The war in Ukraine will have a pervasive impact on the North Atlantic Treaty Organization (NATO), which is set to adopt a new strategic concept at the upcoming Madrid summit in June 2022. There is little doubt that adapting the alliance’s deterrence and defense posture in Eastern Europe will be a strategic priority on the road to Madrid. However, the alliance should not neglect other challenges and priorities, including preserving stability in its southern neighborhood. Spanning from North Africa and the Sahel to the Balkans and the Middle East, NATO’s “South” remains fraught with growing vulnerabilities—and is not impervious to the broader strategic competition with Russia and China. Rather than transforming NATO into a unidirectional entity, the future strategic concept offers the alliance an opportunity to reimagine its approach toward the South.

“We, the Heads of State and Government of the 30 NATO Allies, have met today to address Russia’s aggression against Ukraine, the gravest threat to Euro-Atlantic security in decades.” In this solemn statement released after an extraordinary summit in Brussels on March 24, 2022, NATO leaders sent a clear signal: Russia poses an unprecedented threat that the alliance needs to address as a matter of priority. Beyond its decisions to assist Ukraine and reassure frontline allies, NATO is also preparing for the long-term implications of the return of war to the European continent. Incidentally, this reorientation coincides with the preparation of a new strategic concept that will be adopted in Madrid.

The strategic concept is arguably NATO’s most important political document as it scans the international security context, identifies the main threats and challenges to Euro-Atlantic security, and outlines an approach to addressing such challenges. The previous strategic concept, adopted in Lisbon in 2010, signaled a meaningful rebalancing among NATO’s so-called core tasks, namely collective defense, crisis management, and cooperative security. Inter-state competition took a back seat because the alliance still hoped it could strike a cooperative relationship with Russia despite the invasion of Georgia in 2008. The return of great-power competition in Europe—arguably best illustrated by Moscow’s illegal annexation of Crimea in 2014—forced allies to put collective defense once again at the center of NATO strategy. Russia’s full-scale invasion of Ukraine in February 2022 is further compounding this shift. A renewed commitment to territorial defense will undoubtedly be at the forefront of the Madrid strategic concept.

However, this should not lead NATO to neglect other priorities, including stability in its southern neighborhood. Spanning from North Africa and the Sahel to the Balkans and the Middle East, NATO’s “South” remains fraught with many challenges—and is not impervious to the larger competition with Russia and China. The stability of the South remains critical for Euro-Atlantic security. Yet the war in Ukraine and prioritization of deterrence...
should also incentivize NATO to reimagine how it engages with the South. Instead of relying on large-scale military interventions as it did in Afghanistan, the alliance should invest in strengthening its partners’ resilience so they can better resist both pressures from competitors and transnational challenges. Promoting “forward resilience” will require NATO to be innovative and to deepen its cooperation with other organizations, starting with the European Union.

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THE END OF AN ERA
In many ways, the 2010 Lisbon strategic concept draws on the previous one (adopted in Washington in 1999). It represents a crystallization of NATO’s experience in the post–Cold War era, a unique period characterized by Western unipolarity and military-technological supremacy, as well as the seeming absence of peer competitors. Since the end of the Cold War, the United States and its allies enjoyed a rather favorable position in the pivotal regions of Europe and East Asia. There was still a widely-held belief that former adversaries such as Russia—and even emerging great powers such as China—could somehow be integrated in the rules-based order. This belief underpinned much of the thinking that shaped the Washington and Lisbon concepts.

The power surplus the United States and its allies enjoyed gave the West a freer hand—both politically and militarily—to engage in ambitious out-of-area endeavors and leverage crisis-management operations and collective-security initiatives to help stabilize the broader Euro-Atlantic neighborhood and beyond. NATO’s operation in Afghanistan illustrates this paradigm, as well as its limitations. During this long post–Cold War era, collective defense and deterrence took a back seat. Even though such goals remained the fundamentals of Euro-Atlantic security, they were considered almost superfluous in light of the West’s military-technological supremacy. Crisis management and collective security ruled the day, as illustrated by allies’ military engagement (whether under the NATO umbrella or in ad-hoc coalitions) in Afghanistan, Iraq, Libya, the Sahel, and Syria.

