



AS THE US ELECTION APPROACHES, THE RISING SENSE OF ALARM AMONG EUROPEANS IS PALPABLE

- Europeans are alarmed, prompted by two related fears – first that Donald Trump, in their view, will once again be president, and, second, that his presidency will wreak havoc on the global world order. A first casualty of the carnage will be support for Ukraine, and the second casualty will be US support for NATO.
- While legislation attempted to “Trump-proof” NATO, Trump’s recent campaign rally statements have prompted a reassessment of the efficacy of that legislation. There are a variety of ways in which Trump could undermine NATO and its deterrent effect without formally withdrawing from NATO.
- There are myriad reasons why Europe should shoulder greater responsibility for the defense of Europe, but it is unclear how quickly and effectively they can do so, and in particular in sufficient time to constitute an effective deterrent against Putin’s clearly articulated ambitions to restore the Russian Empire.
- While support for NATO/Ukraine are critical, should both be imperilled, the predicate for that (Trump-47) represents a potentially greater threat to world order.

Not long ago I wrapped up another trip through various European capitals, and I came away with one dominant observation: the mood is somber, and that is a significant understatement. Europeans are very concerned – more precisely, they are alarmed, and it is impossible to overstate the level of concern. The Europeans I visit regularly and others I spoke to as part of a series of briefings I delivered on the upcoming US elections, from journalists to policymakers, business leaders to professionals, are laser-focused on the state of our politics and the state of the presidential race. They follow the political developments of the day as closely as denizens of Washington, D.C. – from Trump’s civil and criminal trials to the polling to the implications of third-party candidates.

Europeans have no vote in our elections. They know they are mere bystanders, but they are painfully aware that a victory by Donald Trump would have palpable negative consequences for their continent, and for much of the world. So, yes, bystanders in the process by which Trump could again become president, but by no means bystanders when it comes to the consequences of that outcome. As President Biden often remarks, when he attended his first G7 summit in 2021 as president and announced, “America is back,” some of his fellow heads of state asked, “for how long”? Others presumably remarked, “which America” (which was not as much a question as a statement of concern)?

These concerns come amidst what Brad Dress, writing in The Hill, [referred to](#) as an “‘epoch-making’ shift in world order.” The world order today is very different than it was at the end of Trump’s term in office, let alone at the beginning of his term.

Bewilderment

Overall, according to polling [reported on](#) by Bruce Stokes for the German Marshall Fund, Europeans view the United States as the most influential actor in global affairs (which



influence they view as positive), but at the same time, they express little faith that that influence will continue.

European policymakers and thought leaders look at macro and micro trends in their own economies, and then look to our economy with great admiration and envy. They are intimately familiar with our rebound from the pandemic, our taming of inflation, the creation of nearly 11 million new jobs, an unemployment rate at a near 50-year low (3.5%), the launch of a record number of small businesses, the progress we are making in onshoring chip and semi-conductor manufacturing under the CHIPS and Science Act and our commitment to funding the transition to a more sustainable economy under the Inflation Reduction Act (which incidentally is attracting foreign direct investment from Europe at the expense of expansion in Europe). But they cannot fathom why those accomplishments do not appear to resonate with American voters (or at least those who respond to election-year polling).

Europeans cannot understand why we so often are on the brink of a government shutdown. Similarly, they cannot understand why we seem incapable of addressing the scourge of gun violence.

What is also incomprehensible (and inexcusable) from their perspective is the failure of Congress to pass the national security supplemental package to provide \$60 billion in aid to Ukraine. There is a clear-eyed consensus that Russia poses an existential threat to peace and security in Europe that extends well beyond Ukraine (though the horrors of that war are bad enough), and that if Russia “succeeds” in Ukraine (and I understand the definition of “success” is far from precise), it will not stop there. The only uncertainties appear to be how Putin will define victory and which country may be next on his hit list.

