

國立政治大學國際事務學院外交學系

碩士論文

超越集體行動的邏輯：國內政治和與俄羅斯的鄰近

性對北約責任分擔的影響

Beyond the Logic of Collective Action:

The Effects of Domestic Politics and Geographic Proximity to

Russia on NATO's Burden Sharing

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Abstract

NATO's burden sharing problem is almost as long as its existence, it remains unresolved and still haunts the alliance to this day. Olson's logic of collective action is the dominant theory on alliance burden sharing, which predicts that disparities in NATO members' economies will incentivize smaller members to free ride. However, there has not been obvious signs of "exploitation of the great" in recent years. In 2020, of the 9 non-US NATO members that had exceeded the 2 percent pledge made in 2014 Wales Summit, of which, 6 were small economies. On closer inspection, 5 of the 6 small economies meeting the 2 percent target were all in close geographic proximity to Russia. In addition, member states that display higher threat perception of Russia, stronger support of NATO, and having cohesive ruling coalitions in favor of increasing defense spending, tend to have higher military expenditure. This thesis uses Olson's Logic of Collective Action as its backbone, incorporates Waltzian's Levels of Analysis and Boulding's Loss of Strength Gradient (LSG) for a more comprehensive study. It concludes that NATO members with higher threat perception of Russian, strong domestic support of NATO, and are in close geographic proximity to Russia, are more likely to have higher defense expenditure, bringing it closer to the 2 percent pledge. This thesis will use Germany and Poland as case studies to help demonstrate its findings. It will also look at the exception, the United Kingdom, and its "special relationship" with the US.

Keywords: NATO, The Logic of Collective Action, Free Riding, Levels of Analysis, The Loss of Strength Gradient

摘要

本文主旨在於探討北約經費分攤的責任問題。依據曼瑟爾.奧爾森 (Mancur Olson) 的集體行動邏輯 (The Logic of Collective Action, CA)，北約成員國因為在政治和經濟上的實力參差不齊，經常導致小國「搭便車」(free ride)。但近年來，北約並無出現「小國剝削大國」(exploitation of the great) 的現象。在 2020 年，共有十個北約成員國的國防開支超過國內生產總額的百分之二，其中就有六個成員國是「小國」；而在這六國中又有五國與俄國有地理上的鄰近性。這些有達到「國防開支超過國內生產總額的百分之二」的國家普遍支持北約，也因為與俄國有地理上的鄰近性而對俄國感到恐懼。本文以 (LSG) 作為主軸，結合肯尼斯.華茲 (Kenneth Waltz) 的「層次分析」(Waltzian Levels of Analysis, LA) 和肯尼斯.博爾丁 (Kenneth Boulding) 的「力量損失梯度」(The Loss of Strength Gradient, LSG) 來進行更全面的研究。本文的結論是：北約成員國如將俄國視為威脅且支持北約，又與俄國在地理上有鄰近性，則該國就越有可能如期達到北約「國防開支須佔國內生產總額百分之二」的目標。本文將以波蘭和德國作為研究案例來佐證其論述，也會個別討論英國和美國間的「特殊關係」來說明其對英國在國防開支上的影響。

關鍵詞：北約、集體行動邏輯、搭便車、層次分析、力量損失梯度

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Chapter I: Introduction

1. Background and Context

Is NATO's current burden-sharing arrangement sustainable or is it "obsolete" and "brain-dead" as some world leaders have claimed, remains a question that still haunts the alliance 70 years after its establishment. Since Trump's 2016 presidential campaign that was built on the "America First" platform,¹ he had repeatedly expressed his skepticism regarding the security and financial burden the US shoulders for its allies,² and if the US should continue to fulfill those commitments.³ In retrospect, disproportional burden sharing in NATO is not a recent phenomenon, it was the inception of the "2 percent pledge" that helped publicize its ingrained burden sharing problem.

The Annexation of Crimea in 2014 sunk Russia's relations with the West to a record low. In order to reverse the trend of defense budgets downsizing in NATO member states, and to help better assess NATO's defense posture, NATO adopted multiple measures to measure members' readiness to combat and level of commitment to the alliance. The most politically significant accomplishment of the 2014 Wales Summit was a pledge made by all members to maintain or raise their military spending to 2 percent of their respective GDP before 2024.⁴

Since 1949, the US has been the guarantor of security of Europe, and NATO was meant to be a political administration that oversees the security guarantee and make Europe stakeholders of its own security. However, there has been a drastic decline in European NATO's military spending, and this trend has caused many to question its deterrence and

¹ Sloan, S. R. (2018). A Way Forward for NATO Allies: Cope With Trump While Preparing For A Post-Trump Future. *War on the Rock*, 1-7.

² Frizzelle, B. (2018). What makes a reliable ally? A fresh perspective on NATO, strategic culture and collective defense. *War On the Rocks*, 1-9.

³ Halilzad, Z. (2017). 3 NATO Reforms Allies Should Expect From the Trump Administration. *The National Interest*, 1-5.

⁴ Techau, J. (2015). The Politics of 2 Percent: NATO and the Security Vacuum in Europe. *Carnegie Europe*, 1-22.

sustainability.⁵ In 1990, military spending of the 14 European NATO summed up to \$314 billion. In 2020, after a series of enlargement, combined military spending of the 29 European NATO was \$322 billion. It is clear that the already-uneven burden sharing has not resolved after enlargement, and the European allies are now even more dependent on the United States for their own security.⁶ Will the 2 percent pledge that intends to name-and-shame allies into paying more for their own security help remedy NATO's burden sharing problem remains unanswered.

The inclusion of the 2 percent pledge is without a doubt the most controversial measure of troop deployability and combat readiness. Some of the most notable criticisms against the 2 percent pledge include, first of all, it measures input instead of output. Spending 2 percent does not say much about defense capabilities or effectiveness;⁷ and why must it be 2 percent, and not 2.5 or 5 percent? There does not appear to be a convincing answer to that question, and the answers provided by NATO high ranking officials is that spending 2 percent of GDP on defense will “be enough for allies to have enough capacity for defense”; which is neither concrete nor convincing. “Relying on the 2 percent metric to measure NATO's health is tantamount to eating an apple a day to keep the doctor away – it's not a bad idea, but neither is it a good indicator of fitness nor the key to lasting health,” stated by Julien Richard, an analyst at International Crisis Group.⁸ Secondly, it is overly simplistic and static. It offers no indication of how well or poor an ally had utilized its resources on defense. Thirdly, any member's failure

⁵ Raynova, D., & Kearns, I. (2015, February). *The Wales Pledge Revisited: A Preliminary Analysis of 2015 Budget Decisions in NATO Member States*. Retrieved from European Leadership Network: www.europeanleadershipnetwork.org/medialibrary/2015/02/20/04389e1d/ELN%20NATO%20Budgets%20Brief.pdf.

⁶ International Institute for Strategic Studies. (2015). *The Military Balance 2015*. London: *International Institute for Strategic Studies*, 1-22.

⁷ Major, C. (2015, April 14). *Time to Scrap NATO's 2 Percent Pledge? Judy Dempsey's Strategic Europe*. Retrieved from Carnegie Europe: <http://carnegieeurope.eu/strategieurope/?fa=59918>.

⁸ Chollet, D., Keil, S., & Skaluba, C. (2020, October 14). *Rethink and replace two percent*. Retrieved from Atlantic Council: <https://www.atlanticcouncil.org/content-series/nato20-2020/rethink-and-replace-two-percent/>

to meet the 2 percent pledge can be construed as lacking solidarity and commitment within the alliance, which will ultimately hurt its deterrence. Fourthly, members are given 10 years to cross the 2 percent threshold, and that timeframe will excuse most of the signatory leaders the agony of implementation.

Given the negatives of the 2 percent pledge, why is it still implemented? The answer is that the 2 percent pledge is both straight forward and politically meaningful. Defense capability is a very complex issue, but when all the metrics are consolidated into a numerical value, it becomes a lot easier for the public to grasp, especially to the voters and political leaders. Secondly, this numerical number divides allies into partners and free riders. The 2 percent commitment does not say enough about military capabilities, but it is an important yardstick that indicates political will. As a result, if the goal of the 2 percent pledge is to stimulate a political debate on burden sharing, and reverse the trend of military downsizing, then its flaws can be overlooked.

When a numerical value represents a member's contribution to the collective security, it is not surprising that many Americans were shocked and enraged to discover that European allies including France and Germany had been "free riding" on the US, and this rage was fueled even more by Trump's relentless claims that Germany owes the United States "vast sums of money".⁹ In addition to Trump's vigorous criticisms and tweets against NATO's current burden sharing, the alliance is now facing further fiscal and economic challenges stemming from the COVID-19 pandemic and disruption in the global supply chains. Smaller national budgets and slowed economic growths will inevitably make it even harder for NATO members to increase its defense expenditure and to fulfill the 2 percent pledge.¹⁰

⁹ Schreer, B. (2019). Trump, NATO and the Future of Europe's Defense. *The RUSI Journal*, 10-17.

¹⁰ Kunertova, D. (2020). Can the new 'magi' save NATO? *War on the Rocks*, 1-9.

Despite diminished economic growths and skyrocketed unemployment rates, some NATO allies continue to fulfill their commitment to the alliance while others remain reluctant to pull their weight.¹¹ According to the 2020 NATO's annual report on member states' defense expenditure, there were only 10 members exceeding the 2 percent pledge. These members include the United States, Greece, the United Kingdom, Romania, Estonia, Latvia, Poland, Lithuania, France and Norway. On closer inspection, it is very noticeable that of the 10 members meeting the 2 percent, 6 are small economies, and 5 are in close geographic proximity to Russia; and were either part of the Soviet Union or the Warsaw Pact. Germany, being the largest economy in Europe and one of America's closest allies, is only spending a mere 1.57 percent of its GDP on defense. In fact, 1.57 percent was a historical high for Germany's defense expenditure, while the Baltic states had been consistently exceeding the pledge since 2018.¹²

Unlike alignments that dissolve after having served its purpose, security alliances like NATO require prolonged coordination and financial support. Lichbach in *The Rebel's Dilemma* explains that any large collective dissent that is geographically dispersed and wish to sustain momentum need dissident organization.¹³ Emotions, whether it be excitement or fear, that were elicited by crises can ignite social movements, which can sometimes turn into institutions. However, movement longevity requires organizing, leadership, financial backing, strategies and communication. NATO seems to have ticked all the boxes. It was established in response to the rise of the Soviet Union, members are relatively close in geographic proximity, it has a permanent command structure, financial backing from the US, and most importantly, despite its flaws in burden sharing, it has persisted through a series of obstacles. However, it can be very difficult to maintain relevant when the alliance loses focus on its main source of

¹¹ Babones, S. (2018). What is NATO good for? *The National Interest*, 1-5.

¹² NATO. (2020). *Defense Expenditure of NATO Countries (2013-2020)*. NATO Public Diplomacy Division

¹³ Lichbach, M. I. (1998). *The Rebel's Dilemma*. The University of Michigan Press

threat. NATO's burden sharing problem is almost as long as its existence,¹⁴ and many presidents before Trump have voiced their discontent regarding the disproportional load the US carries for the alliance, but the problem remains unresolved.¹⁵ However, some members have been going against the trend of military down-sizing and are fully committed to the alliance, and this phenomenon is worth exploring.

2. Purpose of Study and Research Question

NATO has been the guarantor of security for Europe for the past 70 years, but the burden sharing problem remains unresolved. Table 1.1 shows NATO members' defense expenditure as a share of GDP from 2012 to 2020, and it illustrates the differences in each member's contribution to the collective defense. The US, being the leader of the alliance, has been consistently contributing to the collective defense at a high level, while Germany, being the largest economy in Europe, remains reluctant to raise its military spending. In fact, many of the member states meeting the 2 percent pledge are relatively small and in close geographic proximity to Russia. This thesis raises the question why is it that some allies are willing to commit to the 2 percent pledge while others struggle to do so?

¹⁴ Kramer, F. D., & Becker, J. (2012). Saving NATO. *The National Interest*, 1-4.

¹⁵ Zeneli, V. (2017). Why NATO's European members can no longer expect America to pick up the bill. *The National Interest*, 1-6.

Table 1.1*NATO members' defense expenditure as a share of GDP*

| Defense expenditure as a share of GDP | | | | | | | | | |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| The US | 4.37 | 4.03 | 3.73 | 3.52 | 3.52 | 3.3 | 3.28 | 3.51 | 3.87 |
| Greece | 2.29 | 2.21 | 2.20 | 2.30 | 2.37 | 2.34 | 2.47 | 2.31 | 2.58 |
| The UK | 2.16 | 2.23 | 2.14 | 2.03 | 2.08 | 2.09 | 2.11 | 2.10 | 2.43 |
| Estonia | 1.90 | 1.90 | 1.92 | 2.01 | 2.07 | 2.02 | 2.00 | 2.03 | 2.38 |
| Romania | 1.23 | 1.28 | 1.35 | 1.45 | 1.40 | 1.72 | 1.80 | 1.84 | 2.38 |
| Latvia | 0.88 | 0.93 | 0.93 | 1.04 | 1.45 | 1.60 | 2.07 | 2.03 | 2.32 |
| Poland | 1.74 | 1.72 | 1.85 | 2.22 | 1.99 | 1.89 | 2.02 | 2.02 | 2.30 |
| Lithuania | 0.76 | 0.76 | 0.88 | 1.14 | 1.48 | 1.71 | 1.98 | 2.02 | 2.28 |
| France | 1.87 | 1.86 | 1.82 | 1.78 | 1.79 | 1.78 | 1.81 | 1.83 | 2.11 |
| Norway | 1.52 | 1.50 | 1.55 | 1.59 | 1.74 | 1.72 | 1.74 | 1.86 | 2.03 |
| Bulgaria | 1.34 | 1.46 | 1.31 | 1.25 | 1.25 | 1.23 | 1.45 | 1.18 | 1.93 |
| Montenegro | 1.66 | 1.47 | 1.50 | 1.40 | 1.42 | 1.35 | 1.38 | 1.41 | 1.91 |
| Turkey | 1.59 | 1.52 | 1.45 | 1.39 | 1.46 | 1.52 | 1.83 | 1.85 | 1.91 |
| Croatia | 1.53 | 1.46 | 1.85 | 1.78 | 1.62 | 1.67 | 1.58 | 1.66 | 1.87 |
| Slovak Republic | 1.09 | 0.99 | 0.99 | 1.12 | 1.12 | 1.11 | 1.23 | 1.71 | 1.86 |
| Portugal | 1.41 | 1.44 | 1.31 | 1.33 | 1.27 | 1.24 | 1.35 | 1.39 | 1.63 |
| Germany | 1.31 | 1.23 | 1.19 | 1.19 | 1.20 | 1.24 | 1.26 | 1.36 | 1.57 |
| Netherlands | 1.24 | 1.17 | 1.15 | 1.13 | 1.16 | 1.15 | 1.21 | 1.36 | 1.48 |
| Albania | 1.49 | 1.41 | 1.35 | 1.16 | 1.10 | 1.11 | 1.16 | 1.29 | 1.47 |
| Denmark | 1.35 | 1.23 | 1.15 | 1.11 | 1.15 | 1.15 | 1.28 | 1.31 | 1.47 |
| Canada | 1.09 | 0.99 | 1.01 | 1.20 | 1.16 | 1.44 | 1.31 | 1.29 | 1.45 |
| Czech Republic | 1.05 | 1.03 | 0.95 | 1.03 | 0.96 | 1.04 | 1.12 | 1.18 | 1.43 |
| Italy | 1.32 | 1.26 | 1.14 | 1.07 | 1.18 | 1.20 | 1.23 | 1.18 | 1.43 |
| Hungary | 1.03 | 0.95 | 0.86 | 0.91 | 1.01 | 1.21 | 1.02 | 1.27 | 1.33 |
| North Macedonia | 1.23 | 1.17 | 1.09 | 1.05 | 0.97 | 0.89 | 0.95 | 1.15 | 1.27 |
| Slovenia | 1.17 | 1.05 | 0.97 | 0.93 | 1.01 | 0.98 | 1.01 | 1.07 | 1.20 |
| Spain | 1.04 | 0.93 | 0.92 | 0.93 | 0.81 | 0.91 | 0.93 | 0.91 | 1.16 |
| Belgium | 1.04 | 1.01 | 0.97 | 0.91 | 0.89 | 0.88 | 0.89 | 0.90 | 1.10 |
| Luxembourg | 0.38 | 0.38 | 0.38 | 0.43 | 0.39 | 0.51 | 0.50 | 0.54 | 0.64 |

Source: NATO. (2020). *Defense Expenditure of NATO Countries (2013-2020)*. NATO Public Diplomacy Division

The dominant theory of “burden sharing” in alliances is Olson’s *The Logic of Collective Action*, which revolves around the concept of “exploitation of the great”. However, after a series of enlargement, smaller members do not seem to be the ones free riding on the alliance. In 2020, only 9 of the non-US NATO members exceeded the 2 percent pledge, and on closer inspection, 6 of which were smaller economies. This thesis aims to explain why some NATO members choose to comply with the 2 percent guideline while others remain reluctant to do so. Building on Olson’s logic of collective action, this thesis will incorporate Waltzian’s levels of analysis and Boulding’s LSG to better understand what factors drive members’ commitment to the 2 percent pledge.

Understanding NATO’s ingrained burden sharing problem is vital to the sustainability of the alliance and Europe’s security. The vast majority of NATO members are democracies, meaning public opinion are translated into votes which ultimately determines political leaders and policies. If majority of the voters feel threatened by a foreign power, and want a bigger defense budget, that country’s defense spending will most likely to increase. Conversely, when threat perception is low, or when the public prioritizes social welfare over defense, the government is less likely to raise its military spending at the cost of social welfare. Cohesion in ruling coalitions also determines how successful political agendas can pass through the legislative process. A unified ruling coalition that is in favor of increasing its military budget will be more successful at pushing for defense spending boost than a government that is divided.

After 70 years, Russia is still the greatest threat to the Europe’s security and stability. Despite today’s technological advances, distance remains a natural barrier, and it is blatantly noticeable that NATO members along the Eastern flank appear to be more likely to spend higher percentage of GDP on defense. According to Boulding’s LSG, distance diminishes

relative power.¹⁶ Russett and Oneal also made similar remarks that “distance is the most important constraint” on power projection. Members along the Eastern flank are considerably more vulnerable and susceptible to Russian threat because of geographic proximity. As a result, they are more likely to have higher military expenditure.

Findings from this analysis will help policymakers identify factors that help drive military spending, and the challenges members face when trying to boost their defense spending. This thesis will also explore ways to go beyond the 2 percent measure of military contribution and recommend measures that focus on “output” instead of “input”. A better yardstick to evaluate members’ contribution will boost NATO’s deterrence and help optimize its resources. Insights gained from this research could also help other security alliances to maintain relevance and sustainability.

3. Literature Review

NATO is constantly facing new challenges, some are external threats, while others can be internal strategic implementations, and coordination problems. Over the past seven decades, NATO has persisted through various challenges, even after the dissolution of the Soviet Union and a number of enlargements, it remains Europe’s primary security guarantor.¹⁷ However, when NATO is confronted with new threats, taking on new missions, accepting new members, and facing fiscal difficulties, one question always comes up, which is who will pay?

The Logic of Collective Action by Mancur Olson helps to explain burden sharing in military alliances.¹⁸ It suggests that larger NATO members shoulder disproportional share of

¹⁶ Markowitz, J. N., & Fariss, C. J. (2017). Power, proximity, and democracy: Geopolitical competition in the international system. *SAGE journals*, 1-16.

¹⁷ Leppgold, J. (1998). NATO’s Post-Cold War Collective Action Problem. *International Security*, 78-106.

¹⁸ Olson, M. (1977). *The logic of collective action: Public goods and the theory of groups*. Cambridge, Mass: Harvard University Press.

financial and defense burden in relations to smaller states.¹⁹ Meaning members with larger economic capacities and population will allocate higher percentage of GDP on military expenditures. Olson explains that when an alliance is composed of members of different capacities, it offers smaller members the incentives to free ride. “Exploitation of the great” describes smaller states’ lack of enthusiasm to contribute their share of “public goods” when larger states have already fulfilled and exceeded their commitments to the alliance. The two fundamental characteristics of “public good” are “nonexcludability” and “nonrival consumption”. “Nonexcludability” refers to any resource that is available to all members regardless of contribution, and “nonrival consumption” refers to one’s consumption of a resource does not affect amount available to others. Nuclear deterrence is the perfect example of “public good”, it is available to all NATO members, and its value does not diminish over consumption.²⁰

In *An Economic Theory of Alliances*, Olson’s theory of collective action is supported by a model developed by Olson and Zeckhauser. This paper proposes that disproportional share of burden is expected of any international organization, especially in defense alliances. Their model concludes that the collective action problem hypothesis, which describes the phenomenon that members with larger economic capacities typically bear disproportionate share of financial and defense burden to their less-capable counterparts. According to their observations, there appears to be a statistically significant correlation between the size of economy and the share of income allocated to defense in NATO. Their explanation is that benefits derived from NATO membership is divided amongst nation states, and there is little

¹⁹ Oneal, J. R. (2009). The theory of collective action and burden sharing in NATO. *International Organization*, 379-402.

²⁰ Sandler, T. (2004). *Global Collective Action*. Cambridge University Press.

incentive for the smaller members to shoulder any burden when the larger allies have already provided the “public good” regardless of their contribution.²¹

If Olson’s theory of collective action and “exploitation of the great” is true, we should expect the largest economies such as Germany, to shoulder more security and financial burden than smaller economies, such as Poland, Romania, and Estonia; but in 2020, according to NATO members’ defense expenditures, only 10 of its members fulfilled the 2 percent pledge made in 2014, including the United States, the United Kingdom, France, Norway, Poland, Romania, Greece, Lithuania, Latvia, and Estonia. This contradicts with Olson’s theory of collective action and “exploitation of the great”. So, if all countries are rational rent-seeking actors, why do some choose to contribute while some free ride?

Some studies have attempted to explain the disproportional share of financial and defense burden between the large and small states through national interests and aspirations. Joel R. Hillison in *Stepping Up: Burden Sharing by NATO’s Newest Members*, explains that larger states tend to have broader national interests and will naturally require more military capabilities to defend those interests.²² The US has aspired to be the leader of democracies and police of the world order ever since the end of WWII, that aspiration came with more responsibilities and interests that require tending. Consequently, the US military have interests that extends beyond the scope of Europe, and needs more military capacities that surpasses what NATO demands of its members. In fact, the US being the number one spender in NATO is able to reap more benefits from the collective security alliance, and as the “good” becomes “less public”, its willingness to shoulder larger share of the burden increases²³.

²¹ Olson, M., & Zeckhauser, R. (1966). An Economic Theory of Alliances. *The Review of Economics and Statistics*, 48(3), 266-279. doi:10.2307/1927082

²² Hillison, J. R. (2014). *Stepping Up: Burden Sharing by NATO’s Newest Members*. Carlisle, PA: Strategic Studies Institute, US Army War College Commandant.

²³ Hallams, E., & Schreer, B. (2012). Towards a ‘post-American’ alliance? NATO burden-sharing after Libya. *International Affairs*, 313-327.

Plumper and Neumayer in *Free-riding in Alliances: Testing an Old Theory with a New Method* used “responsiveness to growths in the US and the Soviet Union military expenditure” to infer free riding. Results show that smaller allies tend to free ride on larger members, but size in terms of economy and population do not correlate with free riding. However, geographic proximity to Russia, especially allies that were once part of the Warsaw Pact are less likely to free ride.²⁴ Plumper and Neumayer also concluded that the old test for free riding is inaccurate, because the level of free riding was predominantly determined by dividing military expenditure by GDP, and completely neglected the differences in national interests and aspirations.

Contrary to Olson’s collective action hypothesis that correlates economic size to the level of free riding, Hillison’s findings also suggest that newer members, typically smaller in economic size, devote higher percentage of GDP into defense and security, especially right after gaining membership, in comparison with older members. According to the collective action logic, smaller members are expected to free ride, but are not. Some scholars claim that newer members are more concerned with its reputation, which compels them to comply with the burden sharing requirement to show commitment to the collective security. Positive reputation, especially being able to fulfill security and financial commitments, could lead to potential invitation into the European Union, and tightened relations with the United States. The socialization process within NATO happens through participation in various operations that help shape newer members’ behaviors. These processes prove to be very successful at making new members to resist the natural incentive to free ride. The constructivist literature also highlights the importance of “identities”, and what these “identities” entail. New members that had acquired the NATO “identities” will comply with the burden sharing commitments

²⁴ Plümpner, T., & Neumayer, E. (2015). Free-riding in alliances: Testing an old theory with a new method. *Conflict Management and Peace Science*, 32(3), 247–268. <https://doi.org/10.1177/0738894214522916>

and prioritize collective interests over self-interests. These findings again conflicts with the logic of collective action which suggests the rent-seeking nature of smaller alliance members.²⁵

However, findings suggest that new members' willingness to meet the burden sharing standards decreases after their accession. After the initial compliance, new members typically decrease their military spending to maximize private interests and to lower fiscal standings to help pursue EU memberships. Another explanation for the decline in compliance in new members is that older members of the alliance are not meeting the burden sharing guidelines, which gives new members little incentive to continue fulfilling their commitments to NATO. In addition, when the perception of conventional threat is low, domestic competition for government funding is high, and formal sanctioning mechanisms for not meeting the burden sharing standards is nonexistent, rational states will act rationally and free ride.

Theory of collective action suggests that the free riding problem will exacerbate as the number of members increases. However, findings from various literature finds that enlargement did not worsen the level of free riding. Decline in military spending began during the collapse of the Soviet Union, when perceived level of threat diminished for most Western European countries. Private benefits remain the only determinant for increased military spending.

Few conclusions can be drawn from Hillison's *Stepping Up: Burden Sharing by NATO's Newest Members*. First, the results were consistent with Olson's logic of collective action that larger states shoulder larger portion of the burden than smaller states, because larger states have greater economic capacities, and broader national interests that requires tending. In fact, larger states with interests that extends beyond the scope of Europe benefit more from the collective security alliance.

²⁵ Hillison, J. R. (2014). *Stepping Up: Burden Sharing by NATO's Newest Members*. Carlisle, PA: Strategic Studies Institute, US Army War College Commandant.

Secondly, findings also suggest that newer member devote higher percentage of their GDP to the alliance than older members. Socialization and credibility literature suggest that length of time spent within the alliance is negatively correlated with its willingness to shoulder burdens, and that unwillingness is expressed in military expenditure as a percentage of GDP. This correlation holds true even when considering new members' close geographic proximity to Russia and their shared history. Studies found that despite common beliefs, military expenditures of states neighboring Russia especially ones that had been invaded by the Soviet Union, do not correspond to Russian military spending. Socialization and credibility literature claim that newer members justify their higher military spending for their reputation within the alliance and to foster relations with the United States.

Thirdly, although new members' percentage of GDP devoted to defense declined after accession, but expenditures did not decline. Explanations for the decline in military expenditures as a percentage of GDP include economic growth in newer members, decline in the global economy, and heightened sense of security after accession.

Fourthly, literature aimed to examine potential correlations between military expenditures of Russia, European NATO, and the US during and after the Cold War have found that, during the Cold War, Russian military expenditures were responsive to the US military spending, while non-US NATO only respond to fluctuations in Russian military expenditures. However, after the Cold War, European NATO states stopped responding to changes in Russian military expenditures, because their perception of Russian threat has diminished.

