

THE COOPERATION BETWEEN EU AND NATO IN RESPONSE TO HYBRID THREATS – A RETROSPECTIVE ANALYSIS FROM THE INSTITUTIONALIST PERSPECTIVE

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Abstract

The annexation of Crimea in 2014 and the violation of the territorial integrity of Ukraine by the Russian Federation provided new impetus for the EU and NATO to develop and later also intensify cooperation in hybrid threats. This unique process, that happens between two actors who have different histories, aims or membership structures, is analysed from the institutionalist perspective, which served as a framework to understand the development. The main aim of the article is to assess interinstitutional cooperation between the EU and NATO in the area of hybrid threats: especially in the area of capacity building, strategic communication, crisis management, counterterrorism or WMD use, and civil protection. The author concludes that both the EU and NATO successfully developed cooperation in hybrid threats and created mechanisms that enable similar perceptions of the threats and better coordination of the responses. The article serves merely as an exploratory study dedicated to the development of cooperation between the EU and NATO in this challenging area in the period between 2014 and 2022.

Keywords: EU, NATO, Cooperation, Hybrid Threats, Ukraine, Institutionalism.

INTRODUCTION

The cooperation between the EU and NATO was, in some respects, always problematic. The main reason is both functional and structural as both organizations have different institutional genealogy and *raison d'être*, which overlap just in several areas mainly related to security. While European Communities were dominantly aimed at economic cooperation and the creation of a single market (economic integration), NATO from the early beginning and for a very long time presented the main pillar of defence in Western Europe. However, this division of tasks was not consolidated as

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there were always attempts to create a European pillar of defence, which would be independent or complementary to NATO (Hunter, 2002). Moreover, European integration gradually split over to new areas of cooperation. The Maastricht Treaty transformed immature European Political Cooperation into the newly established Common Foreign and Security Policy, which was later strengthened by the Common Security and Defence Policy. The active role of the EU in these areas brought new challenges for the *modus vivendi* with NATO and opened questions about the security culture of both organisations.

This was a particularly challenging task as the membership varied significantly, with a potential conflict of interests undermining dominantly inter-governmental cooperation based on unanimity. There are EU members which are not members of NATO (Austria, Cyprus, Ireland, Malta), EU candidates to NATO (Finland until April 2023 and Sweden), and NATO members not being EU members (USA, UK, Turkey, Norway, North Macedonia, Montenegro, Iceland, Canada), while some of them applied for EU membership. As a result, an agreement is sometimes problematic, which is further undermined by the bureaucratic structures of both institutions. However, the degree of cooperation varies from one area to another, having different intensities and different characters. Moreover, both organisations had to face changes in the international system of states and new security trends that are remarkable for blurring the borders between civilian and military threats, changing the nature of warfare, and making new tools available to potential enemies.

The main aim of this article is to assess interinstitutional cooperation between the EU and NATO in hybrid threats. For that reason, there are two main research questions: First, how did cooperation between the EU and NATO regarding hybrid threats evolved? And second, how might this development be interpreted and understood in the context of institutionalist theory? Answering both research questions may contribute to a better understanding of the nature and limits of cooperation between the EU and NATO, which is crucial for the future development of the EU Security and Defence Policy.

The analysis is conducted within the framework of new institutionalism: a new interest in the institutions and their role in European integration with the notion, that institutions matter as they can act independently and influence politics (Puchala, 1999; March and Olsen, 1984). Critics argue that institutionalism is a vague approach with several streams behind the label (Alvesson and Spicer, 2019; Abrutyn and Turner, 2011). Notably, 1) rational

choice institutionalism considers institutions as rational actors helpful for solving problems of states; 2) historical institutionalism highlights historical aspects in play for creating institutions and reflecting the issue of time in a life of institutions or path dependence models; 3) sociological institutions with a very broad understanding of what institution is and focus on the issues such as identity or behaviour (Koelble, 1995). Finally, some authors stress that next to the institution also context matters and develops the idea of “discursive institutionalism” for understating institutional context (Schmidt, 2008). For the purposes of the article, all four streams mentioned are considered complementary, rather than exclusive. All of them might provide an interesting perspective regarding rational choices, time and timing of cooperation, diversity of the institutions, or unique context in which cooperation takes place.

Regarding methods and methodology, the article may be considered an exploratory case study (Yin, 2009), which aims at exploring institutions and assessing relations in the theoretical context. As a result, it is not a completely atheoretical case study, but rather a study having an interpretative character (Lijphart, 1971) by utilising and applying selected aspects of institutionalist theory. Most of the data were gathered from internal documents produced by the EU institutions or NATO, which is having natural limits that rest in the origin of the documents and a limited means of verifying the correctness of the content. In other words, institutions rarely publish negative information critical to their activities, highlighting failures and vulnerabilities.

Every study shall be clearly defined in terms of topic, setting rational limits regarding its scope. The study is focusing on the case of the EU-NATO joint institutional cooperation in hybrid threats, with a special focus on the period between 2014 and 2022. The selection of both years is not random as it marks the Russian annexation of Crimea or violation of the territorial integrity of Ukraine in 2014 and the full-scale invasion of Ukraine in 2022: two key security events which provided important impetus to the EU-NATO cooperation. It is a natural effect that a significant security event opens the ‘window of opportunity’ to intensify cooperation (Kingdon, 1984). Hence, it is legitimate to expect that this effect opened a new chapter for interinstitutional cooperation and agenda development in the selected period in hybrid threats.