Foreboding

And then there is the upcoming election. This subject elicits two sets of related concerns. The first is the fear regarding the outcome of the election, and the second is the fear of the consequences of the election outcome. As to the first, I was hard pressed to find anyone who thought that Joe Biden would win re-election, even among self-described optimists and long-time observers of US politics. That conviction then leads to the second set of fears – in short, Vladimir Putin, reading whichever signals he wishes from a Trump victory, would likely invade a member of NATO and the Europeans would have to counter that invasion without US support.

Incidentally, the apprehension expressed by thought leaders mirrors European public sentiment, which is not surprising given [Bruce Stokes](#)' conclusion that “disillusionment with US global leadership may be better explained by widespread European public anxiety about a return of Donald Trump and the implications of his presidency for Europe.” Recent [polling](#) by the European Council on Foreign Relations similarly finds that few Europeans would be pleased to see the return of Trump (in many countries, even far-right parties are distancing themselves from Trump) and many see a second term as presaging a defeat for Ukraine.

The threat to NATO

If anyone needed reminding of the existential threat that Trump poses to the world order, that reminder came through loud and clear on February 10 when Trump, at a campaign rally in



South Carolina, [threatened](#) to jettison the foundational principle of NATO by implying the United States would not come to the collective defense of a NATO member were it to be attacked.¹ He then literally invited Vladimir Putin to attack NATO countries that have failed to meet their defense spending targets of 2% of GDP, annually. That 25-second riff, which prompted Brookings Director of Research Michael E. O’Hanlon [to exclaim](#), “Trump is not just being unseemly and belligerent[. . .] he is playing with fire,” came after a less widely followed threat [posted](#) on Truth Social – to end foreign military and development assistance and replace it with a program of loans – that, yes, would be expected to be repaid.

Many viewed this most recent rant (and, particularly, the invitation to Putin to attack) to be far more incendiary than Trump’s suggestion at a 2018 NATO summit in Brussels that the United States would not honor its Article 5 commitment unless NATO members met their defense commitments.² The sense of alarm flows in part from Trump’s language, and in part from the changed geopolitical landscape in which the world finds itself.

Europeans, like their American counterparts, generally have come to understand that one must take Trump at his word – which, as former National Security Adviser John Bolton characterized [for the Washington Post](#), does not mean motivating European members to pay more, but rather is the predicate for withdrawing from NATO.³

Last July, Congress passed, as part of the [National Defense Authorization Act](#), bipartisan legislation (sponsored by Senators Tim Kaine and Marco Rubio) that prohibits a president

¹ Article 5 of the [North Atlantic Treaty](#) (which has only been invoked once, following the 9/11 attacks) does not actually compel NATO members to declare war on an aggressor if one member is attacked; rather, it provides as follows:

The Parties agree that an armed attack against one or more of them in Europe or North America shall be considered an attack against them all and consequently they agree that, if such an armed attack occurs, each of them, in exercise of the right of individual or collective self-defense recognized by Article 51 of the Charter of the United Nations, will assist the Party or Parties so attacked *by taking forthwith*, individually and in concert with the other Parties, *such action as it deems necessary*, including the use of armed force, to restore and maintain the security of the North Atlantic area. (Emphasis added.)

² Incidentally, just as observers have pondered whether Putin had timed the murder of Alexei Navalny so as to send shockwaves through the Munich Security Council, so too could one ask whether Trump’s remarks were similarly timed. For the conspiracy theorists, there was the tantalizing possibility that the outburst was inspired by the almost universally panned Tucker Carlson interview with Putin.

