

A large, stylized compass rose logo in a lighter shade of blue, positioned in the upper left quadrant of the cover. It features four main points and four secondary points, with circular arcs indicating the cardinal directions.

Building Security,
Fostering Unity,
Sharing Values –

Bulgaria
in NATO
for 20 Years

St. Kliment Ohridski University Press

BUILDING SECURITY,
FOSTERING UNITY, SHARING VALUES –
BULGARIA IN NATO FOR 20 YEARS

20 ГОДИНИ БЪЛГАРИЯ В НАТО –
ИЗГРАЖДАМЕ СИГУРНОСТ, НАСЪРЧАВАМЕ
ЕДИНСТВОТО, СПОДЕЛЯМЕ ЦЕННОСТИ



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*Academic reviewers: Prof. Habil. Dr. Tatyana Dronzina
and Assoc. Prof. Dr. Iskren Ivanov*

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и доц. д-р Искрен Иванов*

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<p>Борис Костов</p>	<p>Доктор от СУ „Свети Климент Охридски“ и магистър по международни отношения от Манчестърски Университет, Великобритания. Участва в Програма за обучение по иновативни методи на преподаване – Център за развитие на учебни програми, Централноевропейски Университет и специализира политология в Нов университет за социални изследвания (New School for Social Research), САЩ, септември 1996 – юни 1997. „Жан Моне“ лектор – Модул „Обща външна и отбранителна политика на ЕС“. Участва също така в Програма „Жан Моне – модул“ към ГД „Образование и култура“ Европейска Комисия, (2005 –2008). Неговите интереси са в сферата на Теория на международните отношения, изследвания на сигурността и Европейска политическа интеграция</p>
<p>Борислав Банков</p>	<p>Борислав Банков е специалист в сферата на сигурността и отбраната с фокус върху развитието на институционалния капацитет и създаването на партньорства. От февруари 2022 г. ръководи участието на Институт GATE (част от СУ Св. Климент Охридски) в ускорителя на НАТО за технологии с двойна употреба (т.нар. DIANA). До януари 2022 г. работи в Кабинета на помощник-генералния секретар на НАТО по нововъзникващите предизвикателства пред сигурността. Предишният му опит включва Дирекцията за развитие на оперативни способности на Европол, Кабинета на генералния секретар на НАТО и мрежата Европа Директно, информационната платформа на ЕС.</p>

<p>Димитър Ганев</p>	<p>Димитър Ганев е роден във Варна през 1986 г. Завършва IV Френска езикова гимназия „Фредерик Жолио Кюри“ в родния си град. Продължава образованието си в СУ „Св. Климент Охридски“ в бакалавърската програма на специалност „Политология“. Завършил е магистратура по „Политически мениджмънт“ в същия университет. Зачислен е за редовен докторант в катедра „Политология“ на СУ „Св. Климент Охридски“ през 2012 г., а през 2016 г. придобива докторска степен. Темата на дисертацията му е: „Политически и институционални фактори при изготвяне и приемане на българската конституция от 1991 г.“. На базата на неговия дисертационен труд излиза и първата му книга „Пътят към конституцията“. През 2024 г. публикува втората си книга под заглавието „Българската политическа почва. Пластовете на националната политическа култура“ посветена на българската политическа култура. Автор е и на редица други научни публикации. От 2015 г. е хоноруван преподавател по политология в Софийски университет „Св. Климент Охридски“, а от април 2020 г. Димитър Ганев е главен асистент в катедра „Политология“ на СУ по направление „Модерни политически системи и институции“. Член е на Академичния съвет на СУ от 2023 г. От 2011 г. до 2016 г. Димитър Ганев работи като политолог в социологическа агенция „Галъп интернешънъл“, а от 2016 г. е съосновател на Изследователски център „Тренд“, където работи като изследовател и до днес.</p>
<p>Елена Поптодорова</p>	<p>Елена Поптодорова е член-учредител на Атлантическия клуб в България, където е вицепрезидент, директор по евро-атлантическите въпроси и проект мениджър на националната програма „На три морета“. Тя е вицепрезидент на Асоциацията на Атлантическия договор (АТА) и два пъти е служила като посланик на Република България в САЩ (от 2002 – 2008 г. и от 2010 – 2016 г.). През 1975 г. Елена Поптодорова се присъединява към българското Министерство на външните работи (МВНР), където започва като 3-и секретар и минава през длъжностите на министър-съветник в секретариата, в Държавния протокол, в кабинета на министъра и в дирекциите за ООН и за разоръжаване, до 1990 г., когато е избрана за народен представител в българското Народно събрание. От 1987 – 1990 г. е пълномощен министър в Посолството на Република България в Италия и генерален консул на Република Сан Марино. Преди първия си мандат като посланик на България в САЩ е говорител на МВНР и директор на дирекция „Международни организации и права на човека“. В периода 2008 – 2009 г. Елена е специален посланик за черноморския регион в министерството. Преди второто си назначаване във Вашингтон посланик Поптодорова е директор на дирекция „Политика за сигурността“ в Министерството на външните работи – длъжност, която заема за една година от 1 август 2009 г. Елена получава бакалавърска и магистърска степен по английска и италианска филология в Софийски университет „Св. Климент Охридски“, след което прави следдипломна квалификация по международни отношения в Университета за национално и световно стопанство в София. По-късно специализира в Leeds University, Англия, и University of Siena, Италия.</p>

<p>Елена Симеонова</p>	<p>Д-р Елена Симеонова е доцент по емпиричен политически анализ и политически риск в Катедра „Политология“ на УНСС. Завършила е специалност „Международни отношения“ на УНСС (1996). Притежава магистърска степен по „Финанси“ и докторска степен по „Политология“.</p> <p>Специализирала е в Гърция (1997 г.), Дания (2002 г.), Швеция (2003 г., 2005 г.) и САЩ (2008, 2009) в областта на разрешаването на конфликти, управлението на международни и корпоративни кризи, управление на проекти и американска политика на сигурност.</p> <p>Работила е като експерт по осъществявани в България проекти на: Програмата за развитие на ООН (1999-2002); Световната банка (2000); Департамента на ООН по икономически и социални въпроси (2003-2005).</p> <p>Има публикации на български и английски език в областта на: анализа на политическия риск; управлението на кризи; оценка на социалното въздействие; разработването и управлението на проекти.</p>
<p>Евелина Стайкова</p>	<p>Евелина Стайкова е доктор по политически науки и доцент в департамента по Политически науки на НБУ. Ръководител е на департамент "Политически науки" (2020-Евелина Стайкова е доктор по политически науки и доцент в департамента по Политически науки на НБУ. Ръководител е на департамент "Политически науки" (2020-2024). Координатор е на CERMES (Център за бежански, миграционни и етнически изследвания) и зам.председател на факултетния съвет на Бакалавърски факултет. Тя е член на ръководството на Центъра за изследване на европейските ценности и член на управителния съвет на Българската асоциация за политически науки. Нейните преподавателски и научни интереси включват теми свързани с градски политики и местна демокрация, миграционни изследвания, популистки партии и движения. Евелина Стайкова има опит в координиране и участие в различни проекти в сферите на анализ на качеството на демокрацията, интеграцията на мигрантите и малцинствата, както и развитието на градски политики. Ръководител е на проект ConnectBG (2023-2026, фонд "Научни изследвания"). Автор е на множество текстове, публикувани в български и чуждестранни издания. Последните и книги са: Местна демокрация и градски политики в началото на 21 век, НБУ:2020; Устойчиво градско развитие – поуки за София (съст. и ред.), НБУ: 2021. Migration and Populism in Bulgaria (with Ildiko Otova), Routledge: 2022; Българските популизми в новото хилядолетие (с Илдико Отова), Парадигма:2024; Безправие и дехуманизитането на ЛГБТИК+ хората в България (с Деяна Марчева) Действие:2024</p>
<p>Георги Георгиев</p>	<p>Георги Георгиев е доктор по Политически науки, хоноруван преподавател в Софийски университет „Свети Климент Охридски“. Дисертацията му е на тема „Национализъм и популизъм в Югоизточна Европа“. Има дългогодишен опит в публичните, корпоративни, кризисни и стратегически комуникации. Работил е като съветник на вицепремиери и министри от различни правителства на република България. Заемал е експертни и ръководни длъжности в международни компании и държавната администрация. В момента Георги Георгиев е директор на Информационния център на Министерството на отбраната.</p>

Илия Ценов	Илия Ценов е роден на 9 юли 1963 г. в Силистра, България. През 1985 г. придобива бакалавърска степен по военно дело от Общовойсковия факултет на НВУ „Васил Левски“ във Велико Търново, през 1994 г. – магистърска степен по икономика със специалност „Финанси“ от Университета за национално и световно стопанство (УНСС), а през 2019 г. – докторска степен по обществени комуникации и информационни науки от УниБИТ. Ценов служи в Българската армия от 1981 г., като заема различни длъжности в различни военни формирования до 2003 г., когато напуска със звание подполковник. След 2004 г. работи като главен счетоводител, финансов контролор и държавен служител в Националната агенция за приходите (НАП) в Пловдив. От 2021 г. е асистент, а от 2023 г. – главен асистент в катедра „Политология и национална сигурност“ в рамките на Факултета по икономически и социални науки на Пловдивския университет „Паисий Хилендарски“. Автор е на монографията „Информационни аспекти на финансирането на системата за национална сигурност“ (2020 г.) и е публикувал множество други трудове в областта на националната сигурност. Изследователските му интереси включват военната сигурност, икономическите и финансовите аспекти на националната отбрана, както и колективната сигурност в рамките на НАТО и Европейската отбранителна общност.
Искрен Иванов	Д-р Искрен Иванов е доцент по международна сигурност и управление на конфликти в катедра „Политология“ на СУ „Свети Климент Охридски“. Работил е като гост – професор в Сеулския институт за чуждестранни изследвания „Хан-кук“, Южна Корея, Университета в Остин, Тексас и Университета в Делтауър.
Маржена Черницка	Доктор на социалните науки в областта на политическите науки. Работи като асистент в Института за политически изследвания на Полската академия на науките (Варшава, Полша). Възпитаник на Варшавския университет, от който получава степента доктор по политически науки (2017). Тема на докторската дисертация: Политика за сигурност на Република България през 1991-2014 г. Бакалавър по културология, специализация по българска култура и език (2012). Стипендиант на Еразъм към катедра „Политология“ на Философски факултет на СУ „Св. Климент Охридски“. Фокусира се върху сигурността, политическата трансформация от 80-те и 90-те години на миналия век и съвременната социално-политическа ситуация в България. Автор на книгата Политика за сигурност на съвременна България (2019) и няколко статии за историята и съвременната обществено-политическа ситуация в страната.

Момчил Дойчев	<p>Доц. Д-р Момчил Дойчев Баджаков е завършил философия в СУ „Св.Климент Охридски“, специализира философия на историята, социология и политически науки. Става доктор по философия през 1989 г. Работи в БАН, ЮЗУ „Неофит Рилски“ и Нов български университет. Той е изследовател с широк кръг от научни интереси като политически конфликти и демократични промени, съвременни политически системи и режими, международни отношения и геополитически анализ. Автор е на десетки научни публикации и медийни изяви. Сред най-значимите му публикации са: Путинизмът: Източници на новата руска диктатура“, 2024, „Евроатлантически записки“ 2024, „В какво общество живеем?“ 1993, „Политическата коректност срещу либералната толерантност“ 2010, „Политика. Основи на политиката“ 1998, „Фейсбуквар. Към отговорна власт и правова държава?“ 2015, „Седем мита за Освобождението“, „Петър Мутафчиев и геополитическите фактори в българската история“ 2019, „Генеалогия на комунистическата менталност“ 2018, „Защо марксистите станаха путинисти“ 2018 и др.</p> <p>Член на ръководството на Атлантическия съвет на България, а от 2019 г. негов съпредседател.</p>
Пламен Димитров	<p>Пламен Димитров е политически анализатор, университетски преподавател и журналист. Той има магистърска и докторска степен по съвременна история от Софийския университет. Сферите, в които специализира, са геополитика, енергийна сигурност, история и съвременна политика на Балканите, Русия и постсъветското пространство.</p>
Явор Райчев	<p>Явор Райчев е доктор (PhD) от Университета в Гранада, като изследванията му са фокусирани върху хибридната война и нейните последици за сигурността на страните от ЕС и НАТО, с особен акцент върху България. Академичната му работа обхваща теми като сигурност, дипломация, въпроси на миграцията и международни отношения. Участвал в редица международни конференции и е публикувал статии в научни списания, като <i>Studia Politica: Romanian Political Science Review</i>, в които разглежда теми като правен конфликт (lawfare) и хибридна война в контекста на България. Той е участвал и в международни дискусии, свързани с радикализацията и влиянието на хибридните заплахи върху европейската сигурност. Освен изследванията си, Явор е управлявал изследователски проекти и е допринесъл за различни политически дискусии и публикации, свързани със сигурността и международните отношения. Академичната му подготовка включва магистърска степен по Международни и европейски отношения от университета в Линщопинг и бакалавърска степен по италианска филология от Софийски университет „Св. Климент Охридски“. Явор владее английски, испански, италиански, арабски, и руски език което обогатява интердисциплинарния му подход към глобалните политически въпроси.</p>
Йордан Дойков	<p>Доктор по политология и доцент по сравнителна политология. Преподавател е в департамент „Национална и международна сигурност“ на Нов Български университет и хоноруван преподавател в Академията на МВР. Преподавал е в УНСС, ВТУ „Св. Св. Кирил и Методий“, УниБИТ. Над 27 г. е служил в системата на МО и има звание „подполковник“. Лекционните му курсове разглеждат въпроси на теорията и различни аспекти на сигурността, както и на международните отношения, организацията на международната сигурност и геополитиката.</p>

Building Security, Fostering Unity, Sharing Values: Bulgaria in NATO for 20 Years

Tatyana Dronzina

This book is published under the project with the same title supported by the Division of Public Diplomacy of NATO.

The project commemorates the 20th anniversary of Bulgaria's membership in NATO. Three leading departments of political science developed it: those at *Sofia University "Kliment Ohridski"*, the *University of National and World Economy (UNWE)*, and *New Bulgarian University (NBU)*, along with four student clubs and the nongovernmental organization *Center for the Study of Global Hybrid Threats*. The media partner for this project is the news site *Faktor.bg*.

The main goals of the project are as follows: to promote understanding, trust, and support for NATO among the general Bulgarian public, particularly among youth, illustrating that membership in the Alliance is not just an institutional issue but also a factor that impacts the everyday lives of citizens by providing greater regional, national, and human security; to emphasize that shared values are the most profound and most solid foundation of NATO unity; to highlight that membership in the Alliance is a crucial factor in ensuring Bulgaria's reliable defense, especially in light of Russia's war in Ukraine; to foster the perception that fuller integration into NATO means a more modern and well-equipped Bulgarian military, increased international prestige, and enhanced confidence in Bulgaria by international organizations; to analyze how Bulgaria can benefit from NATO's collective experience while contributing to the enhancement of this experience, particularly regarding the hybrid warfare that Russia is waging against Bulgaria—aiming to prevent necessary reforms, exacerbate relations between Bulgaria and North Macedonia, and diminish confidence in Bulgaria among NATO and EU partners; and to counter the false notion that left-leaning ideas and attitudes are incompatible with Bulgaria's Euro-Atlantic orientation.