Lastly, levels of free riding did not increase in European NATO members following NATO enlargement as predicted by the collective action literature. Although defense spending as a share of GDP appears to be declining as NATO expands in membership, but it does not infer causation between the two. Such decline could be the result of economic growths in non-US NATO allies, which can depict the wrong impression that military expenditures as a

percentage of GDP is declining. Lowered military expenditures could also reflect diminish in perception of Russian threat following the collapse of the Soviet Union.²⁶

Jacobson used both “material” and “non-material” indicators to determine if European allies are free riding on the United States.²⁷ Material indicators are traditional measures of defense capacities including military expenditures and troop numbers, and non-material indicators are citizens’ willingness to defend their national interests. Results indicated that in general, European NATO – old and new alike – have lowered their military expenditures as a percentage of GDP and their military personnel by abolishing conscription. In addition, Europeans appear to be unwilling to defend their country, especially ones that host US military bases. Explanations for the low material and non-material support on the part of the European allies include European economic growths that had reduced military expenditures as a percentage of GDP; narrowed national interests that is within the boundaries of the European continent; the difference in levels of threat perception between the US and European allies; and the US public also shows low self-reported willingness to defend its country that is comparable to its European counterparts. Jacobson concluded that, only the members that are close in geographic proximity with Russia and were once part of the Warsaw Pact are consistently responsive to Russian military spending fluctuations.

Existing literature on alliance burden sharing have primarily been revolved around economic and population sizes, national interests and aspirations, reputation and identities, and responsiveness to the US and Russia military expenditure changes; but it does not fully explain or predict the spending behaviors of every NATO member in recent years. First of all, in 2020, most of the member states meeting the 2% guideline had been smaller economies; secondly, Germany and France have much broader national interests and greater aspirations than the

²⁶ Lichbach, M. I. (1998). *The Rebel’s Dilemma*. The University of Michigan Press.

²⁷ Jo Jakobsen (2018) Is European NATO really free-riding? Patterns of material and non-material burden-sharing after the Cold War, *European Security*, 27:4, 490-514, DOI: 10.1080/09662839.2018.1515072

Baltic states, but are spending much smaller share of GDP on defense; Thirdly, ever since the 2% pledge made in 2014, it is significantly much easier to identify who is “free riding” on the alliance, but the reputation of “free rider” still unable to compel members to spend more. Lastly, during the Annexation of Crimea in 2014, there is no noticeable increase in military expenditures in most NATO members.

There appears to be a lack of discussion on the effects of domestic factors and geographic proximity to Russia on NATO’s burden sharing problems. Since majority of the NATO members are democracies, and their foreign and security policies are determined by their domestic politics, therefore domestic factors should not be treated as a constant. In addition, despite common belief, distance still diminishes power projection. This thesis will build on Olson’s logic of collective action, and incorporate Waltzian’s levels of analysis to explain the significance of domestic factors, and use Boulding’s Loss of Strength Gradient (LSG) to illustrate the impact of distance on power. In addition, this paper will look at the UK’s “special relationship” with the US to explain its behavior, as it contradicts with most theories on alliance burden sharing.

4. Theoretical Framework

This thesis will adopt Olson’s theory of collective action as its overall approach to examine Poland, Germany and United Kingdom’s level of commitment to the 2 percent pledge in NATO. In addition, the thesis will incorporate Waltzian’s levels of analysis to explore the three members’ public opinion of NATO and the level of partisanship within each member’s ruling coalition, for a more comprehensive analysis. In addition, Boulding’s loss of strength gradient will be included to understand the effect of geographic proximity to Russia on military spending. This thesis proposes that NATO members that are in close geographic proximity to

Russia with a population and a unified political coalition that is highly supportive of NATO will devote a higher percentage of GDP to their defense spending.

Olson's logic of collective action in alliance literature is comparable to realism in the study of international relations, it offers valuable insights into burden sharing in international organizations, especially military alliances. It suggests that larger NATO members shoulder disproportional share of financial and defense burden in relations to smaller allies. Olson explains that when an alliance is asymmetric in capabilities, smaller members tend to free ride. "Exploitation of the great" describes smaller states' lack of enthusiasm to contribute their share of "public goods" when the security benefits are guaranteed by their membership regardless of contribution. However, in 2020, 6 of the 9 European NATO members in compliance with the 2 percent guideline were not large economies. Following a series of NATO enlargement, the logic of collective action and "exploitation of the great" appear to be incomplete. Prussian statesman Prince Otto Von Bismark once stated "the extension of domestic policy is foreign policy", incorporating the domestic level of analysis into the study of burden sharing in alliances will undoubtedly paint a fuller picture.²⁸

Waltzian's levels of analysis is one of the most commonly used frameworks to analyze factors in international relations. The three levels consist of the international system level, the nation-state level, and the individual level.²⁹ The thesis will focus on the domestic level of analysis. All levels of bureaucracy and public affairs can influence a nation state's policies, making it a responsible partner or a free rider of the security alliance. In terms of domestic factors, this thesis will focus on public opinion, political leaders, and partisanship within ruling coalitions. Public opinion in democracies are translated into policies, that means if the majority of electorates want a stronger military, an increase in military expenditure should be expected.

²⁸ Ahmed, J. (2019). The theoretical significance of foreign policy in international relations - an analyses. *Journal of Critical Reviews*, 1-4.

²⁹ Waltz, K. N. (1979). *Theory of international politics*. Reading, Mass: Addison-Wesley Pub. Co.

However, if the public wants a larger budget for education or infrastructure, then it is unlikely for the military to receive more funds for modernization or recruitment. High level of cohesion within ruling coalition, coupled with strong drive to raise military spending in most cases will result in increase in military expenditure. However, if members of the ruling coalition lack consensus, then it would be considerably more difficult for the coalition to turn its agenda into policies. This thesis argues that both public opinion and the level of cohesion within a ruling coalition will have to support NATO and in favor of a strong military in order for any NATO ally to fulfill its commitment to the alliance.

Distance still matters in modern warfare. For example, it is considerably much more difficult for Russia to invade Canada than Ukraine, because logistics alone in terms of transportation and replenishment is very difficult to overcome. Therefore, members along the Eastern flank should experience much higher threat perception than say the UK, or Canada. Figure 1.1 shows where Russian and NATO military assets are stationed along NATO's Eastern Flank in 2018.³⁰ This thesis will incorporate Boulding's Loss of Strength Gradient (LSG) that is illustrated in Figure 1.2 and propose that allies on the Eastern flank that are in close geographic proximity to Russia are more susceptible to the Russian threat, thus have higher threat perception of Russia; and in response, will have higher military expenditures than allies outside of Russia's periphery.

³⁰ Carnegie Endowment For International Peace. (2018, March 28). *Consequences for NATO*. Retrieved from Carnegie Endowment For International Peace: <https://carnegieendowment.org/2018/03/28/consequences-for-nato-pub-75881>

Figure 1.1

Russian Military Assets in Europe, 2018



Source: Carnegie Endowment For International Peace. (2018, March 28). Consequences for NATO. Retrieved from Carnegie Endowment For International Peace:

<https://carnegieendowment.org/2018/03/28/consequences-for-nato-pub-75881>

As travel and communication become easier and faster through technological breakthroughs, does it mean that military operations have escaped the tyranny of distance? The answer is, distance still diminishes power projection in modern warfare. Even with the latest power projection capabilities such as intercontinental ballistic missiles and fighter jets.

Fighting long-distance wars remain challenging, and these difficulties include conquering various terrains, be it mountains or large bodies of water, sending and receiving commands, and overcoming logistical difficulties.

Mearsheimer stated, “The principal impediment to world domination is the difficulty of projecting power across the world’s oceans onto the territory of a rival great power. The United States, for example, is the most powerful state on the planet today. But it does not dominate Europe and Northeast Asia the way it does the Western Hemisphere, and it has no intention of trying to conquer and control those distant regions, mainly because of the stopping power of water.”³¹ That is why LSG proposed by Kenneth Boulding still matters to this day.³²

Despite common belief, distance still acts as a natural barrier in competitive geopolitical environments. Historically, in interstate conflicts, distance between the attacking and the defending country has been the advantage of the defender, and disadvantage of the attacker. Boulding explained that “the further from home any nation has to operate...the less strength it can put in the field.”³³ Mobilization requires a lot of resources to retain power and momentum, Boulding’s LSG explains that relative power decreases as distance increases; in other words, the shorter the distance, the stronger the relative power. Boulding’s LSG explains that military strength declines as distance between its home country and the target of attack increases. Long-distance warfare not only takes more resource and time, it also depletes troop morale because of foreign climate, hostile environments, and resistance from civilians. In addition, as logistics line becomes longer, it will be harder to defend. Most importantly, it is more difficult to maintain domestic support for prolonged-distant wars.

LSG shows that it is possible for a smaller country with smaller military capacity to have an advantage over a larger country with greater military strength, if the point of

³¹ Mearsheimer, J. (2014). *The Tragedy of Great Power Politics*. W. W. Norton & Company.

³² Boulding, K. (1962). *Conflict and Defense*. New York: Harper and Brothers.

³³ Sakaguchi, D. (2011). Distance and military operations: Theoretical background toward strengthening the defense of offshore islands. *NIDS Journal of Defense and Security*, 1-23.

engagement is closer to the smaller country. Boulding explained that “the further from home any nation has to operate... the less strength it can put in the field.”³⁴ In the following figure, the X axis is the distance between Country A and Country B. H (a) is Country A’s strength, and C (b) is Country B’s strength. HH’ shows Country A’s strength, which diminishes over distance, and CC’ shows Country B’s strength also decline over distance. E, the boundary of equal strength, is where both countries have equal military strength. LSG suggests that even if Country A possesses greater strength than Country B, once its point of engagement with Country B goes beyond the “boundary of equal strength”, which is closer to B, Country A may lose its advantage. Distance could weaken any army because of the increase in cost, logistical difficulties, and decline in morale.

There is a geographic phenomenon in military strategy and conflict planning, called “risk distance”, which describes the limited reach an army has. Any confrontation beyond that specific point in space would become overly costly and risky. It is sometimes referred to as “culminating point”. Cost distance on the other hand is the time and resources required to move from point A to point B.³⁵ Military commanders and strategists must calculate these distances before any troop is deployed. “Risk distance” and “culminating point” are any point along HH’ or CC’ on Figure 1.2. Instead of treating the relationship between strength and distance as a zero-sum game, Boulding explained that strength does not simply diminish entirely beyond a point, but declines over distance. Boulding said “(the loss of strength gradient is) the degree to which military and political power diminishes as we move a unit distance away from its home base.”³⁶

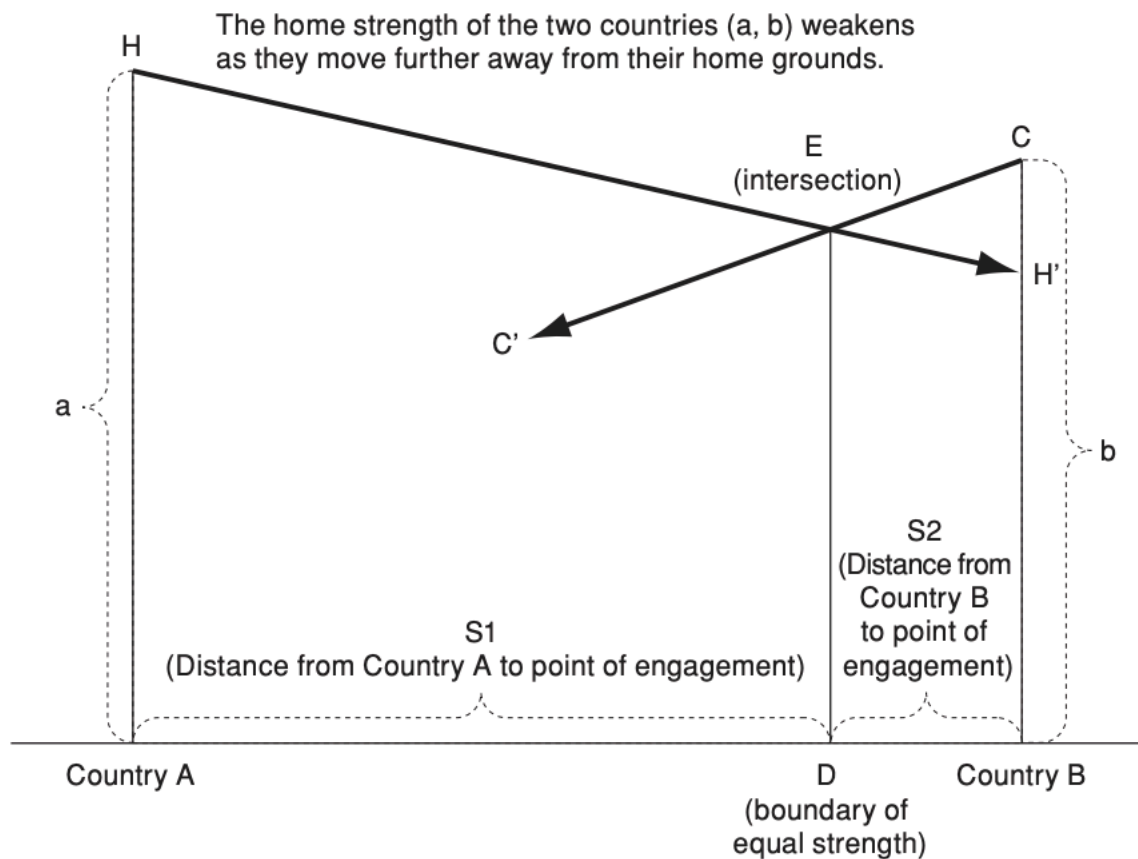
³⁴ Ibid, 23.

³⁵ Demarest, G., Welch, I., & Bartles, C. (2016). Risk distance. *Infinity Journal*, 4-10. Retrieved from Military Strategy Magazine: <https://www.militarystrategymagazine.com/article/risk-distance/>

³⁶ Demarest, G. (2013). *Risk Distance: The Loss of Strength Gradient and Colombia’s Geography of Impunity*. Kansas: University of Kansas.

Figure 1.2

Loss of Strength Gradient (LSG)

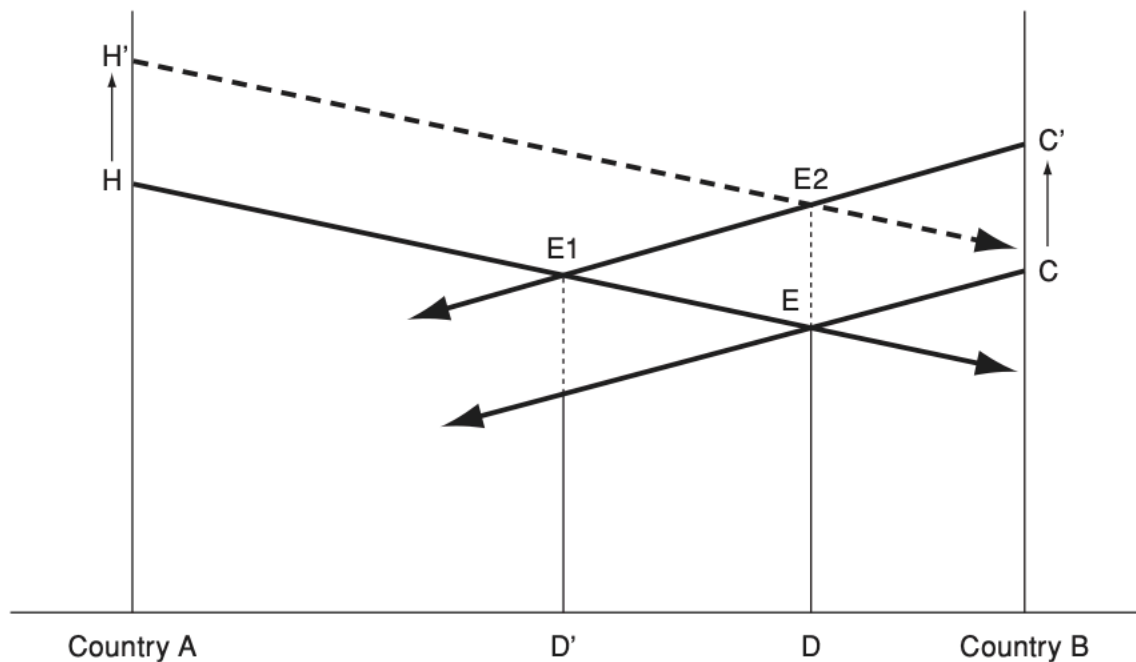


Source: Demarest, G. (2013). Risk Distance: The Loss of Strength Gradient and Colombia's Geography of Impunity. Kansas: University of Kansas

Figure 1.3 shows what would happen if a country increases its military power. When Country B increases its military strength from C to C', it pushes the "boundary of equal strength" towards Country A, from D to D'. To restore the "boundary of equal strength" back to its original position, Country A would have to increase its strength, from H to H'.

Figure 1.3

Boundary of Equal Strength and Growth in Military Power



Source: Demarest, G. (2013). *Risk Distance: The Loss of Strength Gradient and Colombia's Geography of Impunity*. Kansas: University of Kansas

Conversely it is considerably easier to invade nearby countries than ones that are further away. In fact, countries find it more tempting to provoke wars with their neighboring countries. According to Holsti's analysis, from 1648 to 1815, 91% of the wars were fought between neighboring countries.³⁷ Singer and Small's analysis found that from 1816 to 1980, 88% of the wars were fought between nearby countries as well. Bremer concluded that neighboring countries are 35 times more likely to go to war than those that are not.³⁸ In general, geography, especially distance has an enormous influence on power projection, and frequency of wars.

However, as traveling becomes easier and faster with technological breakthroughs and the implementation of new projectile and communication technologies, is distance still an

³⁷ Holsti, K. J. (1991). *Peace and War: Armed Conflicts and International Order 1648-1989*. Cambridge: Cambridge University Press.

³⁸ Bremer, S. A. (1992). Dangerous Dyads: Conditions Affecting the Likelihood of Interstate War, 1816-1965. *The Journal of Conflict Resolution*, 309-341.

obstacle in modern warfare? Webb explained that distance still diminishes power, and affects military operations today. First of all, even with the latest projectile technology and modes of transportation, the opponent will most likely respond with similar level of technologies, such as anti-ballistic missiles and anti-aircraft missiles. Secondly, it is impossible for even the most powerful country to sustain a distant war forever.³⁹ In addition, wars cannot be won by air power alone.

To overcome distance, allies are the best options. Allies can provide logistical support to military operations, and even help establish forward deployment bases. Boulding stated that forward deployment bases can help remedy the loss of power due to distance.⁴⁰ Figure 1.4 shows that by having a “transit base” or “forward deployment base”, Country A is able to project its power further, and has military superiority over Country B. Boulding argued that during the Cold War arms race, it made more sense for the US to station troops abroad in Europe than building its arsenal within the US. The US continues to place much emphasis on ally policies. As of 2021, the US has nearly 750 bases in at least 80 countries and has roughly 173,000 troops deployed in 159 countries.⁴¹ Boulding’s idea of distance decay on strength is very similar to the “First Law of Geography” by Waldo Tobler, that “everything is related to everything else, but near things are more related”. Therefore, to say that distance has been conquered by technology is an overstatement.

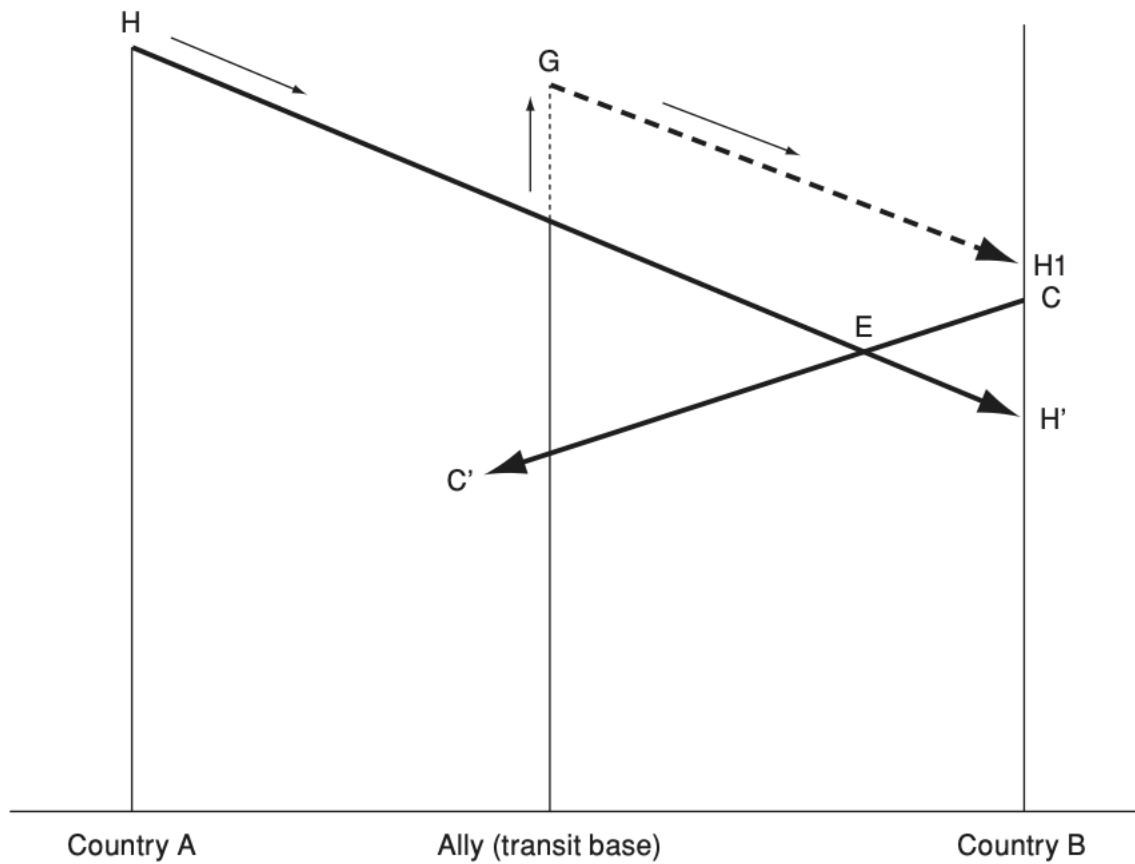
³⁹ Webb, K. (2007). The continued importance of geographic distance and Boulding’s loss of strength gradient. *Comparative Strategy*, 295-310.

⁴⁰ Ibid, 23.

⁴¹ Hussein, M., & Haddad, M. (2021, September 10). *Infographic: US military presence around the world*. Retrieved from Al Jazeera: <https://www.aljazeera.com/news/2021/9/10/infographic-us-military-presence-around-the-world-interactive>

Figure 1.4

Allies and the Restoration of Home Strength



Source: Demarest, G. (2013). Risk Distance: The Loss of Strength Gradient and Colombia's Geography of Impunity. Kansas: University of Kansas

According to Stephen Walt's list of factors that help shape a state's threat output, including aggregate power, offensive power, aggressive intentions, and geographic proximity; which determine the level of threat a state pose. After a series of enlargement, there are currently four of thirty NATO members states sitting right next to Russia, including Estonia, Latvia, Norway, and the US in Alaskan waters. Geographic proximity to Russia does expose these members to potential threat, because it is certainly much easier to invade than say Canada. Geographic proximity is extremely difficult to measure, because it involves too many factors that would affect a country's overall threat posture. For instance, the distance between both

countries, length of shared borders, terrain conditions, and logistical difficulties are all important factors that require consideration.⁴²

5. Research Method

The timeframe of this thesis is set from 2012 to 2020, to account for the second term of the Obama administration and the Trump's one term tenure. Despite common misconception, Trump was not the first American president to complain about the disproportional burden the US shoulders for the collective defense.⁴³ Both former presidents Bush and Obama during their presidency had regularly criticized their European allies for not shouldering enough responsibilities for the collective defense.⁴⁴ It was especially critical for Obama to convince non-US NATO to increase their military expenditures during his second term as President, when Russia supplied separatists in Ukraine with arms which had led to the subsequent Annexation of Crimea in 2014.⁴⁵ In 2014, Obama reminded the alliance that "if we've got collective defense, it means that everybody's got to chip in, and I have had some concerns about a diminished level of defense spending among some of our partners in NATO. Not all, but many." And said that "the situation in Ukraine reminds us that our freedom isn't free, and we've got to be willing to pay for the assets, the personnel, the training that's required to make sure that we have a credible NATO force and an effective deterrent force."⁴⁶ Trump's approach was vastly different from Obama's usual diplomatic demeanor, Trump during his campaign

⁴² Czulda, R., & Madej, M. (2015). *Newcomers No More? Contemporary NATO and the Future of the Enlargement from the Perspective of 'post Cold War' members*. Warsaw, Prague, Brussels: Information Center in Prague, Latvian Institute of International Affairs in Riga, and Atlantic Treaty Association in Brussels.

⁴³ Carpenter, G. (2010). Obama's Security Strategy is Clueless. *The National Interest*, 1-4.

⁴⁴ Cimbalá, S. J., & Forster, P. K. (2017). The US NATO and military burden sharing: post-Cold War accomplishments and future prospects. *Defense & Security Analysis*, 1-16.

⁴⁵ Sloan, S. (2014). NATO summit: messaging to Moscow and burden-sharing. *War on the Rocks*, 1-6.

⁴⁶ Obama, B. (2014). *Transcript: Obama addresses NATO strength at March 26 news conference in Brussels*. Retrieved from The Washington Post: https://www.washingtonpost.com/world/transcript-obama-addresses-nato-strength-at-march-26-news-conference-in-brussels/2014/03/26/ade45c16-b4f2-11e3-b899-20667de76985_story.html

had threatened not to defend those nations that had failed to fulfill their defense commitments.⁴⁷ Trump had even claimed that “Frankly, many countries owe us a tremendous amount of money.”⁴⁸ Even though Obama and Trump have had very different tones communicating with their European counterparts, they are both conveying the same message, which is getting European allies to increase their defense spending levels.⁴⁹ It will be very interesting to investigate how differences in rhetoric between Obama and Trump affect European allies’ support for NATO.⁵⁰

Poland, Germany, and the UK were chosen to be the subject of study. Both Germany and Poland have directly contradicted with the logic of collective action, but are aligned with the paper’s hypothesis; as Germany being the largest economy in Europe had been reluctant to increase its military spending, while Poland being a relatively smaller economy has been consistently able to fulfill its commitment to the alliance. Poland is located along NATO’s Eastern flank and Germany is much further away from Russia, and the two countries have drastically different views of security threats, and defense policies.⁵¹ This paper intends to explain the differences between their military expenditures through domestic factors and geographic proximity with Russia. The UK was chosen because it is consistent with Olson’s prediction as it is the second largest economy in Europe, and has been one of the very few to spend over 2 percent of its GDP on defense despite its vast distance from Russia. This thesis will look at the “special relationship” between the UK and the US to explain this inconsistency.

