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NATO and hybrid warfare

Seeking a concept to describe the challenge from Russia

G. Alexander Crowther

Introduction

The concepts of 'Hybrid Threats' and 'Hybrid Warfare' have gained increasing prevalence in analyses of the contemporary security environment. Revisionist powers, faced with an ascendant NATO and hyper-powerful United States in the post-Cold War era, have figured out how to confront the West below the threshold of a 'use of force' or 'armed attack' as mentioned in the Charter of the United Nations (UN). The West, used to a binary peace/war paradigm, has struggled to develop a conceptual model within which they could prevent the success of these twenty-first-century operations. NATO has made headway in figuring out how to confront these operations but continues to have trouble with an aggressive Russia that makes use of imaginative approaches to discombobulate the West. NATO has performed the analysis and built the teams that allow them to at least mitigate many Russian operations, regardless of what title that modern pundits seek to use.

To understand NATO and its approach to countering hybrid threats and hybrid warfare, one needs to understand the threat confronting the West. This threat is, as outlined earlier, very much linked to a more aggressive Russia. Thus, Russian behaviour forms the context for NATO's approach to hybrid warfare. This chapter will first outline the threat confronting the West, examining Russian activities in recent years and its approach to hybrid warfare. Thereafter, the chapter shifts focus to NATO's approach to hybrid warfare. Finally, conclusions are drawn.

Understanding Russian hybrid warfare

The Russian Federation in general and President Vladimir Putin in particular see the demise of the Soviet Union as a geostrategic catastrophe. Although Russia was forced

to deal with an ascendant West in the wake of the Cold War, once they recovered enough from their economic collapse (aided mainly by buoyant oil prices), they clearly signalled that they would no longer accept the status quo. Although analysts see this trend as starting as early as 2004, it was his address at the 2007 Munich Security Conference where Putin made it clear that they would not tolerate the situation they found themselves in facing in the early 1990s.¹

One thing they would not tolerate was the loss of what they see as their rightful sphere of influence. The Russian Empire directly ruled the Baltic States, Belarus, Moldova, Ukraine, the states of the Caucasus as well as a variety of states in modern Central Asia. During the Cold War the Soviet Union added their hegemony over a wide swathe of eastern Europe through their domination of the Warsaw Pact. In the wake of the dissolution of the Soviet Union, many of these states sought freedom from Russian rule or influence. Due to their historical role as hegemon, many Russians still feel that eastern European countries should pay attention to what the Russians tell them to do and that former Soviet Republics should obey them.

Although they operate from a position of overall weakness, they can create conditions of local superiority. Additionally, they operate across the entire spectrum of competition and seek to leverage all tools available to the modern state to achieve their goals.

The most recent update of the Russian conceptualization of hybrid warfare is sometimes called the 'Gerasimov Doctrine', named after the Russian General Valery Vasilyevich Gerasimov, the Chief of the General Staff of the Armed Forces of Russia. He says that the West has used hybrid warfare against Russia, citing as evidence the Arab Spring and the 2011 Libya Operation.² Although the author Mark Galeotti regrets that he coined the phrase, saying that he 'was just going for a snappy title' and prefers to 'call it non-linear war, or hybrid war, or special war',³ this is the major phrase used to describe the Russian point of view. The other popular label is 'New Generation Warfare'.

This Russians conceiving hybrid warfare started with Frank Hoffman's writing.⁴ They then looked at this through the lens of what they thought that the US was doing to them, in particular the 'Color Revolutions'. They then added significant amounts of information operations to the mix for two reasons. First, as mentioned, Russians have used information as a weapon for centuries. Second, they believe that the USSR collapsed due to a concerted information campaign against themselves and their allies and partners. The mix of these three concepts resulted in what could be called 'Hybrid Warfare with Russian Characteristics'. This, not the Hoffman concept, is what NATO was facing.

According to Jānis Bērziņš, there are ten 'guidelines for developing Russian military capabilities' as part of this approach:

1. from direct destruction to direct influence;
2. from direct annihilation of the opponent to its inner decay;
3. from a war with weapons and technology to a culture war;
4. from a war with conventional forces to specially prepared forces and commercial irregular groupings;

5. from the traditional (3D) battleground to information/psychological warfare and war of perceptions;
6. from direct clash to contactless war;
7. from a superficial and compartmented war to a total war, including the enemy's internal side and base;
8. from war in the physical environment to a war in the human consciousness and in cyberspace;
9. from symmetric to asymmetric warfare by a combination of political, economic, information, technological and ecological campaigns;
10. from war in a defined period of time to a state of permanent war as the natural condition in national life.⁵