The authors of the papers in this book include practitioners, diplomats, researchers, security experts, and students, comprising both civilians and mili-

tary personnel. The contributions are organized into three sections: “Bulgaria in NATO: Learning from the Past, Looking to the Future,” “NATO and the Changing Security Environment,” and “NATO, Bulgaria, and Hybrid Threats.” Considering that the primary target audience for the project is young people born after Bulgaria joined NATO, the intention of the book is to publicize lesser-known facts, revisit the political dialogue and discussions that preceded NATO integration, and address aspects of our membership that are of immediate interest to the youth. This serves as an intellectual dialogue between generations, a debate on what has been achieved and what remains to be done; an analysis of the choices, sometimes difficult and painful, that Bulgarians have had to make in reclaiming their rightful place among democratic European and Atlantic nations; and a discussion of who we are and who we want to be now, in light of the renewed conflict in the heart of Europe.

Today, more than ever, NATO guarantees our security, and security is the foundation of development and prosperity. NATO is not an external imposition that diminishes our sovereignty; it is our choice.

We are NATO!

PART 1
BULGARIA IN NATO:
LEARNING FORM THE PAST,
LOOKING AT THE FUTURE

ЧАСТ 1
БЪЛГАРИЯ В НАТО.
УРОЦИ ОТ МИНАЛОТО,
ПЕРСПЕКТИВИ ЗА БЪДЕЩЕТО

BULGARIA – FROM A CANDIDATE TO A MEMBER OF NATO

Elena Poptodorova

Abstract: The security landscape has evolved dramatically, transitioning from a secretive and specialized domain to a pressing global concern encompassing all aspects of life. Events beginning with Russia's annexation of Crimea in 2014 have illustrated the emergence of hybrid warfare—marked by the manipulation of information, cyberattacks, and indirect military actions. These tactics challenge traditional security frameworks, complicating nations' abilities to defend themselves against multifaceted threats. The Russian government's use of disinformation campaigns has seen significant success, capturing public support even within NATO countries, where narratives framing the invasion of Ukraine as a self-defense maneuver have gained traction among susceptible populations.

The establishment of a hybrid center of excellence in Finland symbolizes a shift towards recognizing and addressing these evolving threats. This center aims to develop strategies and guidelines for countering hybrid warfare, including detailed analyses of maritime threats. The pervasive impact of Russia's actions underscores the interconnectedness of international security, revealing how hybrid tactics exploit the openness of liberal democracies to sow division and polarization.

As hybrid warfare intensifies, it becomes a battleground between authoritarian regimes and open societies. The manipulation of societal structures and the spread of disinformation not only undermine democratic values but also threaten to fragment civil societies and destabilize relationships among nations. The recognition of these threats is vital for developing effective countermeasures and fostering resilience within affected societies. NATO's recent statements regarding hostile Russian activities in Europe emphasize the urgency of addressing these hybrid war dynamics. As geopolitical tensions rise, a coordinated response from the EU and NATO is imperative to safeguard democratic principles and maintain stability in the face of emerging threats.

Key words: security, disinformation, NATO

Анотация: Характерът на сферата на сигурността се е променил драматично, преминавайки от тайна и специализирана област към дейност, обхващаща всички аспекти на живота. Събитията, започващи с анексията на Крим от Русия през 2014 г., илюстрират появата на нов вид предизвикателство – т.нар. хибридна война, характеризираща се с манипулация на информация, кибератаки и индиректни военни действия. Тези тактики предизвикват традиционните рамки за сигурност, усложнявайки способността на нациите да се защитават срещу многостранни заплахи. Използването на дезинформационни кампании от руското правителство има значителен успех, като привлича обществена подкрепа дори в страни от НАТО, където наративите, представящи инвазията в Украйна като самозащитна за Русия маневра, са намерили почва сред податливи сегменти на съответните общества.

Създаването на център за върхови постижения във Финландия, занимаващ се с изследването на хибридната война, символизира промяна към решителност за справяне с тези развиващи се заплахи. Този център има за цел да разработва стратегии и насоки за противодействие на хибридната война, включително подробни анализи на нови заплахи, като морските, например. Всеобхватният ефект от действията на Русия подчертава взаимосвързаността на международната сигурност, разкривайки как хибридните тактики използват откритостта на либералните демокрации, за да сеят разделение и поляризация.

С интензифицирането на хибридната война тя се превръща в бойно поле между авторитарни режими и отворени общества. Манипулацията на обществените структури и разпространението на дезинформация не само подкопават демократичните ценности, но също така заплашват да фрагментират гражданските общества и да дестабилизируют отношенията между нациите. Признаването на тези заплахи е жизненоважно за разработването на ефективни контрамерки и насърчаването на устойчивост в засегнатите общества. Последните изявления на НАТО относно враждебните руски дейности в Европа подчертават спешността на справянето с динамиката на хибридната война. С нарастващите геополитически напрежения координираният отговор от ЕС и НАТО е императивен за опазването на демократичните принципи и поддържането на стабилност пред лицето на възникващите заплахи.

Ключови думи: сигурност, дезинформация, НАТО

Security has become very high on everybody's agenda. I remember times when security was a kind of secret, dedicated sphere, which was the area of activity of a select people. So, the public would not even deal with the details or with the concepts and the essence of security. I'm not saying that I'm happy with the situation as it is today, but it is inevitable. This is the way we shall live for longer than we may even hope or expect. So, talking of security, again, security has changed dramatically, not only in the sense that it encompasses everything in our lives but also in the type of guarantees and the type of safeguards that we need to build and secure.

Ten years ago, in 2014, some mysterious little green men who had no military insignia or distinctions just emerged in Crimea, and they took the peninsula away from Ukraine, even without any real war happening, without even a shot being fired. Soon after, in Eastern Ukraine, a mixed, kind of varied group of armed thugs and Russian forces took over enclaves in the region of Donbas. At that time, some claimed to seek independence, and others claimed to defend those seeking, allegedly, independence. These events and many of the different murky actions attributed to Russia since then, from cyberattacks to attempted coups and assassinations abroad, meddling in elections in the West, and the culmination of all of it, the invasion of Ukraine, have been labeled as different forms of hybrid war. When we talk of hybrid war, we mainly refer to manipulating the information space. It is also an attack on critical infrastructure. It is interference in political processes.

So, it's something that nations actually find very difficult to counter and to protect themselves against. You can put everything in the basket. It may be explo-

sions or attempted coups against a political system or the regime. It is electoral interference. It is artificial online accounts on social media that work from troll factories. Disinformation in general, the alternative, the false narrative, which is always addressed to more vulnerable, I would call them, but also more receptive groups of the population, definitely and arguably so. This phenomenon has intensified and has accelerated tremendously since Russia's invasion of Ukraine, with millions of citizens, not just in Russia but even in Western countries, accepting the Kremlin's line that the invasion was a necessary act of self-defense of Russia itself to help Western governments identify and protect ourselves. NATO and the European Union set up a hybrid center of excellence in Finland.

I should say just very briefly a few words about Finland to those of our participants, who may only have general knowledge about Finland as a great country with great cross-country skiing, excellent science and technology, but in this particular instance, we need to know a little bit more about Finland because it actually marked a historic shift in the bigger geopolitical picture. Why was Finland chosen for that? Center of excellence on hybrid threats. Finland has stayed neutral since World War Two. World War Two actually saw it cede territory to the Soviet Union at the time. The two countries share a border which is 1300 kilometers long. And Finland has always been very nervous about its much bigger and ominous, I would say, neighbor. It has always been very quiet, very cautiously, drawing closer to the West.

But the big change happened after Russia invaded Ukraine when Finland, alongside Sweden, applied to join NATO last year. And so, yes, now we are 32 in NATO with both, most unexpectedly, most surprisingly, Sweden's 200 years of neutrality and Finland joining the alliance. So, the Center of excellence on hybrid threats drew up kind of a handbook outlining maritime hybrid threats because it is no accident that the name is hybrid threats, as I mentioned, and I will be repeating it over and over again this morning; you've got literally everything. You've got the space, you've got the earth, land. You've got the sea. So, the Center in Finland drafted a handbook on maritime hybrid threats and developed ten imaginary but highly plausible scenarios of threats and risks coming through the sea. So, they range from the clandestine use of underwater weapons to declaring a control zone around an island.

The first scenario that they examined in detail was Russia's actions in the Sea of Azov, which was just prior to the invasion of Ukraine, I think it was sometime in the autumn of 2018 and ever since, in order for Ukrainian ships just to travel from their home ports of Mariupol and Berdyansk through the Kerch strait and to reach in that way, the Black Sea. And over there on the other side of the Black Sea is us – Bulgaria, plus Romania, plus Turkey, all three of us NATO member states. This is just in brackets as a geographic description. So, in order for them

to reach the Black Sea, they first had to stay in line to literally queue for inspection by Russian officials. And these delays, they could go on for days, even up to two weeks, which directly inflicted economic damage on Ukraine. But it is in the field of disinformation that this center and the experts at the center have found the most surprising results.

After evaluating a number of opinion polls across Europe, they have come to the conclusion that in several, not the majority, but still several NATO countries, Russia is winning the information war amongst substantial sectors and segments of the population. And you may be surprised, but that has its explanation as well, that one of these countries is Germany. One wouldn't be surprised about Bulgaria, and I'll say a few words about it later, but Germany, which is such a critically important country for Europe and for the transatlantic relationship in general. In Germany, the Kremlin narrative that the attack on Ukraine was actually a reaction, necessary reaction to NATO provocation, has been gaining popularity these last few months, the months of the war, two years of war already, which is not as bad as in other countries, but still there is such an opinion trend, which obviously is caught by pollsters and deserves to be noted. Slovakia, which has been in the news few months ago over the assault on the life of their prime minister. Slovakia has some 30%, maybe even more, of those polled who believe that the West deliberately provoked the war in Ukraine. The West was the poorer reason, almost the perpetrator of that war.

In Hungary, this percentage is 18. They blamed the oppression of Russian speaking population in Ukraine for the war. Bulgaria is a very, very unfortunate example, too, where we also have about a third of the population who definitely believe every single propaganda thesis that comes out of the Kremlin. For Bulgaria, there are historical reasons. There are also, unfortunately, you'll hear me use unfortunately for Bulgaria a number of times. But it's not just historical reasons. It's also this legacy, very, very negative malign legacy, which Bulgaria has after the years of originally Soviet occupation, after World War Two, and then practically a Soviet installed and supported regime. This is a similar picture which was also found out by very serious research carried out by Globsec. It's a relatively new but well established research and polling NGO, which is headquartered in Bratislava, Slovakia, and works in close partnership with the Atlantic Council of the United States. So I would say that although we can all tell individual examples of instances of hybrid war, and I know a few of them, as regards Bulgaria, I would say that Ukraine is probably the first country that directly fights the first hybrid war. As I've tried to describe it to you, what happened is that there was a very delayed reaction from the West. The Russian invasion of Crimea and the initiation of this proxy war in Eastern Ukraine actually stunned the West. There was this major power that mostly relied on a mix of all these special forc-

es, proxy forces, and limited numbers of traditional conventional military units. Sometimes, they would be in disguise and, simultaneously, a very sophisticated campaign of political subversion, economic attack, cyber warfare, and different information operations, which were all aimed practically at carrying out a territorial conquest. This is what basically all the tools of hybrid war used by Russia were to gain territory in Ukraine and, of course, to destroy and annihilate everything Ukrainian practically. You may be surprised to hear what I'm going to say next, but I'm sure Professor Dronzina will agree that there is a close correlation between actions taken by the current Russian government and the Soviet political and propaganda operations during the Cold War. Those of us who lived in that period know very well the correlation and the likelihood between the two. The tools for hybrid warfare are, again, repeatedly but necessary – deception, infiltration, and corruption, which I haven't mentioned so far. I mentioned first the use of some paramilitary forces and units, the creation of new domestic security entities like patriotic groups, which are often armed, and conventional military capabilities were actually used first to seize and consolidate domestic power. And we've known that in the Soviet Union at the time, we've known it in all those satellite countries that formed the then Soviet empire. Today, Russia is the ultimate hybrid threat because it has developed both official and unofficial tools to pursue these strategic objectives. We may argue whether it's physical territory, as is the case with Ukraine, but not only you've got Moldova, you've got Georgia, or it is the attempt to govern, to control, again, a space which Russia likes to call the "Russian World", which means, in their thinking, everywhere where Russian language is spoken, which actually raises a number of questions to many more countries, and not just those which belong more closely to the bigger geographic area where the Russian Federation is situated. Many of the tools and techniques employed by the Kremlin in the pursuit of this external strategy are the same, actually, as it has employed to maintain and even increase its domestic controls.

And we witness, again, through more modern terms, including legislation and special non-governmental entities, that the Kremlin is now doing the same in the attempt to make the war not just acceptable but also supported domestically and by intensifying, strengthening its rule within Russia itself. So bribery, blackmail, hacking, intimidation, I would say even outright murder, which we also witnessed, are part of the arsenal in both domestic and foreign operations. More broadly, President Putin's Kremlin employs non-traditional means to further asymmetric ends. And domestically, as I say, these tools have been used to crush Russia's, a very, very young, nascent democracy, to restrict the development of a civic culture and practically demand exact extraordinary rents from the economy. Right now, Russia's economy is actually entirely placed on a wartime footing. War spending and defense spending have gone beyond 7% of the GDP.

So there is no question at all, no doubt at all, where Russia is going in terms of both economic structure and also, if you wish, the replacement of the defense minister Shoigu with an economist who knows nothing of war science or war art, nothing about the military, but who's a well-known economist and who will practically be running the entire war economy and war finance of Russia in the foreseeable future. Internationally, these same means are employed to destabilize the current international order and, most significantly, our two alliances, the European Union and NATO, but also bilateral relationships, which are essential to peace in Europe.

I know it may sound too strong for you, but believe me, it's very accurate. The strained relationship between Bulgaria and the Republic of North Macedonia, a member of NATO, is at the very beginning of its talks for EU membership, but cannot open negotiations because of this, sorry. Because of this strained relationship with Bulgaria is very much also due to Russian interference, both in Bulgaria and in North Macedonia, amplifying, reinforcing, I would say, even distorting some arguments, historical arguments mostly, which may have their own value and worth, but when wrongly used and manipulatively used, only harm the European future of North Macedonia and hence the shared security of both southeast Europe, but also of Europe and the transatlantic area in general, I should say that no other nation in Europe, literally nobody else, has been implementing such actions that destroy the post-Cold War European and Transatlantic norms and practices. What makes Russia the most dangerous hybrid threat is the use of these non-traditional means, which are integrated and supported by the traditional conventional military capabilities. And both, all of these, they're actually covered by a nuclear umbrella. And this nuclear threat is being waged every now and then again. Most recently, we had the so-called "exercises" that Russia announced on the border of Ukraine to practice the use of tactical nuclear weapons. Nothing happened and nothing could happen in these exercises.