³ In his 2000 [book](#) (“The America We Deserve”), Trump stated that “pulling back from Europe would save this country millions of dollars annually.” His campaign [website](#) says the following about NATO: “we have to finish the process we began under my Administration of fundamentally reevaluating NATO’s purpose and NATO’s mission. Our foreign policy establishment keeps trying to pull the world into conflict with a nuclear-armed Russia based on the lie that Russia represents our greatest threat. But the greatest threat to Western Civilization today is not Russia. It’s probably, more than anything else, ourselves and some of the horrible, U.S.A. hating people that represent us.”



from suspending, terminating, denouncing or withdrawing (each, as defined in the Vienna Convention on the Law of Treaties) the United States from NATO or from funding any such action, unless approved by a two-thirds vote in the Senate or by an Act of Congress (meaning it must pass in both the House and the Senate). Prior to taking such action, the president would have to provide at least 180 days' notice to Congress (the House Foreign Affairs Committee and the Senate Foreign Relations Committee), and obtain the requisite vote. Incidentally, Senators Kaine and Rubio failed in their earlier effort to pass the legislation while Trump was president.

However, as Joe Gould, Cannon O'Brien and Paul McLeary noted in February in POLITICO ([“‘Everyone should be scared as hell’: Democrats call for Trump-proofing NATO”](#)), Democrats are now acknowledging following Trump's riff on NATO that the Kaine-Rubio legislation would have “limited effect on a president opposed to the alliance.” Trump, the authors note, could refuse to appoint a US ambassador to NATO headquarters or could order the Pentagon to pull back on NATO exercises. Trump could have a largely free hand in effectively withdrawing from NATO by reducing troop levels in Europe.⁴ And were there to be an attack that triggered Article 5, a second Trump administration would be free to decide what measures are appropriate, and were he to decide not to act, Congress would largely be powerless to force the administration's hand.

Of equal concern is the rhetoric itself, as the value of Article 5 lies in its deterrent effect – Trump's rhetoric undermines the deterrent effect and could easily be interpreted by Putin as the green light he needs for his next attempted conquest.

Admittedly, there is acceptance of the reality that the European members of NATO have failed to fully live up to their defense spending commitments (after all, this was a recurring theme during the Bush-II and Obama administrations, as well), but my interlocutors also readily acknowledge that fixing that deficit remains not at all straight-forward.⁵ As one long-

⁴ While the Constitution requires the advice and consent of the Senate for the United States to enter into a treaty, it is less clear what is needed to withdraw from a treaty. As Jonathan Swan, Charlie Savage and Maggie Haberman noted in their December 2023 article in the New York Times ([“Fears of a NATO Withdrawal Rise as Trump Seeks a Return to Power”](#)), decisions to revoke treaties by President Jimmy Carter and by President George W. Bush prompted members of Congress to challenge those decisions in court (Carter's withdrawal from the 1955 Mutual Defense Treaty with the Republic of China was challenged by Senator Barry Goldwater, and Bush's unilateral termination of the Treaty on the Limitation of Anti-Ballistic Missiles was challenged by the Center for Constitutional Rights on behalf of 32 members of Congress); those challenges were rejected by the courts, partly on the grounds that the disputes were a “political question.” While far from clear, the general consensus is that the treaties in question are void.

⁵ As Patricia Cohen and Liz Alderman, writing in the New York Times ([“The ‘Peace Dividend’ Is Over in Europe. Now Come the Hard Tradeoffs”](#)), noted in April 2023, the fall of the Iron Curtain in 1989 caused a massive shift in funding away from defense to health care, housing and education (the vaunted “peace dividend”). They cite massive increases, for example, in social spending by Denmark, Britain, Poland, the Czech Republic and Germany. That peace dividend, in the [words](#) of current IMF Managing Director Kristalina Georgieva, “is now gone.” As Cohen and Alderman point out, the increased security outlays now made necessary by Russian



time observer noted, while tensions over NATO contributions have existed for decades,⁶ the US has positioned NATO in such a way as to deepen European dependence on the United States, not lessen it. Ironically, member states may conclude that, should Trump return to the White House, to curry favor with the transaction-obsessed Trump, they will need to move their defense industries closer to the United States. While president, Trump had a fundamental misunderstanding as to how NATO members meet their defense commitments (namely, the 2% figure is a goal and not a mandate, and that the money does not flow to the United States or to NATO), and perhaps his threat may redound to the benefit of US defense manufacturers.⁷