But this world is gone. Great-power competition (also dubbed “strategic competition”) is back—as illustrated by Russia’s illegal annexation of Crimea in 2014 and its increasingly revisionist and aggressive behavior since, as well as by China’s strategic rise and assertiveness, including in the Euro-Atlantic area. Peer competitors are once again challenging the security, geopolitical architecture, and U.S.-led alliances in Europe and the Indo-Pacific, but also the institutional and normative fabric that underpins the so-called rules-based or liberal international order.

Adapting the alliance to this competitive era will arguably be the main purpose of the new strategic concept, especially in light of Moscow’s brutal invasion of Ukraine. This will not only require revamping NATO’s deterrence and collective-defense pillars, but also ramping up allied efforts in technological innovation and strengthening the resilience of NATO countries against hybrid interference in the form of, for example, cyberattacks and disinformation campaigns.

In parallel, the United States and its European allies have experienced a mounting “intervention fatigue,” as illustrated by the abrupt withdrawal from Afghanistan. In Iraq and the Sahel, allies are also reducing their military footprint and privileging a more tailored approach to the fight against terrorism. “Over-the-horizon” operations based on air strikes and special-forces raids seem to be the preferred modus operandi after years of large-scale and intensive interventions.

THE RISKS OF NEGLECTING THE SOUTH
A de facto prioritization of collective defense over crisis management and collective security is probably unavoidable—but it is not without risks. Notably, NATO’s southern neighborhood remains structurally vulnerable. Transnational challenges such as terrorism, organized crime, the proliferation of small weapons, and irregular migration will arguably remain core drivers of instability and insecurity across the South. Despite years of international diplomatic, development, and security engagement, the Sahel continues to face mounting extremist violence, internal displacement, and food insecurity. In Libya, the political process to solve a years-long civil war is still very fragile, while Tunisia has recently experienced worrisome political turmoil. Although the Islamic State has lost its territorial stronghold in Syria and Iraq, it remains
active and resilient. Even the seeming stability of the Western Balkans is misleading, as illustrated by deep, longstanding political tensions between Serbia and Kosovo and within Bosnia and Herzegovina. Instability across NATO’s South is likely to be further compounded by the war in Ukraine. In the Western Balkans, the conflict has heightened fears that Russia’s actions may embolden nationalists, potentially leading to violence. Countries in Africa and the Middle East are already facing spillover effects ranging from higher energy prices to food insecurity. These countries are particularly vulnerable to the sharp decrease in Russian and Ukrainian wheat exports, raising concerns that diminishing grain supply could fuel ongoing crises in Syria or Ethiopia and aggravate instability in Egypt and Lebanon. As UN secretary general António Guterres underlined, Russia’s aggression of Ukraine is “planting the seeds for political instability and unrest around the globe.”

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NATO’s southern neighborhood is also an increasingly relevant theater in the West’s strategic competition with Moscow and Beijing. The expansion of Russia’s diplomatic and military presence in the South, whether directly (as in Syria) or indirectly via proxies and private military companies (as in Libya and Mali), is an issue of growing concern. This increasing military footprint is already affecting allied counterterrorism efforts, as recently witnessed in the Sahel. Taking advantage of Mali’s political instability, Russia’s Wagner Group has managed to entrench itself in the country, ultimately leading to the
withdrawal of French and European troops in February 2022. Far from contributing to the stability of Mali, Russian mercenaries have already participated in mass killings there, as witnessed in the town of Moura at the end of March.

Russia’s increasing military presence—and the proliferation of Russian weapon systems—may also fuel arms races in the South and endanger NATO’s security in more traditional ways. For instance, Russian capabilities deployed in Syria have created interdiction bubbles, or anti-access/area denial zones, limiting NATO’s freedom of action in the Eastern Mediterranean. The French navy has observed a significant increase in the Russian navy’s activity in the Mediterranean since the beginning of the invasion, forcing a French carrier-strike group deployed in the area to adapt its posture to avoid any misunderstandings. More broadly, Russian arms sales and the proliferation of precision-guided munitions and missiles may also fuel arms races in places such as North Africa, thus incentivizing the alliance to look at the South through a deterrence lens as well.

China’s growing political and economic influence is also affecting NATO’s interests. China’s acquisition of digital infrastructure across the South—and its de facto monopoly on the development of fifth-generation (5G) wireless networks in Africa—represents a long-term political and military challenge to NATO and could complicate the alliance’s ability to work with its partners. Similarly, China’s massive investments in transport and energy infrastructure in southern Europe could potentially complicate NATO’s military mobility and readiness during a crisis. Beijing is also progressively expanding its military presence along NATO’s southern flank, as demonstrated by Chinese-Russian naval drills in the Mediterranean.