⁴⁷ Trump Administration Criticizes NATO Members for Failing to Meet Defense Spending Guideline; United States Joins Other NATO Members in Supporting Montenegro's Membership in the Organization. (2017). *American Journal of International Law*, 111(3), 756-764. doi:10.1017/ajil.2017.47

⁴⁸ Hennigan, W. J. (2018). *President Trump Says NATO Allies Owe the US Money. He’s Wrong*. Retrieved from Time: <https://time.com/5335111/donald-trump-nato-spending-facts/>

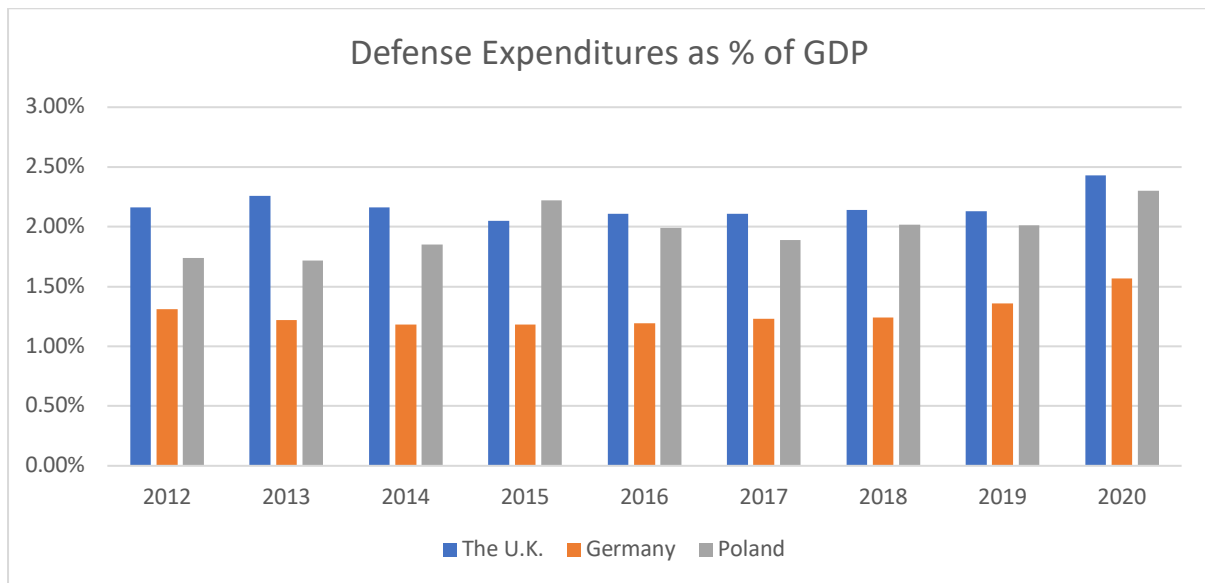
⁴⁹ Bialos, J. P. (2016). How to fix NATO’s chronic burden-sharing problem. *The National Interest*, 1-7.

⁵⁰ Carpenter, T. G. (2017). Trump Must Stand His Ground with NATO. *The National Interest*, 1-5.

⁵¹ Reality Check Team. (2020, July 30). *Trump: What does the US contribute to NATO in Europe*. Retrieved from BBC News: <https://www.bbc.com/news/world-44717074>

Figure 1.5

Defense Expenditures as a share of GDP from 2012 2012 in the UK, Germany, and Poland



Source: Created by author, from NATO. (2020). Defense Expenditure of NATO Countries (2013-2020). NATO Public Diplomacy Division

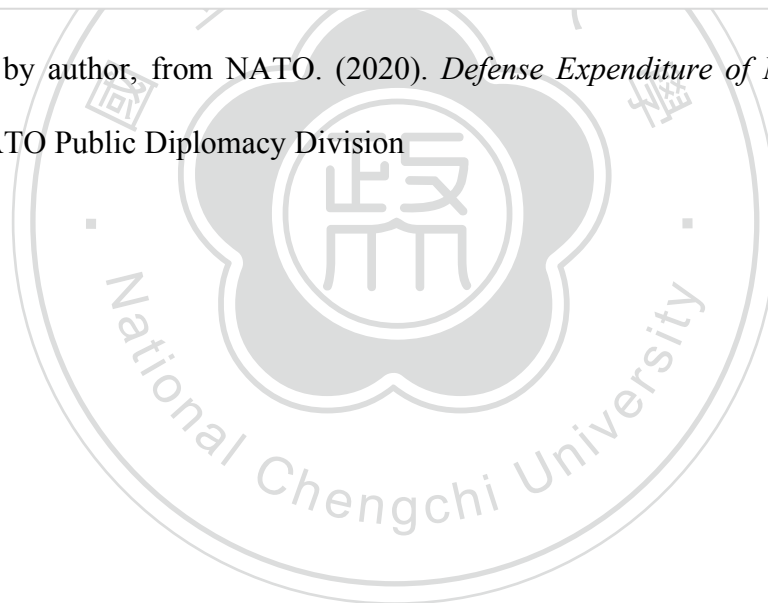


Figure 1.6

Defence Spending by European NATO as % of GDP

Defence spending by Nato countries in Europe as % of GDP



Source: NATO. Based on estimated figures for 2019 spending.

BBC

Source: Reality Check Team. (2020, July 30). *Trump: What does the US contribute to NATO in Europe*. Retrieved from BBC News: <https://www.bbc.com/news/world-44717074>

Poland's NATO accession in 1999 was meant to defend itself against Russian aggression. Boulding states that as distance increases, relative power decreases, because of the loss of strength gradient.⁵² Distance still matters in military operations in spite of technological advances, and Boulding's loss of strength gradient still applies to today's circumstances. Power projection requires tremendous amount of resources, longer distance means higher cost and lower military efficacy. Maintaining military strength in great distances will also require constant replenishment and infrastructure. Even with today's technological breakthroughs,

⁵² Boulding, K. (1962). *Conflict and Defense*. New York: Harper and Brothers.

natural barriers including oceans and land still act as buffers. In fact, all aspects of military operations including command and control, troop mobilization, and replenishment are all contingent on whether or not distance can be overcome.⁵³ Poland is on NATO's Eastern flank, meaning Poland is sitting at the front seat of Russia's power projection. This fear drives Polish security policies, especially when it comes to strengthening US relations. Poland is one of the very few non-US NATO allies successfully and consistently fulfilling its commitment to the collective defense. According to a poll done by Pew Research Centre, 82 percent of its population have a favorable view of NATO, which produces a ruling coalition, United Right, that consists of Law and Justice (PiS), United Poland (SP), and Agreement that supports a strong Polish military. Poland aspires to be a model member, it spends 2 percent of its GDP on defense, it actively participates in NATO missions, and it welcomes NATO's presence within its borders. To the Poles, strong support for the collective defense will strengthen its ties with the United States, even the Polish public shares the same sentiment, and welcomes a permanent US military presence on its soil.⁵⁴ As a result, strong public support for the alliance with a ruling coalition in favor of a larger military budget and NATO presence, will most likely lead to a hike in military spending.

Germany is the largest economy in Europe and no country can contribute to the collective defense as much as it can. However, its support for NATO remains unclear as it continues to underfund its military, the Bundeswehr.⁵⁵ Unlike the US where high-ranking military officials are visible to the public and have the power to advise the administration on foreign policies, the German high-ranking generals are less vocal and visible to the German public. The ready answer to why despite Germany's economic capabilities and general support

⁵³ Sakaguchi, D. (2011). Distance and military operations: Theoretical background toward strengthening the defense of offshore islands. *NIDS Journal of Defense and Security*, 1-23.

⁵⁴ Sieradzka, M. (2019, November 3). *DW*. Retrieved from After 20 years in NATO, Poland still eager to please: <https://www.dw.com/en/after-20-years-in-nato-poland-still-eager-to-please/a-47862839>

⁵⁵ Haynes, W. (2019). Explaining the poverty of Germany's strategic debate. *War on the Rocks*, 1-11.

for NATO, Germany remains reluctant to raise commitment to the collective defense effort, is history.⁵⁶ Domestically, while Germany is still haunted by its image during World War II, Germany's inability to raise its defense expenditures also comes from the lack of consensus between the Christian Democratic Union (CDU) and the Social Democratic Party (SPD). Aside from disagreements between the governing coalitions, the German public lacks interests in its strategic policies. Germany intends to be more like Switzerland, which prioritizes economic growth over interstate power struggle. Trump's criticism against Germany did not help either, it only exacerbated Germany's mistrust of the US, which made it less likely for Germany to shoulder more defense burden. Upgrading and maintaining military capabilities is extremely expensive, especially when Germany does not aspire to be a world leader, and limited its interests within Europe and its borders. Very much like the US politics, the military answers to a leader elected by the public. If the German voters are uninterested in an active security policy, and there is no consensus on defense budget within the ruling coalition, then it is unlikely for Germany to allocate more resources to its military.

The UK is the second largest economies in NATO that is consistently meeting the 2 percent pledge and is highly supportive of the collective defense. It does not fit well with the hypothesis proposed by the thesis, as it is a large economy that spends above the 2 percent guideline, and is far away from Russia. However, its domestic politics is very much in favor of NATO. According to multiple surveys completed in various time periods, it appears that the British public are highly supportive of NATO. A survey compiled by Eichenberg in "Public Opinion and National Security in Western Europe" shows that from 1967 to 1991, between 59% to 81% of the public are in favor of NATO. Survey compiled by Pew Global Attitudes Project surveys show that between 2009 to 2017, 60 - 64% of the British public are supportive of NATO. Survey compiled by Transatlantic Trends show that between 2002 to 2014, over

⁵⁶ Kunz, B. (2018). The Real Roots of Germany's Defense Spending Problem. *War on the Rocks*, 1-9.

60% of the public think that NATO is essential to Britain's security. Lastly, survey from Pew GAP 2017 show that regardless of gender, age, level of education, political party, or ideology, the British public are overwhelmingly in favor of NATO.⁵⁷

In addition, the Conservative Party has been very determined on boosting its military spending, on the Party's webpage, it reads 'this commitment gives our defense budget an extra \$340 billion over the next four years, the largest investment in our nation's defense since the end of the Cold War' and 'We are also meeting and surpassing our manifesto commitment to exceed our NATO defense spending target'.⁵⁸ The Prime Minister Boris Johnson had even said a 'once-in-a-generation modernization' is required to extend British influence and its own security.⁵⁹ In fact, the Conservative Party had recently secured its largest majority in 34 years, and Johnson's win was the Party's fourth election win in a row. When public's support for the alliance is high and is complemented with a strong ruling party that is in favor of increasing its military capabilities, it is very likely that a boost in Britain's military spending will become reality.⁶⁰ Furthermore, the UK shares a "special relationship" with the US, which also compels it to spend more on defense.

(1) Case Analysis

This thesis chose the UK, Germany, and Poland as the subjects of study. Their levels of commitment from 2012 to 2020 to the alliance including defense spending, military expenditures as a share of GDP, research and development spending, and various contribution

⁵⁷ Clements, B. (2019, December 4). *British Politics and Policy at LSE*. Retrieved from The British public and NATO: still a strong alliance?: <https://blogs.lse.ac.uk/politicsandpolicy/the-british-public-and-nato/>

⁵⁸ Conservatives. (2019, November 19). *Our largest boost to our Nation's Defence in a Generation*. Retrieved from Conservatives: <https://www.conservatives.com/news/record-defence-spending-boost>

⁵⁹ Beale, J. (2020, November 19). *Defense funding boost 'extends British influence', says PM*. Retrieved from BBC News: <https://www.bbc.com/news/uk-54988870>

⁶⁰ Eichenberg, R. C. (1989). *Public Opinion and National Security in Western Europe: Consensus Lost?* Palgrave MacMillan.

to collective defense will be accounted for.⁶¹ In addition to their recent contributions to NATO, this paper will also explore factors, including history, exterior environment, domestic factors, and leaders, that could potentially sway their levels of political commitment to the collective security alliance.

(2) Data Collection

Data collection of this thesis is primarily based on printed materials, such as journal articles, books, various publications, and various online sources, including speeches and interviews. In addition, news reported between the 2012 to 2020 by British, German, and Polish media are also collected to gain a more comprehensive perspective on each non-US NATO's circumstances.

(3) Scope and Limitations

This thesis limits its timeframe from 2012 to 2020, and its subjects of investigation are limited to three non-US NATO allies, Poland, Germany, and the United Kingdom. These members each represents a unique subgroup within the security alliance. First of all, Poland represents the group of small economies that exceeds the 2 percent NATO pledge, that is in close geographic proximity to Russia, and its domestic politics fully commits to the security alliance; secondly, Germany represents the group of large economies that spends less than 2 percent of GDP on defense, that is not in close geographic proximity to Russia, and its domestic politics are divided on Russian policies; thirdly, the UK is an exception, its commitment to the alliance is primarily derived from its desire to preserve the “special relationship” with the US.

⁶¹ Daniels, S., & Hicks, K. (2018). Redefining NATO Security Investment: Moving Beyond 2 Percent. *War on the Rocks*, 1-7.

The timeframe is set from 2012 to 2020 to account for the second term of Obama's presidency and Trump's one term as the president, as the two presidents have very different approaches to engage with Europe. By including two presidents that are vastly different in their leadership styles could help answer the question if Washington has a say in allies' defense expenditure. In fact, the 2 percent pledge that is used by this paper to determine if an ally is "free riding" was declared at the 2014 Wales Summit; therefore, to include Obama's first term as president in the timeframe of the thesis would not be necessary. As for Europe, from 2012 to 2020, there has been political realignments in Poland, Germany, and the UK; as well as the Annexation of Crimea in 2014, that had serious implications on NATO members' security policies. Due to the restraint on time and resources, it will only cover events that could have an impact on Poland, Germany and the UK's defense spending. It will not cover the 2022 Russia-Ukraine War as it is still unfolding, but this study hopes to offer a set of frameworks for future studies.

This research aims to understand what drives the levels of commitment to NATO for the three non-US NATO through a qualitative approach. However, English is not the official language in neither Germany or Poland, and majority of the publications and news will only be presented in their respective languages. Due to the language barrier, this research limits itself to only materials in English and Chinese.

This thesis also intends to understand how public opinion, ruling coalitions, and geographic proximity to Russia affect NATO members' foreign and strategic policies. Therefore, it will only study democracies that permits public opinion be translated into policies, and its findings are only applicable to countries with similar political systems. However, one must keep in mind that every country is unique in terms of its history, and geopolitics, so inferences derived from the study may not apply to every member.



Chapter II: Poland

1. Domestic Factors

This portion of the paper will focus on domestic factors that drive the political decision-making process in Poland, and what determines its level of support for NATO. It will look at the Polish electoral system; general sentiment of the Polish public regarding security, Russia, and NATO; the Polish President and Prime Minister's main political agenda; and the parties that control the Sejm, its lower house.

(1) Electoral System

Poland is a republic and parliamentary democracy with a cabinet and parliamentary system. The Polish Constitution is the supreme law that sets the rules for the government, and for all legislative acts. The Polish political system is similar to the composition of the US federal government, in that it has three branches of power, the legislative, the executive, and the judiciary branch. The legislative branch consists of two parliaments, the Sejm, which is the lower chamber, and the Senate, which is the upper chamber. The Sejm consists of 460 deputies, while there are 100 senators in the Senate. Although both deputies of the Sejm and senators of the Senate are elected, but the Constitution gives the Sejm considerably more legislative powers. The Sejm is in charge of passing legislation and running the state administration, including the Council of Ministers; while the Senate works alongside the Sejm to create laws.

The President shares the executive power with the Council of Ministers. The President is directly elected by a majority vote. The Prime Minister, and Council of Ministers are then nominated by the President and confirmed by the lower chamber, the Sejm. The Prime Minister leads the government, he is also the President of the Council of Ministers. Currently, Andrzej Duda is the President, and Mateusz Morawiecki is the Prime Minister. The judicial power is divided amongst independent courts and tribunals, and oversight by the Supreme Court.

(2) Polish Public Opinion

The Polish public tends to have unfavorable views of Russia, and this view has worsened in recent years. One of the reasons why the Poles are especially sensitive to Russian aggression is their shared history. In the 18th Century, eastern Poland was annexed by Russia, and after briefly gained independence towards the end of World War I, it was once again invaded by the Soviet Union in 1939.⁶²

Poland finally gained independence in 1993, but the Annexation of Crimea in 2014 once again reminded Europeans of how fragile stability and security were. This crisis had undoubtedly caused genuine unease in Europe, especially in Eastern European countries, including Poland and the Baltic states. Despite Polish President Bronislaw Komorowski and Prime Minister Donald Tusk's reassurance that Poland is under no direct Russian threat, but the public still feared future Russian aggression. "Now they want to attack Ukraine but we are neighbors so I don't think Poland is safe, especially because we have a shared history with Russia and they were always the aggressors," said a Polish teacher, and this sentiment was shared amongst many Poles.⁶³

Experts and leaders have also expressed their concerns for the security and stability of the region. Marcin Zaborowski, director of the Polish Institute of International Affairs said that "I think there is a sense that certain boundaries have been crossed, that precedents have been created and because of that it's not clear where Putin is going to stop." Poland is not the only Eastern European country that is under constant Russian threat. Lithuanian President Dalia Grybauskaite warned Russia's intention of redrawing the map of Europe; and Ukraine, Moldova, the Baltics and Poland are all in its crosshair. Many countries with large ethnic

⁶² Kucharczyk, J. (2017). Exploiting Political Polarization in Poland. *National Endowment for Democracy*, 1-31

⁶³ Devlin, K. (2015, March 19). *Anti-Russian views on the rise in Poland*. Retrieved from Pew Research Center: <https://www.pewresearch.org/fact-tank/2015/03/19/anti-russian-views-on-the-rise-in-poland/>

Russian diaspora including Estonia and Latvia have considerable Russian population, and are worried that Moscow could use that to its advantage to justify an invasion to “protect ethnic Russians”, much like what had happened in Crimea in 2014. In addition to the fear of military invasions, Poland and the Baltics’ dependence on Russian energy is also a source of insecurity, as Russian gas company, Gazprom supplies Poland over half of its energy, which leaves Poland vulnerable to energy switch-offs.

In a poll conducted by the Pew Research Center in 2015 right after the Annexation of Crimea, found that the Poles are significantly more concerned about the crisis than most other NATO members. According to the poll, 70% of the Poles saw Russia as a major military threat, while only 49% of other NATO members shared that sentiment. 57% of the Poles thought Russia was to blame for the situation in Ukraine, and 80% reported unfavorable view of Russia. In terms of how NATO should deter against Russia and support Ukraine, 49% supported increasing economic sanctions on Russia, 50% supported NATO providing arms to the Ukrainians, and 59% supported Ukraine in joining NATO. This survey shows that the Poles have a higher threat perception of Russia than other NATO members, and is willing to put its resources to use.⁶⁴

⁶⁴ Simmons, K., Stokes, B., & Poushter, J. (2015, June 10). *NATO Public Blame Russia for Ukrainian Crisis, but Reluctant to Provide Military Aid*. Retrieved from Pew Research Center: <https://www.pewresearch.org/global/2015/06/10/nato-publics-blame-russia-for-ukrainian-crisis-but-reluctant-to-provide-military-aid/>

Table 2.1*The Polish Public's Stance on Russia*

| Poland Takes a Tougher Line on Russia | | | |
|--|-----------------|--------------------------------|-------------|
| | Poland % | Other NATO countries* % | Diff |
| Russia is a major military threat to neighboring countries | 70 | 49 | -21 |
| Russia is to blame for violence in eastern Ukraine | 57 | 37 | -20 |
| Unfavorable view of Russia | 80 | 67 | -13 |
| Increase economic sanctions on Russia | 49 | 25 | -24 |
| Support for NATO sending arms to the Ukrainian gov't | 50 | 40 | -10 |
| Support for Ukraine becoming a NATO member | 59 | 57 | -2 |
| Support for Western countries providing economic aid to Ukraine | 77 | 68 | -9 |
| *Median includes Canada, France, Germany, Italy, Spain, the UK and the US | | | |
| Source: Spring 2015 Global Attitudes survey. Q12d, Q27, Q47, Q48a-b, d & Q50 | | | |
| PEW RESEARCH CENTER | | | |

Source: Simmons, K., Stokes, B., & Poushter, J. (2015, June 10). *NATO Public Blame Russia for Ukrainian Crisis, but Reluctant to Provide Military Aid*. Retrieved from Pew Research Center: <https://www.pewresearch.org/global/2015/06/10/nato-publics-blame-russia-for-ukrainian-crisis-but-reluctant-to-provide-military-aid/>

According to another poll done by Pew Research Center, unfavorable views of Russia had increased from 54% in 2013 to 80% in 2015, and went up to 69% in 2017. In a public survey conducted by Poland's Institute for Public Affairs (IPA) had indicated that 62% of Poles had negative views of the Polish-Russian relations. The IPA study also suggested that a majority of Poles are supportive of the sanction against Russia, 41% believed the sanction should be tougher, while 35% believed the sanctions at its current magnitude is adequate.

Many NATO members along the eastern flank, including the Baltic states, and Poland, see Russia as an existential threat, and its expansionist ambitions are dangerous to the entire European continent. The IPA study showed that 71% of the Polish public saw Russia as a military threat to Poland. The Gallup World Poll conducted in 2015 showed that NATO members along the eastern flank are generally saw Russia as their biggest threat; 69% of the Polish, 58% of Estonian, 57% of Romanian, 46% of Lithuanian, and 42% of Latvian saw Russia as their biggest threat.⁶⁵

In contrast, the Poles hold positive views of NATO and the EU. In 2017, a poll done by Poland's Public Opinion Research Center (CBOS) indicated that 88% of Poles were supportive of Poland's membership in the EU, and 82% were supportive of Poland's membership in NATO. The same study suggested that a majority of the Polish public welcomed permanently stationed NATO troops on Poland's soil, and believed that NATO would help defend Poland against Russian aggression.

According to a poll done by Center for Insights in Survey Research, 52% of Poles believed that NATO has been the guarantor of peace in Europe for the past 70 years, and will continue to help maintain peace and stability. 51% of Poles believed that Russia is a threat to Europe and must be countered against by a strong security alliance. 60% of Poles believed that

⁶⁵ Esipova, N., & Ray, J. (2016, April 4). *Eastern Europeans, CIS Residents See Russia, U.S. as Threats*. Retrieved from Gallup: <https://news.gallup.com/poll/190415/eastern-europeans-cis-residents-russia-threats.aspx>

the US is a partner to Europe, and its presence in eastern Europe contributes to NATO's ability to maintain regional stability. 47% of Poles believed that given the current circumstances, Poland should invest more in its defense and security, even at the cost of pensions, healthcare and other social benefits.⁶⁶

According to numerous polls and surveys, it is quite noticeable that the Polish population is generally threatened by Moscow, and believe that NATO can help safeguard Poland's security.⁶⁷ This anxiety of Russian invasion and determination to boost security is then reflected in its election results. Both the Sejm and presidents throughout the period from 2012 to 2020 have all been supportive of NATO and are determined to spend over 2% of GDP on its defense in order to meet the pledge made in 2014.⁶⁸

(3) President

The Polish president plays a decisive role in Polish politics. The president is directly elected by the Poles, and is elected by an absolute majority. In terms of legislative powers, the president is free to select the prime minister, who is typically from the same party as the president and controls the Sejm; the president is free to initiate the legislative process and has the right to veto bills; and prior to signing bills into laws, the president has the authority to demand the Constitutional Tribunal to ensure that the bill complies with the Polish Constitution. In addition to the legislative powers, Polish presidents also has the right to ratify and revoke international treaties and agreements, and acts as the commander of the Polish forces. As a result, what the president sees as Polish national interests and how he sees Poland will peruse those interests have direct impact on Polish foreign and domestic policies.

⁶⁶The International Republican Institute. (2017). Public opinion in Hungary, Poland, Czech Republic and Slovakia. *Center For Insights in Survey Research*, 1-53.

⁶⁷ Gerdziunas, B. (2018, June 20). *Germany no longer seen as 'threat' in Poland: poll*. Retrieved from Politico: <https://www.politico.eu/article/germany-poland-no-longer-seen-as-threat-poll/>

⁶⁸ Ibid, 41.

During the 2010 Polish presidential election, Civic Platform (PO) Bronislaw Komorowski defeated Law and Justice (PiS) Jaroslaw Kaczynski, whose twin brother, former President Lech Kaczynski died during the Smolensk crash. President Komorowski was known to be particularly determined to increase NATO's military presence in Eastern Europe and accelerate Poland's integration into the West. During his presidency from 2010 to 2015, Poland saw a massive increase in defense budget. From 2010 to 2013, Polish defense expenditure as a share of GDP was consistently above 1.7% and by 2014, it was increased to 1.85%; in which Komorowski had played a vital role. In 2014, Komorowski claimed that, NATO members need to develop infrastructure to support NATO missions and must increase their financial efforts to fund NATO.⁶⁹ In addition, during a meeting with NATO Secretary General Jens Stoltenberg, and then Prime Minister Ewa Kopacz in Warsaw, Komorowski managed to secure a reassurance from Jens Stoltenberg, "NATO's most important task is to protect and defend our nations against attack. We will defend our Allies, all Allies", said the Secretary General.⁷⁰

In response to the heightened tension between Russia and Ukraine over Crimea, which led to the 2014 Annexation of Crimea, Polish defense spending as a share of GDP skyrocketed to 2.22%, which was a historic high for Poland's military spending. Considering that NATO only started to make a plea to its member states to commit 2% of GDP to their defense in 2016; in which only a handful of members to this day have successfully fulfilled that pledge.

Raising Polish defense expenditures was not only to modernize equipment, to build arsenal, and to pay for military personnel, President Komorowski's main goal was to appeal to the joint alliance and show that Poland is willing and capable of contributing to the collective

⁶⁹ Komorowski, B. (2014, June 3). *President Komorowski: Russia has No Rights to Block Deployment of NATO Troops and Infrastructure in Poland*. Retrieved from Atlantic Council:

<https://www.atlanticcouncil.org/blogs/natosource/president-komorowski-russia-has-no-right-to-block-deployment-of-nato-troops-and-infratructure-in-poland/>

⁷⁰ North Atlantic Treaty Organization. (2014, October 6). *NATO will defend every Ally, NATO Secretary General stresses in Poland*. Retrieved from North Atlantic Treaty Organization: https://www.nato.int/cps/en/natohq/news_113578.htm

defense. He welcomes America's decisions to increase its military presence in the Eastern countries that would help neighboring allies along the eastern flank to deter against Russian threat. President Komorowski has even repeatedly and publicly lobbied NATO and the US to increase military presence along the eastern flank, and have permanent stationed US troops in Poland.⁷¹ He sees increase in the US and NATO presence in Poland as signs of solidarity and will to collective defense.⁷²

Komorowski was not able to secure a second term in the presidential election in 2015, he was defeated by Law and Justice (PiS) Andrzej Duda. Both parties, PiS and PO are supportive of Poland taking a strong stance against Russia through economic sanctions whilst pursuing a larger NATO presence in Central Europe, but PiS stance has always been much tougher on Russia.⁷³ PiS is known to criticize PO for not being tough enough on Russia, and one of the reasons is because major European powers, especially Germany, considers any attempt to strengthen the eastern flank too provocative, and PO does not want to sour its relationship with Berlin. As Duda took office, like his predecessor, he also vowed to seek greater NATO military presence in Poland, and permanently stationed US forces, but a lot more assertively.⁷⁴

President Duda believes Russia still holds imperial aspiration, and sees it as Poland's biggest threat to its security. In addition to raising Poland's defense spending, lobbying for larger NATO and US military presence, President Duda is also actively seeking to strengthen ties with other Central and Eastern European neighbors, known as the "Jagiellonian Policy". This policy aims to establish an alliance amongst Central-Eastern European nations and

⁷¹ Reuters. (2020, November 10). *Polish president ratifies defence deal with the U.S.* Retrieved from Reuters : <https://www.reuters.com/article/us-poland-usa-defence-idUSKBN27P2HX>

⁷² Ibid, 45.