Regarding the area of “hybrid threats”, three other limits are present. First, both the EU and NATO developed over time their own policies regarding hybrid threats. These are not assessed in the article, except for joint undertakings. Second, in the general wisdom, the issues related to

cybersecurity, cybercrime, or cyberspace in general, are considered part of hybrid threats and hybrid warfare. However, this is not the case for the EU, where cybersecurity is merely a separate agenda in which some cooperation occurred between the EU and NATO. Due to the extensive scope of cybersecurity cooperation, this stream is not covered in this article but may be found in different resources (see, for example, Carrapico and Barrinha, 2017; Barrinha, 2018; Boeke, 2018; Staszczyk, 2019). Finally, there are some limits related to institutions. The article employs the prism provided by institutionalism, understanding institutions as independent actors pursuing their own interests. The varying and often divergent role of the EU member states is not assessed in this article, despite offering a very promising topic for another study. Instead, the article focuses mainly on the positions of the European Council, Council of the EU, European Commission, or the EU Hybrid Fusion Cell.

It is not the purpose of this article to define and distinguish between various streams of institutionalism. Instead, all four forms are taken as complementary, which allows them to highlight different aspects of cooperation and interpret cooperation between the EU and NATO in different ways by employing rational choice logically, path dependency and time-related factors, a broader understanding of institutions, or the importance of context for institutions. As a result, the institutionalist perspective is not rigorously applied, but provides a significant source of inspiration for analysis involving institutional interactions within a very specific policy area that fits into the ongoing debate about EU-NATO relations.

The article is divided into three parts. The first part presents a short literature overview with the aim of introducing existing research in the area. The second part is dedicated to the introduction and analysis of the initial steps taken by the EU and NATO cooperation in the area of hybrid threats. The third chapter is assessing mutual cooperation in the selected areas which are dealt with in the individual subchapters, dedicated to capacity building, strategic communication, crisis management and civil preparedness, counterterrorism, weapons of mass destruction, and civil protection. The final chapter assesses most actual development in the context of Covid-19 and the Russian aggression against Ukraine.

1 LITERATURE OVERVIEW

There is plenty of research dedicated to various aspects of the security policies of both the EU and NATO, and cooperation between both actors is

not exception. The mutual relationship was analysed in the historic and strategic context already before the EU developed its security and defence dimension (See for example Evera, 1991; Menon, 1995; Andreson, 1995; Keohane, Nye, and Hoffman, 1997; Schake, 1998; Sperling and Kirchner, 1998 or Kay, 1998). Since the EU officially launched its European Security and Defence Policy in 1999, the number of studies dedicated to joint activities significantly increased and covered various areas. While some authors continued to focus on more general aspects of cooperation in the context of the international environment and global challenges (Hofmann, 2009; Howorth and Keeler, 2003; Smith, 2011; Reichard, 2016; Cornish and Edwards, 2001; Koops, 2020), others were focusing on specific areas of joint cooperation. This is notably the area of EU and NATO enlargement (Kydd, 2001), focus on Western Balkans (Antonenko, 1999; Bechev, 2006), the issue of crisis management (Missiroli, 2002; Muletti, 2023) or relations with selected countries, such as Germany (Hyde-Price, 2000), paradoxes of Sweden and Finland (Forsberg and Vaahtoranta, 2001). However, the dominant focus was naturally on the EU-NATO relations with the USA and Canada (Aldrich, 2004; Sloan, 2005; Mérand, 2006; Filipec, 2017), Turkey (Missiroli, 2002; Güvenç and Özel, 2017) or Russia (Light and White, 2000; Diesen, 2016; Rontoyanni, 2002), where Ukraine played a central role already before the 2014 annexation of Crimea.

In recent years, a debate over joint cooperation between the EU and NATO crystallised over several issues including post-Brexit settlement (Martill and Sus, 2018; Ewers-Peters, 2021; Cladi and Locatelli, 2020; Shea 2020; Svedsen 2019) or *modus vivendi* between both actors (Howorth, 2019; Duke 2019; Aggestam and Hyde-Price, 2019; Schreer, 2019; Ringsmose and Webber, 2020; Perrin, 2022). Analysis in specific areas is still quite rare, with valuable exceptions (Lété, 2019; Poptchev, 2020; Giuglietti, 2022). In the context of existing research literature, it is the ambition of this article will provide a deeper understanding of EU-NATO cooperation in the area of hybrid threats.

2 INITIAL STEPS AND INTER-INSTITUTIONAL COOPERATION

The Russian annexation of Crimea in 2014 and the violation of the territorial integrity of Ukraine led to a reconsideration of EU policies. Due to the divergent interests of the member states and the sometimes also hesitant attitudes of the EU institutions, the changes occurred tentatively (Heath, 2017). Regarding NATO, the most important milestone is the Joint EU-NATO Declaration of 2016 signed in Warsaw between the President of

the European Council, the President of the European Commission, and the NATO Secretary General. The Joint declaration identifies in total seven areas of cooperation, including hybrid threats with the aim to: *“boost our ability to counter hybrid threats, including by bolstering resilience, working together on analysis, prevention, and early detection, through timely information sharing and, to the extent possible, intelligence sharing between staffs; and cooperating on strategic communication and response”* (European Council, 2016). This declaration is the first document outlining areas for cooperation described as “strategic priorities” and anticipates mechanism for implementation, allocation of responsible staff, and creation of a mechanism for cooperation. From the institutionalist perspective, it is necessary to mention the context, which stood behind the joint declaration. Unsurprisingly, it was mainly the hybrid character of the Russian aggression against Ukraine (Rusnáková, 2017), which resulted in the illegal annexation of Crimea, providing new momentum for close cooperation between the two actors and opening a new “window of opportunity” (Kingdon, 1984) in the security area to develop mutual relations. However, the beginning was not smooth as, for example, some experts criticized Federica Mogherini for being soft on addressing disinformation and propaganda, or the attitude towards Russia in general (Heath, 2017)