Each of these marks the Russian approach: influence operations designed to eat away at the culture of your opponent as part of a total war designed to render the opposition incapable of defeating you. In his book 'Russian Hybrid Warfare', Ofer Fridman identifies a series of characteristics similar to these as coming from the pens of retired Russian Colonels Sergey Chekinov, and Sergey Bogdanov as well as Andrey Kokoshin,⁶ all of whom had read 'Unrestricted Warfare' (the Chinese study of how the US-led coalition very effectively defeated Iraq in 1991) as well as previous Russian and Soviet writings on the nature of conflict, reflecting 'on the nature of the concept while integrating existing ideas into their vision and understanding of warfare'.⁷

Figure 2.1 shows us the spectrum of Russian hybrid operations from the very frequent, non-violent information operations they practice on a daily basis up through cyber-enabled conventional military operations that they have only practiced a few times.

Figure 2.1 Russian hybrid operations.

Notable is the integration of information operations, which accompanies every one of these examples. The Russians deploy aggressive rhetoric on a daily basis. For example, Putin has threatened 'to invade Poland, Romania and the Baltic states',⁸ Finland⁹ and Sweden¹⁰ if they agree to join NATO. Norway has been threatened for hosting more US troops,¹¹ Poland¹² and Romania¹³ for hosting ballistic missile defence facilities. In fact, the threat extends to 'any European countries hosting US missiles'.¹⁴ He has also threatened to exercise the use of nuclear weapons on Denmark,¹⁵ Poland,¹⁶ the Baltics,¹⁷ the United Kingdom,¹⁸ Sweden,¹⁹ Ukraine,²⁰ the EU²¹ and, of course, NATO and the United States.²²

Information operations do not just stand-alone but are also used in support of other operations. The Russians tout their build-up in Kaliningrad as defensive while NATO deployments to the Baltics are offensive in nature.²³ They lie about the size and intent of their large-scale military manoeuvres to justify non-compliance with the OSCE regulations and the Vienna Agreement.²⁴ They deny performing cyber operations.²⁵ They deny that their people have participated in targeted killings, even though the people were caught on video.²⁶ They say that Crimea was a spontaneous uprising and that Russian troops were not present either in Crimea.²⁷ That the conflict in the Donbass area of Ukraine was initiated by Ukrainians in the Donbass.²⁸ These examples show the integration of information from the least- to the most-violent of Russian hybrid operations.

What this discussion shows us is that this type of warfare is hard to understand and master, and that the Russians are very good at it. NATO faced a new reality.

NATO and hybrid warfare

As we have seen, the Russians took Hoffman's ideas on hybrid warfare and looked at them through a Russian lens. NATO took the Russian viewpoint as a start and designed their own in order to confront Russian hybrid techniques. NATO had to do several things in order to respond to this Russian hybrid warfare challenge. First, they had to conceptualize the challenge and then the response. Then NATO had to simultaneously perform a series of actions as part of their response: NATO had to use information (in particular diplomacy) in order to minimize support for Russia and maximize support for NATO, to collaborate with allies and other partners, and to use NATO's inherent hard power to deter Russia.

Continuing operations, conceptualizing problems

As with any problem, the initial requirement is to recognize that you have a problem and think through what that problem is. Although NATO had discussed hybrid threats before 2014, it was the Russian operation that took control of Crimea that really alerted NATO allies to the threat. In the wake of Russian operations in Crimea and the Don River Basin (Donbas) in 2014, NATO allies realized that the Russian approach had changed. From a partner who NATO considered for membership in the 1990s

to an antagonist by 2007, Russia had emerged as a spoiler. Because of their inherent economic, demographic and military weaknesses, the Russians could not confront a much stronger NATO alliance directly. Instead, they had to adopt a more indirect approach. They revived concepts from the Russian Empire and the Soviet Union and adapted them to the realities of the twenty-first century as previously described.

NATO had to decide on how to approach the new reality. NATO has a biennial Summit; at the end of each summit, NATO issues a 'declaration'. Each subordinate organization within NATO works very hard to get 'their' subject addressed in the declaration. Therefore, summit declarations are useful to determine what is important within NATO and thereby to NATO. It is illustrative that the 2012 Chicago Declaration does not contain one reference to 'hybrid',²⁹ whereas the 2014 Wales Declaration opens with a recognition that 'Russia's aggressive actions against Ukraine have fundamentally challenged our vision of a Europe whole, free, and at peace' and also mentions hybrid five times.³⁰

Not only did NATO condemn Russian activities in Crimea and the rest of Ukraine, but also came out strongly with the need to face hybrid threats.