⁷³ Milewski, L. (2018). Poland's Diplomatic Efforts to Assure Extended Deterrence within NATO, From Crimea to Warsaw and Beyond. 1-14.

⁷⁴ Szczerbiak, A. (2015, August 7). *Poland's new hawkish president could be shape of things to come from Warsaw.* Retrieved from The Conversation: <https://theconversation.com/polands-new-hawkish-president-could-be-shape-of-things-to-come-from-warsaw-45792>

consolidate their military capabilities to collectively deter Russian imperialist ambitions, and having Poland acting as the “security guarantor”.⁷⁵ However, this policy is unrealistic as it faces resistance from both Russia and Germany. Naturally, Moscow would not allow such an alliance to exist. Berlin on the other hand, thinks this policy is too provocative, and could destabilize the region. In fact, opposition stemming from Germany and Russia are the biggest obstacle Duda must overcome to increase NATO ground presence in the region.⁷⁶

The 2014 Annexation of Crimea, to many post-Soviet states, was a wakeup call, and a reminder that Russia still holds expansionist ambitions. During that time, there was a rise in defense spending across many NATO members, and spikes in defense expenditures was especially pronounced in members closest to Russia. For instance, from 2013 to 2014, the defense expenditure in Estonia went up by 6.9%, Latvia by 4.6%, Lithuania by 20.6%, and Poland by 12.2%. In terms of defense expenditure as a share of GDP for the three Baltic States, Estonia, Latvia, and Lithuania were 1.92%, 0.93%, and 0.88% respectively in 2014; in 2015, Estonia raised its defense expenditure as a share of GDP by 4.68%, Latvia by 11.8%, while Lithuania by 29.5%.

Under the leadership of Duda, Poland’s defense expenditure as a share of GDP in 2014 was 1.85%, and rose to 2.22% in 2015, seeing a rise of 20%. As illustrated in Table 2.2, there is a steady upward trend in Poland’s military spending regardless of its economy. However, such response to Russia’s aggression was not shared amongst major powers of NATO. Referring back to Table 1.1, there is no change in Germany’s defense expenditure as a share of GDP from 2014 to 2015. In fact, France’s defense expenditure as a share of GDP in 2014 was merely 1.82% and fell to 1.78% in 2015; the UK’s defense expenditure as a share of GDP also went from 2.14% down to 2.03%. One may say that the decline in defense expenditures

⁷⁵ Cienski, J. (2015, August 19). *The world according to Duda*. Retrieved from Politico: <https://www.politico.eu/article/duda-tusk-poland-foreign-policy-germany-nato/>

⁷⁶ Ibid, 46.

as a share of GDP is due to economic growth, however, Table 2.2 illustrates otherwise, as there is decline in spending across Germany, France, and the UK regardless of its GDP. As a result, Russian aggression or expansionist behavior do not appear to be correlated with every NATO members' military spending, but this trend appears to happen more in members closer to Russia.

At the NATO Warsaw summit, Duda called for a long-term plan on reinforcing the Eastern and Southern flank to ensure members' security. He also warned the alliance of growing Russian threat, and the alliance should strengthen its deterrent in Central-Eastern Europe in the forms of troops, infrastructure, and mechanisms that would help boost its defense.⁷⁷



⁷⁷ Palowski, J. (2016, January 19). *Andrzej Duda Presents Three Main Pillars of the NATO Summit in Warsaw*. Retrieved from Defence 24: <https://defence24.com/andrzej-duda-presents-three-main-pillars-of-the-nato-summit-in-warsaw>

Table 2.2*NATO Members' Defense Expenditure (Million US dollars)*

| Defense expenditure (Million US dollars) | | | | | | | | | |
|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
| The US | 712,947 | 680,856 | 653,942 | 641,253 | 656,059 | 642,933 | 672,255 | 730,149 | 784,952 |
| The UK | 58,016 | 62,258 | 65,658 | 59,492 | 56,154 | 55,674 | 60,307 | 59,365 | 59,634 |
| Germany | 46,470 | 45,944 | 46,164 | 39,829 | 41,618 | 45,486 | 49,750 | 52,543 | 56,074 |
| France | 50,245 | 52,331 | 52,009 | 43,492 | 44,221 | 46,150 | 50,484 | 49,634 | 50,247 |
| Italy | 26,468 | 26,665 | 24,481 | 19,574 | 22,388 | 23,911 | 25,629 | 23,556 | 24,853 |
| Canada | 19,994 | 18,215 | 18,172 | 18,689 | 17,708 | 23,700 | 22,399 | 22,319 | 22,150 |
| Spain | 13,912 | 12,610 | 12,631 | 11,095 | 9,978 | 11,893 | 13,194 | 12,629 | 14,069 |
| Turkey | 13,895 | 14,427 | 13,583 | 11,957 | 12,649 | 12,972 | 14,145 | 13,986 | 13,303 |
| Netherlands | 10,365 | 10,229 | 10,346 | 8,672 | 9,114 | 9,646 | 11,167 | 12,268 | 12,067 |
| Poland | 9,574 | 9,007 | 10,104 | 10,596 | 9,405 | 9,938 | 11,857 | 11,923 | 12,043 |
| Norway | 7,134 | 7,839 | 7,722 | 6,142 | 6,431 | 6,850 | 7,544 | 7,514 | 6,671 |
| Romania | 2,100 | 2,452 | 2,691 | 2,581 | 2,645 | 3,643 | 4,359 | 4,608 | 5,498 |
| Belgium | 5,169 | 5,265 | 5,199 | 4,204 | 4,259 | 4,442 | 4,843 | 4,761 | 5,173 |
| Greece | 5,633 | 5,311 | 5,232 | 4,519 | 4,638 | 4,754 | 5,386 | 4,843 | 4,785 |
| Denmark | 4,423 | 4,217 | 4,057 | 3,364 | 3,593 | 3,780 | 4,559 | 4,557 | 4,718 |
| Portugal | 3,040 | 3,263 | 3,007 | 2,645 | 2,616 | 2,739 | 3,247 | 3,298 | 3,472 |
| Czech Republic | 2,185 | 2,148 | 1,975 | 1,921 | 1,866 | 2,259 | 2,750 | 2,910 | 3,038 |
| Hungary | 1,322 | 1,280 | 1,210 | 1,132 | 1,289 | 1,708 | 1,615 | 2,051 | 1,829 |
| Slovak Republic | 1,020 | 969 | 998 | 987 | 1,004 | 1,056 | 1,297 | 1,902 | 1,753 |
| Bulgaria | 722 | 811 | 747 | 633 | 671 | 723 | 961 | 2,158 | 1,195 |
| Lithuania | 324 | 355 | 428 | 471 | 636 | 818 | 1,056 | 1,093 | 1,118 |
| Croatia | 865 | 850 | 1,064 | 883 | 837 | 924 | 966 | 1,002 | 986 |
| Latvia | 248 | 281 | 294 | 282 | 403 | 485 | 709 | 692 | 722 |
| Estonia | 437 | 480 | 513 | 463 | 498 | 541 | 615 | 637 | 669 |
| Slovenia | 543 | 507 | 487 | 401 | 450 | 477 | 546 | 573 | 584 |
| Luxembourg | 214 | 234 | 253 | 250 | 236 | 326 | 356 | 381 | 422 |
| Albania | 183 | 180 | 178 | 132 | 131 | 144 | 176 | 197 | 210 |
| North Macedonia | 120 | 127 | 124 | 105 | 104 | 101 | 120 | 146 | 151 |
| Montenegro | 68 | 65 | 69 | 57 | 62 | 65 | 76 | 77 | 97 |

Source. NATO. (2020). Defense Expenditure of NATO Countries (2013-2020). NATO Public Diplomacy Division

Polish political leaders along with other leaders along NATO's eastern flank, responded to Russia's expansionism much more drastically than the European major powers. Both PO

and PiS recognized the importance of military deterrent against Russian threat, and both Komorowski and Duda sought to raise Poland's defense expenditure to strengthen its military to appeal to the West, especially the US, that Poland is a worthy partner who is willing and able to shoulder its fair share of defense burden. Both presidents lobbied for increased NATO and US presence in Poland. In fact, Duda and Trump had also talked about higher level of military cooperation between the US and Poland.⁷⁸ Over the past decade, Poland had invested in infrastructures that could host more NATO units and US forces, and have implemented mechanisms that would enable the Polish army to better support and cooperate with allies. It came as no surprise that Poland has been diligent at maintaining a high level of defense expenditure, and kept its commitment to the 2% pledge.⁷⁹

In 2020, President Duda approved the new National Security Strategy (NSS), which had highlighted Russia's lack of regard for international law which had destabilized the region. According to the NSS, Russian aggression includes military exercises directed at NATO members, advancement in military capabilities, and rapid buildups of Russian troops along the eastern flank are undermining the security of NATO allies. Externally, Poland will strengthen its ties with NATO and the EU, and aims to align its military with NATO to increase coordination, which would demonstrate European solidarity and strength in deterring against Russian aggression. Internally, Poland will bolster combat readiness of the Polish force, emphasis will be placed on operational and deterrence capabilities. Poland's defense expenditure as a share of GDP is set to 2.5% in 2024 in order to fully modernize its equipment, infrastructure and troops.⁸⁰

⁷⁸ President.PL. (2018, July 11). *President Duda talked with President Trump at NATO summit*. Retrieved from President.PL: <https://www.president.pl/news/president-duda-talked-with-president-trump-at-nato-summit,36760>

⁷⁹ Ibid, 48.

⁸⁰ Szopa, M. (2020, 5 14). *President Signs the Polish National Security Strategy. New Threats & Back to the Roots*. Retrieved from Defence 24: <https://defence24.com/president-signs-the-polish-national-security-strategy-new-threatsback-to-the-roots-commentary>

Duda's effort in raising military spending to tighten the Polish-US relationship has proven to be effective. In 2020, Trump and Duda made a joint statement highlighting the importance of US-Polish strategic partnership in eastern Europe, and would help strengthen Poland's deterrent against Russia.⁸¹

Trump had repeatedly in various occasions spoke about "fair-burden-sharing" in NATO, and has praised Poland for spending over 2% of its GDP on defense, while criticizing other NATO members, especially Germany for "free riding".⁸² In fact, because Germany has not been able to fulfill its commitment to NATO and increase its military expenditure to 2 percent of its GDP, Trump has even warned Germany that the US would pull US troops out of Germany and redeploy a portion of that force to Poland.⁸³ Moreover, during a joint press conference, Trump specifically mentioned redeployment of US forces to reinforce defense along the eastern front; Duda reaffirmed Poland's commitment to NATO and welcomed the US forces to station in Poland.⁸⁴ In Trump's narrow view, the 2 percent threshold separates partners from free riders, and only partners deserve US protection; Duda recognizes that and have fulfilled that commitment to earn him the preferred Polish presidential candidate of Trump, and fortified Poland's security.⁸⁵ Despite the fact that Trump's maneuver could jeopardize the Polish-German relations as Poland now finds itself caught in between the US

⁸¹ Ibid, 48.

⁸² The White House. (2020, June 24). *Joint Statement by President Donald J. Trump and President Andrzej Duda*. Retrieved from Statements & Releases: <https://trumpwhitehouse.archives.gov/briefings-statements/joint-statement-president-donald-j-trump-president-andrzej-duda/>

⁸³ Lemire, J., & Reichmann, D. (2020, June 25). *1,000 more U.S. troops to Poland as Trump and Duda discuss NATO's eastern flank*. Retrieved from Military Times: <https://www.militarytimes.com/news/your-military/2020/06/24/1000-more-us-troops-to-poland-as-trump-and-duda-discuss-natos-eastern-flank/>

⁸⁴ Defence24. (2020, June 26). *Duda and Trump Paving the Way Towards Increased US Presence in Poland. Specifics and Cost not Known*. Retrieved from Defence 24: <https://defence24.com/duda-and-trump-paving-the-way-towards-increased-us-presence-in-poland-specifics-and-cost-not-known-commentary>

⁸⁵ Reuters. (2020, July 14). *Trump congratulates Polish President Duda's 'historic' re-election*. Retrieved from Reuters: <https://www.reuters.com/article/us-poland-election-trump-idUSKCN24E32E>

and its most powerful neighbor, Germany, and Duda's plan was to increase overall US presence in Europe, but more US troops in Poland is considered a win for Duda.⁸⁶

(4) Prime Minister

The prime minister of Poland, is also the president of the council of ministers, heads the Polish government. The prime minister is indicated by the parliamentary majority, and has the powers to propose to the president of the composition of the cabinet, determine the government's agenda, and to countersign official acts of the presidency. As a result, Polish prime ministers also play a decisive role in Polish politics and foreign policies.

There has been constant tension between the Poles and Russians for centuries. Poland wants to move closer to the orbit of the West, meaning greater integration into EU and NATO. Former Polish Prime Minister and former president of the European Council, Civic Platform (PO) Donald Tusk had stated that, as long as former Soviet Union states continue to gravitate toward the West, the possibility of future Russian expansion will be diminished. Although both PO and PiS vowed to raise Poland's defense budget to increase its deterrent against Russia, but in comparison, PO is still slightly more conciliatory and less hostile toward Moscow than PiS, and has sought to ease the tension between the two countries. PiS on the other hand, is especially determined to pull Poland out of Moscow's gravity.⁸⁷ After Tusk's defeat to PiS candidate, Mateusz Morawiecki in 2017, and PiS took control of the government and Sejm, the defense expenditure as a share of GDP has grown immensely, and has consistently been over the 2 percent requirement.

⁸⁶ Schultz, T. (2020, July 2). *What Poland wants when it comes to US troops*. Retrieved from Atlantic Council: <https://www.atlanticcouncil.org/blogs/new-atlanticist/what-poland-wants-when-it-comes-to-us-troops/>

⁸⁷ Szczerbiak, A. (2014, September 8). *Russia's borders: competing visions for Europe have made Poland arch-critics of Putin*. Retrieved from The Conversation: <https://theconversation.com/russias-borders-competing-visions-for-europe-have-made-poland-arch-critics-of-putin-31332>

In 2019, in response to French President Emmanuel Macron's comment that NATO was experiencing "brain death" for its lack of coordination and the lack of predictability on Trump, Polish Prime Minister Morawiecki stated that any doubts in the collective defense guarantee will threaten the future of the EU and the military alliance.⁸⁸ Prime Minister Morawiecki then reaffirmed Polish commitment to NATO, and challenged Macron's commitment to the joint alliance by targeting France's failure to meet the 2 percent requirement. Further, Morawiecki attributed NATO's shortcomings, including deployability and combat readiness, to the lack of reciprocity on the part of certain European allies, not the absence of commitment from the United States.⁸⁹ As long as the Polish government sees meeting the 2 percent requirement as a way to strengthen NATO and a leverage for American protection, it will continue to maintain its defense expenditure over 2 percent of its GDP.

(5) Sejm and Political Parties

The Sejm is the lower chamber of Poland that shares its legislative function with the upper chamber, the Senate. However, the Polish Constitution vests the Sejm considerably more legislative power than the Senate, and only the Sejm has control over the executive body of the Polish government, the President and the Council of Ministers. The Civic Platform (PO) controlled the Sejm from 2011 to 2015, and Donald Tusk was the Prime Minister. It was eventually defeated by Law and Justice (PiS) in 2015, and Mateusz Morawiecki acting as the Prime Minister.

Poland's independence did not come easy, and that is precisely why security and defense have always been the emphasis on Polish foreign policies. PiS fully embraces its

⁸⁸ Reuters. (2019, November 19). *Polish PM: questioning NATO treaty a threat to collective defence*. Retrieved from Reuters: <https://www.reuters.com/article/us-poland-politics-nato-idUSKBN1XT1AV>

⁸⁹ Reuters. (2019, November 11). *Poland says France's Macron comments on NATO 'dangerous': FT*. Retrieved from Reuters: <https://www.reuters.com/article/us-poland-nato-idUSKBN1XL13B>

membership in NATO and its partnership with the US, because during the Cold War, NATO contained the Soviet Union, and became the guarantor of European security; and the US was Poland's only ally that possessed sufficient deterrent to help defend Poland's borders. PiS believes that NATO and the EU are the most important multinational institutions, and its solutions to Poland's sensitive geopolitical position include strengthening its military and modernizing its defense capacities; increasing funding to its troops until defense expenditure reaches 2.5% of GDP by 2030; and tightening the trans-Atlantic partnership. In fact, PiS has on multiple occasions lobbied to increase NATO and US military presence in Poland and establish permanent US bases on its soil. Moreover, PiS has positioned itself as a loyal supporter of US agenda, by backing various US operations. PiS is also conservative and a "soft Eurosceptic", meaning it will remain a part of the EU, but will oppose EU's common foreign and security policies. Preserving Polish autonomy and identity are PiS's priorities, it rejects further integration with the EU that could undermine Polish traditions and culture.⁹⁰

Russia has been a threat to Poland for a long time, but PiS's position on Russia has not always been confrontational. When the party was established, its attitude towards Russia was quite neutral. It proposed that the two countries should look past their dark history, and work towards a friendly Polish-Russian relationship. However, as Russian foreign policies turn aggressive, particularly its attack on Georgia, and the Smolensk plane crash, the PiS's Russian policies also turned tougher. Ultimately, PiS's position on Russia is driven by Russia's dangerous past and its aspirations to expand its influence in eastern Europe.

When conservative PiS defeated the incumbent PO government in the 2015 Poland parliamentary election, it had generated a lot of anxiety and uncertainty not just for the Poles, but for EU and NATO. PO wanted to position Poland within the "European mainstream", by

⁹⁰ Folvarčný, A., & Kopeček, L. (2020). Which conservatism? The identity of the Polish Law and Justice party. *Sciendo*, 16(1), 1-30.

presenting Poland as a model EU member that endorses values aligned with the West, also in the hopes of cultivating better relations with major EU powers, especially Germany. PO also appointed Tusk as the President of the European Council to show Poland's willingness to be further integrated into the EU. PiS on the other hand, seeks to regain Poland's national sovereignty and emphasizes that Poland need to be more assertive and active in pursuing its own national interest, as opposed to surrendering itself to EU politics, that is primarily determined by Germany.⁹¹

During the 2016 NATO Warsaw summit, PiS lobbied for larger NATO military presence, and permanently stationed US troops; and as PiS takes control of the executive and legislative bodies of the government, Poland's eastern policies, including raising its defense expenditure beyond 2% of GDP, and pursuing a military and political coalition composed of post-Soviet states to counter Russian expansionist ambitions, is expected to be more confrontational and provocative against Moscow, and will be considered destabilizing in the eyes of Germany. In fact, in 2020, PiS Jaroslaw Kaczynski has said that NATO troops along the Eastern flank must be "combat ready" to deter potential threat against the alliance, and demanded more troops to be deployed to the Baltic States to bolster NATO deterrent.⁹²

⁹¹ Szczerbiak, A. (2015). What does Law and Justice's election victory in Poland mean for Europe? *LSE*, 1-4.

⁹² Bettman, A. (2020, January 27). *Poland calls for NATO 'readiness' on Russia*. Retrieved from EUobserver: <https://euobserver.com/justice/147271>

Table 2.3

Main Polish Political Parties' Stances on Russia, NATO, and the 2% pledge

| | Russia | NATO | 2% |
|-----------------------|---------------------|---|--|
| Law and Justice (PiS) | Skeptical of Russia | Views NATO as the cornerstone of Poland's security | Aims to reach 2.5% of GDP on defense expenditure by 2030 |
| | | Prioritizes NATO over any other international organization | |
| | | Seeks larger NATO and US military presence in Poland | |
| Civic Platform (PO) | Skeptical of Russia | Supports NATO, but also wants Poland to further integrate into the EU | Supports the 2% NATO pledge, but not as driven as PiS, because it strives to improve Polish-German relations |
| | | Seeks larger NATO and US military presence in Poland | |

Source: Created by author

2. Geographic Proximity

There are some experts believe that Russia has the combat power to overcome distance and logistic problems to invade Poland, but this part of the thesis will suggest otherwise. Warsaw is over 1,200 kilometers away from Moscow by land. A Russian invasion is most likely to meet resistance from both the Poles and NATO, making it very difficult for Russia to advance and replenish. The biggest challenge Russia faces when engaging in warfare beyond its borders is the lack of logistics capacity to support long-distance warfare. There is just insufficient personnel and equipment to help sustain such operations. The slightest disruption in Russian supply lines and transportation infrastructure would be detrimental to Russia's

success. In addition, unlike the rest of Europe, Russian forces are heavily dependent on wide gauge railroads to travel because of its geography. In fact, these wide gauge railroads used by the Russian army only exist in former Soviet nations and Finland, forcing Russia to rely on trucks to travel, making cross-border mobilization especially inconvenient and vulnerable to disruption. The wide gauge railroads stop at the border between Belarus and Ukraine. The closest railheads to Poland are both in Belarus, Grodno and Brest, which are 130 miles and 177 miles from Warsaw respectively. Since Kaliningrad is landlocked by NATO countries, it could only offer limited help to Russia's invasion of Poland. Moreover, because of NATO air and naval power, resupply by sea is unlikely. As a result, Russian army would have to rely solely on trucks to replenish its operations, which demands much more resources and operational pauses.

“The Russian army does not have enough trucks to meet its logistic requirement more than 90 miles beyond supply dumps,” explained US Army Lieutenant Colonel Alex Vershinin.⁹³ Military operations burn through supplies such as ammunition, fuel, food, water, and medical supplies at a very fast pace, even when the troops are idle. For example, during the battle of Grozny in the Chechen wars, the Russian army was firing over 4,000 shells a day, which required 50 trucks a day just to sustain such firing rate; that number is likely to be much higher if Russia plans to invade Poland, as it is further away from home and deep into NATO territories. It is already very difficult and expensive for Russia to invade the Baltic States, let alone Poland and the rest of the NATO.

Supplying deep offensive operations with ammunition and fuel continues to be a challenge in modern warfare, and the Russian army is built to fight within and along its borders, lacking the capacity to sustain long range warfare. Its recent invasion of Ukraine is not going

⁹³ Vershinin, A. (2021, November 23). *Feeding the bear: A closer look at Russian army logistics and the fait accompli*. Retrieved from War on the Rocks: <https://warontherocks.com/2021/11/feeding-the-bear-a-closer-look-at-russian-army-logistics/>

as smoothly as it had hoped is a result of logistical challenges. Russian convoy has been stranded for several days, because of limited routes and poorly paved roads leading to the Ukrainian cities. Some experts had even called logistics a “definite vulnerability” of the Russian military.

Armored vehicles breakdown very often, which makes maintenance another logistical problem. The only solution is to establish forward repair points to fix broken trucks. However, once repair starts, vehicles become inoperable and vulnerable to attacks.⁹⁴ In addition, breakdowns of Russian trucks are because of “poor truck management practices”, resulting in trucks incapable of long travels.⁹⁵ Secondly, mud has been Achilles heel for ground troops for centuries. It had impeded French soldiers’ retreat during Napoleon’s invasion of Russia in 1812, and had obstructed Hitler’s tanks’ advance to Moscow. There had been incidents where the vehicles became immobile because of muddy road, and the soldiers had to go on foot, which would only hinder the troop’s advance.⁹⁶ Thirdly, extended supply lines are extremely difficult to defend. Especially operating in hostile territory, it could be susceptible to hit and run raids, that often result in significant casualties.⁹⁷ The most notable example of vulnerability in supply lines is Russia’s 40 miles long convoy that had been unmoving for several days because of ambush, equipment failures, freezing temperature, and rough terrain.

In general, distance still diminishes power. If Russia intends to invade Poland, it would have to operate deep in hostile territory, away from wide gauge railroads, and be forced to rely on trucks that are not properly maintained to replenish. In addition to logistical problems,

⁹⁴ Vershinin, A. (2022, March 10). *Russia’s logistical problems may slow down Russia’s advance - But they are unlikely to stop it*. Retrieved from Modern War Institute: <https://mwi.usma.edu/russias-logistical-problems-may-slow-down-russias-advance-but-they-are-unlikely-to-stop-it/>

⁹⁵ Sabbagh, D. (2022, March 8). *Russia ‘solving logistics problems’ and could attack Kyiv within days - experts*. Retrieved from The Guardian: <https://www.theguardian.com/world/2022/mar/08/russia-solving-logistics-problems-and-could-attack-kyiv-within-days-experts>

⁹⁶ Cavanagh, N. (2022, March 10). *Logistics: the hidden challenge for Putin’s military*. Retrieved from Yahoo News: <https://news.yahoo.com/logistics-the-hidden-challenge-for-putins-military-155316923.html>

⁹⁷ Hugos, M. (2022, March 16). *Russian logistics for the invasion of Ukraine*. Retrieved from SCM Globe: <https://www.scmglobe.com/russian-logistics-for-the-invasion-of-ukraine/>

Russia would face enormous resistance from the Poles and alliance forces, as illustrated in Figure 2.2, there are multiple NATO and US bases in Poland, and nearly 7,000 troops in Poland alone, and another 5,000 across Lithuania, Estonia, Latvia, and Romania. Russia's recent invasion of Ukraine had already triggered a massive buildup of troops and boost military expenditure in Europe. In fact, reinforcement from Germany and other parts of Europe would not be met with resistance, hence a secure supply line, which Russia does not have.⁹⁸

Warsaw is over 540 kilometers away from Minsk, and it would cost Russia a lot of casualties and resources to establish railheads, pipelines, supply depots and various logistical infrastructure to advance; and it would be even more difficult to secure such supply line, as it is immensely vulnerable to attacks. Although geography, logistics, and alliance presence will undoubtedly take a toll on Russia's power projection, but Poland does share a 230-kilometer-long border with Kaliningrad, and a 420-kilometer-long border with Belarus, making Russia an existential threat to Poland. That is why Poland continues to allocate over 2 percent of GDP on defense and welcomes NATO and US military presence on its soil.

⁹⁸ Picheta, R., & Pettersson, H. (2022, February 10). *Here's where Alliance forces are deployed across Eastern Europe*. Retrieved from CNN: <https://edition.cnn.com/2022/02/10/europe/nato-troops-eastern-europe-map-intl-cmd/index.html>

Figure 2.1

Alliance Forces Along NATO's Eastern Front



Note: This graphic shows forces focused on the defense of member states in NATO's east along with US Army troops in the same countries; it excludes military capabilities of individual member states. Troop numbers are approximate, latest available as of February 9, 2022. The US Army has small numbers of liaisons and advisors in Latvia, Estonia, Slovakia, and Hungary.

Source: NATO, US Army, Maps4news/@HERE
Graphic: Henrik Petterson, CNN

Source: Picheta, R., & Petterson, H. (2022, February 10). Here's where Alliance forces are deployed across Eastern Europe. Retrieved from CNN:

<https://edition.cnn.com/2022/02/10/europe/nato-troops-eastern-europe-map-intl-cmd/index.html>

3. Chapter Summary

Poland has been one of the most active members in NATO in recent years; not only has it been able to exceed NATO's 2 percent pledge since 2018, it has also participated in many NATO missions. In terms of domestic politics, there is a growing negative view of Russia in Poland, and over half of the Polish population considers Russia a threat to European security; its ruling party, PiS, along with the Polish president are fully committed to NATO's 2 percent

pledge, and welcome NATO military presence on its soil. As for geographic proximity with Russia, nearly 90 percent of the Poles sees Russia as a military threat because of it. Therefore, it comes as no surprise that Poland spends a larger share of its GDP on defense than other allies when domestic politics and geographic proximity to Russia are taken into consideration.