The first progress report (2017) reflecting the implementation of the joint declaration stresses the importance of cooperation and mentions ten proposals related to hybrid threats. The lines mention cooperation on activities of the European Centre of Excellence for Countering Hybrid Threats in Helsinki, better situational awareness to counter hybrid threats more effectively, the establishment of the EU Hybrid Fusion Cell (and its interaction with the newly established NATO Hybrid Analysis Cell). The report mentions that a Joint Assessment of Hybrid Threats was conducted and both actors were working on joint communication in delivering coordinated messages, aimed especially at being united regarding Eastern partners or Western Balkan. Furthermore, both institutions noted that they exchanged information on resilience requirements and supportive measures that can better support individual nations (NATO, 2017). To sum up, the first lines of cooperation were established. From 2017 until 2022 in total seven progress reports were published, summarising cooperation between the EU and NATO around hybrid threats. In this period, cooperation was created and developed within several ‘pillars’, including:

1. capacity building,
2. strategic communication,

3. crisis management and civil preparedness,
4. counterterrorism (CT),
5. weapons of mass destruction (WMD) and civil protection.

These pillars are having significant policy and institutional dimensions reflecting the existing policies of both actors and their institutional structure. However, cooperation leads also to the creation of new institutions or adaptation of existing ones, to the creation and development of new tools governed by those institutions, and the extension of cooperation to new areas over time. It is necessary to note, that pillars are overlapping. For example, an exercise simulating terrorist use of WMD or a crisis communication during the crisis management of an unexpected event). Furthermore, despite hybrid threats having significant cyber security elements, with EU-NATO cooperation, “cyber threats” and “hybrid threats” have individual policy streams and for this reason, this paper deals only with hybrid threats without a cybersecurity element, partially because of the robustness of the cybersecurity agenda.

From the institutionalist perspective, the most important aspect is inter-institutional cooperation. Regarding the hybrid threats, it is necessary to distinguish between two types (or two levels) of inter-institutional cooperation. At the top level, we have cooperation between the EU and NATO in general, which in practice means cooperation mainly between three institutions at the EU level (European Commission, Council of Ministers, and the European Parliament) together with NATO’s institutions, including North Atlantic Council, Military Committee, NATO Secretary General and its Secretariat). However, this level is dealing mainly with political issues and general directions of cooperation, which is in practise strongly determined by the will of member states, and both actors exercise less autonomy. For that reason, it is necessary to distinguish a subordinate level of cooperation which includes specific structures responsible for the technical part of the agenda and its implementation. This level is less political and might be characterized by lower control (or direct involvement of member states) as it is managed and developed mainly by institutions themselves.

Among specialised institutions is the European Centre of Excellence for Countering Hybrid Threats in Helsinki or the EU Hybrid Fusion Cell, which is part of the EU Intelligence and Situation Centre. This Hybrid Fusion Cell is closely cooperating with the NATO Hybrid Analysis Cell, which contributes to a shared and more complex situational picture. (NATO, 2017). Later, the institutions become connected also via monthly video teleconferences

and discussing possible trilateral cooperation using open-source materials (European Council, 2018). Because the experience was evaluated positively this communication link was soon extended by the EU version of the NATO Battlefield Information Collection and Exploitation Systems (BICES) (NATO, 2017). It is necessary to note, that it was just at the time when OSINT methods used by volunteers become a powerful tool to fight disinformation and propaganda (Higgins, 2021).

On 2nd October 2017, the European Centre for Excellence of Countering Hybrid Threats was officially opened during the ceremony with the personal attention of EU High Representative Frederica Mogherini and the Secretary General of NATO Mr Jens Stoltenberg, who had the company of Prime Minister of Finland Juha Sipilä and President of Finland Sauli Niinistö. The Centre serves as a network-based international hub of experts and practitioners dealing with the issue of hybrid threats. The Centre is having many functions, including the cultivation of strategic-level dialogue and consultations, the conduct of research related to hybrid threats and methods to counter them, the development of doctrine, conduct of training or connecting communities (Hybrid CoE, 2017). While the establishing memorandum was signed by representatives of 16 countries who are members of the Centre, the membership grew rapidly to 33 countries in 2023, including the USA, UK, France, Germany, and Poland among founding states and some joining later including for example Canada (2018), Turkey and Montenegro (2019), Iceland (2021) and Ireland (January 2023) (Hybrid CoE, 2023). Regarding membership, it is interesting that all the so-called “post-neutral” countries including Austria, Ireland, Finland, Sweden, and Malta are part of the centre.

From an institutionalist perspective, it is interesting that two organizations (based on the initiative of the EU) created a specialised, autonomous institution, developing activities of mutual interests and providing added value for member states, especially in information sharing and capacity building (European Commission, 2016). However, with the establishment of “Hybrid CoE”, the activities of NATO and the EU did not end (Hybrid CoE, 2020). On the opposite, instead of “problem delegation” Hybrid CoE represents a qualitatively different platform for issues that might be solved separately to direct inter-institutional cooperation between the EU and NATO. In other words, “Hybrid CoE” is an extension of existing lines of cooperation, which continues.