So, they were primarily meant as political blackmail and political threats. But they do serve the purpose of precisely what they were meant to do. To insert, to instill fear also on politically, on decision making, political levels, when decisions about Ukraine and the war there need to be made, as demonstrated by the operations to seize Crimea, to destabilize Eastern Europe, to invade Ukraine finally, and all these numerous recent exercises, the Russian military is actually increasingly capable of and is specifically designed to support the employment of these hybrid means and methods to secure political and territorial gains that have been achieved. The bad news which I'm breaking to you, but I'm sure that you've felt that much, and you've sensed that much, you've learned that much, is that hybrid warfare is a battle between open and closed societies. Actually, hybrid methods are intended to exploit the openness, to test and try the openness of

liberal democracies of the West as a collective civilization, and if not civilization, at least not to use that bigger word, but lifestyle, understanding of international relations, understanding even of the big issues of war and peace. And right now, what we face is nothing less than an assault on civil society. It was assumed, incorrectly and sadly, that citizens in democratic societies would not fall victim to information warfare or would be duped by propaganda because we believed the liberal legal frameworks of norms and traditions would make such a foreign alien intrusion unacceptable and unappealing. However, as I alluded before, there is increasing evidence that those, as experts call them, hybrid warriors, work from Moscow, from Beijing, and from other capitals.

We should not forget to mention Turkey, Iran, or other countries where you may find those troll factories. And Europe, unfortunately, is not immune to that practice either. So, there is increasing evidence that these hybrid warriors are actually waging a hybrid war via the Internet against civil society. The main goal is to show divisions and promote polarized politics. This is another very important conclusion that has been made. They not only show divisions, but they also instill and not only provide; they impress it on people's consciousness, disinformation, wrong, false information. But they also try to stimulate polarized politics, not compromise, not dialogue, but polarization. They manipulated the fundamental elements of the system, which are globalization, the integrated markets in a globalized era, and the traditions of open borders, which was the big glory, the big pride of Europe.

Liberal citizenship rules the rights to free speech and association of people. I remember when we were making our transitions in the early nineties, we were preaching those principles that we knew defined the strength of the West. These were the principles we aspired to before 1990. We believe that our success in this part of the world will be practically measured by the degree to which we can introduce the same principles in our societies. And you see the irony of today: adversaries now exploit them practically in an unexpected manner. This Western blindness comes from, maybe from several things: naivete, which is intellectual, probably naivete, but also outdated conceptions of what propaganda is used for, about collusion, about complicity, with foreign powers. This was still the concept of propaganda from, as I said, the Cold War. They are rooted in the Cold War memories of the Soviet efforts of that time to construct counter-narratives against the West. And I remember them perfectly well. The way in which we were indoctrinated against the West in order to have communist interests advance globally. There is no communism anymore. Nobody bothers about communism. What we have today is the ultimate ambition, the blind ambition of an imperial power, autocratic power like Russia, to impose not only influence, but also dictate rules of relationships, of life by its own stand-

ards and nothing else, nothing more. So, we'll see no more of what we used to see in the past. In the past, the Soviet tools included working with labor unions and left-wing newspapers, in other words, finding your own kind of individual or organization in the other country to use in propagating, propagating, propagating communist ideology.

I remember something that is already past classified norms. You will remember. I hope you do. There was an assault on the life of John Paul II. And Bulgaria was implicated in this attempt on his life. It was not directly responsible, and somebody had to suffer consequences. He was imprisoned for alleged complicity, which was not the case. Sergei Antonov is the name. But at the same time, why did it happen? Because in the meantime, the Bulgarian secret services, as branches of the Soviet KGB in Rome, Italy, I worked there at the time, had their agency on the ground who were supposed to do exactly this, to go and contact and recruit agents, local agents from CGIL¹, which was the local trade unions and left-wing newspapers. So those were the past methods. But there is no more. When you come to think of it, even now. I'm telling you this old story which goes back to the eighties of the 20th century. I'm telling you this story and I hear myself pronouncing, actually kind of rather antiquated, obsolete, even cheap methods of doing propaganda. When you compare it to the hybrid warfare of today, you see how much more sophisticated today's I tools are.

They're much less obvious, which the old kind of the old tools were. Now, Russian hybrid war trolls can push believable agendas of disruption that look as if these are the local homegrown, grassroots moves. This is the thing. Before one could protect themselves, Western societies and Western systems, Western agencies could put up real guarantees and real defense against the old style, the old school attempts at intervention. Today, this doesn't seem that easy or doable anymore because, as I say, the idea is to imitate local developments and local movements to create these divisive politics that I mentioned earlier, which look genuinely local and national but that have the ulterior motives of weakening national unity and the social cohesion, the social texture of a nation. An adversary would pursue hybrid actions such as propaganda, information warfare, and disinformation as a way of fragmenting the civil society pillar in ways that were practically impossible in pre-globalization and especially in the pre-Internet era. And I'm sorry, I have to say something about the role of Internet today, and that's this is obviously a blessing in disguise. I thought so at the beginning of this century when the WWW appeared.

We all love it, as you see. We can go forward no matter where we are. So many, so many blessings. But there is also the disguise as well. And we have to learn now.

¹ CGIL – Confederazione Italiana Generale del Lavoro (Italian General Confederation of Labor).

We have to teach our citizens how to fight the hidden negative impacts of this vast and amazing technological development. So, technological advances have played an obvious and fundamental role in these new hybrid attacks against the West. And again, I would say that these troll farms that appear actually bring about hyperpolarized debates, and they actually lead many citizens with access to social media.

That's a different huge topic: social media and access to social media to make citizens subconsciously choose one side of a totally false choice debate without realizing that there could be a moderate choice and a moderate policy. So basically, the purpose of hybrid wars is, as I said, not just to polarize but also to stimulate the extremes. And this is what we will see happening on June 6 – 9, 2024, on the days of the European Parliament election. And I only pray that we won't suffer a more significant blow before getting ready to handle this new threat. It is also more than just a weaponized narrative because the propaganda efforts are no longer meant to shape the information terrain in favor of the aggressor. Sometimes, you don't even know, you don't see the aggressor, you don't identify him directly or immediately. Hybrid attacks on social society are meant to weaken the system from within by weaponizing grievances and social divisions. It goes entirely on the local level, the local agenda.

In those attempts, the hallmarks, achievements, and gains of liberal democracy in a country and society will be depicted as vulnerable, like the pluralist interest representation. Democracy itself is under attack now. The political arrangement of democracy is under attack. This is accomplished with the intent of making existing problems appear intractable and also creating imaginary problems, which, as I say, fragment as many group identities as possible. Usually, they are very smart in taking the most divisive issues that animate people to a very high level of emotion, passion, and contradiction. Again, a brief example about Bulgaria. Right now, we have both national and European elections.

On the Eurozone, which is unfortunately influenced by the negative interpretation, which is done very smartly. They would not say "No!". Never, never a Eurozone. We don't go there at all. No, no, no. We have to wait. We are not ready yet because it will bring upon the population some very negative economic and financial impact, etcetera. The eurozone is one, of course.

The war in Ukraine is the other one. Unfortunately, the fear of making Bulgaria a part of the war, of bringing war on the Bulgarian sea coast, is amplified. No reasonable arguments can break through and explain that actually the war on Ukraine is a war on our lifestyle in general. And it will further continue after Ukraine. It may not be in territorial terms, but it may be through different means because it will continue to be a hybrid war between Russia and the West. Before thinking liberal, we should always remember that Russia has always fought up against the West. And that is likely to continue now.

These divisive issues I mentioned, which are introduced intentionally, are such because they fall between conservative and progressive views on the political spectrum. And you can find many examples. Again, I can continue by giving you more examples from the Bulgarian political scene. You've got the very conservative, oftentimes outdated perception of the world versus the progressive views. And since progressive views always take longer and more effort, obviously it is easier to work on the conservative part of society. Actually, the idea and the hope is that these hybrid warriors are there to deepen and polarize these divisions, transforming them in nothing less than existential threats. This is what's going on in my country.

All issues. And yes, of course, there are all the time. We are coping with issues and problems all our lives because life goes forward, and we are faced with new and new positives and also, yes, challenges. But all of these are turned into existential threats in Bulgaria. Bulgaria will cease to exist. The Bulgarian population will disappear. Bulgaria will be in war. Bulgarian soldiers will be sent to Ukraine. The Euro will make everybody much poorer. People will practically be devastatingly poor. So, all of this comes down to existential threats. Not a threat on a war camp, not a threat on the war front. No existential that touches most deeply on the psyche and the thinking of everyone. Evidence indicates, for example, that Russia pushed for Brexit with its troll farms. It hacked the 2017 French election.

It meddled in the 2016 American presidential elections. And I'm not even mentioning the attempted coup, a political coup in Montenegro, which was orchestrated and arranged from Bulgarian soil, from Bulgaria, by GRU agents. But it luckily failed. This does not mean that attempts to influence the political process in Slovenia, Montenegro, and the Republic of North Macedonia have ceased or will stop anytime soon. I'm not mentioning Serbia because Serbia is a totally different case. Serbia is kind of a, how should I put it? I'm hesitating between "brother in arms" or "partner in crime" of Russia. So it is up to national security, intelligence agencies and law enforcement agencies to deal with these problems.

But here the big question comes. Are they well equipped to do it? Are they capable of doing it? And even more than that, are they given authority by the executive or legislative branches of government to do so? Again, Bulgaria is an example of the total impotency of our law enforcement and national security agencies to deal with the Russian threat, which is real and powerful in Bulgaria. So, basically, the bottom line is that the West remains far behind in developing coherent countermeasures, and this problem will only get worse in the foreseeable future. It is. Yeah, I did say that it's ironic that actually the Western culture and civic society institutions that made the West so strong are now, and which actually contributed to the demise of the Soviet Union in 91, are being used against this culture.

Actually, the authoritarian regimes and governments with such tendencies discovered how easy it is to penetrate an open society, open access lifestyles, orders to propagate political disunity. Exactly. Because our systems, the systems of our world, of the West, are so open to debate. So that's what we are faced with. Political confusion will be sown in the west, is being sown in the west because that will give these authoritarian regimes more strength, more power, and more space domestically and also internationally, to be honest. So if there is no democratically feasible way of defeating those hybrid warriors, stopping them from infiltrating Western civil society, because, as I say, our own norms, legal norms, and legal order will say, no, there is freedom of speech, there is freedom of association, etcetera. So it is ironic indeed, and it's unfair, too. But then what remains, one would ask.

Maybe I'm not saying that this is the way it can happen and should happen, but maybe as an allied community, the EU, and NATO, we should also wage some hybrid war against societies in Russia and China. I know this may sound extravagant, but it's not impossible. It may be difficult, but not impossible. It is difficult because the regimes very tightly control those societies, and this is why those people out there in those countries idealize the Western values and traditions. So, what I believe should be used is a mix of soft and hard-powered or sharp power tools that the West can deploy and develop. However, the first step is for political insecurity establishments in our countries to acknowledge this threat's nature and character to civil society. We should be able to finger-point this threat, formulate it, and communicate it to our own national audiences, which has not been done everywhere, not in Bulgaria, for sure. I will finish by reminding you of a statement that is kind of a good step forward.

A statement from May 2, 2024, when NATO issued a very sharp warning over hostile Russian activity across Europe. It was an expression of deep concern about Moscow's malign activities. It pointed out disinformation, sabotage, acts of violence, cyber and electronic interference, and other hybrid operations, as they say. And countries were named in that statement. Czechia, Estonia, Germany, Latvia, Lithuania, Poland, the UK have all been affected by this hybrid war, according to NATO. And this is part of an intensifying campaign of activity that Russia continues to carry out across the Euro-Atlantic area, also through proxies, just again in brackets. Now we have a lawsuit in London against six Bulgarian nationals accused of practically providing Russia with information and carrying out disinformation on behalf of Russia in London, England, and elsewhere because this is the other danger. They may be physically, these six Bulgarians located in London, but they've been functioning, they've been operational across Europe.

Of course, the statement of May 2 expresses solidarity with all affected nations and condemns Russia's behavior. And I say this is a good step forward, but we must move on from this statement to action. One thing that NATO continues to remind of and repeat and work on is resilience. So, I want you to remember this other key notion, the key concept of resilience. This is what we all need as Europeans, as NATO allies, as nationals of our own countries, and as citizens of our own countries. So probably, I will stop here. Oh, no. I should mention one more thing.

That the NATO statement was actually coupled by a resolution of the European Parliament in March which said it was looking into claims that some members of the European, sorry, of the European Parliament, were paid to spread Russian propaganda. And the European lawmakers issued this very firm resolution about steps forward, about following up in denouncing and prosecuting such misdemeanors. So, I'm mentioning this to tell you that maybe, finally, the main institutions of the two alliances are widely aware of the danger. But the biggest challenge, the hardest part, is doing our homework at home.

THE MECHANISM OF DECISION FOR BULGARIA'S MEMBERSHIP IN NATO

Yordan Doykov

Abstract: This article examines the operational dynamics of the institutional mechanisms involved in the decision-making process regarding Bulgaria's NATO membership. A chronological outline of the actions taken is presented, highlighting the contributions of key participants within the "competent and responsible circle" of national security decision-making in Bulgaria. The institutional mechanisms are analyzed from both formal (procedural) and substantive perspectives, allowing for a comprehensive understanding of their functioning and implications.

Key words: political decision, institutional mechanism, national security, membership, NATO

Анотация: Статията проследява действието на институционалния механизъм на вземане на решение за членството на България в НАТО. Очергана е хронологическата последователност на действието. Акцентирано е на ролята на актьорите от „компетентния и отговорен кръг“ на вземане на решения по националната сигурност в страната. Действието на институционалния механизъм е разгледано, както от формална (процедурна), така и от съдържателна гледни точки.

Ключови думи: политическо решение, институционален механизъм, национална сигурност, членство, НАТО

Introduction

Although it is retrospective, the relevance of this topic is underscored by the objectives of the project "20 Years of Bulgaria's NATO Membership." Over time, the growing significance of security in an increasingly globalized and complex world has become evident. Bulgaria's membership in NATO is deeply connected to this context. The admission of the country to the alliance should be examined with the goal of drawing practical lessons for the development of the institutional mechanisms of national security decision-making and for the defense of national interests.

Methods

The methods utilized in this thesis include deductive reasoning, inductive reasoning, structural-functional analysis, comparative approaches, historicism, legal-normative analysis, as well as analysis, synthesis, and abstraction as heuristic tools.