Incidentally, Putin's invasion of Ukraine (and the US pivot to Asia) has been far more effective than Trump's bluster to motivate increases since 2016 in defense spending – the Washington Post [notes](#) that of the six NATO members bordering Russia, all but Norway have met the annual 2% target, and Norway intends to do so in 2026. According to the International Institute for Strategic Studies, [increases](#) in defense spending across NATO members of 32% since 2014 mean that 10 European members of NATO reached the 2% target last year, up from two in 2014. Timing being everything, laments over NATO often were followed by recriminations over differences in national responses to arming Ukraine. My conversations in Paris the day after President Macron's comment on deploying French

aggression come at an inopportune time as Europe confronts both an ageing population and the costs of combatting climate change. They note that military spending by Canada and the European members of NATO reached a low point in 2014 as demand for weapons dropped; then came the annexation of Crimea.

Last April, the Stockholm International Peace Research Institute [reported](#) that military spend in Europe in 2022 saw its steepest rise in 30 years, representing the sharpest rise (13%) of any region. Military expenditure by states in Central and Western Europe totalled \$345 billion in 2022. In real terms, spending by these states for the first time surpassed that in 1989, as the Cold War was ending, and was 30% higher than in 2013. According to [The Hill](#), spending in 2023 among European NATO members reached \$388 billion,

- ⁶ Writing in Foreign Affairs in 1963 (“[The Practice of Partnership](#)”), Dean Acheson noted that NATO member tensions were inevitable because of a failure of the organization to come up with a unified strategy covering military, political and economic policies. That failure created a vacuum, which when combined with US ambivalence over the organization, would lead to fear that the defense of Europe would remain dependent on the United States. Those failures were never overcome.
- ⁷ A July 2018 Time Magazine article (“[President Trump Says NATO Allies Owe the US Money. He's Wrong](#)”) quotes a former commander of NATO forces, retired Admiral James Stavridis, who posited that “President Trump does not appear to understand that the 2% of GDP spending by the allies is a guideline, not a mandate.” The article goes on to explain that the 2% figure was established in 2002 as a non-binding annual target to collectively share the burden of defense expenditures. It was later enshrined at a summit in Wales in 2014 when NATO members that had yet to meet the target pledged to do so within a decade.



troops in Ukraine and the shocked responses across the continent, and in Paris as well, underscore the gaps.

So, here we are, only a few months away from celebrating the 75th anniversary of the establishment of NATO and in the midst of the largest NATO exercise since 1988 – Steadfast Defender 2024, and yet as *Le Monde* summed it up earlier this month, Trump has managed to heighten apprehension and nervousness over the future of NATO at a time when there is an existential conflict on NATO’s borders. That the intransigence of Republican lawmakers to approve aid to Ukraine is seen as a harbinger of the dangers the world may soon face is eminently reasonable and understandable. It is unclear that shows of strength or comforting words will be enough to reassure nervous allies and, in the meantime, the suffering of the people of Ukraine continues.

Ukraine

What has struck me most in my conversations in Europe, particularly when I compare those conversations to conversations in the United States around what I loosely call democracy-related themes, is that while my interlocutors may be following the day-to-day news about Trump, when it comes to cataloguing threats to democracy, they point directly to the broader implications of the failure to stop Putin in Ukraine. Notwithstanding the ubiquity of Ukrainian flags one still sees in the United States, there appears to be neither the urgency nor the depth in similar discussions in Washington, let alone elsewhere in the United States. I have long thought that the Biden administration needs to do a better job of making the case to the American people why Putin needs to be stopped, and why doing so is not just a European imperative but one that directly implicates our own national security as well.⁸

Are the Fears Misplaced?

What did not happen?

Liana Fix and Michael Kimmage, writing in *Foreign Affairs*, in their piece, “[Trump’s Threat to Europe: His First Term Tested the Transatlantic Relationship – but His Second Would Break It](#),” dispel any notion that, from a geopolitical perspective, a second Trump term would be no worse than the first.