For example, covering inter-institutional cooperation and capacity building are staff-to-staff contacts between both organizations (EU and NATO), which are mainly on the expert level. There are several examples

of joint cooperation: in September 2017 there was a special workshop aimed at resilience, fostering information exchange, and developing ideas over critical infrastructure protection. However, it is important to note that staff-to-staff contacts go beyond workshops as they have regular character and support NATO Defence Planning Process via developing NATO's baseline requirements for national resilience. To be more specific, EU staff participated in NATO's advisory mission in Romania to foster resilience there (NATO, 2017). Cooperation in this area is beneficial for both organizations as it put a much more complex look at the NATO Defence Planning Process and EU Capacity Development Plan (NATO, 2017). This cooperation further developed in 2018 when a staff-to-staff meeting in May 2018 contributed to the inclusion of resilience and hybrid threats in the respective defence planning process and capacity development (European Council, 2018). Later on, cooperation contributed to the development of the revised EU Capability Development Priorities, agreed upon in June 2018 (European Defense Agency, 2018).

It is evident that an effective response to hybrid threats is a matter of skills and capacities, which is another mutual interest of both organisations, and thus a pillar of cooperation. Capacity building together with strategic communication, crisis management, civil preparedness, the fight against terrorism or the use of WMDs, and civil protection are the most relevant activities for the EU and NATO to cooperate under the umbrella of hybrid threats. For that reason, this agenda is explored in the following section.

3 AGENDA DEVELOPMENT

As the previous part shows, the EU and NATO established inter-institutional cooperation in various fields and developed new communication channels. This would be impossible without adapting capabilities and training them in the relevant areas related to hybrid threats. For that reason, the second part is to assess capacity building measures, the area of crisis communication, crisis management, civil preparedness, counterterrorism, or the use of WMD.

3.1 Capacity Building

Capacity building from the institutional perspective might be understood in two ways. First, the capacity building of the organisation is aimed at the development of skills and competencies of its employees,

channels of communication, extension pro programmes, etc. And second, the external dimension of capacity building is provided as the added value of the organization to its members or third parties. Regarding the first understanding of their capacity building, both organisations adapted their internal structures and communication channels to effectively detect and assess hybrid threats in their decision-making. Next to it, both institutions started to cooperate to ensure the same level of data quality. In this regard, staff exchanges were established between two new emerging bodies: EU Hybrid Fusion Cell and NATO Hybrid Analysis Branch. Soon, staff-to-staff exchanges were stable monthly (NATO, 2020). Since the initial stage in 2016, the EU and NATO have conducted Joint Intelligence Assessments on a hybrid topic (NATO, 2020). This assessment was followed by the “Parallel and Coordinated Assessment” and soon this tool is prepared on a relatively frequent basis (several documents per year) to ensure that both organisations are working with the same vision of the landscape, for example, in the area of terrorism, hybrid tactics, and strategies, or geographically in the area of the Southern and South-Eastern neighbourhood (NATO, 2019).

EU Hybrid Fusion Cell and NATO Hybrid Analysis Branch are two bodies, which were determined by their functional logic for enhanced cooperation. The first body was established in 2016 as part of the EU Intelligence and Situation Centre, which is part of the European External Action Service. The task of the Fusion Cell is to analyse external aspects of the hybrid threats, which are having an impact on the EU and its neighbourhood. It might be compared to a “probe”, which is providing input into the EU decision-making process in the areas of risk assessment and hybrid threats analysis (European Commission, 2016). Its counterpart – NATO Hybrid Analysis Branch – is a part of the Joint Intelligence and Security Division which helps to improve situational awareness and helps to supply information to the decision-making process of the organisation (Petrescu, 2022). Due to the lack of insight, it is hard to evaluate the effects of cooperation. However, from the theoretical perspective, it leads to a shared understanding of hybrid threats, their scope, and their nature, which is beneficial for both organisations due to shared information background.

Staff-to-staff meetings are vital for the capacity development of both institutions, especially regarding staff-to-staff training, seminars, and workshops to enhance the understanding of the hybrid threats. One of the occasions was a high-level retreat hosted by the Centre of Excellence in March 2018 which resulted in formulated recommendations for EU-NATO cooperation enhancement including 1) early warning and situation

awareness, 2) strategic communication and messaging, 3) crisis response, 4) resilience and 5) cyber-defence and energy security. However, it is necessary to note that in 2018 there was also a scenario-based workshop "Harbour Protection Under Hybrid Threat Conditions". Other workshops in September 2018 were aimed at methodology exchange and women, peace and security. Particular attention was paid to gender aspects in early warning systems and analysis to improve situational awareness and assess the practices of both organizations (European Council, 2018). The harbour protection exercise was repeated in October 2019 and another exercise covered disruptive technologies in hybrid threats (February 2020). The exercise was conducted under the Hybrid Warfare and Future Technologies Project which was jointly organised by the Hybrid CoE, Community of Interest Strategy and Defence and StratByrd Consulting (Hybrid CoE, 2020).

Both institutions, the EU Hybrid Fusion Cell and NATO Hybrid Analytical Branch led an intensive discussion on how to develop and use the capacities of both organisations, especially through exchanging publicly available information. Workshops and seminars are usually open also to experts from the member states. In other words, in addition to the development of the own capacity development, mutual cooperation is aimed also at the development of the capacities of member states, which contribute to a shared understanding of hybrid threats in all relevant areas. Among the most significant is the area of communication.