Results:

Bulgaria's NATO membership is formally (procedurally) demarcated by four "event structures" – from the submission of an application for membership by the caretaker government of Prime Minister Stefan Sofianski in February 1997, through the invitation from the Alliance member states for Bulgaria's membership in November 2002, through the signing of the NATO Accession Protocols in March 2003, to the country's actual accession to the North Atlantic Treaty in April 2004 by the government of Prime Minister Simeon Saxe-Coburggotsky. However, this type of "event structures" is subject to a different type of organizational and political logic compared to those of the OWP membership. First of all, they are not political actions and decisions following the toolkit of the model of the disaggregation-growth strategy in terms of the country's inclusion in the new geopolitical composition of the West. Second, both before and after the submission of the country's candidacy for membership in the Alliance, a "series of institutional steps of politic", (Bloom) are already being implemented, aiming at achieving political and military interoperability of the Bulgarian side with the member states of the Alliance.* Third, in the way these "event structures" are deployed, the factor of "time" influences both as a temporal category and as a teleological one. In temporal terms, the speed of the European geopolitical process acts in two ways on the "competent and responsible circle" of the country's political actors: first, as a stepwise countdown, i.e., time to form an internal political consensus for membership, and second, as a countdown, i.e., "...the increasing time pressure" (Lipovetsky) from the external factor towards union integrity. Hence, the degree of Chrono reflexivity coverage of the post-Malta geopolitical process between the "competent and responsible circle" of Bulgarian political actors and the dominant external factor determines the speed and stage of Bulgaria's NATO accession. (Lipovetsky, Charles, 2005, pp. 83-84.) The qualitative dimension of time provides an understanding of the motives of the "competent and responsible circle" along the "because"- "to" axis in the NATO membership decision-making process. Fourth. The composition of the "event structures" of Bulgarian membership in the alliance in the light of the previous dynamics of the domestic political debate on joining the alliance provides grounds to argue that the actors of the "competent and responsible circle" to one degree or another endure mutual influences and suffer such from the external factor. The Western actor realizes its dominance according to the Brzezinski formula we have already quoted above. Its concretization for the Bulgarian side we find in a text of a Memorandum from 02.08.1991 on the Bulgarian-American consultations, where it says: "The prospects for the development of contacts and consultations between Bulgaria and NATO were discussed, both at a high political and expert level. Ambassador Taft stressed that these should be carried out on a permanent

basis. The point of these contacts is not to receive information and advice from NATO on issues that have already been resolved, but to give our countries an opportunity to present their position and to participate in the process of forming NATO decisions on the main security issues in Europe” (SA, ivn. 48-10, a.u. 24, sh. 33.) * This approach is also a christomatic example of the application of deliberate external influence, which is par excellence an attitude of power. (Ivanov, 1994, p. 122.) The Bulgarian side is placed in a position to “... evaluate the content of the perceived information in the light of its own objectives, views and judgments,...” (Ivanov, 1994, p. 123.) being sovereign in its right “... to put forward counterarguments (Ivanov, 1994, p. 123: Wrong D.H., 1979, p. 32.) because the influencer acts with arguments” (Ivanov, 1994, p. 123: Conolly W.E., 1974, p. 88.). But if the deliberate influence is used according to the specifics of the moment and in relation to the evolving positions of the BSP, combined with forms from the toolbox of political pressure, then in relation to the political actors firmly defending the Euro-Atlantic orientation of Bulgaria, the influence of the external factor is unintentional. Moreover, in relation to the latter, it is also strong, reaching ideological suffusion, because the search for legitimacy, at least for the UDF, is not limited to the occupation of domestic political niches. External recognition is also necessary. Achieving the domestic political consensus for NATO membership leaves the exercise of influence in its forms as a manifestation of the power relation of the dominant geopolitical Western factor over the actors of the “competent and responsible circle” in the Bulgarian state. This brings us to the question: how does the institutional mechanism for national security decision-making work under Bulgaria’s NATO membership, according to the known facts and available documents?

The focus of our search justifiably points to the first of the “event structures”, forming the design of the mechanism of the Bulgarian accession to the Alliance – “on 17 February 1997 the government of Sofianski submitted Bulgaria’s application for NATO membership” (Kalinova, Baeva, 2006, p. 305). Although it is not the final decision* in purely procedural terms, it is undoubtedly the political decision actually taken and put into real action. This is also due to the fact that previous political actions and acts of actors from the “competent and responsible circle” of the Bulgarian institutions have a publicly declarative and somewhat active character.* The operation of the institutional mechanism implies again its consideration from formal (procedural) and substantive perspectives. The CSA did not receive any documentation of the actors’ actions from the “competent and responsible circle” of the Bulgarian institutions in early 2007, and the operational archives of the same, referring to the subject matter of the LSAF and the LPCI, do not provide such documentation or information about it. Nevertheless, from the publicly known facts and documents, we can

state that the government as the main actor of the “competent and responsible circle” of the Bulgarian institutions taking decisions on the country’s national security implemented procedural actions on the decision on the country’s membership in NATO. These include the Decision No. 192 adopted on 17 February, which submitted an application for membership in the Alliance, and the Decision No. 304 of the Council of Ministers adopted one month later, which adopted the National Program for the Preparation and Accession of the Republic of Bulgaria to the North Atlantic Alliance, and Decision No. 99, which established a mechanism for the coordination of the activities under the National Program through the construction of an Interdepartmental Committee (later renamed Council – a.n.) for NATO integration. The Government does not leave the impression that, in terms of the time factor, its composition and the administrative capacity of the agencies available at the time, it has developed in a collegial manner and in accordance with the administrative procedure (in terms of content) the complex measures it has adopted, outlining the design of the decision it has taken to join the Alliance. None of the other actors of the ‘competent and responsible circle’ implemented any procedural action in taking this decision. From a formal point of view, this from a substantive point of view, it should be pointed out that the two governmental documents constructing the decision to join the Alliance are the product of competent elaboration in form and content. The national program is structured in six parts, covering foreign policy dialogue and consultations and other diplomatic actions, political preparations for membership and accelerated implementation of NATO and member states’ standards in security and defense policy, measures to improve the interoperability of the country’s armed forces and those of member states, economic aspects of NATO integration and the development of military-industrial cooperation, information activities, and financial, material and other (DoMC № 304, annex 1). “Interministerial Council for NATO Integration” (DMS No 99/17.03.1997, prom. SG No 24 of 21.03.1997, SG No 48 of 13.06.2000, SG No 24 of 21.03.1997, SG No 48 of 13.06.2000, SG No 75 of 26.08.2003, SG No 112 of 23.12.2003) is a good organizational design for the establishment of a mechanism for the coordination of activities under the National Program. In fact, its creation is indicative of the absence of that necessary actor from the “competent and responsible circle” of decision-making on the country’s security, which we have defined as its *differentia specifica*, and also of the obvious organisational and functional insufficiency of the NSCC to effectively perform such a role. Under these normative documents, however, we cannot analyse the decision-making process – its stages, the selection of possible alternatives and their eventual outcomes. We can assess the potential feasibility of implementing the decision already taken.

Discussion

The government decides on NATO membership by submitting the country's official candidacy to the organization and adopting a National Program and a mechanism for coordinating the implementation of the activities set out in it. It possesses the most significant power resource as a competent and responsible institution in security matters. The Cabinet takes the decision as a collective body. The decision-making, however, is formal: the Cabinet points to the different party status of its members, i.e., different access to participation in the party decision-making process, and the "time" factor points to the impossibility of making such a decision, even as a mere government administrative procedure, let alone as a complete politico-expert elaboration. (The Cabinet was appointed on February 12, 1997, and announced its decision with a submitted application on February 17, 1997, i.e., in only five days!) It is even inadequate (35-48 days) for an initiated government-authored elaboration for such documents as the program, the mechanism and the subsequent proposal for their financial backing in view of the actual state of administrative capacity and the processes of personnel changes in the departments as well as the socio-economic situation and financial situation in the country! The government is caretaker! The understanding and traditions in European constitutional practice, from which the Bulgarian one draws legal matter and practical procedural models, take into account "its temporary nature and the fact that in a parliamentary state it is not under the control of the parliament, (which – a.n.) imposes certain limitations on its activity. It is not supposed to engage in the solution of strategic and long-term tasks..." (Spasov, 2001, p. 74.), such as a membership in a geostrategic military-political alliance. Negotiation in principle and/or in specifics of broader powers of this government by the actors of the "competent and responsible circle" is not their competent and responsible decision. (Duma newspaper, special issue, 14.02.2002) The country's membership in NATO does not need, alongside this type of negotiation, to trigger an institutional decision-making mechanism with a caretaker government. The chronological reflection of the actors of the "competent and responsible circle" in Bulgarian politics about it, as an instrumentalization of the geopolitical choice of the state, is manifested through the symptoms of a kind of heterotopic crisis: first, the effect of the split political consciousness – where to, with whom, and second, the problematization of political (national) identity and legitimacy – who and what we are. The degree of correlation of Chrono-reflexivity about the geopolitical process between the "competent and responsible circle" of Bulgarian political actors and the dominant external factor leads to the manifestation of the heliotrope effect of this crisis as well: the internal factor, reflecting in the "actual and non-actual" geopolitical realities the actual ones, feels the actual action of the external factor, which on the principle of solar magnetism amplifies the speed of convergence of the two countries towards common union membership.

The President of the Republic did not initiate a meeting of the CSNS on the decision of the caretaker government to submit Bulgaria's application for NATO membership. The NCCC, as a *differentia specifica* of the "competent and responsible circle" of Bulgarian institutions and decision-makers on the country's security, does not function. The President will participate in the procedure of accession to the treaty and that of its ratification by the Parliament.

The National Assembly is dissolved. It and its specialized standing committees will only be activated during the ratification procedure. Again as a formal actor from the "competent and responsible circle".

There is the leading role of the party actors, who actively defended the political line for full membership in NATO, and especially the SDS. Most likely, the decision to join the Alliance by submitting the country's official candidacy by the caretaker government of Stefan Sofianski was taken by the leadership of this party – its deputy chairman is a newly elected president who appoints the composition of this government by functionaries of this party. By its nature, this decision can be classified as a collective decision. The political situation in the country has realised its undoubted parliamentary victory. The main political opponent has been defeated in the political confrontation over the geopolitical orientation of the country and the manner of its implementation. Political consensus has not been achieved through creative political debate.

The heads of the army and the special services are rather nominally present in the actions and decisions of the caretaker government. It is likely that even before the formation of this cabinet, the 'competence factor' – the expert opinions of symbolic analysts and professionals close to the SDS, using immediate know-how from the outside and/or directly provided such.

The mechanism of institutional interaction and decision-making on national security under the country's NATO membership has not worked under the normal functioning of constitutional parliamentary. It has manifested itself in a constitutional emergency – the existence and operation of a caretaker government. Here is the structural defect of the Bulgarian political approach to the decision to join the Alliance: a formal governmental decision based on a prior party decision. Membership in the Alliance is again largely predetermined by past and current actions of the external factor. The political class is again virtually unprepared. Again, the "competent and responsible circle" of institutions and officials in the highest state power is faced with the problem of staying within the possible free perimeter of action in this predetermined better and more advantageous starting position for the state. The overall composition of this circle does not yet produce the necessary institutional procedure – a protective reflex minimizing the influences of external factors and the errors of the internal factor. At the same time, in the concrete historical state of Bulgarian

society, opportunities for avoiding major mistakes have emerged – democratic organization of state life: pluralism and publicity; adoption and development of procedural technology for implementation of decisions. It remains to turn it into a technology for decision-making.

Notes

* Bulgaria, like the other former Eastern European socialist countries, has come a short way from bilateral contacts with the US and NATO to institutionalized political-military interaction. Once in the framework of the OSCE and more through the North Atlantic Cooperation Council (NACC) and the Partnership for Peace (PfP) program. This process is transparent, (from the general political framework and content to the purely expert-technical issues) and with a predictable “horizon of expectation” (Kozellek) – both at the individual stages and for the ultimate goal of Alliance membership. – a.n.

* Ambassador William Taft was the U.S. Permanent Representative to NATO at the time. – a.n.

* Former SDS MP Stoyan Raichevski brought to public attention the fact that “on February 17, 1997... the caretaker government adopted Decision No. 192 for full membership of the Republic of Bulgaria in the North Atlantic Treaty Organization” – (see Raichevski Stoyan. “Ten years ago Bulgaria chose NATO”, Democracy newspaper, issue 7 (62), year II, 16.02.2007, p. 3) – a.n.

* This is so because the Decision No. /29.12.2002 of the Council of Ministers approves a mandate and a team to conduct negotiations for NATO membership, which take place in two rounds: the 1st round – started on January 10, 2003 and the 2nd round – from February 10 this year. An example of such a hypothesis becoming a historical fact is the revision of Norway’s decision on EU membership, as a result of this type of negotiation, in which the Scandinavian country considers that the conditions offered do not meet Norwegian interests – (not approved quotas for strategic sectors of the Norwegian economy – fishing and energy extraction in the North Sea) – a.n.

* These are mostly acts of various legislations of the National Assembly as the main actor of the “competent and responsible circle” of the Bulgarian institutions, such as the Declaration on Bulgaria’s Aspiration to Join NATO and the WEU of 21.12.1993 and the Declaration of National Accord, which defines Bulgaria’s accession to NATO as a major national priority of 08.05.1997, adopted by consensus. Acts of this kind should not be regarded as “legal acts, they do not give rise to rights and obligations” – (see Spasov Boris. The National Assembly..., Ibid, p. 108). Their “political content” should be read primarily in domestic political terms, as they are stages in imposing consensus, as an element of political struggle between party actors in the country. It is no coincidence that

after the last declaration, three months later, on 11 July 1997, the UDF government, headed by Ivan Kostov, adopted its Declaration, which confirmed that the recent accession to NATO was in Bulgaria's immediate national interest and strategic priority. – a.n.

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DYNAMICS OF PUBLIC ATTITUDES TOWARDS NATO

Dimitar Ganev

Abstract: The article aims to analyze the data from nationally representative public opinion surveys regarding Bulgarians' attitudes towards NATO. The chosen period is the last three years to capture the dynamics of attitudes before and during the war in Ukraine. The article provides a detailed presentation of the surveys' methodology, a comparative analysis of the data from different waves of research, and a demographic breakdown based on several demographic indicators.

Key words: NATO, Survey, Data, Demographic

Анотация: Статията има за цел да анализира данните от национално представителни проучвания на общественото мнение относно нагласите на българите към НАТО. Избраният период са последните 3 години, за да се улови динамиката на нагласите преди и по време на войната в Украйна. Статията предоставя подробно представяне на методологията на проучванията, сравнителен анализ на данните от различни вълни на изследване, както и демографска разбивка по няколко демографски показателя.

