. In the longstanding debates over the functions of NATO, those who argue that NATO’s institutional identity is no longer fundamentally important under the present circumstances generally offer two main reasons. First, they argue that the underlying transatlantic bond at the heart of NATO can no longer serve the interests of its members. Second, NATO can no longer ensure the security and stability of continental Europe. However,

NATO’s continued existence indicates that the meaningfulness of the transatlantic bond does continue to endure, at least within the Alliance.

In the post-Cold War era, *crisis management*, which involved expanding NATO’s combat and intervention zone, and *cooperative security*, which was

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based on developing relations with non-NATO member countries, were included in NATO's strategic concepts and declared in 1991, 1999 and 2010. Additionally, NATO defined *collective defense* as the Alliance's main aim of establishment.⁴⁰ Every new strategic concept reflects an increase in salient threats against the alliance. These new strategic concepts draw attention to the variety of threats against NATO's current security. For example, the 2010 strategic concept listed as current threats the proliferation of nuclear weapons and ballistic missiles, instability or conflict beyond NATO borders, cyber-attacks, terrorism and key environmental and resource constraints. Nonetheless, member countries differ in their perceptions of these threats and their willingness to participate in balancing them. Although these differences have not led NATO to disband, they have caused the European allies in particular to be less eager than the U.S. to participate in and share the costs of NATO's new global tasks. Since 2009, for example, the U.S., highlighting its interests in the Asia-Pacific—a region where NATO has officially had little role to play—has developed new regional policies.⁴¹ This development has increased the familiar pressure on European countries to allocate more funds to bear the costs of the alliance.

At this point, it is necessary to draw attention to the economic conjuncture that limits the struggle against the security threats NATO has identified, as well as the variety of threats and pressures to be struggled against. Each country's defense spending is shaped by many different factors, such as the nature of the perceived threats, and each country's geopolitical position, military capabilities, economic capacities and foreign policy objectives. The quantity and quality of a country's spending also depends on many factors, such as the quality of the military equipment it owns, and its ability to adapt to technological innovations and sectoral trends. The global financial crisis caused growth rates to decrease to zero or worse in developed economies in 2008 and 2009, especially in the U.S. This crisis, which adversely affected defense capacities, was even more intense in Europe. According to the report of the NATO Political Committee, between 2001 and 2013, European NATO members' defense spending in terms of real GDP decreased from 1.93% to 1.58%. In contrast, while most European countries cut defense budgets by 10 to 15% between 2008 and 2013, defense spending in the People's Republic of China and the Russian Federation grew by 43.2% and 31.2%, respectively.⁴² The report clearly highlights that the decline of NATO member defense budgets is one of the most important challenges that NATO faces today.

Smart defense is a concept created in an international conjuncture where global threats have increased, while the resources to fight them and, more

importantly, the common will to fight them has diminished and the U.S. has shifted its strategic priorities to the Asia Pacific. Rasmussen describes smart defense as “ensuring greater security, for less money, by working together with more flexibility.”⁴³ He considers the decline in the defense expenditure of the European allies as alarming in the current period, when rising powers like China and India have increased theirs. Rasmussen therefore presented smart defense as a solution to a problem that mainly concerns European countries.⁴⁴ Smart defense is clearly considered as an opportunity to compensate for this contraction European defense spending while reducing Europe’s military dependence on the U.S. As we know from NATO’s Libyan operation in 2011, the European allies still depend on the U.S. for the critical resources necessary for conducting an advanced military operation, such as combat drones for air intelligence, airlifts, precision-guided weapons and ground control facilities.⁴⁵

It is a common practice for European countries to meet their military needs through cheaper, joint projects. Likewise, smart defense is based on the

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principle of “pooling and sharing”, which is also an element of the EU Security and Defense Policy. Both before and especially after the establishment of the European Defense Agency in 2004, EU countries have implemented defense projects in which they invest together within this framework. Smart defense is a familiar solution to U.S. criticisms that the European allies are not allocating more resources to cover NATO’s costs. The main reasons for making this idea the most important element of NATO’s defense policy are

the financial distress of the European allies and the clear shift in U.S. strategic priorities beyond Europe.