3.2 Strategic Communication

Strategic communication is from the early beginning a key area for dealing with hybrid threats and also here both key actors have relevant bodies for cooperation. Regarding the EU it is especially "StratCom Task Force East" which is based under the umbrella of the External Action Service and in NATO, it is the Strategic Communications Centre of Excellence located in Riga. EU and NATO strategic communication teams cooperate to deliver coordinated messages. Since 2016 this cooperation has focused on Western Balkan (NATO, 2017). However, later extended to new areas. In 2017, consultations on strategic communications covered Ukraine, Bosnia and Herzegovina, the Republic of Moldova, and Georgia (NATO, 2017). Mentioned bodies of EU and NATO are for example working together on a research project dedicated to regional media environment assessment and disinformation tendencies in the region or co-hosted several visitor groups from the region, including young political party leaders, journalists, or government communication

specialists (NATO, 2019). Later on, StratCom Task Force East together with the Centre of Excellence was working on training materials and developed joint simulations on disinformation attacks and appropriate responses to them or prepared awareness-raising activities. In this regard, the Centre of Excellence provided inputs for the “Anatomy of Disinformation” campaign.

Strategic communication continued to cover the most important areas of mutual interest and soon annual report concluded, that both organizations enjoyed frequent engagement between EU and NATO spokespersons, strategic communication counterparts, and the EU Strategic Communication Task Forces together with the NATO Strategic Communications Centre of Excellence in Riga (European Council, 2018). A considerable part of the effort was dedicated to crisis communication, which is inseparable from crisis management and public communication on security threats.

Regarding communication, disinformation, and propaganda belongs to the key agenda of NATO and the EU. In 2018 the EU adopted the Action Plan against Disinformation (European Commission, 2018), which was in its development phase and subject of consultations. Approximately at the same time, the EU staff was working on the development of NATO’s Information Environment Assessment capability, including data analyses and assessment. This was developed in the context of a NATO exercise entitled “Trident Juncture 18”, which brought together over 50 thousand soldiers, 250 aircrafts, 65 ships, and 10 thousand vehicles to Norway (Forsvaret, 2021). The Trident Juncture exercise was followed by another exercise in November 2018 and during the EU HEX-ML 18 and NATO PACE 18 exercises (Council of the European Union, 2018), both organisations tried staff-to-staff cooperation regarding strategic communications (NATO, 2019).

The EU Stratcom Task Force East and the NATO Stratcom Centre of Excellence in Riga focused mainly on research on pro-Kremlin narratives, however, the analysis covered also the impact of Russian media channels including Russia Today or Sputnik. Institutions were also developing plans for further cooperation within the Eastern Partnership countries to help them with the training of professionals. As there is much disinformation about NATO within pro-Kremlin narratives, the topic was developed within the East Task Force database of disinformation called “EUvsDisinfo.eu” (NATO, 2019). Out of 14931 recorded disinformation articles in the database, NATO is the target of 1686 cases, which is roughly 11 % (as of January 2023) (EUvsDisinfo, 2023). Currently, both institutions conducted steps to improve ways how to strengthen mutual alerting on disinformation incidents or hostile information activities, including capacities for early

detection, analysis, and exposure to disinformation. Mutual learning in strategic communication is a positive step forward, however, addressing hybrid threats requires complex communication strategies and coordination among actors. The main challenge might be the transfer of information from the EU/NATO level to the member states and then to the citizens. A very valuable might be an analysis of these communication channels, to reveal flaws and propose improvements for a smooth and non-conflicting flow of information.

3.3 Crisis Management and Civil Preparedness

Certainly, one of the most promising areas of cooperation between the EU and NATO is crisis management or crisis response. It is a domain in which especially NATO is having strong experience (Prior, 2017). In order to improve EU resilience to hybrid threats, NATO shared with the EU staff the guidance on the Resilience of National and Cross-Border Energy Networks and its guidance for incidents, including cases of mass casualties (European Council 2018). Moreover, NATO invited EU staff to participate in the NATO Energy Security Roundtable, which took place in December 2017 in Brussels and was focusing on the Eastern European region (NATO Energy Security Center of Excellence, 2017). EU staff provided valuable input on energy issues to the NATO Industrial Resources and Communications Services Group in 2018 (European Council, 2018). Furthermore, NATO and EU resilience experts met in June 2018 to discuss the methodology for mapping activities related to NATO's Resilience Baselines and EU prevention and Preparedness work streams. (European Council, 2018). Focus on energy infrastructure remained on the agenda also in 2019 and 2020 and is belonging to one of the most salient and persistent priorities (Tichý, 2016; Keypour, 2022). The issue of critical energy infrastructure was debated at the EU Consultation Forum for Sustainable Energy in the Defence and Security Sector, and NATO staff provided regular briefings to the European Defence Agency (Energy and Environment Working Group) (NATO, 2021). As demonstrated above, in this area both actors are also having specialized institutions creating networks and partnerships.