We will ensure that NATO is able to effectively address the specific challenges posed by hybrid warfare threats, where a wide range of overt and covert military, paramilitary, and civilian measures are employed in a highly integrated design. It is essential that the Alliance possesses the necessary tools and procedures required to deter and respond effectively to hybrid warfare threats, and the capabilities to reinforce national forces. This will also include enhancing strategic communications, developing exercise scenarios in light of hybrid threats, and strengthening coordination between NATO and other organisations, in line with relevant decisions taken, with a view to improving information sharing, political consultations, and staff-to-staff coordination. We welcome the establishment of the NATO-accredited Strategic Communications Centre of Excellence in Latvia as a meaningful contribution to NATO's efforts in this area. We have tasked the work on hybrid warfare to be reviewed alongside the implementation of the Readiness Action Plan.³¹

In addition, NATO announced several other initiatives to deal with Russian hybrid operations. These include significantly enhancing the responsiveness of the NATO Response Force (NRF) by developing force packages that can move rapidly and respond to potential challenges and threats and establishing a Very High Readiness Joint Task Force (VJTF). NATO has also established an enhanced exercise program with an increased focus on exercising collective defence, including practicing comprehensive responses to complex civil-military scenarios. Moreover, NATO's decision to suspend all practical civilian and military cooperation between NATO and Russia remains in place (although political channels of communication would remain open).

NATO received plenty of assistance in their mission to conceptualize the threat and propose responses. National security researchers seek issues to develop and responded eagerly and rapidly – NATO has identified over 100 articles published in 2015 alone. This production has remained steady, with over ninety articles published in 2016 and eighty in 2017.³² A wide variety of actors have published, both from within and without

NATO. NATO has its own capabilities within the NATO Defense College³³ in Rome as well as its Centre of Excellence (COE) program. NATO has twenty-five different COEs. Several of the newer ones focus on aspects of hybrid warfare and include the Cooperative Cyber Defence COE in Tallinn, Estonia, the Strategic Communications COE in Riga, Latvia, the Energy Security COE in Vilnius, Lithuania, and the Hybrid COE in Helsinki, Finland.³⁴ Organizations in the US and Europe weighed in as well, including the Strategic Studies Institute (the US army's think tank), the Naval War College and the US National Defense University on the government side as well as think tanks such as Center for Strategic and International Studies (CSIS) and the Atlantic Council. Even web-only publications like Small Wars Journal and Small Wars & Insurgencies helped NATO think through hybrid operations. Foreign Affairs and Foreign Policy chimed in. Even mainstream and well-respected organizations like the New York Times and the Washington Post joined the discussion. A variety of European outlets have also thought about hybrid warfare including supra-governmental organizations such as the European Commission, think tanks, defence organizations and different newspapers. This shows that interest in hybrid warfare is wide-ranging. If anything, there may be too much writing about hybrid warfare, which risks confusing the situation by providing several writings by unqualified authors.

The next thing that NATO had to do was to use information (in particular diplomacy) in order to minimize support for Russia and maximize support for NATO. As the NATO web page says, '(NATO) also actively counters propaganda – not with more propaganda, but with facts – online, on air and in print'.³⁵ NATO has been particularly aggressive about pushing the truth out to the rest of the world. NATO leadership makes regular comments to the press.³⁶

The main NATO talking point is the defensive nature of NATO, because Russia says that NATO is aggressive and seeks to attack them. Other subjects include NATO/Russia relations, because Russia claims that NATO spurned Russia in the wake of the Cold War³⁷ and that NATO refuses to talk to them.³⁸ NATO puts explanations on the reality of their relationship with Russia on the web.³⁹ Since exercises are a particular bone of contention between Europe and Russia, NATO also comments on both NATO⁴⁰ and Russian exercises. Russia holds large-scale exercises in violation of the Vienna Agreement⁴¹ while claiming that they are too small to trigger Vienna requirements for reporting⁴² and then accuses NATO of using exercises to prepare for aggressive moves against Russia,⁴³ and so NATO responds with press releases emphasizing that they are not preparing to attack Russia.⁴⁴ The Russians have two major advantages: they are not constrained by the truth and their decision-making apparatus is much leaner and quicker. Despite those advantages, the West discovered during the Cold War that the truth was more powerful in the long run. This information back and forth is ongoing. The Russians will not stop, so NATO continues their information campaign.

In another part of their response to Russian hybrid operations, NATO had to collaborate with allies and partners. Within the Alliance, NATO

supports Allies' efforts to identify national vulnerabilities and strengthen their own resilience, if requested. NATO also serves as a hub for expertise, providing support

to Allies in areas such as civil preparedness and chemical, biological, radiological and nuclear (CBRN) incident response; critical infrastructure protection; strategic communications; protection of civilians; cyber defence; energy security; and counter-terrorism.⁴⁵

In particular, NATO coordinates allied responses to Russian efforts via their main tool, hard power, which will be addressed in the next section.