Ключови думи: НАТО, изследване на общественото мнение, данни, демография

Over the past 20 years, with this exceptional dynamic of events and shifts in the political process, no institution or organization has remained unaffected by the changed environment. Along with the main political institutions, such as parliament, government, and president, leading sociological agencies in Bulgaria periodically test the attitude towards the geopolitical attitudes of Bulgarians, including organizations such as the EU, NATO, and leading countries in the region and the world.

In this article, I will focus specifically on NATO to establish the dynamics of public attitudes toward the organization in the last few years. This article aims to determine whether certain trends in attitudes toward NATO can be identified, considering the war in Ukraine and the support the organization has provided to Kyiv in its defense against Russia.

Research Methodology

The data used are indicators set in national representative surveys, which are conducted monthly using the same methodology, in order to compare the results between the different waves of the survey.

In terms of the communication format with respondents, the study was conducted through face-to-face interviews using tablets, where the questions were read out loud, and the interviewer recorded the answers. The direct semi-standardized interview at the homes of the respondents face-to-face with a national sample of 1,000 people in the country is the established standard for professional public opinion research. This is also the model of method and sample used, which is used in world practice in research programs such as Eurobarometer, the World Values Survey. The European Values Survey.

The specified sample model assumes preliminary stratification of the adult Bulgarian population. The sample is based on the latest official data of the National Statistical Institute on the country's population, distributed by gender, age, administrative region (the 28 administrative regions) and types of settlements (capital, regional centers, small towns and villages). The sample is stratified by region and type of settlement with selection of respondents by gender and age.

For this purpose, a nationally representative sample of 1000 cases are modeled after:

- initial stratification of the adult Bulgarian population by administrative region, type and size of the settlement.
- cluster selection of settlements or neighborhoods in large cities.
- a starting address is selected for each cluster.

Following instructions, the interviewer follows a random route and contacts individuals at their residence until completing the planned number of effective interviews. Only one person per household may be interviewed.

This sampling algorithm guarantees the random selection of individuals from a probability-theoretic point of view, which guarantees the representativeness of the sampling model for the target group. Thus, the sample created by this algorithm is representative of all key parameters of the population – socio-demographic and socio-economic.

This methodology ensures the relevance of the results obtained and makes them representative of the structure of the adult population throughout the country. Additional statistical processing is applied, according to various socio-demographic characteristics.

Advantages of the method: first of all, choosing this method the usual risks of quick telephone surveys and online surveys are avoided, which often lead to data distortions through the overrepresentation of certain groups of the population. Secondly, studies that are implemented through telephone or online surveys are incomparable with other similar national and international studies.

This type of research methodology ensures the highest possible level of data reliability. For this specific sample size, the maximum permissible stochastic error is within 3.1% at 50% response proportions.

The empirical information that we will analyze in this article was obtained when the interviewer asked the interviewee the question: “What is your attitude towards NATO?” Subsequently, the interviewer reads out four possible options to the respondent in the order: completely positive / rather positive / rather negative / completely negative. The option “I don’t know, I can’t decide” or the refusal to answer the specific question is not presented as an explicit choice to respondents. However, respondents are free to refrain from selecting any of the listed options if they choose to do so.

Research period

The data analyzed in this article are part of the research program conducted by the sociological agency Trend. As part of this program, the agency periodically assesses public attitudes toward NATO and has provided data from several of its surveys specifically for this article.

We selected a total of four waves of nationally representative surveys, conducted as follows: December 2021², April 2022³, January 2023⁴, and April 2024⁵. These surveys were chosen to provide empirical data from different points within a three-year period heavily influenced by the war in Ukraine.

Our aim was to establish a baseline for public attitudes toward NATO just before the war began, which is why we selected December 2021 instead of the months immediately preceding the start of military actions. From January 2022 onward, public discourse was already saturated with news about a potential Russian invasion of Ukraine.

The second wave, conducted in April 2022, reflects public opinion shortly after the war began and the announcement of Western support for Ukraine’s defense. The January 2023 wave allows us to assess whether public attitudes had shifted nearly a year after the start of the war. Finally, the fourth wave, from April 2024, provides the most recent snapshot of Bulgarian public opinion regarding NATO.

The data from these four snapshots of public opinion give us a sufficiently clear picture of the dynamics and trends towards NATO in an extremely event-

² The survey was conducted between December 1 and 7, 2021, among 1,009 adults through direct, semi-standardized face-to-face interviews.

³ The survey was conducted between April 4 and 11, 2022, among 1,004 adults through direct, semi-standardized face-to-face interviews.

⁴ The survey was conducted between January 11 and 18, 2023, among 1,002 adults through direct, semi-standardized face-to-face interviews.

⁵ The survey was conducted between April 12 and 19, 2024, among 1,002 adults through direct, semi-standardized face-to-face interviews.

ful period, which could be related to the attitudes of Bulgarians towards their attitude towards the North Atlantic Treaty.

Key Observations from the Comparison of Results Across the Four Survey Waves

What is your attitude towards NATO:

	Completely positive	Rather positive	Rather negative	Completely negative
December 2021	30%	14%	25%	17%
April 2022	29%	14%	28%	17%
January 2023	30%	15%	26%	20%
April 2024	32%	17%	22%	20%

The comparison of the attitude towards NATO between the different waves of the survey shows a lack of significant dynamics and the absence of a certain trend in a positive or negative direction. It seems that despite the eventful and change-filled period, this does not significantly affect the attitudes of Bulgarians towards NATO.

The only change that goes beyond the potential stochastic error can be registered in the latest national representative survey, which was conducted in April 2024. It shows a positive change, with the agency reporting the highest values of the “completely positive” attitude of 32%, which is 2% more than the survey in January 2023. There was also an increase in the “rather positive” option, and here the difference is also 2% compared to January 2023 and is the highest value for the four surveys. The most significant difference is the decline in the shares of the “rather negative” option from 26% in January 2023 to 22% in April 2024. This is also the only difference that is beyond the potential stochastic error.

In this case, if we accumulate the values of positive and negative attitudes in comparison between the two surveys (in January 2023 and April 2024), we will find that the positive values have increased from 45% (the sum of 30% + 15%) to 49% (the sum of 32% + 17%), and the negative ones have decreased from 46% (the sum of 26% + 20%) to 42% (the sum of 22% + 20%). Beyond the quantitative change, the difference in percentages between January 2023

and April 2024 also leads to a qualitative change – the survey in 2024 is the one in which the positive values (49%) are the highest and the negative ones are the lowest (42%), along with those in December 2021.

Here’s how this looks in comparative terms:

	Positive (the sum of the options “completely positive” and “rather positive”)	Negative (the sum of the options “completely negative” and “rather negative”)
December 2021	44%	42%
April 2022	43%	45%
January 2023	45%	46%
April 2024	49%	42%

This positive change could be primarily attributed to two main factors:

The first is that, following Russia’s military invasion of Ukraine, Bulgarians are more aware of the higher level of security provided by NATO membership. Even if the war in Ukraine extends beyond its borders, it is less likely to spread to the territory of a NATO member state. Countries like Moldova, for example, appear to be more potentially at risk.

The second factor that has likely contributed to the slight improvement in attitudes toward NATO is the expansion of the alliance with two new members—Sweden and Finland. Both Scandinavian countries are perceived by Bulgarians as highly developed nations that often serve as examples in various comparative rankings and statistics. The decision of two highly developed countries, undoubtedly influences some Bulgarians to change their attitude towards NATO in a more positive direction

In other words, the fact that so many years after the establishment of the North Atlantic Treaty Organization, countries that have always had the opportunity to join the defense alliance are now deciding to become part of it, indicates that it can be trusted and that the trend for the alliance is positive. This also affects public opinion in our country.

Demographic Dependencies in Attitudes Toward NATO

What is your attitude toward NATO?

Demographic breakdown, April 2024⁶

	Total	Gender		Age						Education		
		Men	Women	18-29	30-39	40-49	50-59	60-69	70+	Higher	Secondary	Primary and lower
All Respondents	1002	484	518	142	168	198	181	176	135	292	596	114
Completely Positive	174	95	79	20	42	40	35	23	13	67	90	16
	17%	20%	15%	14%	25%	20%	19%	13%	10%	23%	15%	14%
Rather Positive	325	153	172	53	58	78	56	45	35	103	195	28
	32%	32%	33%	38%	34%	39%	31%	26%	26%	35%	33%	24%
Rather Negative	216	109	107	29	32	40	48	44	23	58	135	23
	22%	23%	21%	20%	19%	20%	26%	25%	17%	20%	23%	20%
Completely Negative	196	102	94	19	25	33	31	48	40	47	130	20
	20%	21%	18%	13%	15%	16%	17%	27%	30%	16%	22%	17%
Don't know	91	24	67	21	12	7	11	16	24	17	46	27
	9%	5%	13%	15%	7%	4%	6%	9%	17%	6%	8%	24%

To identify attitude dynamics within certain demographic groups, it is necessary to compare the results of these groups with the overall picture (the leftmost numerical column – total). For a difference in opinion between a specific demographic group and the general population (the adult population of the country) to be considered significant, the disparity needs to be at least 5% in one direction or the other.

⁶ In the far-left column, you will find the overall data on attitudes (all 1,002 interviews), distributed among the four options, along with those who answered “I don’t know / I can’t decide” or refused to respond. In each of the columns to the right of the overall data, you can see the breakdown by various demographic groups—gender, age, education, ethnicity, type of settlement, and the electorate of a specific party.

The data in each column totals 100%. The numbers in the boxes above the percentages indicate the number of respondents who selected the specific option. It should be noted that the data for individual demographic groups is not representative of those groups but provides a sufficiently good relative idea of the attitudes within them.

The results are representative only for the target group being studied—adults residing within the territory of the Republic of Bulgaria.

Ethnicity				Settlement				Electorate								
Bulgarians	Turks	Roma	Other	Capital	Regional center	Small city	Village	GERB	PP-DB	DPS (MRF)	Vazrazhdane	BSP	ITN (There are such people)	I do not support anyone	Others	Non-voters
826	92	61	23	216	336	214	235	130	81	75	74	47	25	36	53	480
139	25	8	2	43	56	33	42	45	42	18	1	4	3	-	4	56
17%	27%	13%	9%	20%	17%	15%	18%	35%	52%	24%	2%	8%	13%	-	7%	12%
266	34	16	9	82	98	66	79	63	30	26	12	12	6	10	13	153
32%	37%	27%	37%	38%	29%	31%	34%	49%	38%	35%	16%	24%	23%	28%	24%	32%
185	16	11	5	32	77	54	53	14	3	13	20	17	6	9	14	119
22%	17%	17%	20%	15%	23%	25%	23%	11%	4%	18%	26%	36%	26%	26%	25%	25%
171	8	13	4	37	81	45	33	7	3	8	41	11	5	11	17	91
21%	9%	20%	18%	17%	24%	21%	14%	6%	4%	10%	55%	24%	22%	31%	33%	19%
65	9	14	4	22	24	16	28	-	2	9	-	3	4	5	5	60
8%	10%	22%	16%	10%	7%	8%	12%	-	3%	13%	-	7%	17%	15%	10%	13%

On this basis, we can identify three groups with dynamics compared to the general picture – by age, education, and electorate.

Among the younger generation (18 – 40 years old), we register higher values of positive attitude towards NATO.

Among the youngest (18–29 years old), a higher proportion of respondents chose the “I don’t know / I cannot decide” option, which is typical for this age group regarding political issues. This generation remains somewhat distanced from the political process and does not follow events or news closely. This explains the higher share of respondents without an opinion. Nonetheless, even within this group, 52% hold a positive view of NATO (compared to 49% in the general picture), while 33% hold a negative view (compared to 42% in the general picture). Among people aged 30–39, the highest level of positive attitudes toward NATO is recorded at 59%, with 25% expressing a “completely positive” view. Negative attitudes among this group stand at 34%.

At the other end of the spectrum are the oldest respondents – those over 60 – where negative attitudes toward NATO dominate. Moreover, the older the respondents, the more negative their views. A significant portion of this group

looks back nostalgically on the socialist era, during which NATO was perceived as an enemy organization.

In the 60–69 age group, 49% have a positive attitude toward NATO, while 52% hold a negative one. Among them, the “completely negative” option dominates at 27%. Among the oldest respondents, those aged 70 and above, only 36% have a positive attitude toward NATO, while 47% hold a negative one. The “completely negative” option is also prevalent, accounting for 30%.

The dynamics by age should not surprise us – the younger generations are more positively disposed towards our country’s European and Atlantic belonging, while the older generations view it with skepticism. This generational dependence is largely a consequence of the nostalgic mood of some of the oldest generations in Bulgaria, who were socialized in the socialist period and have more strongly expressed Eastern sentiments.

The second group in which a specific dynamic is registered in relation to the general picture is that of people with higher education. Among university graduates, 23% declare a completely positive attitude compared to 17% among the general picture and 35% rather positive compared to 32% among all. The shares of negative are also lower, with 20% declaring a rather negative opinion (compared to 22% among the adult population) and 16% completely negative (compared to 20% among all).

Nearly a quarter of respondents with primary or lower indicates the “I don’t know” category, which is not surprising. This group is the most detached from political processes, shows the least interest in them, and is the least informed. The group of least-educated individuals largely overlaps with the Roma population, which explains the similar distribution of responses between these two groups.

The breakdown by political affiliation shows the most significant differences from the general picture. It should be noted that the sample sizes for smaller parties are not large enough to draw definitive conclusions, but they still provide sufficient orientation.

The most significant difference with the general picture is registered in the breakdown by party affiliation. I would like to clarify that the number of respondents in the smaller parties is not large enough to draw any definitive conclusions, but it does provide us with good enough orientation.

The parties’ positions on Bulgaria’s membership in NATO, to a significant extent, also determine the attitudes of the respective electorates in their attitude towards the North Atlantic Treaty. The electorates of PP-DB and GERB are the most positive in their attitude towards NATO. Over half of the PP-DB supporters express a completely positive attitude toward NATO, and 38% have a relatively positive or generally positive attitude of 90%. In GERB, the sum of the two positive options is also close (84%), but among them, a more moderate option of rel-

atively positive (48%) dominates, and slightly over a third (35%) states that they are completely positive. It should be borne in mind that these very categorical assessments of a positive attitude towards NATO are also a consequence of the fact that in the last more than two years, the leaders of both parties have continuously emphasized the strong Euro-Atlantic line that is being followed, which leads to support among the electorate for a positive attitude towards Western structures such as NATO and the EU. The same applies to the MRF⁷, which, following the party line for a strong Euro-Atlantic commitment, in its majority expresses a positive attitude towards NATO (24% completely positive and 35% rather positive), and 28% negatively (18% rather negative and 10% completely negative).