In 2019 there were several cross-briefings, including one on EU crisis response mechanisms, NATO Counter Hybrid Support Teams, the European Medical Corps, and capacity development under the Civil protection mechanism's new RescEU proposal (European Commission, 2017). At the same time, the European Emergency Response Coordination Centre,

together with the NATO Euro Atlantic Disaster Response and Coordination Centre, shared their procedures, systems, and focus. The development spread also to European Emergency Response Coordination Centre, which declared its preparedness to host a NATO liaison cell which shall ensure closer cooperation (NATO, 2019). In other words, the EU and NATO are working closely together in information exchange, including approaches to civil protection, which is also spreading to very specific areas. For example, in the report from 2020, it is mentioned that both organizations improved cooperation regarding the alert system, notably between EU Rapid Alert System and NATO Staff. In June 2019 already a third meeting of experts was organized, to present capacities and views on how to deal with disinformation (NATO, 2020) and this cooperation even intensified during the covid-19 pandemic which provided an important “sharp stress test” for existing cooperation and communication channels.

It is necessary to mention that resilience covers many specific areas. For example, on the mutual agenda between both actors, a special issue within resilience and civil preparedness was the issue of 5G networks. Another such specific area was direct investment screening methodologies, debated at the staff meeting (NATO, 2020). It is important to note that regarding direct investment screening methodologies, it is the EU that has a rich experience (Filipec, 2018) and the significance of this area increased with new rounds of sanctions against Russia.

As the artificially created migration crisis on the Polish-Belarus borders demonstrated, hybrid threats might have various characteristics. A positively evaluated might be the EU Integrated Resolve 2022: Parallel and Coordinated Exercise. In 2022, the exercise focused on the comprehensive management of fast-paced transboundary hybrid crisis, in the internal and external dimensions (EEAS 2022). Exercises are necessary to develop skills and test processes; however, the quality of exercises strongly depends on the ability to reflect reality. In fact, crises and their management are not always happening under ideal conditions. For example, when materials and facilities are prepared, personnel are available, electricity is on, communication between units is working well, and everything runs according to the schedule. For that reason, it is positive that both EU and NATO experts have enough practical experience. However, much more can be done in civil preparedness as some states lack policies aimed at citizens to build resilience in the area of hybrid threats.

3.4 Counter Terrorism

Since 1975 European countries are cooperating in the fight against terrorism, first under the so-called TREVI platform. Soon, the EU created a set of measures and tools, which are comparable to complex counterterrorism policy (Bossong, 2012). Cooperation with NATO on terrorism is another perspective area, which was identified in 2018 as a promising space for cooperation in the field of hybrid threats. In the same year, NATO staff visited the Europol Headquarters (January 2018). Staff discussed CBRN terrorism risk and the issue of Improvised Explosive Devices. NATO was invited to participate in Europol meetings on explosive precursors (European Council, 2018). Joint cooperation was developed positively in 2018 in three ways: First, staff level contacts were strengthened between NATO, EU and the European Counter Terrorism Centre operating under Europol; second, cross-participation in respective EU and NATO working groups was enhanced and third, staff of both organisations participated in events related to counter-terrorism, including global Counter-terrorism Forum, events organised by the African Union or the Global Coalition to Defeat ISIS.

Regarding the work of the Global Coalition to Defeat ISIS, staff established regular contacts for strategic communication. A special event was organised between the EU's Working Party on Terrorism and NATO's Political Committee to discuss strengthening resilience against terrorism. An initiative was organised under the Romanian presidency of the EU which replicated the format launched in 2018 when the presidency of the EU was held by Bulgaria and the event was again repeated in 2019 under the Finnish presidency, focusing mainly on countering Unmanned Aerial Systems (UAS) and later the focus was shifted on battlefield evidence (NATO, 2020) and terrorist misuse of technologies (2021). Slovenian presidency focused on gender issues of terrorism (NATO, 2022)

The agenda of UAS was developed also in 2021 when the staff of both organisations worked on joint projects, including participation in the NATO Counter Unmanned Aircraft Systems (C-UAS) working group and the virtual counter-UAS workshop which was organised by the European Commission in March 2021. Staff worked also on the NATO Drone Single Local Air Picture project, and exchanges between European Security and Defence College and NATO were established (NATO, 2022).

ISIS played an important role in the EU-NATO agenda on hybrid threats, especially in the area of communication. The European External Action Service (or its StratCom Task Force South) cooperated with NATO Public

Diplomacy Division to combat ISIS activities online. The staff participated in the Global Coalition against Daesh Communication Working Group and provided updates to its Communications Cell. The EU institutions (Commission and Parliament) were informed by NATO officials about the development, and EEAS was invited to brief NATO staff about its work (NATO, 2020). Invitations to NATO projects continued also in late 2021 and 2022 when EU staff observed Martial Vision Technical Exploitation Seminar and Battlefield Evidence Training organised by the NATO Stability Policing Centre of Excellence in June 2022, which was prepared for partners in the Middle East and North Africa (NATO, 2022).

Cooperation between the EU and NATO in terrorism is limited by the fact, that counter-terrorism policies are mainly created and implemented at the level of member states. NATO is primarily a military organisation, which is having its relevance in providing expertise in tactics, special forces, weapons, or equipment and covering aspects of communication. Due to developed cooperation in home and justice affairs, the EU is slightly closer to the states. Here, Europol might serve well as a natural hub for information exchange and transfer of expertise and that is why strengthening this institution might be a vital interest for EU, NATO and member states.