NATO also works closely with partners. At the state level, NATO works with forty-one different countries: twenty-one countries (including Russia) via the Euro-Atlantic Partnership Council (EAPC), seven in the Mediterranean Dialogue, four through the Istanbul Initiative and nine 'Partners Across the Globe'. NATO also works with the United Nations, the European Union and the Organization for Security and Cooperation in Europe.⁴⁶

Some of that collaboration is military in nature, as with the 'NATO plus Two' relationship with Sweden and Finland. The two main tools are the Partnership Interoperability Initiative and the Defence and Related Security Capacity Building Initiative.⁴⁷ The overall strategic objectives of partnering include the following:

- Enhance Euro-Atlantic and international security, peace and stability;
- Promote regional security and cooperation;
- Facilitate mutually beneficial cooperation on issues of common interest, including international efforts to meet emerging security challenges;
- Prepare interested eligible nations for NATO membership;
- Promote democratic values and institutional reforms, especially in the defence and security sector;
- Enhance support for NATO-led operations and missions;
- Enhance awareness of security developments including through early warning, with a view to preventing crises;
- Build confidence and achieve better mutual understanding, including about NATO's role and activities, in particular through enhanced public diplomacy.

These are understandable military objectives for partnerships, however, in the twenty-first century, military means alone are insufficient to meet with modern hybrid threats. Perhaps more important for NATO are relationships with other organizations. When one examines who has responsibility for wielding power in Europe, it is obvious that NATO is not able to provide for anything other than hard power, applied externally to Europe. The European Union is responsible for internal hard power (through European Police [EUPOL] and the European Union Military Staff [EUMS]), internal soft power through internal information operations and legislation, and external soft power through diplomacy via the European Union External Action Service (EAS) (Figure 2.2).

The biggest of these issues is military mobility, particularly movement from the US via the ports of northeastern Europe to the Baltic States via the Suwalki Gap on the border between Poland and Lithuania. This is a major issue for NATO and has been

Who has responsibility for wielding power in Europe?

	Internal	External
Hard Power	EU	NATO
Soft Power	EU	EU

Figure 2.2 Who has responsibility for wielding power in Europe?

discussed in excruciating detail since 2014. Unfortunately, NATO has several problems with military mobility:

- NATO does not own any of the infrastructure necessary for these movements.
- Forces cannot cross borders rapidly with trainloads of arms and munitions in peacetime.
- Foreign ministries control the process of movement across borders.
- Ministries of the interior control the actual movement across borders.
- Private companies control what goes on ships and trains, when and where.
- Infrastructure is not optimized for eastward military movement.
- Rail lines between Warsaw and Tallinn are still a Russian gauge.

For a US armoured unit based in the continental United States to get to the eastern edge of the Alliance, they have to move commercially to a port of embarkation in the United States, move on commercial ships across the Atlantic, debark at a port in western Europe, and move across the heart of Europe to the eastern flank. They have to cross a variety of borders and stop at each one because the ministry of the interior must inspect papers and cargo, especially when the cargo consists of arms and munitions. Although there are agreements for the rapid movement of units across Europe in time of war, there currently are none for the expedited movement of military equipment and munitions quickly in peacetime.

NATO is working with the EU and the Baltics states for transportation infrastructure (in particular the Baltarail project which runs European gauge rail from Warsaw to Tallinn) and with the German government who controls Deutsche Bahn (the German rail system) and, as discussed later, has stood up a logistics headquarters in Ulm, Germany, to assist with this issue.

The other major impediment to this issue is the fact that none of the infrastructure east of the former intra-German border was developed to facilitate eastward movement of military forces. Every river crossing east of that former border was optimized by the Warsaw Pact to move military forces west, not east; indeed, the defensive infrastructure

at river crossings was designed to prevent forces from moving east towards the Soviet Union. As NATO does not own any of this infrastructure nor the engineer units that would survey and update them, NATO logisticians have had to work with national forces and governments. As they have been working for years, progress has been made, however. Unfortunately, it appears that the will to spend the requisite amount of money is lacking in parts of Europe.⁴⁸

The last major initiative uses NATO's greatest strength: military power. Military power is necessary but not sufficient to counter, and particularly to deter, hybrid operations. This use of NATO's inherent hard power to deter Russia does not mean that NATO conducts military operations against Russian targets, but that NATO prepares for the defence of allies under article 5 of the Washington Treaty.⁴⁹