At the other extreme in their attitude towards NATO are Vazrajdane and the Bulgarian Socialist Party. Among the sympathizers of Kostadin Kostadinov's party, 18% declare a positive attitude towards NATO (only 2% completely positive and 16% rather positive), while 81% declare a negative attitude (26% rather negative and 55% completely negative). Here too, the main reasons can be found in the party leader's categorical assessment that Bulgaria should leave NATO. The BSP formally supports Bulgaria's membership in the North Atlantic Treaty Organization, but ordinary socialists tend to have a negative attitude towards NATO, but among them the opinion is more moderate compared to the Vazrajdane electorate. The option "rather negative" collects 36% among the red electorate, while the extreme "completely negative" has 25% of mentions. Slightly less than a third of socialists express a positive attitude towards NATO, with 24% expressing a rather positive attitude and 8% completely negative. In forming the attitudes of the BSP electorate, the leading factor is not the party's position but the fact that two-thirds of the red sympathizers belong to the generation over 60 years.

Due to the youth profile of the ITN electorate (There are such people), there is a higher share of lack of expressed opinion among them in the option "I don't know." The explanation here coincides completely with what we gave above for the youngest age group (18-29 years).

Factors Influencing Attitudes Toward NATO in the Future

In the short term, the most significant factor that could affect Bulgarians' attitudes toward NATO is the ongoing dynamics of the war in Ukraine and the potential outcome of the conflict. However, from today's perspective, it is difficult to predict how NATO's image might evolve under any possible scenarios for the war's resolution. Moreover, since the start and subsequent development of the military conflict have not significantly impacted Bulgarians' views on NATO

⁷ At the time of the fieldwork of the survey (April 2024), the Movement for Rights and Freedoms (MRF) (DPS) was still a single party and had not undergone a split.

over the past two years, there is no guarantee that the war's outcome will necessarily have a major influence.

In the long term, assuming no significant international events alter public perception of NATO positively or negatively, the outlook suggests improving attitudes among Bulgarians toward NATO. This trend is driven by generational factors – younger generations (18–40 years old) consistently express more positive views toward the North Atlantic Treaty Organization compared to the general population. In comparison, older generations (60+ years old) exhibit the highest shares of negative attitudes.

TECHNOLOGICAL ASPECTS OF NATIONAL SECURITY AND INTEGRATION INTO NATO AND COMMON EUROPEAN DEFENSE

Iliya Tsenov

Abstract: The article focuses on the technological aspects of national security and integration into NATO and the pan-European defense. The situation at the beginning of the 21st century is presented in terms of the challenges of technology and innovation. The focus is placed on the inevitable challenges and societal transformations arising from technological change and security issues. The purpose of this report is, by analyzing the state of national security, and in particular the country's defense readiness, to point out the role and importance of new technologies for strengthening collective security in the increasingly dynamic situation in the world and especially in our region, to point out the problems and weaknesses and look for possible solutions. As a result of the research, it can be stated that the basis of the changes are economic and social reforms, but in order to achieve true military security, it is necessary to introduce the latest achievements of science and technology, to rely on innovations, to overcome the lagging of European countries in a global aspect, and Bulgaria in particular. The key conclusion that can be drawn is that security issues do not tolerate delay and compromise, and serious and thorough analysis is needed to take the necessary actions and make relevant decisions to secure the future of our country.

Key words: national security; integration; technologies; pan-European defense; innovations.

Анотация: Статията се фокусира върху технологичните аспекти на националната сигурност и интеграцията в НАТО и общоевропейската отбрана. Ситуацията в началото на 21 век е представена от гледна точка на предизвикателствата на технологиите и иновациите. Фокусът е насочен върху неизбежните предизвикателства и обществени трансформации, произтичащи от технологичните промени и проблемите на сигурността. Целта е, като се анализира състоянието на националната сигурност, и по-специално на готовността на страната за отбрана да се посочат ролята и значението на новите технологии за укрепване на колективната сигурност във все по-динамичната ситуация в света и най-вече в нашия регион, да се посочат проблемите и слабостите и се потърсят възможните решения. Като резултат на изследването може да се посочи, че в основата на промените са икономическите и социалните реформи, но за да се постигне истинска военната сигурност е необходимо да се въведат най-новите постижения на науката и технологиите, да се заложи на иновациите, да се преодолее изоставянето на европейските страни в световен план, и в частност на България. Ключовите изводи, които могат да се направят, е, че въпросите на сигурността не търпят отлагане и компромиси, и е необходим сериозен и задълбочен анализ, да се предприемат необхо-

димите действия и да се вземат съответните решения, за да се осигури бъдещето на страната ни.

Ключови думи: национална сигурност; интеграция; технологии; общоевропейската отбрана; иновации.

“It has become appallingly obvious that our technology has exceeded our humanity.”

Albert Einstein

This article focuses on the technological aspects of national security (NS) and its integration into NATO and pan-European defense. It presents the situation at the beginning of the 21st century in terms of the challenges of technology and innovation. It focuses on the inevitable challenges and societal transformations arising from technological change and security issues.

Introduction

The relevance of the topic is conditioned by the growing role of security in an increasingly globalized and contradictory world and Bulgaria's membership in NATO. At a time when science and technology are becoming increasingly important, it is a real challenge not to miss the right moment and join the leading countries. Europe recognizes its own military-technological gap with the US and China, and the plans to overcome it give us a chance to seize all opportunities by fully integrating into NATO and joining the Common European Defense (CED).

Methods

The methods used in this thesis include deductive, inductive, structural-functional, and comparative techniques, as well as analytical synthesis and abstraction as heuristic tools.

Results

“Welcome to the 21st century!”

We relate modern technologies with scientific and technical progress achievements and the constant development and improvement of production methods and tools. Technology (*Greek – art, craftsmanship, skill and their study*) is a set of means for the transformation of the “given” into the “necessary”, the algorithm of operations and procedures carried out by equipment and machinery or, in general, the technique. We associate them with the beginning of human civilization and the constant development and improvement of today's highest achievements, which we assume to be in information technology (IT). Since as far back as 1958, when in an article in the Harvard Business Review Harold

Leavitt and Thomas Whistler pointed out that the new technology that emerged had no definite name and would be called the original information technology, to today when it is simply taking over the world. The focus of IT is, of course, information and its increasing importance to the world economy and humanity as a whole. And today it is making giant strides towards the future, the new world and realities, changing the global existence of people and each individual towards a better and richer life. "Today's wealth revolution will provide many opportunities and new life trajectories not only for creative entrepreneurs in business but also for entrepreneurs in culture and education. It will provide new chances to eradicate poverty around the world. But it will issue this invitation to a brighter future with a caveat: The risks are not only multiplying, but they are also escalating. Welcome to the twenty-first century!" (Toffler, 2007, p. 21) It is historically fair to note that before our century, the world has passed through different stages of its civilizational development, and in the most global terms, two major waves of change can be noted. Each of these largely wiped out the previous culture and, quality-wise, replaced it with a new way of life. One of the main differences is the time required for change. The first wave- the Agrarian revolution- took thousands of years to accomplish, the second- the Industrial revolution- about three hundred, and the impetuosity of the third is mirrored by the few decades it took to turn things around.

Whether this is William Rostow's mature society, Daniel Bell's post-industrial stage, or Alvin Toffler's information world is more a matter of debate. Things just happen and we all see the changes in organization from market to information, in the basic interest from capital to knowledge and the basic product from industrial product to technology. The changes are everywhere – management, budget allocation, strategic environment, and most of all, in the way of thinking. The emerging new civilization brings with it a new economy and politics, a changed consciousness, new relations between people, and a new life in all its dimensions. This technological globalism leads to the need to clarify society-technology relations and to overcome the emerging relations resulting from different perspectives – political, economic, social, structural, moral-ethical, and professional.

Modern society is made up of a myriad of systems, each of which is a whole, as a set of individual parts interconnected – input, output, environment with basic parts interacting on basic principles such as synergy, flexibility, and contingency, efficiency, and effectiveness. Established and functioning organizations conform and adapt to the environment seeking ways to fulfill their strategic objectives in accomplishing a mission.

As a natural and social phenomenon, they use the existing resources respecting the basic principle of strategic guidance for global equilibrium, which is the basis of homeostasis – the pursuit of a continuous process of reliable maintenance

of structural, functional stability, constancy of internal parameters, preservation of integrity and survival of an object in a dynamically changing environment.

When governance is disrupted, disorder occurs in strategy, conflict – in structure, internal competition, and low efficiency – in the system. It should be noted that the larger and more comprehensive a system is, such as the national security system, the more existing processes and relationships are mobilized and confronted at a higher level. As such, a meta-system has different elements – economic, political, social, cultural, and administrative. In confrontation, each side, as an ultimate goal, seeks victory (some form of domination) over the adversary by terminating the synergy in its organization, thereby causing a loss of quality and effectiveness. Today, the struggle is for strategic advantage by achieving superiority in IT. The better-adapted party will have the advantage in constantly changing circumstances of all kinds. As a consequence of IT in societal development at the beginning of the twenty-first century, one can point to the expansion of the influence of multinational corporations and the weakening of states (on account of this), the increasing role of international organizations in the security system and of non-governmental organizations, as well as the role of the individual, his mobility and the formation of an information society. In parallel, we are already witnessing opposing trends for a truly multi-polar world, which will inevitably lead to new shocks in more and more sectors such as trade, investment and, above all, technology, which are a prerequisite for a new phase of global confrontation and the search for supremacy.

Technology and innovation

The Information Society (IS) can be seen from different perspectives: economic, professional, spatial, cultural, and, of course, technological. This is further evidence of Kondratieff's empirical rules of cycles in world development – textiles – France (1783- 1847); railways – England (1847-1893); the automobile – Germany (1893-1938); the atom – USA (1939-1991); satellites and information – USA (1991...). Thus, IS becomes the next basic scheme of civilization, where information is the main factor of evolution and progress.

Scientifically and theoretically, it is still an open question whether what is happening today is another stage of the third or a new fourth technological revolution. More importantly, there is a real change in the smallest and most important element of the system – the human being. Billions of people are now connected to the global network via mobile devices, and their access to information and knowledge is increasingly borderless.

The technological revolution is causing these fundamental changes in the professional sphere and in lifestyles. Automation and digitalization are leading to a remarkable transformation and are impressing, above all, with their speed, scope,

and impact on individual systems. Challenges are appearing and falling for innovation in all areas of life – economic growth and vast new markets, cheaper transport and communications, efficient supply chains, and, of course, increasing inequalities, people going out of work at the expense of robots, and, of course, the increasingly crucial importance of human over financial capital. The main effects are expected to be on business and consumers, product development innovation, and now the customer at the center of the economy and competition. “By having access to an unprecedented array of information, educated consumers can make more informed decisions. This change is radical for companies that have been accustomed to a restrictive information approach to their consumers. Millions of consumers are now collectively confronting the traditions of industries as disparate as entertainment, financial services, and health care” (Ramaswamy, Prahalat, 2009, p. 19).

Clearly, the future, the new world, and the new realities will be realized through the central role of the individual. This is at the heart of the change fundamental to the latest, which is increasingly difficult to foresee, but the direction is that set more than 150 years ago by Abraham Lincoln: “... of the people, by the people, for the people...”, envisaging a democratic, global society in which human rights, needs and values prevail, in contrast to the current dominance of institutions.

The transformation of society is taking place with the incredible pace of development of knowledge and related technologies and innovations and the changed mindset of companies and consumers. As a result of the strategic changes and globalization of the customer base, deregulation in the main business sectors and the emergence of quality new markets are creating new opportunities forcing a complete transformation of companies to reach the appropriate degree of competitiveness. The changing world will require a new corporate philosophy in which the employee will be at the center of shared knowledge and the customer – at the top of the pyramid, as the futurists predict. The generation of the bearer of this knowledge is a serious challenge for the management, which literally has to “catch” the consumer requirements.

Unfortunately, the reasonable question “Where are we?!” can hardly be answered optimistically. In terms of innovation, Bulgaria ranked 39th in the world in 2015, 42nd in 2016 and 51st in 2018. Dreams of 1% of GDP for science are increasingly out of reach. If we assume that competitiveness includes the main pillars of sustainable growth, such as the availability of natural and intellectual capital, governance, social cohesion, a balanced import and export regime, skilled labor and the application of new technologies, a high level of partnership between enterprises, technology centers, and universities, a good business climate, etc. then things are not looking good. One of the short, but adequate solutions formula:

‘Problem-Solution-Change’ is a possible option, but the most important change is in the individual and hence in society, as an alternative to the conservative path and the evolutionary approach.

The art of the manager is to refine the risks, the possibilities of benefits and harms among the complex and contradictory options, and to assess, on the basis of the available information, the probabilities of the new, its effectiveness, its costs, its possible benefits and gains, all on the basis of the knowledge and intellectual capital created. More than clear is the emerging advantage of knowledge as a deep factor, whereas time and space have always been the basis of the previous systems of agrarian economy and industrialization based on growing and making things.

The new wave relies on thinking, experience and knowledge. Knowledge, which differs from data as an abstract entity devoid of context, is now information with overarching functions at another level linked to other structures. Its most essential characteristics are difficult to summarize and find, but it is essentially inexhaustible and non-excludable, intangible and non-linear, relational, combinable with other knowledge, portable, compressible and storable. It is difficult to contain, it proliferates and is virtually limitless. Although it is considered difficult to define, we can accept it as a tool that transforms thinking, learning, and culture. It will increasingly influence economic processes with its dynamics in all sectors and participate in changing the world. “The differentiation of knowledge as such and as personal training and experience is also characteristic of the people, we call professionals...” (Doykov, 2010, p. 111) Knowledge is closely related to science, which is a category in its own right, and its methods are the best filter for truly exploring the unknown to drive technological change and economic development. As the great friend of Bulgaria Baron Emile de Lavelle pointed out at the end of the 19th century – “The importance of science applied to the production of goods grows every day and, in the future, the richest and therefore the wisest will be those who will put the most knowledge to work.”

Returning to our time, we can state that real digitalization is still in separate points of the world – Bill Gates’ “City of the Future”, the four winners of Europe – Estonia, Finland, Sweden, and Croatia, Elon Musk’s space plans and several other projects, against the background of which our total underdevelopment stands out. The unfulfilled plans for an e-government, the lowest levels we occupy in the ranking of electronic payments (according to various data between 5-10%), the problems with electronic signatures. Unfortunately, according to the Strategy for the Development of Scientific Research by 2030, the budget allocations for scientific research should triple by 2022, but even then they will be around 0.7% of GDP. A Web of Science (WOS) reference ranks us around 60th in the world (between Algeria and Nigeria). This steady abandonment is,

unfortunately, becoming a trend, and this is against the background of individual glimpses, such as a plant in Vidin region that is being sold for cryptocurrency and the digitalization of heating in some parts of Sofia, the participation of a Bulgarian scientist in Luc Montale's team and a young engineer of ours in the electronic archiving of the public administration of Norway. Obviously, on an individual level, we have already grasped Alvin Toffler's point that knowledge is the most ubiquitous source of power, and it remains a problem to be solved at the institutional level. This is definitely imperative because the EU has already adopted a deadline for the digital bureaucrat – 2022 – and there are already talks of a fifth freedom of movement – of data. It is more than clear that the world will be split in two and the main criterion will be the speed with which e-services are introduced. In parallel, of course, the Member States are adopting requirements for digital security and the implementation of the eIDAS regulation on electronic identification in the internal market.