3.5 WMD Use and Civil Protection

Weapons of mass destruction is an area in which both organizations have significant achievements, but slightly different attitudes related to the different power of both actors (EU as soft power promoting non-proliferation and disarmament). Under the umbrella of newly established cooperation, there was a special workshop organized on EU-NATO cooperation in the area of civil protection, was organized in February 2019. The approaches of both organisations were tested in the hybrid threat scenario in a tabletop exercise with a special focus on medical preparedness (NATO, 2019). This exercise followed a successful EU MODEX medical exercise in Romania, which took place in October 2018. In Romania, EU staff cooperated with NATO Euro-Atlantic Disaster Response Coordination Centre. The area of medical preparedness is certainly a promising one for bringing together civilian (dominantly EU) and military (dominantly NATO) expertise. EU experts were invited to the NATO Chief of Military Medical Services Committee and NATO and the staff is engaged in structured cross-briefings and information exchange to evaluate potential synergies between organisations and their approaches,

especially regarding stockpiling medical countermeasures and medical evacuation (NATO, 2019).

In May 2019 a special expert-level workshop on preparedness and crisis response was held, mainly dedicated to Chemical, Biological, Radiological, and nuclear resilience. Just a few months before the outbreak of the Covid-19 pandemic, the scenario simulated a biological attack against a state, which is a member of both the EU and NATO. The workshop helped to identify policies, plans, and procedures to enhance Chemical, Biological, Radiological, and Nuclear Preparedness, including the response mechanism (NATO, 2019).

A special workshop was organized in July 2019 entitled “Resilience and cross-sectoral cooperation in Responding to CBRN Threats with the hybrid element” and later in January 2020 another workshop on “Building Capacities, Strengthening Resilience: EU and NATO Partnerships for Addressing CBRN Risk and Threats” took place (NATO, 2020). In the area, biannual staff talks were established to debate the most salient CBRN issues, and EU staff was invited to brief NATO Committee on Proliferation on activities and complementary approaches (NATO, 2020). With the outbreak of the pandemic in 2020 the CBRN training was changed in the context of Covid-19.

The CBRN area shows clear limits which are like the fight against terrorism and rests in both actors. However, it is evident, that non-proliferation plays an important role and is a shared interest of both actors. Despite the fact that the EU has extensive regulation of dual-use goods and materials to enhance its export controls, proliferation networks are more sophisticated than ever before. For that reason, deeper cooperation with “watchdog” organisations, including the Organisation for the Prohibition of Chemical Weapons (OPCW), the International Atomic Energy Agency (IAEA), or The Comprehensive Nuclear Test-Ban Treaty Organization (CTBTO) might be further developed at the multilateral level.

4 COVID-19 AND RUSSIAN AGGRESSION

The outbreak of pandemics had a significant impact on the EU and NATO members. The phenomenon had a multidimensional character with implications for strategic communication and fights against disinformation, crisis management, medical emergency, etc. Many areas mentioned above were touched on, and naturally existing structures were used to deal with the impact of pandemics. From a certain perspective, the outbreak of pandemics

represented a 'shape stress test' of existing cooperation and communication channels and a unique opportunity to verify the effectiveness of cooperation which is impossible to simulate.²

With an increasing amount of disinformation about covid-19, the cooperation between EU and NATO staff intensified. Both institutions shared an information environment assessment and had weekly calls with international partners, including the G7 rapid response mechanism. NATO shared with the EU its NATO COVID-19 Strategic Communication Framework, the Covid-19 Integrated Communications Plan, and the selection of proactive communication products, prepared weekly basis (NATO, 2020). On the other hand, the EU (resp. its EEAS) was invited to brief the NATO Crisis Management Task Force on the disinformation impact of COVID-19 and attended the NATO StratCom Working Group.

The outbreak of the pandemic highlighted the importance of low-probability-high-impact events, having implications for supply and the utility of the recently established rescue mechanism. After the outbreak of pandemics, the EU and NATO had biweekly coordinated meetings of medical advisors together with military staff, which provided military expertise, especially in the context of the MEDEVAC project (NATO, 2020). And biweekly virtual meetings were established between NATO's Euro-Atlantic Disaster Response Coordination Centre (EADRCC) and the Emergency Response Coordination Centre (ERCC) of the EU to ensure mutual situational awareness and prevent duplication.

The EEAS and NATO commissioned a study proposal from the NATO Strategic Communication Centre of Excellence on disinformation in democracies aimed at strengthening cognitive and societal resilience against disinformation. The EEAS East StratCom together with StratCom CoE (NATO) prepared a training on disinformation attacks. In order to enhance resilience, the Commission provided information to NATO's Civil Emergency Planning Committee (CEPC) about the Eu response to Covid-19 and NATO shared with the EEAS and the Commission its baseline requirements for Resilience in November 2020. Covid-19 provided excellent inspiration for training, including the pandemic wargame 'Resilient Response 20' organized by the Multinational Medical Coordination Centre/European Medical Command (MMCC/EMC and hybrid CoE. Next to this exercise, there was a field exercise in North Macedonia in September 2021 aimed at consequence management (NATO, 2021).

² The key problem is that simulations are usually planned, time limited and conducted under ideal conditions without multiplication of the negative effects.

As of January 2022, following the visitation of the NATO Secretary General to the College of Commissioners in December 2020, both EU and NATO started so-called “Structured Dialogue on Resilience”, hopefully bringing more synergy in the EU and NATO activities regarding resilience. This is an important issue, especially in the context of the Strategic Compass for Security of the EU, the upcoming EU Critical Entities Resilience Directive, and other tools of the EU and NATO, including Baseline Requirements for National Resilience (NATO, 2021).