Adapting NATO’s Approach to the South

NATO’s overall objectives in relation to the South have not really changed much in the sense that the stability of the southern neighborhood remains key to Euro-Atlantic security. What is changing is the broader strategic context and the nature of the threats and challenges emanating from the South. This means that the nature of NATO engagement in the South should also adapt in at least three ways:

360-Degree Deterrence
First, NATO should follow a 360-degree approach to deterrence, building on its recent commitment to “significantly strengthen” its “longer term deterrence and defense posture” in response to the war in Ukraine. Admittedly, the type of deterrence challenges the alliance faces in the South differ from the ones in the East and North. While allies are strengthening their forward defense along NATO’s eastern flank, including by deploying additional forces and capabilities, securing the southern flank requires a different approach based on rotational maritime presences in both the Mediterranean and the Black Sea.

As allies think about the future of NATO’s deterrence and defense posture, they should aim to strengthen the credibility of NATO’s maritime presence in these strategic areas—particularly to address potential gaps in terms of command and control, force posture, and capability development. More broadly, as NATO continues to revise its approach to missile defense in light of the growing challenge in the East, it should also give consideration to the proliferation of precision-guided munitions and short- and medium-range missiles in the South.

Forward Resilience
Second, NATO should reckon with the ongoing transition toward a more indirect approach to projecting stability. This connects with the emerging concept of “forward resilience,” namely the need to strengthen NATO partners’ capacity to both resist pressures from adversaries and confront other challenges such as terrorism, organized crime, and the effects of climate change.

Such a forward-resilience strategy should put partnerships front and center, both with regional actors and with other relevant entities, notably the European Union, given that the local needs of partners transcend the security domain. NATO would notably need to go beyond its one-size-fits-all approach to partnerships (as exemplified by the Mediterranean Dialogue and the Istanbul Cooperation Initiative) and favor more tailor-made, flexible, and bilateral interactions with countries in the region. The alliance should also consider looking beyond existing partnerships to strengthen the resilience of non-partners elsewhere in the South, such as the Sahel, the Gulf of Guinea, and the Horn of Africa.

A Transatlantic Division of Labor in Crisis Management
Finally, allies should strengthen their ability to act rapidly in the event of a crisis in the southern neighborhood. In this regard, allies should reckon with the reality that, despite Russia’s invasion of Ukraine, China remains...
Washington’s “most consequential strategic competitor” and a “pacing challenge” that will inevitably require a recalibration of the U.S. presence in Europe and its vicinity in the medium term. This will compel European allies to take up greater responsibilities in security and defense.

As Europeans step up their defense spending and efforts, NATO will arguably remain their main referent when it comes to deterrence and collective defense. However, when it comes to crisis management in the South, Europeans may prefer to act in smaller coalitions or through the European Union. The adoption of an EU Strategic Compass does indeed signal a specific interest in crisis management, notably through the development of a “rapid deployment capacity,” which would allow the European Union to send up to 5,000 troops in scenarios ranging from evacuation missions to stabilization operations. Such initiatives are beneficial for NATO as a whole, especially if complemented by a strengthening of the EU-NATO relationship.

CONCLUSION

The Ukraine war and the need to rethink priorities will inevitably influence the ongoing debate about NATO’s future role in its southern neighborhood. There is little doubt that the next strategic concept will confirm the growing prominence of the eastern flank and include a de facto prioritization of collective defense over crisis management and collective security. In the meantime, allies have experienced “intervention fatigue”—as seen in Afghanistan—which is accelerating a transition toward a more indirect approach to projecting stability.

Yet, NATO should not overlook the South, which is also a theater in the strategic competition with Russia and China. In addition, challenges of a more transnational or asymmetric nature, such as terrorism, organized crime, the proliferation of small weapons, and irregular migration, are likely to remain core drivers of instability across the South.

Against this backdrop, the alliance should maintain a 360-degree approach to deterrence to ensure that its updated deterrence posture also addresses emerging challenges in the South. Moreover, NATO should invest in the South’s resilience and development, as well as strengthen partnerships with regional and other key actors, starting with the European Union. Finally, allies will need to maintain their readiness to act in the event of a crisis in the southern neighborhood, not least with EU cooperation.

**NATO should invest in the South’s resilience and development, as well as strengthen partnerships with regional and other key actors, starting with the European Union.**

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