NATO's military power waned in the wake of the Cold War. This trend was reversed in the wake of the Russian occupation of Crimea in 2014. At the Wales Summit, NATO announced several changes. The major initiative to develop more readily available forces was the Readiness Action Plan (RAP), which NATO calls 'the most significant reinforcement of NATO's collective defence since the end of the Cold War'.⁵⁰ The RAP tripled the size of the NRF and established the VJTF, able to deploy at very short notice. It also enhanced Standing Naval Forces.⁵¹

In addition to the RAP provisions, NATO also sought to halt decades of declining defence budgets. At Wales the allies promised the following:

Allies currently meeting the NATO guideline to spend a minimum of 2% of their Gross Domestic Product (GDP) on defence will aim to continue to do so. Likewise, Allies spending more than 20% of their defence budgets on major equipment, including related Research & Development, will continue to do so. Allies whose current proportion of GDP spent on defence is below this level will: halt any decline in defence expenditure; aim to increase defence expenditure in real terms as GDP grows; aim to move towards the 2% guideline within a decade with a view to meeting their NATO Capability Targets and filling NATO's capability shortfalls.⁵²

This is probably the most important initiative that NATO has promulgated since agreeing to NATO expansion in the 1990s. All the appropriate rhetoric is useless if the cold reality is that there are no resources for defence. The 2 per cent declaration was designed to boost the defence spending of the twenty-five or so allies who did not spend that much at the time. This spending would meet the intent of article 3 of the Washington Treaty, which calls for 'the Parties, separately and jointly, by means of continuous and effective self-help and mutual aid, will maintain and develop their individual and collective capacity to resist armed attack'.⁵³

NATO has continued to improve its capability to deal with hybrid threats through military means. Starting in 2015, they stood up eight NATO Force Integration Units (NFIUs) in Bulgaria, Estonia, Hungary, Latvia, Lithuania, Poland and Romania, and Slovakia to facilitate reception, staging and onward integration (RSOI) for any deploying forces. Additionally, they stood up the Multinational Corps Northeast Headquarters (HQ MNC-NE) as well as Multinational Division Northeast in Poland to provide command and control for any NATO forces deployed into the area. In 2018,

or less.⁵⁹ This initiative has come to fruition. During the London meeting of the North Atlantic Council in December 2019, the Secretary General announced that ‘I can announce that we have delivered on the NATO Readiness Initiative. Allies have committed 30 battalions, 30 air squadrons, and 30 combat ships, available to NATO within 30 days.’⁶⁰ We can rest assured that this will not be the last readiness initiative that NATO will produce as part of their attempt to deter the more violent hybrid operations.

Hard power is NATO’s strong suit, and therefore the major was for NATO to deter Russian hybrid operations, in particular higher-end, more violent hybrid operations as seen in Georgia and Ukraine. NATO understands both the strengths and weaknesses of the use of that hard power and seeks to use that hard power to prevent the Russians from conducting hybrid operations on NATO territory. Although this has worked so far, it means that the Russians have moved farther into the more non-violent means of challenging NATO, the EU and the rest of the West.

Conclusion

NATO faces a multifaceted threat from Russia. As Russia operates from a position of overall weakness, they seek to operate in the grey zone, below the threshold of armed attack or use of force in order to avoid the strength of their adversaries, in particular the United States and NATO, who are both strong in conventional military capability. Russia took Frank Hoffmann’s 2009 concept of Hybrid Warfare and looked at it through two lenses: what they thought the United States was doing to them and how the Russian traditionally compete using wide variety of techniques such as active measures, *dezinformatsia*, political warfare, reflexive control, information warfare, *maskirovka* and others. What they have in common is a strong emphasis on information operations.

Although many discussed hybrid warfare before 2014, it was then that NATO faced the reality of the situation. In the wake of Russian operations in Crimea and the Donbas, NATO reacted quickly at the Wales summit, announcing a variety of measures to counter and deter hybrid warfare. After Wales, they conceptualized the challenge and then the response, began to use information in order to minimize support for Russia and maximize support for NATO, ramped up collaboration with allies and other partners and figured out how to use NATO’s inherent hard power to deter Russia.

These measures have had a modicum of success; however, Russia is not going away and will not stop using their traditional methods of competition. NATO must continue to do all of these things into the foreseeable future in order to do their part of guaranteeing a future of a free, secure, just and united Europe.

Efforts thus far have been necessary but not sufficient, both Russian hybrid operations and NATO efforts to respond to them will continue for the foreseeable future. In the end, NATO will consider it a success if they can prevent the Russians from making any violent moves against any NATO countries.

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