Chapter III: Germany

1. Domestic Factors

This chapter of the thesis will focus on some of the most important domestic factors that drive German politics, including the electoral system; how the German public feels about security, Russia, and NATO; the chancellor, Angela Merkel's stance on German security; and the Bundestag and the parties that occupy it.

(1) Electoral system

Germany is a federal republic and parliamentary democracy. The Chancellor leads the government and is vested with the executive powers, while the two chambers, the Bundestag and the Bundesrat, hold legislative powers. The Federal President is the head of state, but is primarily a ceremonial role. The German Chancellor holds the decision-making power, and heads the German government. The Bundestag currently has a total of 736 elected representatives, which is comparable to the House of Commons of the United Kingdom, and its representatives are directly elected by the German people; and the Bundesrat, is similar to the House of Lords of the United Kingdom, represents the 16 federal German states. In most cases, the executive branch, consisting of the chancellor and the cabinet ministers, initiates the legislative process, and the Bundestag assesses and amends the government's legislative decisions. Members of the Bundestag are the only federal officials directly elected by the German people; the Bundestag then elects the Chancellor. The Bundestag checks and balances the executive branch by overseeing, questioning, and investigating government policies.

The German government is typically composed of at least two parties. The largest party will seek to form a coalition with other parties. The main political parties in Germany include the Christian Democratic Union (CDU), Christian Social Union (CSU), the Social Democratic

Party (SPD), the Alternative for Germany (AfD), the Free Democratic Party (FDP), The Left, and The Greens.⁹⁹

The CDU has been the dominant party in the Bundestag since 2005, and the SPD is its main opposition party. In the 2009 election, the CDU formed a grand coalition with the FDP. However, in 2013 the FDP was not able to win any constituency seats nor was it able to pass the 5% vote electoral threshold, meaning the FDP had no representation in the Bundestag to secure a majority with the CDU. Merkel eventually reached a coalition agreement with its main opposition party, the SPD, and the coalition remained intact until the 2021 election.

The party, or coalition with a majority in the Bundestag will form the government. The Chancellor then picks Cabinet of Ministers to head different functions of the government; and these ministers could be from different political parties than the Chancellor, for example the Federal Minister of Foreign Affairs, Heiko Maas, and Federal Minister for Labor and Social Affairs, Hubertus Heil, were from the SPD, and both served in the fourth cabinet of Angela Merkel, who is from the CDU.

(2) German Public Opinion

Since the end of the Cold War, defense expenditure across NATO members have decreased dramatically. Take Germany as an example, in 1989, its defense expenditure as a share of GDP was 2.9%, and has reduced to 1.57% in 2020. This trend of down-sizing defense budgets can be seen across NATO members, including the United States, and has become an existential crisis for the alliance. To preserve NATO, members of the joint alliance pledged in 2014 to reverse the trend of scaling down military budgets, and increase their defense expenditure to 2% of their GDP by 2024.

⁹⁹ Zunneberg, C. (2017, July 26). *Europe in the German federal elections: What do the manifestos say?* Retrieved from European Council on Foreign Relations: https://ecfr.eu/article/commentary_europe_in_the_german_federal_elections_manifestos_7219/

Although it is unlikely and unrealistic to expect all 30 members will reach the 2% goal, and despite its flaws, including being overly-simplistic and misleading, it proves to be politically valuable. It divides members into ones who are politically committed and those who free rides. The pledge has also successfully stimulated debates over European security and NATO's sustainability. What the US policy-makers had hoped to see was through "naming and shaming", European allies would shoulder more financial and defense burden. However, policymakers had underestimated the difficulties, including austerity and growing divergent threat perceptions, European NATO face when it comes to increasing defense budgets.

Germany is amongst many European NATO that faces austerity and has very divergent opinions about threat. According to a survey conducted by Center for Insights in Survey Research in 2017, poverty and social inequality, refugee policies, and terrorism are three of the biggest threats in the eyes of the German public, while less than 4% of the population saw security and international crises or wars as the biggest problem facing Germany. When asked "what will most likely to threaten yours and your children's way of life?", 40% responded "terrorism, extremism, and political violence", 19% responded "loss of culture and values", 15% responded "migration and demographic change", 12% responded with "bankruptcy and disappearance of health and social security services" and only 6% of the Germans saw "war or expansion of the conflict in Ukraine" as the greatest threat to their ways of life.

A series of polls conducted by Centre for East European and International Studies that over the past few years indicated that most German are in favor of expanding cooperation with Russia. In fact, Russia has been the second most favorable country Germany wants to cooperate with after France. Poll done by Center for Insights in Survey Research in 2017, over 60% of German are supportive of a new Ostpolitik, that aims to tighten German-Russian economic and political relations and lift sanctions to avoid conflicts. In addition, only 34% of German consider Russia as a threat to Europe and should be balanced against by a strong security

alliance, while 61% of German believes that Russia should be integrated into the European security system. In terms of their opinion on NATO, 59% of German are still supportive of the alliance, while 39% think that NATO is obsolete and is incapable of keeping up with today's challenges. In fact, only 30% of German are willing to sacrifice social welfare, such as pension, healthcare and education, to modernize and strengthen the Bundeswehr; while 66% thinks that the threats currently facing Germany are not enough to justify increase defense spending.

According to the polls, it appears that a large portion of the German population does not see Russia as the biggest threat, and that the government should prioritize the refugee crisis and social welfare over defense. Since the Bundestag directly reflects the will of the German electorates, then it comes as no surprise that Germany struggles to spend over NATO's 2% pledge.

In terms of response to the Annexation of Crimea, the Pew Research Center asked NATO members in 2015 that if Russia is a military threat to its neighboring countries; results were mixed. 70% of the Poles saw Russia as an immediate threat to its neighboring countries, as did 53% of the Brits. But only 38% of the Germans saw Moscow as a major military threat. When asked which country was to blame for the Ukraine Crisis, 57% of Poles and 40% the British said Moscow was responsible for the violence, while only 29% of Germans blamed Russia. Now in response to how NATO should support Ukraine and if Ukraine should join NATO, a median of 70% of the NATO public surveyed were in favor of providing financial aid to Ukraine, but only a median of 57% favored Ukraine joining NATO. 59% of the Poles and 57% of the Brits favored Ukraine joining NATO, but only 36% of the Germans wanted Ukraine to join the alliance. Throughout various surveys, it appears that the German public have a less negative view of Russia than their Polish and British counterparts, and are generally

unwilling to provoke Russia by actively suppressing its defense spending and taking a strong stance against it.¹⁰⁰

In essence, Germany has a very complicated and often conflicting relationship with NATO, the US, and Russia. They know they need NATO; hence they need the US, but they are not always fans of Washington. Long after the Cold War, Germany's memories of standoff with the Soviet Union is fading, and is replaced by NATO's failure in Afghanistan and George Bush's unilateralism. In addition, there is growing pacifism, anti-Americanism, and anti-nuclear sentiments in Germany, that often leads to skepticism in NATO. In general, Germany does not want to sit too close to Washington and would prefer to position itself as the mediator between the West and Russia.¹⁰¹

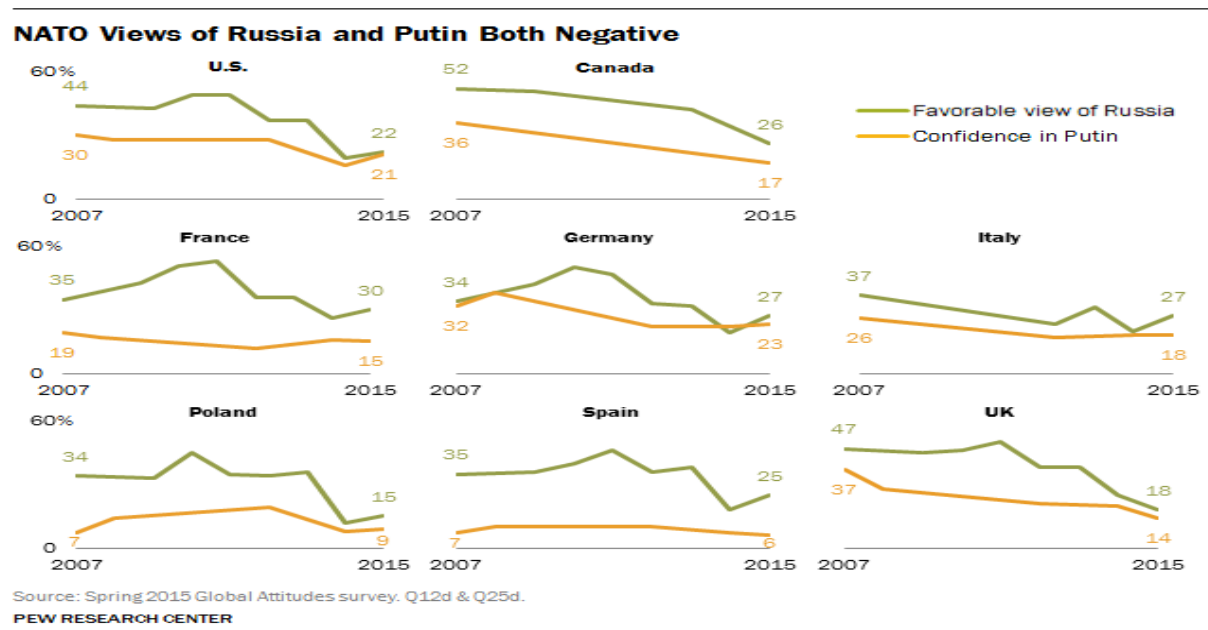


¹⁰⁰ Simmons, K., Stokes, B., & Poushter, J. (2015, June 10). *NATO Public Opinion: Wary of Russia, Leery of Action on Ukraine*. Retrieved from Pew Research Center: <https://www.pewresearch.org/global/2015/06/10/1-nato-public-opinion-wary-of-russia-leery-of-action-on-ukraine/>

¹⁰¹ Kühn, U. (2015, November 3). *With or without you: Germany and NATO*. Retrieved from War on the Rocks: <https://warontherocks.com/2015/11/with-or-without-you-germany-and-nato/>

Figure 3.1

NATO Members' Views of Russia and Putin



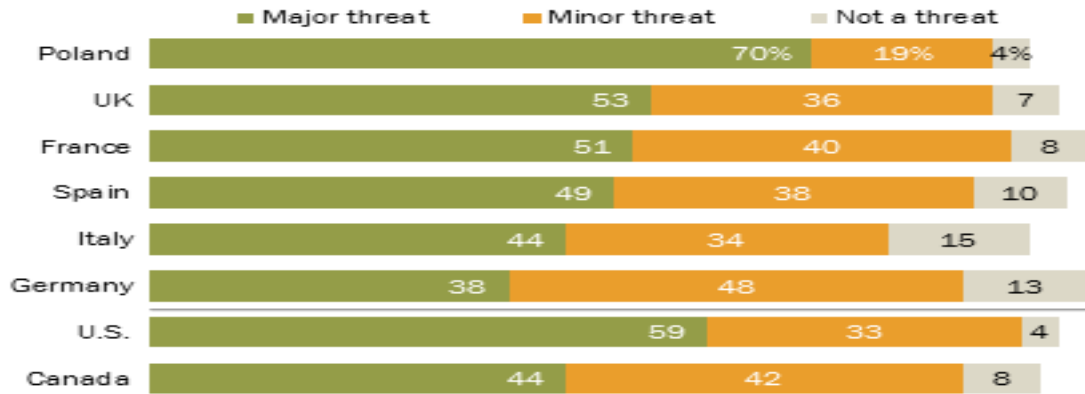
Source: Simmons, K., Stokes, B., & Poushter, J. (2015, June 10). NATO Public Blame Russia for Ukrainian Crisis, but Reluctant to Provide Military Aid. Retrieved from Pew Research Center: <https://www.pewresearch.org/global/2015/06/10/nato-publics-blame-russia-for-ukrainian-crisis-but-reluctant-to-provide-military-aid/>

Figure 3.2

NATO Members' Views of Russia

Poland Most Worried about Russian Military Threat

How much of a military threat, if at all, is Russia to its neighboring countries, aside from Ukraine?



Source: Spring 2015 Global Attitudes survey. Q27.

PEW RESEARCH CENTER

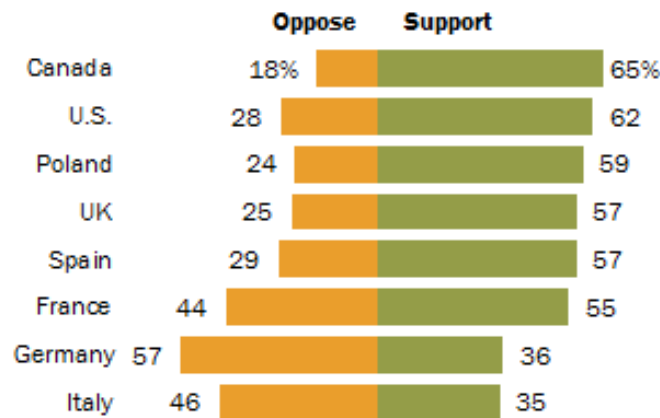
Source: Simmons, K., Stokes, B., & Poushter, J. (2015, June 10). NATO Publics Blame Russia for Ukrainian Crisis, but Reluctant to Provide Military Aid. Retrieved from Pew Research Center: <https://www.pewresearch.org/global/2015/06/10/nato-publics-blame-russia-for-ukrainian-crisis-but-reluctant-to-provide-military-aid/>

Figure 3.3

NATO Members' Level of Support of Ukraine Joining NATO

Germans Oppose Ukraine Joining NATO

In response to the situation involving Russia and Ukraine, do you support or oppose: Ukraine becoming a member of NATO?



Source: Spring 2015 Global Attitudes survey. Q48b.

PEW RESEARCH CENTER

Source: Simmons, K., Stokes, B., & Poushter, J. (2015, June 10). NATO Publics Blame Russia for Ukrainian Crisis, but Reluctant to Provide Military Aid. Retrieved from Pew Research Center: <https://www.pewresearch.org/global/2015/06/10/nato-publics-blame-russia-for-ukrainian-crisis-but-reluctant-to-provide-military-aid/>

(3) Chancellor

In 2018, when Trump claimed that “Germany is captive of Russia” because of its dependence on Russia’s natural gas and that “Germany is totally controlled by Russia”,¹⁰² German Chancellor Angela Merkel responded by sharing her upbringing in Soviet-dominated

¹⁰² Reuters. (2018, July 11). *Merkel recalls own East German youth in riposte to Trump*. Retrieved from Reuters: <https://www.reuters.com/article/us-nato-summit-merkel-east/merkel-recalls-own-east-german-youth-in-riposte-to-trump-idUSKBN1K11GE>

East Germany. “I grew up in the part of Germany that was not free, the German Democratic Republic. For many years I dreamed of freedom, just as many others did” said the Chancellor.¹⁰³ Having first-hand experience under Soviet occupation, the Chancellor understands how precious and fragile freedom and sovereignty could be. She has been the Chancellor of Germany since 2005, and despite Germany’s seemingly lack of commitment to NATO and willingness to strengthen its military, Merkel has been a strong proponent of the joint alliance. In fact, over the past 16 years of leadership, Merkel has consistently voiced her support for NATO and called for solidarity against the Russian threat. When French President Macron called the alliance “brain dead”, Merkel responded “this view does not correspond to mine”, and said that NATO is the “cornerstone of security” for Germany. And To underline NATO’s importance to Europe's security, Merkel warned that “Europe currently cannot defend itself on its own.”

When the 2% pledge was agreed by all NATO members, Merkel along with other members of the CDU, including then Defense Minister Ursula von der Leyen from the CDU, had expressed their support for the target and endorsed that goal. “Germany must fulfill its obligation to NATO and raise its contribution” said the Chancellor. Both CDU and CSU believe that by raising Germany’s defense expenditure to 2% will send signals to the other NATO members that Germany is reliable and is politically committed to the alliance. In addition to raising the military spending to meet the 2% pledge, Merkel sought to boost Germany’s presence along NATO’s Eastern flank to boost deterrent against Russia.¹⁰⁴

However, after nearly 16 years under Merkel, the Bundeswehr still seems underfunded. This paper will address two of the reasons why it is so difficult for the chancellor to raise

¹⁰³ Hansler, J. (2018, July 11). *Merkel responds to Trump: ‘I have witnessed’ Germany under Soviet control*. Retrieved from CNN: <https://edition.cnn.com/2018/07/11/politics/angela-merkel-east-germany-nato-trump/index.html>

¹⁰⁴ Delcker, J. (2018, July 7). *Angela Merkel: NATO must refocus on Russia threat*. Retrieved from Politico: <https://www.politico.eu/article/angela-merkel-nato-summit-defense-spending-must-refocus-on-russia-threat/>

Germany's defense spending, including opposition from rival parties, and the public. First, there is a lack of consensus amongst Merkel's current coalition between CDU, CSU, and SPD over how much Germany should invest in its defense. Both CDU and CSU are supportive of the 2% pledge, but the SPD remains skeptical. The SPD agrees that the Bundeswehr needs modernization, but devoting 2% of GDP is both unrealistic and unnecessary.¹⁰⁵ Then foreign Minister and Vice-Chancellor Sigmar Gabriel from SPD had openly challenged Merkel's call to raise defense spending. Gabriel along with other members of SPD warned against the consequences of raising Germany's military spending, and repercussions to Germany's security and regional stability.¹⁰⁶ Their criticisms against boosting Germany's defense expenditure typically revolve around turning Germany into a big military power that will upset its neighbors to the East and could trigger an arms race in Europe; also calling the incumbent hostages to Washington, and is giving in to the demands of Donald Trump. But to be fair, Washington has been trying to get its allies to spend more way before Trump took office, and have urged partners like Germany to pull their own weight. 'There are few defense professionals in Europe who dispute that Germany currently contributes far less than its share on defense within NATO.' said Justin Bronk, a research fellow at the Royal United Service Institute.¹⁰⁷

In 2017, Trump in the hopes of appealing to his supporters at home had demanded Germany to raise its defense spending, claiming that "Germany owes NATO large sums of money for defense". In fact, during the 2018 NATO summit in Brussels, Trump demanded

¹⁰⁵ Sprenger, S. (2018, January 4). *Trump might get pushback from Germany on NATO spending after all*. Retrieved from Navy Times: <https://www.navytimes.com/global/europe/2018/01/03/trump-might-get-pushback-from-gemany-on-nato-spending-after-all/?contentQuery=%7B%22section%22%3A%22%2Fhome%22%2C%22exclude%22%3A%22%2Fglobal%22%2C%22from%22%3A805%2C%22size%22%3A10%7D&contentFea>

¹⁰⁶ Shalal, A., & Alkousaa, R. (2018, May 14). *NATO spending target not some 'fetish' for Germany: Merkel*. Retrieved from Reuters: <https://www.reuters.com/article/us-germany-military-idUSKCN11F1TN>

¹⁰⁷ Smith, A., Williams, A., & Eckardt, A. (2018, April 26). *NATO ally Germany urged by U.S. to up its military spending*. Retrieved from NBC: <https://www.nbcnews.com/news/world/nato-ally-germany-urged-u-s-its-military-spending-n869206>

NATO allies to increase military spending immediately, while calling Germany's energy dependence on Russia "inappropriate"; "Germany is totally controlled by Russia" said Trump, and addressed his constituencies that "it's very unfair to our taxpayers", causing the German-American relations to sour. Trump's criticism against Germany's dependence on Russian energy was referring to a 2015 agreement between Germany and Gazprom, a Russian company, for building a pipeline that would supply Germany natural gas. It was especially confusing for many NATO allies that Merkel condemned Russia's Annexation of Crimea, and called for solidarity against Russia, while defending the \$11 billion energy project. Trump claimed that the energy deal had made Germany a "hostage" to Russia, making it even more difficult to raise its defense spending. "Many countries are not paying what they should, and Frankly, many countries owe us a tremendous amount of money for many years back, and they're delinquent, as far as I'm concerned, because the United States has had to pay for them" said Trump.¹⁰⁸

Trump's ruthless criticisms against Germany's contribution to NATO had not only damaged its image as a joint alliance, undermined its deterrent against potential threats, it had also impaired its solidarity. Merkel immediately rejected Trump's claim that Germany is politically disengaged from NATO and emphasized Germany's role in NATO's missions in Afghanistan and Ukraine. Many sees Trump's outburst as counterproductive to encourage Germany policy makers to raise its defense expenditure, as many leaders of the SPD are calling Merkel's attempts of investing more funds into the Bundeswehr as compliance to Trump's demands. In 2018, then German Defense Minister, Ursula von der Leyen admitted that Germany would not meet the 2% pledge by 2024, and Merkel claimed that because of

¹⁰⁸ Horsley, S., & Neuman, S. (2018, July 11). *Trump blasts allies at NATO summit*. Retrieved from NPR: <https://www.npr.org/2018/07/11/627932769/trump-unloads-on-nato-secretary-general-over-defense-spending>

Germany's post-World War II history, it is difficult to get the Bundestag to agree on 2% by 2024.¹⁰⁹ But the real challenge stems from its coalition partner, the SPD.¹¹⁰

Germany's coalition government is under a lot of stress as the SPD has been unhappy with its current standing in the bloc with the CDU. In an attempt to appeal to the voters, SPD leaders are now portraying itself as a guardian of German social welfare at the cost of defense. In a poll conducted by Infratest Dimap, only 3% of the German public believed defense deserved a budget increase over social welfare, such as education and health. The CDU on the other hand, had always placed more emphasis on Germany's defense and security, as German Defense Minister Ursula von der Leyen claimed that Germany would not be able to spend 2% of GDP on defense by 2024, but had promised its allies that Germany's defense budget is on track to reach 1.5% of GDP by 2024. The Defense Minister had also extended the 2% target deadline to 2031, which was endorsed by the Chancellor; she reassured NATO allies Germany's commitment of spending 2% of GDP "by the early 2030s" and said that "the preservation of NATO is in our own interest, more than during the Cold War." But CDU is facing resistance from their cabinet colleague, Finance Minister Olaf Scholz of the SPD, who has proposed to redirect fund out of the Bundeswehr into social welfare. To avoid being marginalized in Germany's political scene, the SPD is betting on welfare and not complying to Trump's demands to gain some traction with its voters.

The second hurdle Merkel faces when trying to raise Germany's defense spending is the German public. Despite Germany's general support of NATO, a number of surveys had shown that the Germans are increasingly more concerned with problems such as social inequality, refugees, and terrorism. When asked what would most likely to threaten theirs and

¹⁰⁹ Taiwan News. (2017, March 20). *Merkel disputes Trump's NATO debt claim*. Retrieved from Taiwan News: <https://www.taiwannews.com.tw/en/news/3121409>

¹¹⁰ Brazell, E. (2018, May 15). *Angela Merkel fails to meet NATO spending target as Germany's defence minister admits budget is unlikely to be reached in future*. Retrieved from VT: <https://vt.co/news/us/angela-merkel-fails-to-meet-nato-spending-target-as-germanys-defence-minister-admits-budget-is-unlikely-to-be-reached-in-future>

their children's ways of life, most responded with terrorism, loss of social welfare, and migration, while only a miniscule portion of Germans responded with wars or crisis in Ukraine. Undoubtedly, very few Germans are concerned with threats from Russia, and think it should be the government's priority. In fact, some polls had even suggested that there is a growing number of Germans supporting more cooperation with Russia, and that Russia should be more integrated in Europe. In order for the chancellor to raise Germany's defense budget, he or she would have to convince the Germans that in the face of austerity, defense should come before social welfare, and that Moscow is a threat.

(4) Bundestag and Political Parties

The main political parties in Germany are the Christian Democratic Union (CDU), Christian Social Union (CSU), the Social Democratic Party (SPD), the Alternative for Germany (AfD), the Free Democratic Party (FDP), The Left, and The Greens. These parties have very different opinions about Germany's security issues and its involvement in NATO.

The CDU and CSU are the most NATO-friendly German parties. They are fully supportive of NATO and deems it an indispensable part of regional and global security. It is also important for the CDU that Germany fulfills its 2% pledge to the joint alliance. The SPD on the other hand agrees that NATO is valuable to Europe's security, but rejects a massive boost in defense expenditure. The SPD supports Germany's military deployment for peacekeeping missions, crisis prevention and conflict resolutions, but must be under NATO and UN frameworks of international order; and increase in military spending should be modest. The Alternative for Germany (AfD) supports NATO, but believes it is necessary to strengthen Europe's leadership in the alliance. The Green Party also sees NATO as an integral part of Germany's security. The Left Party is the most NATO skeptic. It is in favor of Germany exiting

from NATO and form a collective security system that includes Russia. The Left Party is also against all Bundeswehr missions abroad, and actively organizes protests against NATO.¹¹¹

In terms of the pledge made in 2014, Germany's political parties remain divided over the 2% pledge, and the guideline continues to be a source of contention. The Left Party and the SPD reject massive increases in funding to the Bundeswehr, while the FDP, CDU, and CSU are in favor of a larger and modernized Bundeswehr that would meet the 2% pledge by 2024.¹¹²

In general, the biggest parties, the CDU and CSU, and SPD all share a common attitude that NATO can serve as an effective deterrent against potential aggression, but they cannot agree on how much fund should go to the Bundeswehr. The CDU and CSU see NATO as the foundation of German security, whereas the SPD sees NATO as a source of security, that is equally as important as other international institutions. Their attitudes toward NATO also determines how important it is for Germany to fulfill the 2% pledge for them. Although the SPD, FDP, CDU and CSU are all in favor of a European Common Security and Defense Policy (CSDP), and believe it would complement NATO to help stabilize the region, but the SPD and FDP are much more ambitious than the CDU at building an European force, and the CDU believes Germany should focus its energy and resources on strengthening NATO. Consequently, the CDU is much more determined to fulfill the 2014 pledge than its counterparts.¹¹³

In the 2017 Parliamentary election, after the sudden dissolution of preliminary coalition talks between CDU, CSU, FDP, and the Green Party, CDU and CSU once again had to look to SPD, its main opposition party and previous coalition partner, to negotiate a new coalition deal.

¹¹¹ Sanders, L., & Martin, D. (2017, September 24). *German election - where do political parties stand on foreign policy and security?* Retrieved from DW: <https://www.dw.com/en/german-election-where-do-political-parties-stand-on-foreign-policy-and-security/a-40501361>

¹¹² Ibid, 74.

¹¹³ Ibid, 74.

The 2% pledge is undoubtedly a source of contention for the two parties.¹¹⁴ Members of NATO agreed to increase their defense spending to correct the negative trends in military expenditures. Although the main German political parties, including the CDU, CSU, SPD, and FDP, all agree that NATO is important to its security, but as Trump assumed office, his transactional approach and critical tone has soured the transatlantic relations.