⁸ The President did state in his SOTU [speech](#) that “Putin of Russia is on the march, invading Ukraine and sowing chaos throughout Europe and beyond” and “if anyone in this room thinks Putin will stop at Ukraine, I assure you: He will not.” “If the United States walks away, it will put Ukraine at risk. Europe is at risk. The free world will be at risk, emboldening others to do what they wish to do us harm [sic].” Helpful, marginally, but this was not the framing I had in mind.

I note by the way that defense/national security leaders in both Sweden (Carl-Oskar Bohlin, [Minister of Civil Defense](#) and Micael Bydén, Commander-in-Chief) and Britain (General Patrick Saunders, [head of the British Army](#)) have raised the prospect of a war with Russia. Boris Pistorius, the German Minister of Defense, [has warned](#) that Putin could attack NATO in five to eight years, and Dutch Admiral Rob Bauer, chair of the NATO Military Committee has [called for](#) a war-fighting transformation of NATO, as we “face the dangerous world in decades.”



During Trump's four years in office, there were no major wars involving the United States, there were four peace agreements signed by Arab states with Israel, and the NAFTA trade agreement was renegotiated. Fix and Kimmage note that Trump did not withdraw from NATO (in fact, during his term, North Macedonia and Montenegro joined the alliance) and his administration delivered lethal military aid to Ukraine that had been blocked by the Obama administration and would play a critical role in enhancing the ability of Ukraine to defend itself during the early days of the invasion.

Admittedly, Trump had his own more selfish motives for aiding Ukraine, and both the "perfect phone call" between Trump and President Zelensky and the hold-up in aid as part of the plan to enlist the Ukrainians to impugn the reputation of Joe Biden were classic examples of Trump's unabashed transactionalism (not to mention an example of "high Crimes and Misdemeanors" within the meaning of Article II, Section 4 of the Constitution).

Despite his many odd (and for many inexplicable) interactions with, and professed affinity for, Putin (the most bizarre being his siding with Putin at the 2018 Helsinki summit over the US intelligence community assessment regarding Russian interference in the 2016 election), the essential relationship with Russia remained little changes from Obama days – Trump did not recognize the annexation of Crimea, did not push to recognize Putin's efforts in eastern Ukraine, did not continence further inroads in the region or lift sanctions on Russia that were in place in 2017. That said, Trump did [withdraw](#) a third of the 36,000 US troops stationed in Germany, some of whom returned to the States and some were redeployed elsewhere in Europe. President Biden reversed that drawdown, and actually deployed more troops in Germany.

What could (or is likely) to happen?

In any event, there are few who believe that a second Trump administration, were it to come to pass, would resemble his first.

Fix and Kimmage predict that, even if Trump does maintain military support for Ukraine, which is unlikely, his statements and actions are likely to embolden Putin, which in short order could prompt the Kremlin to assert control over significant parts of Ukraine. The threat that Trump poses, they submit, should be viewed less in terms of discrete decisions he might take but rather "it is Trump's mercurial nature [and consequent uncertainty], more than his ideas that could wreak havoc."

Add to that mix the likely absence of the so-called "adults in the room" from his first term, the fact that the world is in a more volatile state than it was in 2016 and the transformation of the Republican Party into the party of Trump, with fewer Republican lawmakers willing to embrace traditional Republican orthodoxy around a strong Atlantic-centric foreign policy or willing to oppose Trump's more dangerous impulses. Instead, as Swan, Savage and Haberman [noted](#), were Trump to return to the White House, he would have the backing of now better organized and better funded conservative institutes that are skeptical of an activist US foreign policy – these anti-interventionists include the [Center for Renewing America](#) and the [Heritage Foundation](#). He would also likely surround himself with hardline nationalists beholden to an "America First" ideology who have had four years to regroup.