Challenges for Promoting Smart Defense

According to NATO officials, smart defense rests on three pillars: cooperation, prioritization and specialization.⁴⁶ These pillars may be seen as NATO’s attempt to rationally adapt itself to the realities of the 21st century. However, it should not be forgotten that applying these pillars is not as

easy as it sounds in the official texts. Those who think that smart defense cannot go beyond a slogan, despite being a good idea, offer three main reasons:⁴⁷ First, the allies' trust in each other has diminished, as became evident during the NATO-led operations in Afghanistan and Libya. Second, countries often see defense expenditure as a way of reviving their national industries. Third, bureaucratic domestic procedures complicate the provision of military services. In addition, it is difficult to identify exactly where the allies will invest and coordinate private sector involvement in this process.

Specialization is arguably the most difficult principle to realize within the smart defense framework. Specialization is also directly related to national defense industry activities and policies. Provision practices, which constitute the basis of defense industry activities, are a basic building block of sectoral development as well as the target of meeting user needs. Thus, services such as defense industry policies, defense system procurement, project management, industrialization, financing, research and development, exports and defense industry cooperation are carried out through single and centralized institutional structures that can adapt to the changing conditions of the day and are based on project management. Maintaining this centrality in an international organization like NATO is more difficult than it is in a single state. It is therefore hard to determine the criteria under which NATO countries will pursue "specialization" because each nation's defense industry is directly linked to its national sovereignty. Today, decision-making for defense procurement requires a comprehensive assessment. While NATO members whose economic capacities are relatively small adopt the specialization principle of smart defense and prefer to allocate resources to build cell capacities, states with better economies, such as the U.K., France and Canada insist on having "full scope" defense capacities.⁴⁸ This disparity prevents specialization from spreading throughout NATO.

Smart defense aims at military integration in every sense among NATO member countries. However, even in a supranational organization based on the delegation of sovereign powers such as the EU, "pooling and sharing" cannot be implemented very successfully. In this sense, an answer to the question, what makes smart defense different from its predecessors and what makes it worth following, is the international conjuncture we have described above and the effects it entails.

The exact form of smart defense depends on coordinating member states' defense planning policies and their common threat perceptions. Given the

difficulty of agreeing on a common threat within NATO outside official texts, smart defense cannot be fully realized. However, the “smart defense discourse” will remain on NATO’s agenda as a label and slogan. Indeed, smart defense will clearly remain on the agenda, especially because the number of states needing NATO’s security umbrella has increased due to the threat they feel, especially from Russia, after the crisis in Ukraine.

Possible Implications of the COVID-19 Pandemic on the Burden-sharing Issue

COVID-19 has revealed that no international organization can fulfill its announced mission and that all have created bureaucratic structures that have inflated over time.⁴⁹ Formed as a collective defense organization before claiming to transform itself into a global security organization following changes in the international conjuncture, NATO too was caught unprepared for the pandemic. One focus of criticism is NATO’s failure to provide the desired cooperation and coordination with two of its member states, Italy and Spain, after the pandemic first appeared.⁵⁰ This failure has brought NATO’s strategic concept and preparedness against security threats into question and forced a reevaluation of NATO’s effectiveness in perceiving and taking measures against non-military global threats to human security. The cancellation of Exercise Defender-Europe 20, which would have been the largest military exercise in terms of both the number and range of personnel since the Cold War, due to the pandemic seems likely to bring garrison and medical security onto NATO’s agenda.

After NATO Secretary General Jens Stoltenberg stated that they were fighting an “invisible enemy,”⁵¹ NATO foreign ministers assigned the Supreme Allied Commander Europe on April 2, 2020 to coordinate the air transport of medical supplies and personnel.⁵² Various parts of NATO’s institutional structure took on the task of ensuring coordination between member states during the pandemic, such as the Euro-Atlantic Disaster Response Coordination Centre (EADRCC) and the Committee of the Chiefs of Military Medical Services in NATO (COMEDS).⁵³ However, despite these assignments, member countries failed to establish a common sharing system for medical equipment and personnel and used their own resources rather than NATO’s to fight the pandemic.⁵⁴ For its part, NATO has taken some steps to eliminate its deficiencies regarding coordination, particularly through decisions taken at the NATO Defense Ministers Meeting on June 17–18, 2020.⁵⁵ Participants discussed plans for a possible second wave and

decided to stock up on critical medical equipment and materials, and create a fund for their procurement.