The resilience agenda got again new momentum after the Russian aggression against Ukraine, which led to an intensive briefing between the EU and NATO (especially the NATO Civil Emergency Planning Committee and the Politico-Military group of the EU) (NATO, 2022). Also, cooperation in the area of CBRN defence was intensified by the civil implications of the Russian aggression. At the November 2021 Annual Conference, the NATO Joint CBRN Defence Centre of Excellence explored various aspects of possible interactions between the NATO and the EU. Soon, a special workshop on CBRN consequence management followed.

As the war provides a vital topic and conditions for disinformation and propaganda, EU and NATO staff intensified interaction on Strategic Communication and come up with proposals for broader cooperation. Staff cooperated in information exchange about the information environment on the Russian invasion of Ukraine and ensured that they work with relevant information. Situational awareness of hostile activities also included the EU Rapid Alert System. Both staff participated in tracking Chinese communication activities, which were aimed at providing support to Russia.

In this difficult environment caused by war, the NATO-led “Information Environment Assessment Tiger Team” promoted close cooperation and coordination, including capacity development, and both organizations participated in the G7 Rapid Response Mechanism. Both organisations participated in the project “Disinformation in Democracies: improving Societal Resilience to Disinformation”, which was aimed at case studies from seven countries (NATO, 2022). Regarding communication, the EU and NATO organs (StratCom CoE and European CoE for Countering Hybrid Threats) exchanged knowledge on tactics identification, techniques, and procedures of hostile actors within the information sphere. Moreover, the EU and NATO continued the coordination of public communication, including mutual amplification of digital content, common messaging, and public diplomacy (NATO, 2022).

The Russian aggression against Ukraine with the increasing internationalisation of the conflict and adverse effects represents another

complex and large-scale challenge for cooperation between the EU and NATO. The event in the scope is comparable with the pandemic, but potentially unprecedented consequences in the case of escalation. Most probably, the Russo-Ukrainian war will belong to the most important conflicts in the 21st century, influencing its character in terms of a fight between democratic and non-democratic forces. As pointed out by Timothy Snyder in his essay written for Foreign Affairs, the future of Europe is being (again) decided on the eastern battlefields (Snyder, 2022). Both, defeating Russia in Ukraine or its victory there, will have significant consequences for the security of Europe and the nature of hybrid threats. For that reason, cooperation between the EU and NATO in this area is vital for the security of Europe. However, it is mainly up to the states how much they will enjoy access to the bodies, tools, and expertise both actors develop in cooperation.

CONCLUSION

The main aim of this article was to assess cooperation between the EU and NATO in hybrid threats. For this reason, two research questions were formulated. First, how did cooperation between the EU and NATO regarding hybrid threats evolved?

Regarding the cooperation between the EU and NATO in the field of hybrid threats, the laic public may have an impression attributed to Oscar Wilde that “bureaucracy is expanding to meet the needs of expanding bureaucracy” (Quotes.pub, 2023). Indeed, the EU and NATO expanded their cooperation into several areas linked to hybrid threats, which since 2014 experienced a boost caused by external factors, mainly the Covid-19 pandemic and the 2022 Russian full-scale invasion of Ukraine. However, in this case, cooperation is based merely on the extension of links and adaptation of existing structures for the benefit of both organisations and their member states. Cooperation is vital for connecting the civilian background of the EU with the military perspectives of NATO: the two elements, which are key for addressing hybridity. Moreover, it is evident that the EU and NATO developed mechanisms that allow similar perceptions of the threats (e. g., legislative inputs, joint threat assessment, staff consultations, and exchanges) and coordinated responses (mastered in joint exercises). Still, it is up to the member states how much they will enjoy access to the bodies, tools, and expertise both actors developed in cooperation to strengthen and optimize their own national capacities.

The second research question was focusing on how this development might be interpreted and understood in the context of institutionalist theory. The character and extent of activities proven, that institutions matter, and when necessary, they adapt existing structures, extend links or create new bodies in the areas evaluated as beneficial for cooperation. From many perspectives, it is a rational choice leading to innovation within organisations and adaptation to a new environment, and with it comes enhanced justification of institutional existence. This model of course follows existing institutional background and is built on existing experience. In this regard, “patch dependency” is creating certain limits. From the perspective of historical institutionalism, it is not surprising that both organisations enhanced their activities after the deteriorating situation in Ukraine in 2014 and again after the outbreak of global pandemics in 2020, and (most probably) again during the full-scale invasion of Ukraine in 2022. External events shaped the window of opportunity to create and adapt the activities of both organisations which might be relevantly analysed in the context of discursive institutionalism.

From the macro-level perspective, organizations created a very dense network of specialised institutions (in the broader sense) or specialized bodies, with varying autonomy and levels of formality, varying memberships, tasks, and aims. Even for researchers and insiders, it is sometimes hard to see the full picture of “who does what” which raises questions about the effectiveness of information flows, information assessment, and processes when it comes to the benefit of member states. The positive is that various points of contact and points of convergence exist in the international milieu and it is up to the administration of member states and decision-making authorities how to optimize the flow of information and benefits of participation in both structures and the dense institutional environment between.

This study has its intrinsic limits as it stands mainly on the official EU and NATO documents and published information which, in line with institutionalist theory, presents positive information about cooperation and achievements. On the other side, the failures and not developed potential of cooperation are hidden, and their uncovering will probably require an insider perspective, which might be developed in a policy paper with some proposals for further strengthening. For sure, fast developing security environment will provide many incentives for doing it.

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