During Germany's 2017 election campaign, SPD's candidate, Schulz argued against the 2% commitment, suggesting that Germany should not pursue a large Bundeswehr that would trigger an arms race in Europe, and should only focus on humanitarian and peacekeeping missions. During the election campaign, he drew clear distinction between the SPD and CDU, which had agreed to meet the 2% guideline. Schulz's position and argument against the 2% pledge is likely to exacerbate the anti-American sentiment in Germany and turn the 2% pledge that was intended to strengthen Europe's joint security into an act of compliance to Trump's demand.¹¹⁵ Even Merkel admitted that it is difficult to get the Bundestag to agree on reaching 2% by 2024, and the real challenge comes from her coalition partner, the SPD.¹¹⁶

In 2019, as the coalition of between the CDU, CSU, and SPD try to formulate the government's budgetary plans for the next two years, German Finance Minister Olaf Scholz of the SPD clashed with Defense Minister Annegret Kramp-Karrenbauer of the CDU over Germany's security policies and funding of the Bundeswehr. German Defense Minister Kramp-Karrenbauer wanted to fulfill Germany's commitment to the alliance by 2024, while the Finance Minister Scholz rejected that plea and claimed that an increase in funding to the Bundeswehr to 2% of GDP is unrealistic and unnecessary.

¹¹⁴ Gebauer, M., Müller, P., & Schult, C. (2018, July 20). *What did Merkel pledge in Brussels?* Retrieved from Spiegel: <https://www.spiegel.de/international/germany/nato-spending-debate-what-did-angela-merkel-pledge-in-brussels-a-1219458.html>

¹¹⁵ European Horizons. (2017, December 14). *Three Key Defense Issues to Watch in German Politics.* Retrieved from Huffpost: https://www.huffpost.com/entry/three-key-defense-issues-to-watch-in-german-politics_b_5a32fad5e4b0e7f1200cf977

¹¹⁶ Ibid, 74.

To reach 2% of GDP in defense spending from Germany's current standing of 1.26% would mean a massive increase from nearly 50 billion euros to over 65 billion euros. Scholz has had very similar disputes with Kramp-Karrenbauer's predecessor, then Defense Minister Ursula von der Leyen over if Germany should fulfill the 2% pledge; Scholz and the SPD ultimately won. Germany's defense expenditure is projected to reach 1.5% of GDP by 2024, and 2% by 2030. A passage that reads "increase in the defense budget to 2% of GDP" was removed from the coalition government's midterm assessment, and replaced by Berlin will "within the limits of budgetary feasibility," reach 1.5% of GDP by 2024 and intend to "further increase" spending "thereafter." Placing the Defense Minister under enormous pressure from NATO for not staying on track to meet the 2% pledge. After Merkel's coalition announced Germany's new budgetary plan for its defense, NATO Secretary General Jens Stoltenberg warned during a meeting of NATO defense ministers that such minute increase in defense budget is not acceptable, and if NATO members continued the negative trend of not shouldering their burden, it would undermine NATO's sustainability.¹¹⁷

Many in the Defense Ministry and the CDU were surprised that Defense Minister Kramp-Karrenbauer would give in to Scholz's budgetary plans, because Kramp-Karrenbauer had been an advocate for boosting Germany's defense capabilities. In 2019, Kamp-Karrenbauer expressed her support for the Bundeswehr and Germany taking more responsibilities in the world at the Bundeswehr University Munich. However, she had to adjust her plans for Germany's defense in accordance with the budgetary plan set by the Finance Minister, which is to reach 1.5% by 2024 and 2% by 2031.¹¹⁸ The Defense Minister is likely

¹¹⁷ Gebauer, M. (2019, November 7). *Germany Remains Tepid on NATO 2-Percent Goal*. Retrieved from Spiegel International: <https://www.spiegel.de/international/germany/german-government-clash-over-nato-2-percent-goal-a-1295429.html>

¹¹⁸ Emmott, R. (2019, November 6). *Germany commits to NATO spending goal by 2031 for first time*. Retrieved from Reuters: <https://www.reuters.com/article/us-germany-nato-idUSKBN1XH1IK>

to face even more pressure from its transatlantic partner as Trump has repeatedly criticized Germany's lack of commitment to the joint alliance.

Table 3.1

Main German Political Parties' Stances on Russia, NATO, and the 2% Pledge

| | Russia | NATO | 2% |
|--|---|---|---|
| Christian Democratic Union (CDU)/ Christian Social Union (CSU) | Holds negative views of Russia | The most NATO friendly German political party | Aims to reach 2% of GDP spent on defense |
| | Supports sanctions against Russia | Views NATO as an indispensable part of regional security | |
| Social Democratic Party (SPD) | Seeks to improve relations with Russia | Supports NATO, but does not support a massive increase in defense expenditure | Claims that spending 2% of GDP on defense is both unrealistic and unnecessary |
| | Relations with Russia is equally as important as relations with the US | NATO is just as important as the EU and other international organizations | A massive boost in defense spending would trigger an arms race in Europe |
| Free Democratic Party (FDP) | Holds negative views of Russia | Supports NATO, and is fully committed to the alliance | Believes Germany's defense expenditure should reach 2% of its GDP |
| Alternative for Germany (AfD) | Divided on Russian policies | Divided on NATO | Divided on the 2% pledge |
| The Left | Seeks to improve relations with Russia, and replace NATO with a collective security system that includes Russia | Against NATO, calls for the dissolution of NATO | Opposes the 2% pledge |
| The Green | Holds negative views of Russia | Supports NATO | Opposes the 2% pledge |

Source: Created by author

2. Geographic Proximity

Distance is still a natural barrier and diminishes power in modern warfare, making countries outside of Russian geographic proximity less threatened by it. Berlin is over 1,800 kilometers away from Moscow, the two countries do not share a border, and Germany is well within NATO territories, making it much safer than members along the Eastern border. As Boulding explained “the further from home any nation has to operate...the less strength it can put in the field.”¹¹⁹ According to Boulding’s LSG, as Russian troops move further away from its home grounds and into hostile territories, its combat power diminishes as logistics become more difficult and expensive, and morale dissipates because of foreign climate, language barriers and cultural differences. LSG also shows that even if Russia possesses a larger military than Germany, if the point of engagement is closer to Germany, Germany could have a greater advantage. As illustrated in Figure 1.2, if the point of engagement is within Germany’s side of ‘boundary of equal strength’, the Bundeswehr would have an advantage over the Russian army. In addition, LSG explains the geopolitical importance of allies, as allies can provide logistical support and even help establish forward deployment bases.

Distance decays power even with today’s technologies. First of all, the Russian army is designed to fight within and along its borders, and is heavily reliant on its wide gauge railroads that only exist in former Soviet Union countries. The closest railheads to Berlin are both in Belarus, forcing Russian armies to use trucks to travel, which according to US Army Lieutenant Colonel Alex Vershinin require operation pauses. Furthermore, there are fundamental vulnerabilities to trucks and tanks that are difficult to overcome.

Secondly, if Russia intends to invade Germany, it would have to operate in hostile territories, leaving its supply lines vulnerable to enemy raids. Collapsed bridges or broken roads could cutoff supply lines and severely hurt its advances. Thirdly, poor ground conditions

¹¹⁹ Ibid, 23.

will always be Achilles heel for ground troops. The belief that all limitations of distance have been conquered by motored vehicles proved to be false.¹²⁰ If mud had stopped Napoleon and Hitler's advances, it would certainly stop Putin.

Germany hosts a number of NATO facilities, such as the Combined Air Operations Center (CAOC) that polices NATO airspace above Germany, Poland, the Czech Republic, Slovakia and the Baltic States.¹²¹ In addition, Germany has been a vital part of US defense strategy in Europe for decades. To illustrate Germany's geopolitical significance and importance in US European strategies, the US European Command (EUCOM) headquarters is located in Germany, that supports partnerships such as NATO, and commands the US Air Forces in Europe, the US Army in Europe, and the US Marine Corps Forces Europe and Africa. Germany also has the largest US base that is home to most of the US troops in Europe, of over 38,000 US troops in 2019. In fact, Germany currently holds an estimated 20 nuclear weapons because of NATO nuclear sharing arrangement.¹²² If the point of engagement is within Germany's borders, the Bundeswehr and allied force would have significant geopolitical advantage over Russia.¹²³

¹²⁰ United States Army. (1962). *Terrain factors in the Russian campaign: historical study*. Washington: Department of the Army.

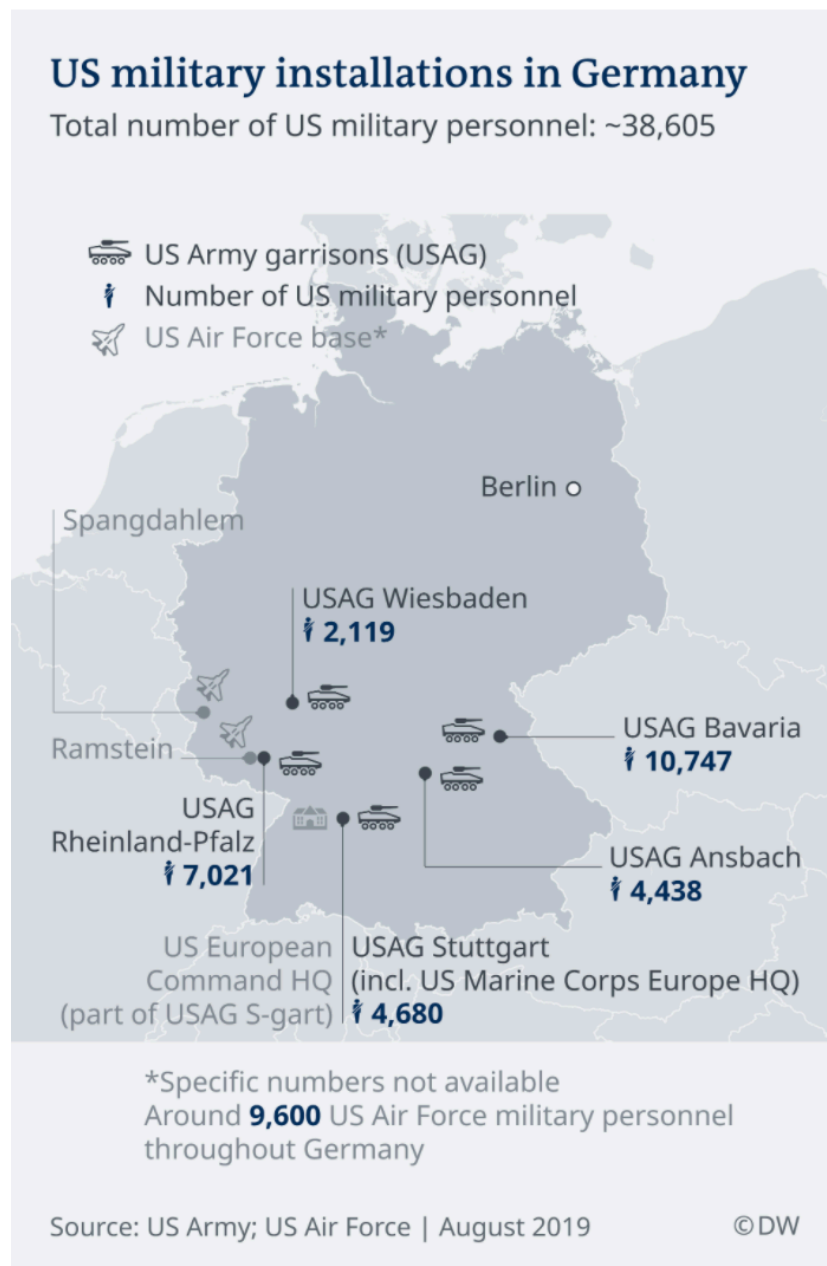
¹²¹ Rabe, P. (2022). *Airspace security - Nothing escapes the German air force*. Retrieved from Bundeswehr: <https://www.bundeswehr.de/en/airspace-security-nothing-escapes-the-german-air-force-5067216>

¹²² Knight, B. (2020, June 16). *US military in Germany: What you need to know*. Retrieved from DW: <https://www.dw.com/en/us-military-in-germany-what-you-need-to-know/a-49998340>

¹²³ Coffey, L. (2012, July 11). *Keeping America safe: Why U.S. bases in Europe remain vital*. Retrieved from The Heritage Foundation: <https://www.heritage.org/defense/report/keeping-america-safe-why-us-bases-europe-remain-vital>

Figure 3.4

US Military Installations in Germany

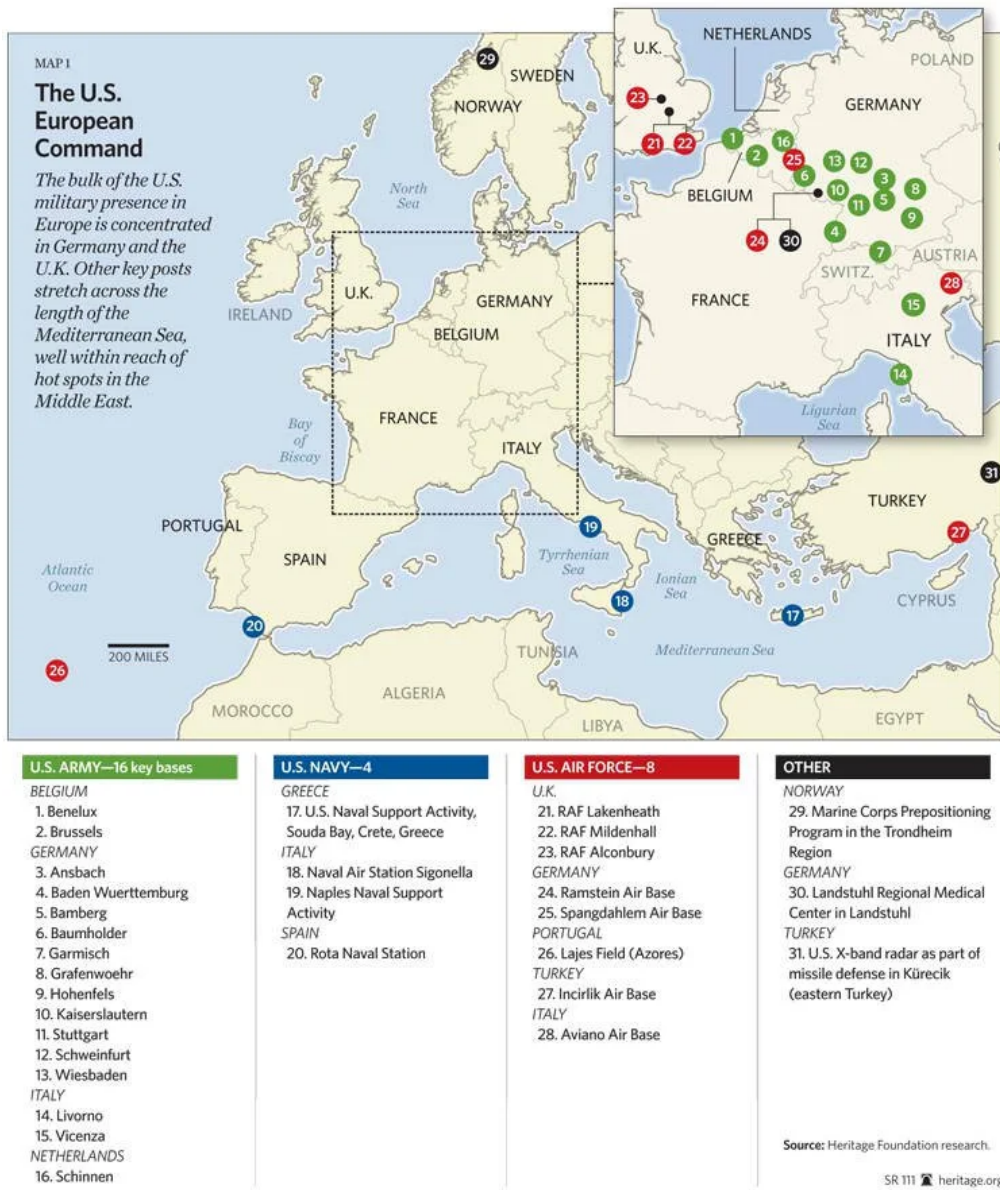


Source: Knight, B. (2020, June 16). US military in Germany: What you need to know.

Retrieved from DW: <https://www.dw.com/en/us-military-in-germany-what-you-need-to-know/a-49998340>

Figure 3.5

The US European Command



Source: Coffey, L. (2012, July 11). Keeping America safe: Why U.S. bases in Europe remain vital. Retrieved from The Heritage Foundation:

<https://www.heritage.org/defense/report/keeping-america-safe-why-us-bases-europe-remain-vital>

A Russian invasion of Germany would not only be challenging, and expensive, it would be catastrophic for Russia. Germans know that despite Russia’s overwhelmingly larger military,

the distance and logistics alone will put it at a disadvantage if it invades Germany, and that becomes part of the reason why threat perception of Russia is much lower in Germany than in NATO members along the Eastern flank. Without a clear threat perception, it is no wonder German politicians prioritize social welfare spending over defense.

3. Chapter Summary

Germany has been reluctant to raise its defense expenditure to meet NATO's 2 percent pledge because of a number of domestic reasons, including its low threat perception of Russia, and a lack of consensus on Russian policies in its ruling coalition. According to various polls, most Germans are more concerned about issues like social welfare, climate change, and refugee policies; and despite Germany's strong support for NATO, over 60 percent of the population are unwilling to sacrifice social welfare for security. Similar polls have shown that only a third of Germans see Russia as a threat, and the rest believe Russia should be integrated into Europe and be treated as a partner. In addition, there is no consensus within Merkel's ruling coalition, which makes it impossible for the Chancellor to raise its defense spending. Geography and distance are also to Germany's advantage. It is sitting comfortably behind a line of allies, and it hosts the largest US military base in Europe and other NATO assets, making it insensible to Russia threat. In sum, unless the German public perceives Russia as a major threat to its security, and the ruling coalition agrees on its security policies, it is unlikely that Germany will spend over 2 percent of GDP on defense.

Chapter IV: The United Kingdom

1. Domestic Factors

This portion of the paper will explore domestic factors that fuel the political decision-making process in the UK, and what determines its level of support for NATO. It will look at its electoral system; British public's threat perception of Russia, and support of NATO; the British prime minister's security policies and the "special relationship" between the UK and the US; the parties that control the House of Commons.

(1) Electoral System

The United Kingdom is a constitutional monarchy, making the Queen, Elizabeth II the Head of State. However, the UK is also a parliamentary democracy; the Prime Minister heads the elected government, and is vested with the executive power. The PM is in charge of all policies and decisions, oversees various government agencies, appoints ministers, and heads the House of Commons.¹²⁴

The British legislative power is vested in two chambers, the lower and the upper chamber. The lower chamber, known as the House of Commons currently holds 650 elected Members of Parliaments. The Commons is elected by the British people.¹²⁵ The party holding the most seats in the House of Commons forms the government, and the Lords complements the work of the government. The upper chamber, the House of Lords currently holds 783 members who are either appointed or hereditary, not elected. Towards the end of the 17th century, the power of the monarch had declined, and the legislative power is shifting away

¹²⁴ GOV.UK. (2022, January 25). *How government works*. Retrieved from <https://www.gov.uk/government/how-government-works#who-runs-government>

¹²⁵ UK Parliament. (2022, January 25). *UK Parliament*. Retrieved from The two-House system: <https://www.parliament.uk/about/how/role/system/>

from the Lords to the Commons. After a series of reforms and shift in traditions, the House of Commons gained superiority over the Lords in legislative powers.¹²⁶

(2) British Public Opinion

Over the years, there has been a number of public polls taken on what Europeans see as threats, how much they support NATO and if they see a need of increasing their spending on defense. The Pew Research Center had conducted a survey in 2016 on what Europeans consider as threats to their national interests; and according to the report, terrorism, climate change, and global economic instability were generally seen as more threatening than Russian expansionism. Although 71% of Poles saw tension with Russia as a major threat, and similar results could be expected in other NATO allies along the eastern flank, the top three threats to the Poles were still ISIS, refugees, and economic instability. To the Germans, the top threats were ISIS, cyberattacks from outside of Germany, and climate change. To the Brits, ISIS, climate change and refugees were seen as the most dangerous to its security. Generally, Putin's aspiration to restore the Russian empire, China's emergence as a global power, and US political influence were seen as minor threats by many European countries.¹²⁷

The same poll also shows that there is widespread European support for NATO, with a median of nearly 60% expressing positive view of the alliance. Support for NATO is particularly strong in the UK and Poland, with more than 60% and 70% of their respective populations claimed to have favorable views of NATO. The UK has been the second biggest defense spender in NATO, and its spending on defense as a percentage of GDP has been consistently over 2%. According to the poll, the UK spent 2.03% of GDP on defense in 2015,

¹²⁶ Britannica. (2022, January 25). *Decline of the House of Lords*. Retrieved from <https://www.britannica.com/topic/Parliament/Decline-of-the-House-of-Lords>

¹²⁷ Poushter, J. (2016, June 13). *Pew Research Center*. Retrieved from *Europeans Face the World Divided*: <https://www.pewresearch.org/global/2016/06/13/europeans-see-isis-climate-change-as-most-serious-threats/>

and 43% of the population were in favor of increasing its military spending and 41% wanted to keep its current level. In 2015, Poland spent 2.2% of GDP on defense, while Germany spent 1.19%, which was nearly half of what NATO had asked of its members to spend, and only 34% of German were in favor of increasing its military spending, while 47% wanted to maintain that level, and 17% wanted to decrease its spending.

A 2016 Pew poll showed that NATO is generally supported by its member nations, with a median of 57% had favorable views of the alliance. The same poll also surveyed members if their country's current levels of defense spending is adequate; in the UK, 43% of the population favored increase, 41% favored staying the same, and 14% favored decrease. 52% of the Poles favored increasing its defense spending, 37% favored maintaining the same level of spending, and 3% favored decrease. In Germany, only 34% favored increasing funding to the Bundeswehr, 47% favored keeping the same level of spending, and 17% favored decreasing. Lastly, when asked "if a NATO ally got into a military conflict with Russia, should your government deploy its military to help defend that ally?", nearly half of the British population were supportive of its government deploying its military to help defend an ally, while 48% of the Poles and 38% of the Germans supported their respective government of sending their army to help defend that ally.¹²⁸

The same survey was conducted by the Pew Research Center in 2018, NATO is viewed favorably by most of the member states, with a median of 61% are supportive of the alliance. The core of NATO is collective security, which is highlighted in Article 5 of its charter, committing allies to defending each other against a common threat. According to polls, most European NATO members are confident that the US would use its military to defend Europe, in other words, most members are confident in NATO's collective security mechanism.

¹²⁸ Cuddington, D. (2016, July 6). *Support for NATO is widespread among member nations*. Retrieved from Pew Research Center: <https://www.pewresearch.org/fact-tank/2016/07/06/support-for-nato-is-widespread-among-member-nations/>

However, member states are generally less supportive of deploying their own country's military to defend an ally. 65% of Germans are confident that the US would use its military to defend an ally, but only 40% are supportive of Germany deploying the Bundeswehr to defend an ally. 66% of British claimed that the US would use its military, and 45% are in favor of sending the British military to help defend a fellow member state. 57% of the Poles responded that the US would deploy its military to help defend an ally, and 62% said, the Polish military should help defend an ally.¹²⁹ This discrepancy between how much members are banking on the US coming to their aid and how little members are willing to defend an ally could be interpreted as members intend to free ride on America's security guarantee but are unwilling to shoulder the burden of defense.

Over the past 70 years, the British public have generally been very supportive of NATO, even when NATO had faced a number of challenges in recent years, including anxiety caused by Brexit, growing tension between Russia and NATO member states, and contention between world leaders, including Donald Trump's criticisms against NATO members who have yet to reach the 2% pledge, and Emmanuel Macron's comment calling NATO obsolete and brain-dead.

A poll on British public's opinion towards NATO from 1967 to 1991 showed that a large majority of the British public has favorable views of UK's membership of NATO. The Pew Global Attitudes Projects also conducted a survey between 2009 and 2017 on the British public's view of NATO, and had concluded that majorities of Britons have favorable views of NATO. In addition, a survey done by the Transatlantic Trends between 2002 and 2014 showed

¹²⁹ Fagan, M. (2018, July 9). *Pew Research Center*. Retrieved from NATO is seen favorably in many member countries, but almost half of Americans say it does too little: <https://www.pewresearch.org/fact-tank/2018/07/09/nato-is-seen-favorably-in-many-member-countries-but-almost-half-of-americans-say-it-does-too-little/>

that most of the British public believes that NATO is still important to the UK's security. In general, the UK's support for NATO has been very consistent throughout NATO's history.¹³⁰

More recently, a poll done by Ipsos and the Policy Institute at King's College London in 2019, had found that NATO is viewed favorably by most NATO countries, especially in Poland, where 60% of the Poles have favorable views of NATO, the US with 56%, Canada with 55%, and Britain with 50%. However, support is low in member states such as Germany and France, where according to the poll, only 30% of the population had favorable views of NATO.¹³¹

It is also worth noting that across the 11 NATO member states polled, the public is generally oblivious to how the alliance is funded and often underestimates the United States' financial contribution to NATO while overestimating their own country's contribution. In fact, the public across NATO member state surveyed are more than likely to think that their country spends over 2% of GDP on defense and complies with the 2016 pledge.¹³²

A survey done by The YouGov-Cambridge Center and the Royal United Services Institute (RUSI) in 2019 finds that 79% of the British public views Britain's membership in NATO is essential to maintain UK's national interests. In addition, most of the respondents do not believe that the British military has the capacity to defend itself against today's threats, such as cyber espionage, climate change, and military confrontation with Russia. Only 7% of the British public thought that the UK is very well protected against military confrontation with Russia.¹³³

¹³⁰ Clements, B. (2019, December 4). *British Politics and Policy at LSE*. Retrieved from The British public and NATO: still a strong alliance?: <https://blogs.lse.ac.uk/politicsandpolicy/the-british-public-and-nato/>

¹³¹ IPSOS. (2019, December 3). *IPSOS*. Retrieved from NATO seen as force for good, but support is low: <https://www.ipsos.com/en-ca/news-and-polls/NATO-Seen-As-Force-For-Good-But-Support-is-Low>

¹³² Ibid, 87.