COVID-19 has shown that security estimates, risk predictions, existing understandings, norms, decision-making processes, institutions and preparations for managing possible crises are not sufficient worldwide.⁵⁶ Regarding security policies, as Aydın notes, chemical-biological threats, which have already entered the national security documents of some security organizations and states, but apparently still have not been adequately prepared for, will be among the top concerns in future planning.⁵⁷ NATO has also begun to work on creating a new strategic concept to increase dialogue and strengthen solidarity among member states while providing political coordination. Considering that the pandemic has reminded the international community that human health is also a security phenomenon, it can be expected that NATO's new strategic concept will devote more space to threats to health, food and technology, and to methods for dealing with them.

The last NATO summit before the COVID-19 pandemic emerged was held in London on December 3–4, 2019. This summit is important because it was held after French President Macron claimed in an interview on November 7 that NATO was 'brain dead' and there was a lack of strategic coordination in NATO's decision-making processes.⁵⁸ Thus, the reiteration in the Summit Declaration's first Article that the principles of "solidarity, unity and cohesion" are NATO's cornerstones was more significant than similar expressions at previous summits.⁵⁹ In the Summit Declaration, NATO leaders also declared a strengthening of NATO's ability to deter and defend with an appropriate mix of nuclear, conventional and missile defense capabilities. Space was also emphasized as a new operational domain apart from land, air, sea and cyberspace. The declaration launched an evaluation to strengthen NATO's political dimension. Within this framework, the NATO Secretary General designated a group of ten experts in March 2020.⁶⁰ Based on their report, NATO is likely to create a new strategic concept to enhance dialogue and solidarity among member countries. Finally, the most distinguishing feature of this summit was that the China-U.S. rivalry was officially added to NATO's agenda. In the Summit Declaration, NATO leaders acknowledged that they cannot ig-

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nore the consequences of China's growing influence and foreign policies. It was thus critical to add China to the agenda as a factor affecting NATO's security approach, given the ongoing trade wars and the political debates within NATO regarding the economy, technology and cyber-warfare.

In a clear sign of efforts to make China internationally responsible for the COVID-19 pandemic, then U.S. Secretary of State Mike Pompeo referred to the pandemic as "the Wuhan virus" in reference to the city where it supposedly originated, while then President Donald Trump called it "the Chinese virus", even claiming that it came from a laboratory in Wuhan. The Trump administration's discourse needs to be evaluated within the framework of internal policy objectives regarding the November 2020 presidential election. China-U.S. rivalry, which had already become more prominent in the three years before the pandemic, is likely to result in a new bipolar or multipolar international system whose economic characteristics will become more evident once the pandemic subsides.

If the international system becomes bipolar again, an international system can be created in which NATO allies can gather around their policies more easily. Considering the current conditions in the U.S., a bipolar system is also compatible with Biden's domestic and foreign policy objectives because, in such an international system, organizations based on collective defense, such as NATO, can become more significant. In sum, it seems that NATO will become more involved in balancing China in the Asia Pacific Region, given the summit's official acknowledgment, for the first time, of the challenge to NATO of China's global policies and the Trump administration's discourse on China's responsibility for the global spread of COVID-19. As Aydın emphasizes, the dependence of the global production chain on China, especially for intermediate goods, which became evident during the pandemic, can transform the U.S.'s efforts before the pandemic to create non-Chinese alternatives to certain products into a common effort across the West.⁶¹ Such an effort could bring states on both sides of the Atlantic together for new purposes by ending divergences between the U.S. and its European allies in security understanding and threat perception.