National Strategy for Science and Technology and Integration into NATO and the EEU

It is only natural that the first steps should be in the finance and banking sector, which is another prerequisite to exploit these opportunities in the national security financial system. As stated in the main program document of the country's defense policy, the White Paper on Defense and the Armed Forces of the Republic of Bulgaria, we will build our security by applying the mechanisms of NATO's collective defense and the EU's Common Security and Defense Policy (CSDP). So far, we have pointed out the priority importance of the modernization of the armed forces and the optimization of the defense infrastructure and the need for this to be carried out, taking into account the changes that are taking place in the world, the changing role of the employee and the customer, the management working for the user, taking into account the real situation and the possible options and risks of development, the judgments and decisions that are made on the basis of the available information.

The overall technological development has a direct impact on the field of NS, and it is more than clear that countries with a high level of investment in education and science will have an advantage in creating the knowledge market and the future organization of the world. Unfortunately, since the beginning of the most technological century, according to Eurostat, we have had negative growth in public spending in these areas as a percentage of GDP. Particularly in the area of security, research structures have been closed down, significant cuts have been made in the military-industrial complex, and the integrity between business and academia has been broken. The human capital created for decades (the most important element in the processes now underway) has been irretrievably lost, the

material base for applied research has been destroyed, and perhaps the biggest problem facing society is the lack of a clear state policy and the opportunities we are missing out on through NATO and the EU.

All this is done with the clear understanding that research is a system of activities to accumulate knowledge by collecting data and information about the processes specific to the field and creating the necessary technologies as tools through certain operations and procedures to achieve the desired result through the transformation of the “given” into the “necessary”. The EU does not hide, moreover, the leading countries seek to involve all comers in a coordinated cooperation in terms of policy implementation, common research and technology to achieve unified security and defense capabilities, through effective and efficient armament programs and the building of a unified European industrial base. The European defense system has four main functions:

- Development of defense capabilities in crisis management.
- Elevating and increasing armaments cooperation in Europe.
- Reinforcing the defense technology and industrial base to create an internationally competitive European defense equipment market.
- Improve the effectiveness of defense research and technology in Europe.

The ambition is to develop the countries’ capabilities to make the most effective use of research and technological advances for defense development, using best practices for cooperation in the future European defense industrial base, without duplicating processes and moving towards ever closer specialization. This can be seen as a good opportunity to participate in these programs, make our contribution, and therefore receive dividends in implementing common projects.

In the NATO Science and Technology Organization, various activities are being worked on, such as:

- Integration of management and coordination processes in NATO military science, research, and technology.
- Development of research and the exchange of technical information based on cooperation between national research organizations.
- Developing long-term NATO research and technology strategies.
- Advising on all aspects of science, research and technology relevant to the military.

System analyses and studies, concepts for electronic and information technology and infrastructure management, transport schemes, etc., are being developed, which are relevant to all parties and, if well organized, can be used to achieve better economic results. This has also been applied in the development of the National Security Strategy of the Republic of Bulgaria and the objectives set for the seven structural security policies to maintain European standards of a wide range of technologically advanced defense capabilities. Implementing and

maintaining them requires defining and building a high level of research and technology that we can provide in the European space.

The strategic framework for the implementation of the state policy in the field of research and technology in these areas essential for the security of the country is regulated in the following normative documents:

- National Strategy for Scientific Research – aiming to turn science into a factor for developing a knowledge and innovation-based economy in line with the tasks set by the European Strategy 2020. It envisages a funding model that stimulates competition and development and increases funding for research and innovation to 1.5% of GDP (including 0.6% public funding).

- The Armed Forces Development Plan of the Republic of Bulgaria – provides a unified set of Armed Forces with balanced capabilities in all components of the military-strategic security environment. Each capability is a set of elements: doctrines and concepts, organizational structure, training, materiel, management, personnel, infrastructure, and interoperability. Behind each of these are advanced science and technology that make them effective and efficient. A major highlight of the Plan is the Investment Program for an Integrated Capital Expenditure Framework for the Acquisition, Maintenance, and Modernization of Armaments, Equipment, and Defense Infrastructure, where the priority projects for the three types of the Armed Forces, Troop Management and Cyber Defense are also located.

- Strategy for the Development of the Defense Technological and Industrial Base – prepared on the basis of the Defense Industrial Base Act to meet the challenges of the country and our contribution to the defense alliances in which we participate.

These documents are oriented towards defining a standard to bring us as close as possible to the levels of the allies in terms of the triangle: security capabilities – science and innovation – defense industry. For this, it is particularly important to go beyond the national framework, where we traditionally have scientific and technological capacity, and to strive to achieve concrete results in individual areas in order to have our share in the implementation of the Common European Security and Defense Policy.

The strategic objectives of the 2015 Strategic Plan for the European Common Defense and Security Policy are:

- Rapid and steady increase in the contribution and effectiveness of security and defense research and technology.

- Expanding and modernizing security and defense science and research capacity.

- Significant increase in the intensity and effectiveness of research institutions and industry/business working in the interest of security and defense.

- Ensure a strong and sustained presence of research and technology in security policy.

- Create the conditions for continuous monitoring and coordination of security and defense research and technology.

In financial terms, a model is envisaged to stimulate the intensity and quality of research and technology and, above all, its deployment in production. It is forecasted to create good conditions for technological development in the departments concerned, up to 2% of their budgets, with up to 20% being made available to the European Defense Agency for joint developments, respecting the principles of cooperation, integrity, competitiveness, coordination, consistency, and flexibility.

The main instruments foreseen are the use of flexible funding models and performance incentives, the use of innovative schemes for qualitative R&D development, and the increase of research funding to the 2% mainly earmarked for targeted programs.

Discussion

Government policy concerning the coordination of technological developments in the field of security is directed towards overcoming the bureaucratic obstacles associated with the implementation of successful projects leading to the desired maximum efficiency. Of the above-mentioned universal financial instruments, structural funds and the prioritization of available funds can be used, as well as the expansion of access to international (mainly European organizations). Particular attention is being paid to the human factor, which is already a leading global priority, given the creation and retention of quality scientific staff that will be the basis of a new national wealth. In this direction, some measures should be organized, such as a favorable working and development environment, the preparation of comprehensive provision and an adequate regulatory base, the provision of appropriate incentives for career development, measures to protect intellectual property, and horizontal programs for the development of scientific potential.

The Strategy for Research and Technology in Security and Defense envisages two phases – a programming phase after an in-depth analysis of the technological areas in the respective periods and a planning phase where the roadmap in the different areas, the investments required for them and the schemes for their most effective use will be outlined. It is in this direction that efforts should be directed to bring about some changes in the financial system of the armed forces and, subsequently, of the armed forces that will meet the requirements of the times in which we live. It is necessary and desirable to examine and point out the specific weaknesses and problems, and in the context of the theses advocated so far, and we will point out options for their solution, and for now we can generally

draw a generalized opinion that the world is not only changing, but it is already different and this is an irreversible process. The most important finding is the steady shortening of the time over which these global and widespread changes are taking place. Whoever fails to understand and grasp this speed and to comply with it will be overboard in the 21st century because they will lose the strategic advantage and the fight for technological superiority.

It is more than obvious that we are not in a good position, but opportunities remain and this is our chance – to use them. We have a normative basis with all possible documents, years of experience, and still preserved human resources, but we need the right organization to put them into practice, which requires effort and will to change things in practice. This can be done by making use of all the potential provided by the economic and military organizations of which we are members and creating on this basis a financial system that meets the requirements of our dynamic life at every moment. Things are changing rapidly, and reactions must be adequate, especially now that the real modernization of the types of armed forces is beginning and, for one reason or another, security and defense budgets are increasing, and this is the right time to proceed with the creation of this modern and up-to-date financing system.

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PART 2
NATO AND CHANGING
SECURITY ENVIRONMENT

ЧАСТ 2
НАТО И ГЛОБАЛНАТА СРЕДА
ЗА СИГУРНОСТ

THE GENESIS AND ENLARGEMENT OF NATO FROM THE PERSPECTIVE OF INTERNATIONAL RELATIONS THEORY

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Abstract: This article examines the genesis and enlargement of NATO from the perspective of international relations theory. Three main theoretical approaches are applied – realism (neorealism), liberalism, and constructivism. The main stages of the historical evolution of NATO as a regional security organization are outlined. The turning points that divide the history of the Alliance into several unequal segments are noted – the end of the Cold War, the attacks in New York and Washington on September 11, 2001, the annexation of Crimea by Russia in 2014, and the beginning of full-scale Russian aggression against Ukraine on February 24, 2022. The author concludes that in general, it is best to apply a comprehensive approach to the topic of NATO's genesis and history, combining different theories of international relations.

Key words: International relations theory, realism, liberalism, constructivism, geopolitics

Резюме: Тази статия разглежда генезиса и разширяването на НАТО от гледна точка на теорията за международните отношения. Приложени са три основни теоретични подхода – реализъм (неореализъм), либерализъм и конструктивизъм. Очертани са основните етапи от историческата еволюция на НАТО като регионална организация за сигурност. Отбелязани са повратните точки, които разделят историята на Алианса на няколко неравномерни по продължителност отрязъка – краят на Студената война, атентатите в Ню Йорк и Вашингтон от 11 септември 2001 г., анексирането на Крим от страна на Русия през 2014 г. и началото на пълномощабната руска агресия срещу Украйна на 24.02.2022 г. Авторът достига до извода, че към темата за създаването и разширяването на НАТО трябва да се прилага комплексен подход, комбиниращ различни теории за международните отношения.

Ключови думи: международни отношения, реализъм, либерализъм, конструктивизъм, геополитика

1. Introduction

NATO is a regional international organization with a long history that spans periods of different global geopolitical configurations. The scientific literature contains a large number of studies explaining the evolution of the North Atlantic Treaty Organization and the reasons for its successful transformation after the end of the Cold War. Most of them fall into the scientific research field of ge-

opolitics. However, the history of the Alliance can be explained from different perspectives corresponding to different theories of international relations.

This article examines the creation and expansion of NATO through the prism of the three most popular theories of international relations – realism (neorealism), liberalism and constructivism. The main stages in the development of the Alliance will be outlined, which correspond to different global geopolitical configurations. An answer will be sought to the question of whether geopolitics or ideology unites the NATO member states. The facts of the history of the Alliance on which this analysis is based are well known, therefore the sources from which they were taken will not be noted.

The presentation will begin with a brief introduction to the three main theories of international relations: realism, liberalism, and constructivism. Then, taking a chronological approach, the genesis and enlargement of NATO will be examined.

2. Basic theories of international relations

According to the theory of realism, states are the main players in the system of international relations, which is anarchic, without a supreme authority. Therefore, each state strives to increase its power, and relations between states depend solely on the balance of might between them (military, economic, and political). According to the realist theory, international politics is a game of billiards, in which individual states are billiard balls, and in a collision between them, only their mass is important. Realism has two varieties – offensive and defensive. Defensive realism claims that states are aggressive by nature and strive for territorial expansion, and this expansion can only be stopped by the restraint of competing states. On the other hand, offensive realism postulates that states are obsessed by fears for their own security and survival. In the theoretical field of realism is the so-called *security dilemma*, according to which the increase in the power of a state creates fear in its neighbors and competitors, who strive to catch up with it, thus entering a spiral of rivalry and hostility.

Liberalism is based on the assumption that a peaceful world order is possible. It can be achieved through international cooperation, as the threat of force is not the most effective means of realizing national interests. Liberalism relies on international institutions. The so-called democratic peace theory emerged from liberalism, which postulates that democracies do not fight each other, which means that if all the large and powerful countries in the world were democracies, this would ensure peace. Practice shows that after World War II, democracies did indeed not fight each other, but far from all great powers have been democracies.

Constructivists claim that international politics is shaped by social norms and not so much by the pursuit of security, survival, or expansion. Ideas, collective values, and cultural and social identities are important. This explains why the

United States does not attack Canada, for example. Or if we go back to the game of billiards, constructivists say that it is not only the mass of the balls that matters but also the material they are made of and even their color. Alliances are more likely between countries with similar ideologies and cultural and historical baggage. (Siegfried and Spindler, 2014).

3. The historical root of NATO

The historical roots of NATO must undoubtedly be sought in the Cold War, which, immediately after the defeat of Nazi Germany, divided the world into two antagonistic blocs. On one side stood the Soviet Union and its Eastern European satellites, and on the other – the USA and its European allies. Thousands of pages have been written about the origin and nature of the Cold War. The general opinion is that it was a global ideological clash, fueled both by differences in worldview and by mutual suspicion and lack of communication between the two warring camps.

The military power that the USSR and the USA developed during the Second World War in order to defeat the coalition led by Germany gradually transformed into an instrument for containing the new enemy, who until yesterday was an ally. With a series of aggressive steps, Stalin imposed his will on the countries of Eastern Europe, which, according to the agreements of Moscow (October 1944) and Yalta (February 1945), fell into the Soviet sphere of influence. The West did the same with regard to Greece. On March 5, 1946, in his speech in Fulton, Missouri, Winston Churchill launched the famous metaphor of the “iron curtain” that divided Europe “from Szczecin in the Baltic to Trieste in the Adriatic”. For many historians, the Fulton speech was the beginning of the Cold War, but it actually marked a bipolar opposition, which, by 1946, had already been clearly outlined.

The end of World War II marked a shift in leadership in the Western world. The exhausted British Empire voluntarily relinquished its leading position to the United States, which had long since become the largest, richest, and most powerful democracy in the world. Through the launch of the Marshall Plan and the Truman Doctrine, the United States confirmed expectations that it would take charge of the economic recovery and military defense of its allies in Europe.

On March 17, 1948, six European countries – Belgium, the Netherlands, Luxembourg, Great Britain, and France – signed the Brussels Treaty, by which they agreed on collective self-defense. In terms of military power, however, all Western European countries taken together were significantly inferior to the Soviet Union. Therefore, the Brussels Treaty was only a prelude to the establishment of a larger defense alliance, which would also include the United States. The consolidation of the Western democracies was accelerated by the Soviet blockade of West Berlin, imposed on June 24, 1948. A few days later, talks on common defense between the United States, Canada, and the Brussels Treaty countries

began in Washington. In March 1949, the draft North Atlantic Treaty was ready, and Denmark, Norway, Italy, Iceland, and Portugal were also invited to join it. On April 4, the document was officially signed in Washington. This is the birth date of NATO, although the treaty itself came into force in August.