¹³³ Rogers, J. (2019, December 4). *YouGov*. Retrieved from The British public still believes in NATO - even if most of us can't say what it does: <https://yougov.co.uk/topics/international/articles-reports/2019/12/04/british-public-still-believes-nato-even-if-most-us>

The British Foreign Policy Group had conducted a public survey with Opinium during the 2019 election campaign to better understand how British voters feel about its foreign policies. When asked which country poses the biggest threat to global peace and security, 25% of the British public identified Russia as the greatest threat, followed by China and North Korea. In general, 57% of the British public placed Russia as the top threat to world security. Upon closer inspection, Conservative voters were overwhelmingly distrustful of Russia and viewed it as the greatest threat to peace and security. In terms of support for NATO, 66% of Britons claimed that UK's membership of NATO will continue to be important for its national interests, with 38% said NATO membership is critically important for the UK's security. Overall, voters of all parties agreed that the UK's association with NATO is important to UK's national security.¹³⁴

When the UK voted to leave the EU during the 2016 referendum, some worried that NATO would face a similar fate of dissolution. Although some may consider Brexit and Donald Trump's election win to be heavy blows to Western solidarity at a time of growing political challenges, but Europe will most likely to remain Britain's top priority in terms of security, and its close ties with both the US and Europe will help secure its position as the intermediary between the two.¹³⁵

The UK is the largest defense spender in NATO following the US, if it also decides to leave NATO, it could devastate NATO's deterrence and its image as a collective security mechanism. Brexit was a wakeup call to all EU members that the supranational union was not the model regional integration it once thought it could be, and its departure could cast serious doubts in NATO's sustainability. In addition to hurting NATO's defense capacity, Brexit

¹³⁴ Gaston, S. (2019, December 3). *BFPG*. Retrieved from Public opinion on global threats and the future of NATO: <https://bfpg.co.uk/2019/12/public-opinion-on-global-threats-future-of-nato/>

¹³⁵ Wither, J. K. (2017, April). *Marshall Center Security Insight*. Retrieved from A Secure Brexit? UK Security and Defense and the Decision to Leave the European Union: <https://www.marshallcenter.org/en/publications/security-insights/secure-brex-it-uk-security-and-defense-and-decision-leave-european-union-0>

would also send signal to Russia that Europe lacks solidarity and coordination, and could lead to Russia taking more risky moves against eastern Europe. However, supporters of Brexit claim that leaving the EU does not foreshadow a leave from NATO; and as long as the UK does not experience severe economic deterioration as a result of Brexit, the UK is expected to maintain its level of spending on defense.¹³⁶

Some experts believe that It is too early to conclude that Brexit will inevitably lead to the dissolution of NATO, or the rise of Russian influence in eastern Europe. Some have made the comparison between Brexit and East Germany's departure from Russia's orbit, which had ultimately led to the dissolution of the Soviet Union. However, Brexit is unlikely to be a welcome mat for Russia to enter Ukraine and the Baltic states, because of Britain's history and bilateral relations with the US. Since the 19th century, Britain has always been hesitant about engaging and cooperating with Europe. its foreign policies have been driven by the "splendid isolation" and "offshore balancing" philosophy. Until this day, the UK is still unwilling to cede sovereignty to the EU. However, when it comes to balance of power, the UK will not hesitate to act and restore stability in Europe. It will most likely continue to be an offshore balancer against Russia. That inclination is reflected in its continued commitment to NATO. Britain has been one of the strongest supporters of NATO and top contributors to the alliance. Therefore, it does not appear that the UK will turn away from the Transatlantic security organization.¹³⁷ Then Prime Minister Theresa May even came out to reassure NATO allies that the UK will continue to defend Europe and help maintain security even after Brexit. In her speech, she reaffirmed Britain's commitment to the alliance even post-Brexit, and will remain an essential partner to NATO.

¹³⁶ Chivvis, C. S. (2016, June 24). *U.S. News*. Retrieved from The Future of Transatlantic Security: <https://www.usnews.com/opinion/articles/2016-06-24/how-the-brexit-vote-could-impact-nato-and-defense-policy?context=amp>

¹³⁷ Spirtas, M. (2016, July 2). *RAND Corporation*. Retrieved from Why Brexit Won't Necessarily Hurt NATO: <https://www.rand.org/blog/2016/07/why-brexit-wont-necessarily-hurt-nato.html>

(3) Prime Minister

If international relations and world politics is a school playground, the US would be the popular kid whom everyone wants to be friends with, and the UK would be the one fighting to preserve their special friendship through helping the US with whatever tasks it wants done.¹³⁸ Their “special relationship” was first coined by Winston Churchill during his “Iron Curtain” speech in 1946 to portray his special friendship with Harry Truman, after the allies had defeated Nazi Germany.¹³⁹ In the 1990s, George W Bush once said “we’ve got no better friend in the world than the Great Britain,” and then British Prime Minister Tony Blair reciprocated that sentiment by fully supporting Bush’s war in Iraq.¹⁴⁰ Though the special relationship, the Obama-Cameron and Trump-May relations were not as “special”, but was soon salvaged by Trump and Johnson’s remarkable similarities and bromance. Trump had even said “I think we’ll have a very good relationship”, when Johnson was elected PM.

The uniqueness of their relationship is most noticeable in the realm of defense and intelligence sharing. Both parties signed the UKUSA Agreement in 1946 to share intelligence during the Cold War. The UK and US intelligence agencies continue to work closely even after the Cold War, and their cooperation has expanded to counter terrorism and other security threats. In 2020, the House of Commons Foreign Affairs Select Committee noted that “the field of intelligence cooperation is one of the areas where the UK-US relationship can be rightly described as special”. In addition, the 2015 UK Strategic Defense and Security Review (SDSR) praised the intelligence sharing cooperation between the UK and US as “unparalleled”.¹⁴¹

¹³⁸ Burns, C., & Morrison, H. (2021, September 21). *BBC*. Retrieved from UK-US special relationship: A short history: <https://www.bbc.com/news/newsbeat-35783309>

¹³⁹ Bartlett, C. (1992). *The Special Relationship: A Political History of Anglo-American Relations Since 1945*. New York: Longman.

¹⁴⁰ Dunn, D. H. (2008). The Double Interregnum: UK-US Relationships Beyond Blair and Bush. *International Affairs*, 84(6), 1131-1143.

¹⁴¹ Pitts-Tucker, A. (2020). Analysing the ‘Special Relationship’ between the US and UK in a Transatlantic Context. *E-International Relations*, 1-10.

The sentiment “the US has no closer ally than the UK” is reflected in their close strategic coordination. This intimacy is attributed to their common language, shared values, and democratic ideologies. Their bilateral relations were then strengthened through bilateral trades and investments. Both countries are advocates for free trade, and are currently trading over \$260 billion worth of goods and services annually, and mutual investment amounting to over \$1 trillion. The US-UK partnership goes beyond trades, and after a series of wars and military operations, including the First and Second World Wars, the Korean War, the Persian Gulf War, wars in both Iraq and Afghanistan, the dominance of their partnership had become almost unshakeable. Most importantly, their bond is reflected in their coordination in NATO and various global affairs.

The special relationship between the US and UK is also most prominent and dominant in the domain of defense. The two countries share a long history of joint military alliance since the Second World War, and the 2019 SDSR had described this defensive relationship as “unique, strong, and enduring”. This defensive partnership was best demonstrated by their joint operations during the 2003 Iraq War despite facing criticism from other European powers. In fact, the UK remains one of the very few non-US NATO allies to spend over 2% of GDP on defense, and the second largest contributor to the collective defense alliance.¹⁴²

It may seem like the “special relationship” between the US and the UK will remain dominant over other relationships, but the uniqueness of this bilateral relations is in essence a socially constructed identity.¹⁴³ This identity is established on shared values, history, and language, which supposedly makes this US-UK alliance superior to other Transatlantic alliances, but it is not fixed nor permanent. The strength of the bond fluctuates as national interests, leaders, and world politics evolve. If their alliance does not serve their interests, their

¹⁴² Danchev, A. (2007). Tony Blair’s Vietnam: The Iraq War and the ‘Special Relationship’ in Historical Perspective. *Review of International Studies*, Vol.33, 190-203.

¹⁴³ Buzan, B. (2004). *The United States and the Great Powers: World Politics in the Twenty-First Century*. Polity Press Ltd.

common language, values, and history can be overlooked. Ultimately, this relationship is only special when it is practical.

Despite their close cooperation in intelligence sharing and defense, the dominance of their relationship to other alliances can vary depending on whose perspective one is observing from. Since the UK's decline as the dominant power since the 1960s, the UK-US relationship became somewhat imbalanced. The UK's nuclear deterrent heavily relies on the US, and it is reasonable to expect that the UK will be even more eager to preserve the "special relationship" once its economy detaches completely from the EU.¹⁴⁴

From America's perspective, it enjoys global military and economic superiority, and is far less dependent on the "special relationship" with the UK. The dominance of the relationship from America's point of view is largely dependent on convenience and self-interests, once the UK declines in value to the US, the UK will become expendable.

The UK has been the bridge between the US and the rest of Europe, and has helped to push American political agenda in Europe. As a result, Brexit could severely hurt the UK's importance in the eyes of American politicians for losing its weight in European politics; as Obama warned in 2016 that if the UK leaves the EU, it would be at the "back of the line" for trade deals with the US. Washington is constantly evaluating which countries can serve their national interests the best. During Obama's presidency, Germany and France grew in importance and challenged Britain's status as America's most important ally. Germany's leadership in various crisis in Europe, such as refugees, climate change and Annexation of Crimea, has made it a valuable ally for the US. In addition, after Brexit, France will be the only country possessing nuclear capabilities whilst holding both EU membership and a seat at the

¹⁴⁴ Dumbrell, J. (2009). The US-UK Special Relationship: Taking the 21st-Century Temperature. *British Journal of Politics and International Relations*, 64-78.

permanent UN Security Council. French President Macron even said in 2018 that the US-France partnership is a “very special relationship”, which is directed at the UK.

British military budget cuts as a result of austerity measures has put pressure on the “special relationship” between the US and the UK.¹⁴⁵ In 2018, the US Defense Secretary James Mattis has pressed Theresa May and the Conservative Party to commit to a more aggressive boost in military spending. In a letter written from James Mattis to UK Defense Secretary Gavin Williamson, Mattis has demanded the UK to increase military spending. Mattis also warned Williamson that the “special relationship” between the two countries could be at stake if the UK does not increase its military budget. He also suggested that “it is in the best interest of both our nations for the UK to remain the US partner of choice,” and “in that spirit, the UK will need to invest and maintain robust military capability.” In response to the letter from General Mattis and to answer the question if it is important for the UK to remain America’s “partner of choice”, the spokesman of the Prime Minister said that “we, the US and France are close allies and partners who are willing to act together in defense of our shared values and interests.” In addition, the UK defense official said “the UK maintains the biggest defense budget in Europe and we have been clear we will continue to exceed NATO’s 2% spending target.”¹⁴⁶

Another factor that determines the dominance of the relationship is leadership dynamics. For example, the US-UK relationship was exceptionally close under President George W. Bush and Prime Minister Tony Blair, as illustrated by their joint operations in Iraq.¹⁴⁷ However, as the war in Iraq dragged on, the British public grew impatient with its government and became

¹⁴⁵ Armstrong, S. (2019, June 4). *Al Jazeera*. Retrieved from UK defence cuts cast doubt over ‘special relationship’ with US: <https://www.aljazeera.com/economy/2019/6/4/uk-defence-cuts-cast-doubt-over-special-relationship-with-us>

¹⁴⁶ Heffer, G. (2018, July 2). *Sky News*. Retrieved from US steps up pressure on UK military spending-but Downing St won’t commit: <https://news.sky.com/story/us-steps-up-pressure-on-uk-military-spending-but-downing-st-wont-commit-11423801>

¹⁴⁷ Danchev, A. (2007). Tony Blair’s Vietnam: The Iraq War and the ‘Special Relationship’ in Historical Perspective. *Review of International Studies*, Vol.33, 190-203.

less pro-American. In response, the subsequent Brown administration decided to distance itself from the US, and Obama shifted emphasis from the UK to both France and Germany.¹⁴⁸ Until the “special relationship” regained importance under Trump and Johnson, as the two share many similarities and Johnson has even been referred to as Trump’s “mini-me”.

The Parliament of the UK issued a report in 2001 on the UK-US relationship, describing their partnership as “special”, because it was built on shared history, values and interests. Their relationship has proven to be resilient as it has been tested through multiple wars. The uniqueness of their relationship is especially pronounced in their long-term military coordination mechanisms, such as their intelligence relationship, as the UK is the only country allowed to place intelligence personnel in the US Central Command headquarters. In this report, the British Parliament recognized the value of NATO on British national security. It also highlighted the importance of helping NATO evolve and overcome new security challenges in the world. Most importantly, the Parliament is fully supportive of maintaining close relations with the US.¹⁴⁹

Political leaders play an important part in the political decision-making process. In this case, they could sway how much fund goes into defense and how much support it is willing to provide NATO. In an article written by then British Prime Minister David Cameron and then President Barak Obama, they advocated the importance of NATO and called for solidarity between the two countries when facing security challenges of the 21st century. When the Cold War was over, many had hoped that it would be the beginning of a new era of peace and prosperity, and NATO would be less needed. However, in today’s security environment, NATO is more vital than ever. NATO is not just an alliance of friends who come to each other’s

¹⁴⁸ Dobson, A., & Marsh, S. (2014). Anglo-American Relations: End of a Special Relationship? *The International History Review*, 673-697.

¹⁴⁹ UK Parliament. (2001). *www.parliament.uk*. Retrieved from Select Committee on Foreign Affairs Second Report: <https://publications.parliament.uk/pa/cm200102/cmselect/cmfaaff/327/32703.htm>

aid, but a mechanism to protect national self-interest.¹⁵⁰ To continue safeguarding security and the sovereignty of Europe and to deter future threats, allies must meet the 2% of GDP pledge.¹⁵¹

In 2014, David Cameron addressed the North Atlantic Council meeting on the future of NATO. Although NATO has proven to be resilient in the past, but in order to continue its vitality, it will have to evolve to overcome future challenges. Cameron is especially critical of Russia's aggression towards Ukraine, and emphasized the importance collective self-defense outlined in Article 5. The Prime Minister is also determined to increase Britain's defense capability, and is committed to spend 2% of GDP on defense, while devoting 20% of that fund to equipment research and development.¹⁵²

In response to Russia's Annexation of Crimea and its continued aggression against other parts of Europe, NATO presented the Wales Declaration in 2014 to reaffirm its commitment to protect Europe's security and prosperity. This declaration also agreed on a "Readiness Action Plan", that would strengthen NATO's posture as a collective defense mechanism and boost its preparedness for future threats. NATO will continue to invest in its armed forces and modernize its equipment to be more effective together. In terms of funding, the alliance has agreed to reverse the trend of military down-sizing and decline of defense budgets. It has agreed to allocate 2% of GDP on defense to boost the security of NATO allies and encourage a fairer and balanced burden-sharing.¹⁵³

¹⁵⁰ Cameron, D. (2014, September 4). *GOV.UK*. Retrieved from Strengthening the NATO alliance: article by David Cameron and Barack Obama: <https://www.gov.uk/government/speeches/strengthening-the-nato-alliance-article-by-david-cameron-and-barack-obama>

¹⁵¹ Dumbrell, J. (2001). *A Special Relationship: Anglo-American Relations in the Cold War and After*. Macmillan Press Ltd.

¹⁵² Cameron, D. (2014, September 5). *GOV.UK*. Retrieved from NATO Summit 2014: PM speaks at North Atlantic Council meeting: <https://www.gov.uk/government/speeches/nato-summit-2014-pm-speaks-at-north-atlantic-council-meeting>

¹⁵³ GOV.UK. (2014, September 5). *GOV.UK*. Retrieved from Policy paper: The Wales Declaration on the Transatlantic Bond: <https://www.gov.uk/government/publications/nato-summit-2014-wales-summit-declaration/the-wales-declaration-on-the-transatlantic-bond>

At a time of government budget cuts and austerity policies, then Prime Minister Cameron went against the flow and decided to maintain UK's defense spending at 2% of GDP in 2016. His decision was very unexpected as most observers had expected Cameron to cut defense spending to meet the deficit reduction targets. The reasons behind such a U-turn in attitude are pressure from within and outside of the UK, and Cameron's personal reasons.¹⁵⁴

The first reason, pressure from within the Conservative Party. In recent years, various sources have suggested that the UK is resigning as a world power, the UK has become irrelevant in world politics, a British voice is absent from Russia's expansion in Eastern Europe, and France will soon replace the UK to be America's most reliable ally. In reality, Cameron could have easily disregarded such criticisms and chose to free ride on the US security guarantee as many countries, including post Second World War Japan and Germany, had done, but it would be against the Conservative Party's long assertion that the UK should remain a dominant global security provider.¹⁵⁵

The second reason for Cameron's eventual decision to meet the 2% pledge is pressure stemming from Washington. The US would not allow the UK's defense spending to fall below 2% because if it did, it would make it even harder for the US to insist other NATO allies to meet the 2% pledge.

The last reason for Cameron's insistence on maintaining the UK's defense spending is personal. The PM decided not to cut defense budget is to avoid being accused of hypocrisy. During the 2014 NATO summit, Cameron had criticized NATO members who had failed to meet the 2% target, while boasting to the US that UK is a reliable ally. In addition, Cameron wanted to establish his Prime Ministerial legacy. As a result, maintaining the UK's defense

¹⁵⁴ Dorman, A. M., Uttley, M. R., & Wilkinson, B. (2016). The Curious Incident of Mr Cameron and the United Kingdom Defence Budget: A New Legacy? *The Political Quarterly*, 87(1), 46-53.

¹⁵⁵ Ibid, 97.

spending over 2% of GDP was not just for the UK's defense and security, it also meant political and partisan points for Cameron and the Conservative Party.¹⁵⁶

In 2016, Cameron reassured NATO that the UK will remain committed to the alliance even after his resignation as Prime Minister and Brexit, and it will continue to support NATO by devoting 2% of its GDP to defense. In addition, at the 2016 NATO Warsaw summit, Cameron announced that the UK will deploy 500 troops to Estonia and 150 troops to Poland to enhance NATO presence in Eastern Europe and deter Russian threat. A British official said “he (Cameron) will confirm that we will be steadfast in our commitment to NATO and that we will back that up with boots on the ground, as we stand shoulder to shoulder with our allies in the face of growing threats to our borders.”¹⁵⁷

During the 2016 NATO Warsaw Summit, Cameron said “Britain's membership of NATO is vital for our country because it helps to keep our nation secure and our people safe” to reiterate NATO's importance to the UK's security. The PM also mentioned the 2% of GDP pledge made in 2014, and said that “Wales 2014 was an absolutely key moment in NATO's development – pledges there included the defense investment pledge, which set the ambition for all Allies to increase defense spending to meet our level of ambition”. Cameron also reaffirmed the UK's commitment to Eastern Europe, “we have also agreed to further reassure our Allies by increasing the number of NATO troops present along our eastern flank. And once again, the UK will play its part. On land with the deployment of 500 soldiers to Estonia early next year as well as an infantry company to be based here in Poland, and in the air by taking part in next year's air policing mission.”¹⁵⁸

¹⁵⁶ Ibid, 97.

¹⁵⁷ Mason, R., & Jones, H. (2016, July 8). *The Guardian*. Retrieved from Cameron to reassure Nato over UK's defence spending at summit: <https://www.theguardian.com/politics/2016/jul/08/david-cameron-nato-summit-warsaw-uk-commitment-defence-spending>

¹⁵⁸ GOV.UK. (2016, July 9). *GOV.UK*. Retrieved from NATO Summit, Warsaw: PM's press conference: <https://www.gov.uk/government/speeches/nato-summit-warsaw-pms-press-conference-9-july-2016>

From 2010 to 2016, Cameron had continuously and relentlessly voiced the importance of NATO and his support for it. During Cameron's tenure as PM, the UK's defense expenditure as a percentage of GDP was comfortably over the 2% target.

The National Security Strategy and Strategic Defense and Security Review published in 2015 outlined the threats currently faced by the UK and its security strategies for the next five years. According to the reports, the Russian threat remains one of the biggest threats to the UK.

Even though the UK voted to leave the EU, Prime Minister Theresa May reaffirmed the UK's commitment to the joint alliance after Brexit. Since the vote to leave, the UK has agreed to deploy troops to both Estonia and Poland, enhancing NATO's deterrent along the Eastern flank, and agreed to lead the NATO Very High Readiness Joint Task Force in 2017, and provided 3000 military personnel. To safeguard the UK's security and national interests, May's government has agreed to meet NATO's defense spending target and remain committed to spending 2% of GDP on defense every year for the next ten years, and will dedicate 20% of defense spending on equipment research and development.¹⁵⁹

The 2016 NATO Warsaw Summit will continue the efforts made at the 2014 NATO Wales Summit on establishing an "enhanced forward presence" of NATO forces in the Baltic States, including Estonia, Latvia, and Lithuania and Poland. The UK has taken a leadership role in the efforts of projecting power and stability through defense capability in eastern Europe.

It is important for Europe to make sure that Washington is committed to NATO and Europe's security. Despite Donald Trump's recent comment that "NATO is obsolete", May has managed to secure a commitment from Trump that the US is 100% supportive of NATO. During a meeting, May stated "on defense and security cooperation, we're united in our

¹⁵⁹ HM Government. (2016, December). *HM Government*. Retrieved from National Security Strategy and Strategic Defence and Security Review 2015: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/575378/national_security_strategy_strategic_defence_security_review_annual_report_2016.pdf

recognition of NATO as the bulwark of our collective defense and we reaffirmed our unshakeable commitment to this alliance. We're 100% behind NATO. I agreed to continue my efforts to persuade my fellow European leaders to deliver on their commitment to spend 2% of GDP on defense, so that the burden is more fairly shared.”¹⁶⁰

Trump and May also made comments about the “special relationship” between the US and the UK, and Trump had said that “the special relationship between our two countries has been one of the great forces for justice and for peace.” May was the first foreign leader to visit Trump, and called the visit “an indication of the strength and importance of the special relationship that exists between our two countries – a relationship based on the bonds of history, family, kinship and common interests.”¹⁶¹

In 2017, Prime Minister Theresa May reaffirmed the UK's commitment to safeguarding European security as she increased the number of British troops stationed in Estonia as part of NATO's Enhanced Forward Presence along NATO's eastern flank. During a visit to Estonia, she reiterated the importance of NATO to European security, and UK's deployment to Estonia signals its unwavering commitment to the alliance.¹⁶²

As Theresa May officially resigned as Prime Minister in 2019, May has repeatedly pointed out that although the UK is leaving the European Union, it is not leaving Europe. The UK's foreign policies had always revolved around the strategy of “offshore-balancing”, where the UK avoids forming permanent political and economic alliances with continental powers. It will only engage in short term pacts with other European countries to balance hostile powers that threaten the “tranquility of the European balance of power”. The UK voted to leave and

¹⁶⁰ Stewart, H. (2017, January 27). *The Guardian*. Retrieved from Theresa May says Nato has 100% support of Donald Trump: <https://www.theguardian.com/us-news/2017/jan/27/theresa-may-white-house-visit-donald-trump-nato>

¹⁶¹ Ibid, 101.

¹⁶² May, T. (2017, September 28). *GOV.UK*. Retrieved from PM: Britain is unconditionally committed to the defence and security of Europe: <https://www.gov.uk/government/news/pm-britain-is-unconditionally-committed-to-the-defence-and-security-of-europe>

sought to regain sovereignty only reflects its traditional foreign policy of offshore-balancing, as long as NATO continues to serve the UK as a way to maintain European stability and balance against Russia, the UK is unlikely to turn its back on the alliance. In fact, the UK has been one of the few NATO members that are meeting the NATO target of spending 2% of GDP on defense. The UK has also increased its military presence along the eastern flank and participated in all of the alliance's military operations over the past few years.¹⁶³

While the relationship between the UK and NATO has gone through ups and downs, the main British political parties have always been behind the alliance, especially the Conservative Party.¹⁶⁴ Boris Johnson's election win gave him an 80-seat majority ensures that any political agenda he decides to pursue will be unhindered by the parliament.¹⁶⁵ He urged European NATO to adjust their defense expenditure and shoulder their fair share of burden. At the NATO's 70th anniversary summit, Johnson said "you have got to ensure that we continue to spend on our collective defense and that's why we have made the case for 2% of GDP is the minimum NATO spend for every member."¹⁶⁶ The Prime Minister also tried to ease tension and downplay division amongst world leaders, as French President Emmanuel Macron recently called NATO 'brain dead' and President Donald Trump fired back at members who had failed to meet the 2% target. At the summit, the PM reassured the alliance that Britain's commitment to NATO remains 'rock solid' even after Brexit.¹⁶⁷

Despite the impact of the pandemic on the UK's economy and a series of austerity measures, Johnson is determined to restore the UK's posture as a power capable of "tipping

¹⁶³ Shea, J. (2020, December 16). *The Foreign Policy Centre*. Retrieved from The UK and European defence: Will NATO be enough?: <https://fpc.org.uk/the-uk-and-european-defence-will-nato-be-enough/>

¹⁶⁴ White, K. (2019, November 29). *The Conversation*. Retrieved from How important is NATO to British defence policy?: <https://theconversation.com/how-important-is-nato-to-british-defence-policy-126534>

¹⁶⁵ Johnson, B. (2019, December 4). *GOV.UK*. Retrieved from PM statement at NATO meeting: <https://www.gov.uk/government/speeches/pm-statement-at-nato-meeting-4-december-2019>

¹⁶⁶ Cooper, C. (2020). British prime minister woos Joe Biden with defense plan. *Politico*, 1-9.

¹⁶⁷ Staunton, D. (2019, December 28). *The Irish Times*. Retrieved from How Boris Johnson became Britain's most powerful prime minister since Tony Blair: <https://www.irishtimes.com/news/world/uk/how-boris-johnson-became-britain-s-most-powerful-prime-minister-since-tony-blair-1.4120281>

the scale”. The PM appears to be eager to appeal to the new President, Joe Biden, by announcing the UK’s biggest increase in defense spending since the Cold War, and is projecting to reach 6.5 billion British pounds amounting to 2.2% of GDP.¹⁶⁸ Johnson said that the increase in defense spending is in line with a pledge made by the Conservative Party that the UK will spend over the NATO target of spending 2% of GDP on defense. According to the PM, this boost in defense spending will “cement the UK’s position as the largest defense spender in Europe and the second largest in NATO.”

(4) The House of Commons and Political Parties

As of now, 11 parties hold seats in the House of Commons, and the largest parties in the UK are the Conservative Party, the Labour Party, the Liberal Democrat Party, the Scottish National Party and Democratic Unionist Party.

Boris Johnson currently heads the Conservative party, and is the Prime Minister of the United Kingdom. After Theresa May’s resignation, and had won both the Conservative party’s leadership and the General Election in 2019, Boris Johnson is often considered to be the most powerful Prime Minister since Tony Blair. It was a significant victory for the Conservative party, winning 365 out of the 650 seats, while the Labour party, led by Jeremy Corbyn only secured 202 seats; making it the biggest win for the Conservative Party since 1987.

The Conservative Party has been one of the major parties in Britain, and has been in control of the Parliament since 2010. It leans center-right on the political spectrum. It favors liberal economic policies, meaning deregulation, marketisation, and privatization. In recent years, it has become more Eurosceptic, and that sentiment had led to the Brexit referendum under the Conservative Cameron government in 2016. The Conservative Party favors a close

¹⁶⁸ Ellyatt, H. (2020, November 19). *UK announces biggest military investment in 30 years*. Retrieved from CNBC: <https://www.cnbc.com/2020/11/19/uk-set-to-announce-biggest-military-investment-in-30-years.html>

tie with the United States, and had prioritized the US-UK bilateral relations over all other partnerships since World War II. Their close partnership had been described by Winston Churchill as a “special relationship”. The Conservative Party sees NATO as a cornerstone of UK security, and had repeatedly advocated for a fairer burden sharing arrangement among NATO allies, and called for all members to fulfill their commitment to the 2% of GDP pledge. Its manifesto reads “We will continue to exceed the NATO target of spending 2 percent of GDP on defense and increase the budget by at least 0.5 percent above inflation every year of the new Parliament”, in addition, the Conservative Party vows to strengthen and modernize the British Armed Forces, maintain nuclear deterrent, and help build peace and security around the globe. The Conservative Party leader, Boris Johnson, promises to go beyond the 2% NATO guideline and increase the UK’s defense spending by 0.5% over inflation every year of the new parliament. These funds will go towards modernizing equipment, improve capability and deployability to maintain UK's security.¹⁶⁹

The Labour Party is currently the Official Opposition party to the Conservative Party, with 199 seats in the House of Commons and is currently headed by Keir Starmer. It is positioned on the center-left on the political spectrum. Unlike its main opposition, the Conservative Party, it emphasizes government's role in the economy, and should intervene whenever it deems fit. In its manifesto, the Labour Party also vows to maintain Britain's commitment to NATO, and continue to spend at least 2% of GDP on its defense.¹⁷⁰

The Scottish National Party (SNP) is the most popular party in Scotland that pursues Scottish independence. It is currently the third largest political party in the UK, with 45 seats in the House of Commons, and is currently led by Nicola Sturgeon. It favors a close tie with both the US and the EU. The SNP opposed Brexit, and sought independence with both NATO

¹⁶⁹ Forces. (2019, December 5). *Politics*. Retrieved from Manifesto Comparison: What Do Political Parties Say on Defence?: <https://www.forces.net/news/manifesto-comparison-what-do-political-parties-say-defence>

¹⁷⁰ Ibid, 96.

and EU memberships. The party is critical of Russian expansion and interference abroad. It supports enlargement of NATO and the EU to deter future Russian threat.¹⁷¹

The Liberal Democrats currently holds 12 seats in the House of Commons and is led by Sir Ed Davey. It was a coalition partner with the Conservative Party from 2010 to 2015. It leans center to center-left, opposes Brexit, and advocates for greater European integration.¹⁷²

The Conservative Party promises to exceed NATO defense spending pledge, and increase military expenditure by 0.5% above inflation every year. The Labour Party lead by Jeremy Corbyn is committed to NATO's 2% of GDP defense pledge, and plans to increase funding to the United Nations peacekeeping operations.¹⁷³ However, unlike the Conservative Party, the Labour Party seeks to bring the UK closer to Europe. The Liberal Democrats headed by Sir Ed Davey is supportive of NATO, and will continue to spend 2% of GDP on defense. The Scottish National Party lead by Nicola Sturgeon is also supportive of NATO.