In the wake of the pandemic, the most important coercive factor that may affect the success of stronger NATO policies adopted by all members, as well as the U.S.'s influence on NATO's European members in its policies toward China, will be the effects of the pandemic on the global economy. These could trigger a period in which European countries, which are already on the cusp of their defense spending, reduce military spending despite being constantly criticized by U.S. administrations. This will inten-

sify discussions about burden-sharing as member states prioritize spending for economic recovery over military spending.⁶² Indeed, Dutch Defense Minister Ank Bijleveld has already announced, “it is clear that we will not reach [the defense spending target] by 2024”.⁶³ The pandemic, which represents a breaking point in traditional security concerns, has sparked new discussions on the mandates of state security, territorial control, border, coast guard, anti-terrorism and public order institutions and organizations.

While it remains unclear when the COVID-19 pandemic will end, whether there will be second or third waves, and what the intensity of these possible waves may be, it is difficult to reach definitive conclusions about how the pandemic will change the functioning of the existing international system and international organizations such as NATO. Yet, even if the pandemic were to end today, it is clear that criticisms of neoliberal policies that do not place people at the center have given momentum to ideas like re-emphasizing social and strong state concepts. Rather than waiting for the pandemic to radically change the current international system, it would be more realistic to expect that the processes outlined above, which had already started before the pandemic, will take effect. Indeed, the pandemic has once again demonstrated the necessity of international cooperation, multilateral policies and functioning international organizations in solving global problems.

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Conclusion

After the 2010 Lisbon Summit, when NATO’s latest strategic concept was published, certain developments changed security perceptions and required a reevaluation of the organization’s security and defense policies—perhaps even a new strategic concept. Conflicts following the Arab Spring, the dissolution of state structures in the Middle East, the growth of DAESH, the refugee crisis, the Ukraine crisis and Russia’s invasion of Crimea were significant developments threatening NATO security. In addition, Trump’s

persistent, post-election criticisms of NATO's European members' lack of burden-sharing was remarkably effective in revealing the differences in threat perceptions among NATO members. Although there is a consensus in the literature about the need for NATO to adapt to this new security environment, how this adaptation will take place remains a question.

Nevertheless, despite being a recurring issue, burden-sharing disagreements will not cause major structural changes such as NATO's disintegration. Although the role and power of the U.S. in the international system have arguably decreased as the international system has evolved into multipolarity, these conditions will not change the U.S.'s position in NATO. Today, the debates on burden-sharing between the U.S. and its European allies are historically similar to political crises in NATO since the 1950s. Today's burden-sharing issue is politically temporary and situational; the defense spending of NATO's European members has tended to increase since 2014, although efforts within NATO to solve the problem, such as smart defense, may contribute to this problem, albeit relatively. Thus, this issue should be regarded as a way of expressing political conflicts between the U.S. and its European allies, such as relations with Russia and China, and the prioritizing of threats to the Alliance. In fact, the problem of burden-sharing lies in the divergences between NATO member states on security and threat perceptions, which have recently become more visible.

NATO could effectively help combat a threat like the COVID-19 pandemic because it requires global cooperation and solidarity. However, NATO's internal problems, due to differences in its member states' geopolitical priorities that preexisted the spread of the pandemic, prevented this. The pandemic has provided a challenging test of NATO, which owes its survival to its ability to adapt to transformations in the geopolitical environment, including changing threat perceptions. The pandemic has revealed that security cannot be addressed from a narrow, state-oriented perspective, and cannot be dealt with merely by means of military power. COVID-19 has made it obvious that health is a security issue that requires states to strengthen their resilience against different types of threats, including pandemics.

As a global phenomenon, the pandemic has rapidly affected many different areas, from the daily habits of individuals to the foreign policies of international actors. Despite uncertainty about how the currently chaotic environment will evolve, the pandemic will influence ongoing processes rather than completely change the current international system. In particular, considering NATO's recent, official acknowledgement at the 2019

London summit that China is a significant security concern, tension in NATO-China relations, which started before the pandemic, will continue to increase. The effects of the pandemic on the global economy may initiate a period in which European countries, whose defense expenditures have always been targeted by U.S. administrations, will nonetheless reduce those expenditures. If so, the Permanent Structured Cooperation process of the EU's European Security and Defense Policy will lose momentum and NATO will become the preferred platform for European defense cooperation.

Despite uncertainty about how the currently chaotic environment will evolve, the pandemic will influence ongoing processes rather than completely change the current international system.

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