Trump would likely jettison both the principles and foundational institutions of the post-WWII [Truman Doctrine](#) and, in the words of Fix and Kimmage, would “likely pursue a kaleidoscopic array of short-term partnerships, most of them with countries outside of Europe and some with countries hostile to Europe.” They also predict that Trump would embrace less transactionalism in favor of a far less restrained pursuit of self-interest and efforts to dominate the news cycle purely for domestic consumption. While those inclinations drove policy and other pronouncements during Trump’s term, they posed fewer dangers to the world order. The world today faces a very different geopolitical landscape largely because Putin has now embraced, and more importantly acted up, imperial ambitions to recreate a Russian empire by force and, in so, doing “remake Europe’s entire security architecture through war.”

Yes, the drift in US foreign policy and a potential second Trump term underscore the imperative for achieving some measure of “strategic autonomy” (a concept coined in 2016 but given [more visibility](#) by President Macron in his 2017 Sorbonne [speech](#)), but that takes time and, as Fix and Kimmage point out, Trump might fracture NATO by causing individual members to strike their own deals with Trump, or with Putin. Compounding the challenge is the sense that as Maj. Gen. Veiko-Vello Palm, the commander of the Estonian Army’s main land combat division, noted in an [interview](#) with the Washington Post, there is little evidence that many NATO members are able to conduct large-scale military operations.

As for Putin, his militarization of the Russian economy and increased spending on the Russian military and arms industry would, following a pause in his war effort for a few years, position him well to move against countries beyond Ukraine. In an [interview](#) with NTB, the Norwegian news agency, Norwegian Chief of Defense Eirik Kristoffersen, citing the fact that Russia had built up its military stockpiles far faster than expected by reason having successfully pivoted to a war economy, warned that Norway has only a few years to build up a defense that could better meet an aggressive Russia. And, in the meantime, to compound the challenge the NATO members continue to draw down their stocks of materiel to support Ukraine.

Trump relishes upending the efforts of his predecessors, simply because he can. Recall the withdrawal from the Paris climate agreement and from the JCPOA. To understand what Trump is likely to do were he to again occupy the White House, expect him to unwind whatever President Biden did during his term. Standing behind Ukraine would be the first casualty. Support for NATO would be the second. In response, as Arancha González Laya, Camille Grand, Katarzyna Pisarska, Nathalie Tocci and Guntram Wolff, also writing in *Foreign Affairs* (“[Trump-Proofing Europe: How the Continent Can Prepare for American Abandonment](#)”) have posited (among others), Putin can be expected to oblige by testing the strength of NATO at the earliest indication that Trump is unprepared to live up to America’s Article 5 commitments.

Concluding Thoughts

In one sense, Trump is doing Europe a favor. He has injected a new urgency into efforts by those in Europe who recognize the imperative for European members of NATO to take greater responsibility for their security. There have been, and will continue to be, a number



of other reasons why Europe needs not only to “Trump-proof” itself but to assume greater responsibility of its own security regardless of the outcome of the 2024 election. These reasons range from the more recent pivot to Asia, to the far more pronounced isolationist tendencies among Republican lawmakers, and the paralysis in Congress generally that calls into question what even an Atlanticist administration can deliver. As for other incentives, overlaying all of this has been a longstanding call by administrations stretching back to the end of WWII for Europe to increase military expenditures,⁹ and we should not also forget the mixed foreign policy legacy of the Obama administration.

The urgency notwithstanding, there is no clear and easy path for Europe to achieve greater “strategic autonomy” in terms of both taking greater responsibility for European security and projecting a sufficiently robust deterrent effect. We should also not lose sight of the broader picture were the predicate for this briefing note to come to fruition, namely a second Trump term. Were that to be the case, US foreign policy would be but one part of a far larger, frightening mosaic.

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⁹ In December 1953, then Secretary of State John Foster Dulles threatened an “agonizing reappraisal” of US foreign policy if Europeans failed to show a greater willingness to defend themselves.