In general, as long as the Conservative Party keeps its stranglehold on the British politics, it is almost certain that the UK will continue to support NATO and spend over 2% of GDP on its defense to appeal to the US.

¹⁷¹ Ibid, 104.

¹⁷² Ibid, 104.

¹⁷³ Lye, H. (2019, November 26). *Army Technology*. Retrieved from UK General Election 2019: Party manifestos square up on defence: <https://www.army-technology.com/features/general-election-2019-defence-pledges/>

Table 4.1*Main British Political Parties' Stances on Russia, NATO, and the 2% Pledge*

| | Russia | NATO | 2% |
|---------------------------|---|--|--|
| Conservative Party | Mistrusts Russia | Views NATO as the cornerstone of UK's security | Prioritizes the UK-US partnership over all other international relations, so it is fully committed to maintain the 2% pledge |
| Labour Party | Mistrusts Russia | Vows to maintain the UK's commitment to NATO | Commits to maintaining the 2% pledge |
| Liberal Democrats | Mistrusts Russia | Supports NATO | Supports the 2% pledge |
| Scottish National Party | Considers Russia a threat to the UK's security Supports tougher sanctions against Russia | Supports NATO | Supports the UK to exceed the 2% pledge |
| Democratic Unionist Party | Mistrusts Russia | Supports NATO | Supports the 2% pledge |

Source: Created by author

2. Geographic Proximity

It would be very irrational of Russia to march through Europe and invade the UK that is over 2,880 kilometers away. An operation of such magnitude would be highly infeasible because of the reasons mentioned above. First of all, to invade the UK, Russian ground troops would have to cross several NATO members, including Poland, Germany, Netherlands, Belgium, and France. In addition to the logistical problems discussed in previous chapters, its advance will be met with enormous resistance from NATO allies. As illustrated in Figure 3.5, and Figure 3.6, a Russian invasion of the UK will be met with enormous resistance from NATO

and the US, causing significant casualties and making the operation unjustifiable. Defending a supply chain that spans over 2,880 kilometers is highly improbable.

Secondly, the UK is inaccessible by vehicles. Mearsheimer stated, “The principal impediment to world domination is the difficulty of projecting power across the world’s oceans onto the territory of a rival great power. The United States, for example, is the most powerful state on the planet today. But it does not dominate Europe and Northeast Asia the way it does the Western Hemisphere, and it has no intention of trying to conquer and control those distant regions, mainly because of the stopping power of water.”¹⁷⁴ Three of the Royal Navy naval bases Portsmouth, Clyde and Devonport are located in close proximity to the English Channel, and its aircraft carriers, submarines and even the nation’s nuclear deterrent are kept in those facilities.

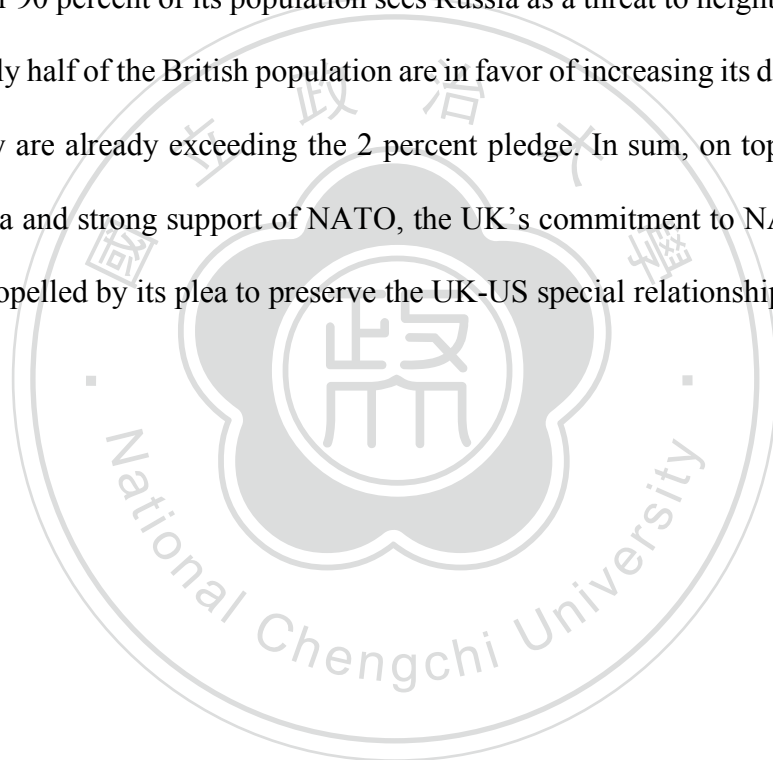
Thirdly, and perhaps most importantly, distance. According to Boulding’s LSG, the vast distance between the two countries will severely diminish Russia’s power, and if the point of engagement falls on the UK’s side of “boundary of equal strength”, then Russia would likely lose its military superiority.

This thesis chose the UK as one of the case studies because it is an exception to the prediction of the thesis; NATO member states in close geographic proximity to Russia should in theory experience higher threat perception, and as a result, spend more of its GDP on defense, as illustrated in Figure 1.5. However, the UK being nowhere near Russia’s geographic proximity, and having the English Channel as additional protection, still dedicates 2 percent of GDP on defense. It does not quite fit the mold presented by this paper. This paper attributes the UK consistent contribution to the joint alliance to its domestic factors, and the special relationship between the two partners.

¹⁷⁴ Ibid, 23.

3. Chapter Summary

The UK prides itself as the second largest spender in NATO, and has consistently exceeding NATO's 2 percent pledge. This paper argues that the UK is able to maintain its current spending level on defense is primarily because of its domestic support for NATO, growing unfavorable opinions of Russia, coherent Russian policies across UK's main political parties, and most importantly, its plea to preserve the "special relationship" with the US. According to various polls, the UK perceives Russia as the greatest threat to global peace and security, and over 90 percent of its population sees Russia as a threat to neighboring countries. In response, nearly half of the British population are in favor of increasing its defense spending, even though they are already exceeding the 2 percent pledge. In sum, on top of the growing mistrust of Russia and strong support of NATO, the UK's commitment to NATO's 2 percent goal is deeply propelled by its plea to preserve the UK-US special relationship.



Chapter V: Conclusion

Olson’s logic of collective action offers its readers an insight into how security and financial burden is distributed amongst members of different capacities. However, in the case of NATO, there is no obvious signs of “exploitation of the great”. In fact, in 2020, of the 10 members that spent over 2 percent of their respective GDP on defense, 6 were relatively small economies; and of the 6 small economies, 5 including Estonia, Romania, Latvia, Poland, and Lithuania are in close geographic proximity to Russia. This paper aims to strengthen Olson’s logic of collective action by incorporating Waltzian’s level of analysis and Boulding’s loss of strength gradient for a more comprehensive analysis. It concludes that member states with higher threat perception of Russia, high domestic support of NATO, and are geographically close to Russia are more likely to spend more of its GDP on defense; however, exceptions like the UK will continue to fulfill its obligations to NATO to preserve its “special relationship” with the US.

Table 5.1

Poland, Germany, and the UK put through the three theoretical frameworks

| | CA | Domestic Support | LSG |
|---------|----|------------------|-----|
| Poland | X | O | O |
| Germany | O | X | X |
| The UK | O | O | X |

Source: Created by author

Table 5.1 illustrates whether or not a NATO member will spend over 2 percent of its GDP on defense. Under the “CA” column, Poland as a small economy will not fulfill its obligation to the security alliance and free ride; Germany and the UK representing members of higher economic and political capacities should shoulder disproportional burden, and spend over 2 percent of GDP on defense.

The “Domestic Support” column represents the domestic level of Waltzian’s levels of analysis. According to multiple polls conducted by various research groups from 2012 to 2020, majority of the Poles view Russia as a threat to their security, and are in favor of taking a strong stance against it. In addition, the main Polish political parties are all supportive of NATO and determined to spend over 2 percent of its GDP on defense. Germany on the other hand, are less threatened by Russia, according to polls done by different research groups over recent years, most Germans are supportive of incorporating Russia into the European security structure, and are unwilling to sacrifice social welfare for security;¹⁷⁵ furthermore, there is no consensus amongst the political elites on if Germany should spend more on defense. As a result, there is a lack of enthusiasm in reaching the 2 percent pledge in Germany. In terms of the UK, there is a high threat perception of Russia and an overwhelming support for NATO. Major British political parties are all supportive of maintaining the UK’s current defense posture; in fact, the UK often finds itself spending more on defense just to preserve its “special relationship” with the US.

Boulding’s loss of strength gradient (LSG) explains that distance diminishes power projection, therefore, NATO members in close geographic proximity to Russia should experience higher level of threat, making it more likely to spend more on defense. As a result, Poland should be more threatened by Russia than the UK or Germany, making it more inclined

¹⁷⁵ Center for Insights in Survey Research. (2017, August 10). *Public Opinion in Germany*. Retrieved from Center for Insights in Survey Research: https://www.iri.org/wp-content/uploads/legacy/iri.org/2017-9-14_germany_poll_presentation.pdf

to spend more on defense. This thesis proposes that the more “O’s” a NATO member scores on Table 5.1, the more likely it will spend over 2 percent of its GDP on defense; conversely, the more “X’s” a member scores, the less likely it will shoulder its fair burden.

Poland has been consistently able to spend over 2 percent of its GDP on defense is because of its close geographic proximity to Russia, high perception of Russian threat, and strong political support for NATO. The Poles generally believe that its security is tied to its NATO membership and its relationship with the US. As a result, it came as no surprise that Poland spends over 2 percent of its GDP on defense.

The Bundeswehr remains underfunded is because Germany lacks many of the factors that would help increase its military budget. First of all, Germany is not in close proximity to Russia, which means that it is under no immediate Russian military threat. Secondly, the German public have very mixed feelings of Russia, and most Germans would rather spend money on social welfare than defense. Thirdly, there is no coherent attitude towards Russia inside Merkel’s ruling coalition. Consequently, Germany’s military expenditure will most likely to remain under 2 percent of GDP.

The UK is an exception, as it is vastly far from Russia, and there are many NATO allies, mountainous terrain, and the English Channel between the two. According to Boulding’s loss of strength gradient, and Mearsheimer’s “stopping power of water”, Russia’s power projection should be diminished, and the UK’s perception of Russian threat should be relatively low. However, because of its ‘special relationship’ with the US, the UK will continue to spend over 2 percent of GDP on its defense.

If the goal is to increase NATO defense spending, the most effective way is to increase public perception of threat. As the world is witnessing Putin’s “special military operation” against Ukraine, many European countries have already amplified its defense spending. In response to Russia’s invasion of Ukraine, Poland has announced its plans to raise spending as

well. “There will be an amendment (to the defense plan): 3% of GDP on defense next year, then we will increase it,” said Jaroslaw Kaczynski, the leader of Polish ruling party, PiS.¹⁷⁶

Even the most pacifist NATO member, Germany has announced plans to beef up its defense. Chancellor Olaf Scholz said ‘we will have to invest more in the security of our country to protect our freedom and democracy’ and Germany would sharply increase its defense spending to more than 2 percent of its economic output.¹⁷⁷ Scholz even agreed to boost Germany’s defense spending to 112.7 billion dollars, from 57.5 billion dollars back in 2021; and some of that budget is expected to replace the aging Tornado with F-35s. If Germany’s 2022 GDP remains the same as 2021, increasing defense expenditure to 112.7 billion dollars would put Germany comfortably over NATO’s 2 percent pledge.

Secretary-General Jens Stoltenberg have already deployed over 40,000 troops to Poland and the Baltic states to help defend NATO’s Eastern flank. NATO’s swift response to Russia’s war in Ukraine has proofed French President Emmanuel Macron wrong for calling the alliance in a state of ‘brain death’, and made Finland and Sweden reconsider whether they want to join. “Vladimir Putin’s actions have enabled NATO to strengthen its ties and relaunch itself,” said Jenny Rafik, researcher at the University of Nantes. “With the Russian invasion, NATO has returned to its original purpose, which also causes the least conflict between member countries.”¹⁷⁸ Moscow’s war against Ukraine was to weaken the West, and to deter NATO eastward expansion. However, Putin has achieved the opposite and brought the West closer. “NATO is united – more so than at any point since the Soviet collapse,” Ian Bremmer, president of Eurasia Group, “So too is the European Union: Germany supports ending their economic

¹⁷⁶ Reuters. (2022, March 3). *Poland to ramp up defence spending, army as Ukraine war rages*. Retrieved from Reuters: <https://www.reuters.com/world/europe/poland-ramp-up-defence-spending-army-ukraine-war-rages-2022-03-03/>

¹⁷⁷ Sheahan, M., & Marsh, S. (2022, February 27). *Germany to increase defence spending in response to ‘Putin’s war’ - Scholz*. Retrieved from Reuters: <https://www.reuters.com/business/aerospace-defense/germany-hike-defense-spending-scholz-says-further-policy-shift-2022-02-27/>

¹⁷⁸ Romeo, L. (2022, March 3). *Has war in Ukraine revived NATO?* Retrieved from France 24: <https://www.france24.com/en/europe/20220303-has-war-in-ukraine-revived-nato>

dependence on Russia and is nearly doubling their defense spending; France is on board.”¹⁷⁹

In a way, Putin has accomplished what many US presidents had been trying to do for many years, which is increasing NATO defense spending.

Now that we have a better understanding of what drives defense expenditure of NATO allies, we can shift our focus to finding better ways to measure burden-sharing. The 2 percent metric is undoubtedly controversial, and often criticized as an inadequate way to measure burden sharing. Some of the criticisms include, it measures input instead of output; it is too simplistic and static; and the 2 percent metric will only hurt NATO solidarity. In fact, when measuring “military expenditure”, NATO allows members to include pensions for military personnel. For many NATO members, pension represents a large share of the military budget. For instance, in 2016, 17 percent of Germany’s defense budget is spent on pension alone.¹⁸⁰ In addition, many members, notably Germany have included many non-military contributions, such as development aid, into its defense expenditure.¹⁸¹ Therefore, a numerical number is hardly a clear indicator of how capable a country is able to defend itself let alone defending its allies.

There is no doubt that the 2 percent metric is controversial. “There is too much focus on the input and too little focus on the output,”¹⁸² says Magnus Peterson, the head of the Center for Transatlantic Studies at the Norwegian Institute for Defense Studies. “Spending at 2 percent says very little about a country’s actual military capabilities; its readiness, deployability, and sustainability levels; and the quality of the force that it can field. It also is mum about a

¹⁷⁹ Ellyatt, H. (2022, March 9). *Putin’s always wanted to weaken the West. He’s done the exact opposite*. Retrieved from CBNC: <https://www.cnn.com/2022/03/09/russia-ukraine-putin-always-wanted-to-weaken-west-hes-done-the-opposite.html>

¹⁸⁰ Béraud-Sudreau, L., & Giegerich, B. (2017, February 14). *Counting to two: Analysing the NATO defence-spending target*. Retrieved from Military Balance Blog.

¹⁸¹ Dowdy, J. (2017, November). *More tooth, less tail: Getting beyond NATO's 2 percent rule*. Retrieved from McKinsey&Company: <https://www.mckinsey.com/industries/public-and-social-sector/our-insights/more-tooth-less-tail-getting-beyond-natos-2-percent-rule>

¹⁸² Rizzo, R. (2017). NATO allies should not be judged on defense spending alone. *National Interest*.

country's willingness to deploy forces and take risks once those forces are deployed. It does not assess whether a country spends its limited resources wisely,"¹⁸³ says Jan Techau, former director of Carnegie Europe. Even if all NATO members spend 2 percent of GDP on defense, it is still unclear how capable it is.

Undoubtedly the 2 percent metric has a number of methodological flaws, but it does offer a glimpse of each ally's level of commitment to the alliance. However, it needs a more comprehensive yardstick to get a clearer picture of "input" and "output". This thesis proposes that in terms of "input", NATO should continue to encourage its members to increase its defense spending. "There's a correlated effect, empirically, between input measures and output measures... You've got to pay more to get more,"¹⁸⁴ says former US ambassador to NATO, Doug Lute. Secondly, limit "defense spending" to only include expenditure that contributes to defense. Thus, it should not include pension, contribution to UN humanitarian missions, or development aid. Thirdly, more money should be invested in equipment, equipment maintenance, and equipment research and development. According to NATO, the US spends \$127,000 per soldier's equipment, while European NATO spends roughly \$25,000 per soldier's equipment.¹⁸⁵ In fact, in 2014, an alarmingly large portion of Germany's air force was not combat-ready; 42 of 109 Eurofighters were operable, 24 of 43 C-160 transport planes were in service, and 4 of 22 Sea Lynx helicopters were operational capable.¹⁸⁶ Lastly, transparency is key. What the defense ministry spends money on should be disclosed within reason. Better equipment would undeniably increase combat efficiency and effectiveness, which would improve deployability and boost deterrence.

¹⁸³ Ibid, 5.

¹⁸⁴ Lute, D., Chalmers, M., & Dempsey, J. (2015, September 17). *The cost of European security*. Retrieved from Carnegie Europe: <https://carnegieeuropa.eu/2015/09/17/cost-of-european-security-event-4995>

¹⁸⁵ Ibid, 112.

¹⁸⁶ DW News. (2014, September 27). *Germany's von der Leyen admits major Bundeswehr shortfalls*. Retrieved from DW: <https://www.dw.com/en/germanys-von-der-leyen-admits-major-bundeswehr-shortfalls/a-17959798>

Output is as important as input. NATO members should be candid about their own defense capabilities, troop deployability, and combat readiness. That conversation should include how well each soldier is equipped and trained, what kind of vehicles, aircrafts and ships are in service, and their level of commitment to collective defense. In addition, their contribution to NATO missions should be included into the scorecard. Only then will we get a fuller picture of burden sharing in the alliance.

In 2022, as the world watches Ukraine resist Putin’s war, there is no doubt that Putin has changed the geopolitics of Europe.¹⁸⁷ Figure 5.1 illustrates days before Putin announced Russia’s “special military operation”, its troop buildup along NATO’s Eastern flank. It had put Europe on edge, and the subsequent invasion had made Europe significantly more security-conscious and in a matter of weeks, and Putin had managed to achieve what many US presidents had hoped to accomplish for decades. First of all, before the war, liberal democracies around the war appeared at times uncertain of their focus and future, but as Putin made moves on Kyiv, it reminded the West of what it represents; the West went from evacuating diplomats to supplying Ukrainians with anti-tank missiles and advanced military drones. To unify the West’s support for Ukraine, The US Defense Secretary Lloyd Austin addressed his counterparts at Germany’s Ramstein air base, stating the goal is to “see Russia weakened to the degree that it can’t do the kinds of things it has done in invading Ukraine.”¹⁸⁸

¹⁸⁷ Brown, D. (2022, February 23). *Ukraine conflict: Where are Russia’s troops?* Retrieved from BBC: <https://www.bbc.com/news/world-europe-60158694>

¹⁸⁸ NPR. (2022, April 26). *Putin wanted a militarily weaker Ukraine. He got the opposite.* Retrieved from NPR: <https://www.npr.org/2022/04/26/1094854213/putin-ukraine-stronger-military>

Figure 5.1

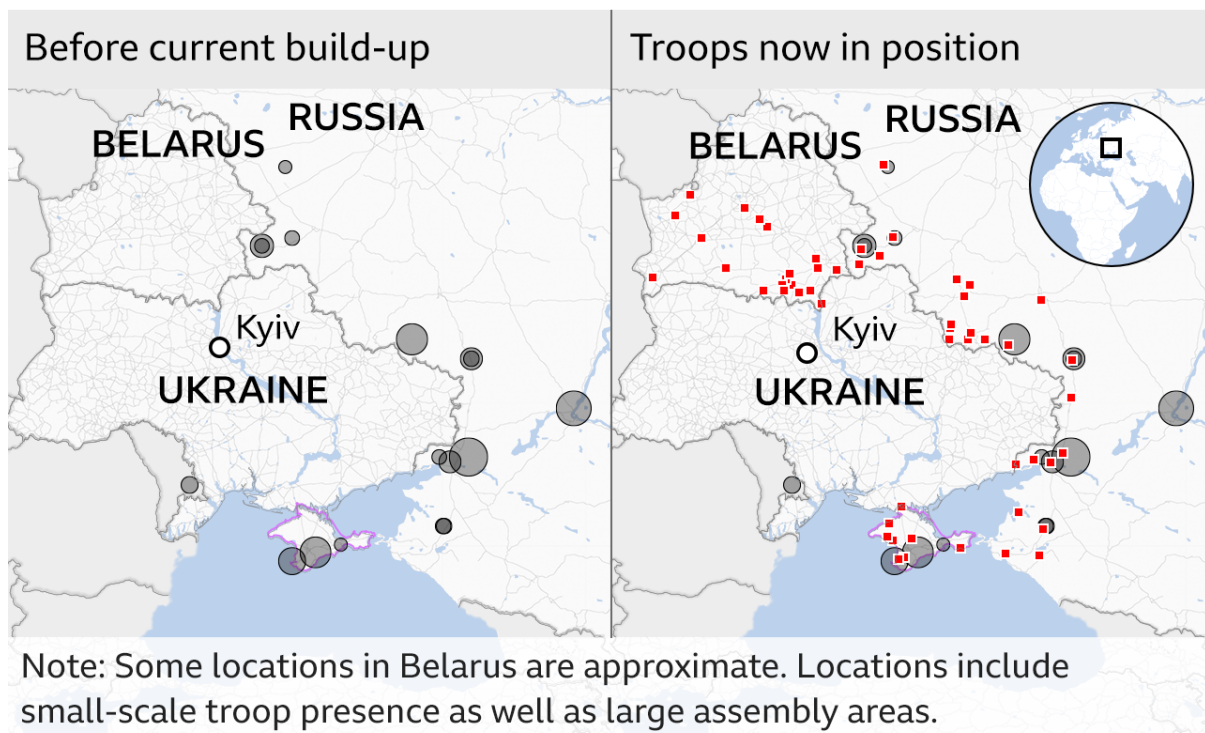
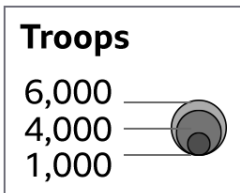
Russian Troop Buildup Around Ukraine, and Along NATO's Eastern Front

Russian troop build up around Ukraine

● Permanently stationed units

■ Units moved into position during current build-up

□ Russia annexed Crimea in 2014



Source: Rochan Consulting, Maxar, 23 February



Source: Brown, D. (2022, February 23). Ukraine conflict: Where are Russia's troops?

Retrieved from BBC: <https://www.bbc.com/news/world-europe-60158694>

Secondly, Russia's invasion of Ukraine has shifted Germany's attitude towards its security, and Russia. A new poll has shown that the war has prompted a major public re-think of Germany's energy policies, including shifting to renewable energies, and diversifying its oil

and gas imports.¹⁸⁹ In terms of security, German Chancellor Scholz has announced a historic 100 billion Euro defense spending package that will bolster Germany's defense expenditure as a share of GDP over 2 percent shortly after Russia's move on Kyiv; keep in mind that, a couple of years ago, Scholz and the SPD claimed that spending 2 percent of GDP on defense is both "unrealistic and unnecessary."¹⁹⁰

Lastly, in response to Russia's invasion of Ukraine, both Finland and Sweden, with long histories of wartime neutrality and non-alignment have made requests to join NATO.¹⁹¹ Ever since the invasion, domestic support for joining NATO has shot up drastically in both countries, specifically Finnish public support for joining NATO soared from around 50 percent to 76 percent in two months, and over half of the Swedes are now in favor of joining NATO.¹⁹² Once they have successfully acquired NATO memberships, it will add another 1,340 kilometers to the existing 1,200 kilometers, doubling the length of Russia-NATO land border as illustrated in Figure 5.2, and putting both countries under the US nuclear umbrella. Going back to the topic of NATO burden sharing, Finland's defense expenditure is already exceeding 2 percent of its GDP, and Sweden is on track to do so.¹⁹³

¹⁸⁹ Staudenmaier, R. (2022, April 7). *Ukraine war sparks major shift in Germany's energy opinions*. Retrieved from DW: <https://www.dw.com/en/ukraine-war-sparks-major-shift-in-germanys-energy-opinions/a-61401277>

¹⁹⁰ Ibid, 72.

¹⁹¹ Buchholz, K. (2022, May 11). *Will NATO Expand North?* Retrieved from Statista: <https://www.statista.com/chart/26674/european-countries-by-year-of-joining-nato/>

¹⁹² Yle. (2022, May 9). *Yle poll: Support for Nato membership soars to 76%*. Retrieved from Yle: <https://yle.fi/news/3-12437506>

¹⁹³ Henley, J. (2022, May 12). *Why are Sweden and Finland not yet in Nato and does the alliance want them?* Retrieved from The Guardian: <https://www.theguardian.com/world/2022/may/12/why-are-sweden-and-finland-not-yet-in-nato-and-does-the-alliance-want-them>

Figure 5.2

NATO Enlargement by Year



Source: Buchholz, K. (2022, May 11). Will NATO Expand North? Retrieved from Statista:
<https://www.statista.com/chart/26674/european-countries-by-year-of-joining-nato/>

Ukraine’s initial success on defending itself against Russia has prompted some US leaders to see the opportunity to deliver a decisive blow to Russia, and forever demolish Russia’s military. However, there is also the possibility that Putin will escalate the war out of

frustration, or turn this “special military operation” into a prolonged conflict that drags on for years. In any case, the war in Ukraine is unlikely to end anytime soon, and no one, not even Putin can predict how and when it might end. Will the threat be enough to finally push some NATO allies to cross the 2 percent threshold, or will the US succeed in weakening Russia to the point of it no longer threatens Europe, resulting in more free riding behaviors in NATO? This thesis hopes to provide a framework for future studies of NATO burden sharing, as the invasion of Ukraine is still ongoing and Putin has made irreversible changes in how Europe perceives the Russian threat. But in any case, NATO will endure and so will the debate on alliance burden sharing.



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