The Washington Treaty of 1949 marked a turning point in the geopolitical strategy of the United States. After many years of isolationism, the Americans, for the first time, entered into a large-scale military alliance in peacetime. Indeed, the USA participated in both world wars and even became a very important factor in their outcome. But in 1917 and 1941, the United States was drawn into the world conflict under the pressure of external circumstances, and not as a result of a previously thought-out long-term strategy. Engagement with European allies was seen as a temporary obligation that would fall away after the defeat of the common enemy. In 1949, things were no longer like that. The United States entered NATO to contain Soviet expansion. This was a long-term task, and its implementation might not even lead to armed conflict with the enemy, although in 1949 few believed in a bloodless outcome of the bipolar confrontation.

However, the decisive intervention of the United States in European affairs was never accepted without reservation in Washington. In 1949, President Harry Truman had to neutralize a series of attacks by the Republican opposition in Congress in order to win the ratification of the Washington Treaty. To this end, the White House administration had to declare that it did not intend to send American troops to Europe. In the end, the fears of the isolationists were overcome and the Senate ratified the treaty establishing NATO by a vote of 84 to 12.

Although the Cold War was primarily ideological, the establishment of NATO was more of a geopolitical act. The United States had always feared the possible dominance of a single power in Europe. In World War I and World War II, Germany posed such a potential threat, which is why the Americans fought against it. In the late 1940's, the balance of military power in Europe was such that, if he wanted to, Stalin could easily achieve the single-man dominance in Europe that Washington did not want. These concerns tipped the scales in favor of full US involvement in the defense of Western European democracies. NATO can also be seen as an instrument preventing the revival of German militarism.

Although it is by inertia considered an alliance of Western democracies, at the time of its creation, NATO was not exactly such an organization. Among the founding members was Portugal, which until 1968 had a traditional dictatorship, led by Antonio Salazar. In 1952 Turkey and Greece, which were also not democracies for long periods of their post-war history, were admitted to NATO. However, due to their geographical location, Greece and Turkey were "frontline states" during the Cold War. This means that the first NATO expansion fits into the paradigm of the realist theory of international relations.

On the other hand, throughout the Cold War, NATO was an alliance of countries that held an anti-communist ideological position. So, if we look at the Alliance from the perspective of constructivist theory, it is an alliance of countries with a similar ideology. Until 1952, NATO united countries belonging to the same cultural and historical circle – that of Western civilization. However, after that, things changed – Turkey was part of the Muslim civilization, and Greece was part of the Orthodox world. Therefore, after 1952 and to this day, NATO cannot be considered as a single civilizational bloc. In this sense, the already established cliché that by joining NATO, Bulgaria made a “civilizational choice” is scientifically incorrect.

Although *de jure* all NATO members are equal and decisions are made by consensus, it was clear as early as 1949 that the United States would have the last word in the North Atlantic Treaty. This is because it is on the shoulders of the Americans that the main burden of collective defense falls. The other member states simply do not have the necessary resources for this.

During the first half-century of its existence, NATO was a typical military alliance for territorial defense. The potential adversary was well known, and the provisional front line was also known. Although in the first years after the Bolshevik Revolution, communist Russia had a real chance to take over the “capitalist fortress” from within, the regime in Moscow quickly evolved into a conservative dictatorship, which at the beginning of World War II finally returned to the good old tactics of territorial expansion. Logically, in the late 1940s, communist rule was established precisely in those Eastern European countries where the Red Army tanks had entered. Therefore, NATO was created to protect the territory of the Western allies and not to remove the communist bacillus from the minds of their citizens. At least until Gorbachev’s *perestroika*, the West also had no chance of winning the confrontation with the Warsaw Pact through “ideological sabotage” because the Soviet bloc was hermetically sealed to the penetration of outside ideas.

By the end of the Cold War, NATO truly lived up to its name, and its area of operation was limited to the North Atlantic. The alliance played no role in major conflicts between democracy and communism elsewhere in the world, such as the Korean and Vietnam wars.

Initially, the Americans’ confidence in their ability to defend Europe rested on their monopoly on the atomic bomb. But just five months after NATO was founded, Washington was shocked to learn that the Soviet Union had also acquired nuclear weapons. Thus began the nuclear race that would mark NATO’s entire history during the Cold War. Very soon, the Americans transferred some of their nuclear weapons to Europe to bring them closer to their potential targets. The Nuclear Planning Group was also established as one of NATO’s most important units.

4. The enlargement of NATO

In 1955, West Germany was admitted to NATO, which was also a potential frontline state in the case of a war with the USSR, i.e. – the logic of this expansion fits within the framework of the realist theory of international relations. The case of Spain joining the Alliance in 1982 was different. It became possible due to the democratization process after the end of the Franco dictatorship in this country. Unlike Greece, Turkey and West Germany, Spain was not a “frontline state” – it was far from the Soviet Union, but its strategic location on the Iberian Peninsula must still be considered.

Among other things, NATO is also a stage on which internal contradictions in the world of Western democracies are played out. The most striking of them was between France and the USA. Irritated by American military dominance, the French were making attempts to create a clearly distinct European component in the defense of the West. As early as 1950, Prime Minister René Pleven outlined his plan for the creation of a united European army within NATO. Two years later, the treaty establishing the European Defense Community was signed. However, it was rejected by the French parliament and never came into force. The culmination of anti-American sentiment in Paris came in 1966 when President Charles de Gaulle withdrew France from NATO’s military structures. The end of the French boycott of the Alliance did not come until 2009.

NATO’s history is clearly divided into two major periods – before and after the end of the Cold War. In turn, the second period also has two internal watersheds – the attacks of September 11, 2001, and the annexation of Crimea by Russia in March 2014. In 1985, Mikhail Gorbachev came to power in Moscow. This was the beginning of the end of communist rule in the USSR and the Eastern Bloc as a whole. The Warsaw Pact organization was officially dissolved on July 1, 1991, and half a year later the USSR also collapsed.

With this, NATO finally won the Cold War, but suddenly it was left without an opponent and entered one of the most complex stages in its development. The organization had two alternatives – to dissolve itself with a sense of a worthy mission accomplished or to outlive the circumstances that gave rise to it and find a new purpose. By the end of the Cold War, the United States had finally become a world superpower with global interests. Therefore, the prevailing opinion in Washington was that NATO should be preserved as an instrument for maintaining Euro-Atlantic solidarity in the military field. Europeans also saw no particular need to liquidate a proven successful international organization. Moreover, over more than four decades of existence, NATO has not only created its own tradition but also grown a large administrative apparatus structured into numerous committees, groups, departments, and headquarters. So the North Atlantic Treaty Organization was no longer associated only with its member states but

also with its Secretary General, its Supreme Allied Commander in Europe, and thousands of other officials who had an interest in preserving the momentum of the organization's existence.

NATO's first new mission after the end of the Cold War was to bring together former adversaries from Eastern Europe and the post-Soviet space. At the end of 1991, the North Atlantic Cooperation Council was established, and in 1994 the Partnership for Peace program was launched. Within the framework of these initiatives, NATO member states supported military reform in the countries of the former Eastern Bloc, conducted joint military exercises, and exchanged information in the security field.

The wars that began in 1992 in the former Yugoslavia, and especially in Bosnia and Herzegovina, were the first armed conflict in Europe since 1945. Events in the Balkans naturally focused NATO's attention. The UN tried to mediate the settlement of the conflicts in the former Yugoslavia, but when the conflicts escalated, it was necessary to act by military means. In July 1992, NATO joined the naval operation in the Adriatic Sea to monitor the implementation of the sanctions imposed by the UN against Serbia and Montenegro. In November of that year, the monitoring grew into an operation to enforce the sanctions. Since April 1993, NATO has been monitoring the prevention of flights over the no-fly zone in Bosnia and Herzegovina, and in February 1994, Alliance forces shot down four military aircraft that violated the ban. In the summer and autumn of 1994, NATO aircraft carried out several isolated attacks against Bosnian Serb targets. However, the first real NATO air campaign was carried out in late August and early September 1995 under the name of Operation Deliberate Force (Schinella, 2019). Heavy blows were struck against the positions of the Bosnian Serbs, who were thus finally convinced that they had to sit at the negotiating table.

In the spring of 1999, NATO embarked on an even more serious task – a full-scale air war against Serbia with the aim of expelling Serbian security forces from Kosovo. The military objective of the campaign was achieved, but the bombing of a practically defenseless country raised many questions and doubts of a moral and political nature. Russia reacted sharply and accused NATO of attacking Serbia in order to find a meaning for its existence. In fact, the bombing of Serbia took place at a time when American dominance in the North Atlantic Alliance was reaching its peak. The air campaign was initiated by Washington, and some of the European allies joined it with great reservations.

After the end of the Cold War, the question of the geopolitical self-determination of Moscow's former allies in the Warsaw Pact also arose. Russia tried to present the events of the late 1980s and early 1990s as a negotiated peaceful transition from a bipolar to a multipolar model of world order, with no winners or losers in this transition. This is, of course, not true. The West won the Cold

War and, following an old historical tradition began to annex large parts of the territory of the defeated enemy. However, Moscow was not suddenly pushed to the wall, but its positions were gradually undermined so that the Russian elite and Russian citizens had time to get used to the new geopolitical realities. Thus, Gorbachev's consent to the absorption of the GDR by the FRG was received with the promise that NATO structures would not be deployed in the eastern part of a united Germany. In the following years, it became clear that not only East Germany but also the whole of Eastern Europe would not be a neutral zone but an inseparable part of the Western military-political bloc. This new reality was legally formalized with the entry of the former Soviet satellites into NATO. In 1999, the Czech Republic, Poland, and Hungary joined the Alliance, and in 2004 – Slovakia, Slovenia, Bulgaria, Romania, and the three Baltic former Soviet republics of Latvia, Lithuania, and Estonia. The enlargement of NATO in the period 1999-2004 is easily explained from the point of view of the realist theory of international relations – the Eastern European countries were looking for guarantees of their security and naturally found them in the most powerful military organization in the world. However, proponents of constructivism would point out the fact that it was a matter of the accession of 10 democratic countries to an international organization in which all the other members were also democracies. Supporting the constructivist approach to explaining NATO enlargement is the fact that Slovakia could not become a member of the Alliance in 1999 due to serious violations of the principles of democratic governance (Ušiak, 2018, pp. 130-131).

The attacks on symbolic targets in the United States on September 11, 2001, fundamentally changed the global security environment and pushed NATO's evolution in a new direction. The organization entered its "post-geographic" period, in which the enemy had no geographical localization and did not have a regular army or territory to defend. After 2001, a transitional period began with the parallel existence of two global security systems. One was linear or territorial and was aimed at protecting against conventional military threats. An element of this system was the thousands of tanks, artillery systems, aircraft, and other similar weapons, with the help of which space can be conquered or defended. The other security system can be described as post-geographic or post-territorial. It is based on intelligence, logistics, propaganda, and preventive strikes against potential sources of asymmetric (unconventional) threats. Shaken by the attacks in Madrid (2004) and London (2005), the European NATO allies also focused on the Damoclesian sword of terrorism.

The major enlargement of 2004 did not slam NATO's doors shut. The admission of new members remains on the agenda. However, by the end of the first decade of the 21st century, NATO's expansion into the post-Soviet space was

already encountering determined resistance from Russia, which had managed to regain some of its geopolitical importance. Moscow warned that it would view Georgia and Ukraine's accession to NATO as a hostile act. At the same time, the decisive American dominance in the North Atlantic Treaty Organization began to weaken.

At the summit in Bucharest in April 2008, President George W. Bush stated Washington's position clearly and categorically: Croatia, Albania, and Macedonia should be invited to NATO, and Georgia and Ukraine should be included in the Alliance's Membership Action Plan. These intentions were realized only with regard to Croatia and Albania. Macedonia, Georgia, and Ukraine did not receive what Washington promised them. The reason is that this time the US failed to impose its will on some of its Atlantic allies.

And while the process of NATO expansion in the post-Soviet space was blocked, it advanced in South-East Europe. In 2009, two countries from the Western Balkans – Croatia and Albania – joined the Alliance; in 2017, Montenegro became a member of NATO, and in 2020 – North Macedonia.

Following Russia's annexation of Crimea in March 2014, NATO began a process of returning to territorial defense. This process culminated after Russia's brutal full-scale aggression against Ukraine, which began on February 24, 2022. NATO took measures to strengthen its Eastern flank, while almost all Alliance countries provided military assistance to Ukraine. The confrontation between Russia and NATO since the 2020s has been primarily geopolitical and can be explained by the security dilemma that is part of the toolkit of the realist school of international relations.

5. Conclusion

In conclusion, it can be noted that the realist and neorealist theory of international relations can best explain the genesis of NATO and most of its waves of enlargement. On the other hand, the Alliance is an international organization, with very few exceptions, and the members are mainly liberal democracies. In the first four decades of its history, NATO countries were united by the goal of containing communist expansion, and in the 2020s – by the need to oppose the aggressiveness of Russia. This means that certain stages of the history of the Alliance should also be viewed through the prism of constructivist theory.

At first glance, the theory of liberalism does not seem suitable for explaining the evolution of NATO because, for the past 75 years, we have truly lived in an anarchic world in which there is no supreme arbiter. However, it is worth mentioning the thesis on the role of the United States as a night watchman within the Western military-political bloc, developed by John Mearsheimer. He writes: *“America's hegemonic position in NATO, the military counterpart to the EC,*

mitigated the effects of anarchy on the Western democracies and induced cooperation among them. America not only provided protection against the Soviet threat; it also guaranteed that no EC state would aggress against another... With the United States serving as a night watchman, fears about relative gains among the Western European states were mitigated" (Mearsheimer, 1990). If we accept Mearsheimer's thesis, it means that relations between NATO member states can be explained through the theory of liberalism in international relations. However, in general, it is best to apply a comprehensive approach to the topic of NATO's genesis and history, combining different theories of international relations.

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UNDERSTANDING THE BIDEN DOCTRINE: FROM PREEMPTION TO PREVENTION

Iskren Ivanov

Abstract. This article offers a structural analysis of the Biden doctrine, focusing on its foreign policy approach. I believe the doctrine to be a product of realist beliefs under the guise of liberal rhetoric, both reflections of the present geopolitical realities and of a policy that seeks to adapt the United States to the post-unipolar world where nuclear deterrence and offshore balancing will be far more beneficial to the U.S. Foreign Policy than soft power and attraction. I assume that positioning the Biden doctrine in the theoretical debate among liberals and realists might be the path not only to assess it but also to challenge the conflicting claims that *realpolitik* is outmoded and could not benefit American politics.

Key words: United States, Russia, Ukraine, War, Realism, Politics

Анотация: Тази статия разглежда доктрината Байдън, фокусирайки се върху външно-политическият ѝ подход. Статията дефинира доктрината като стратегическа амалгама от реализъм и либерална реторика, които отразява настоящите геополитически реалности. Това е доктрина, която цели адаптирането на американската външна политика към международна система, в която ядреното съдържане и офшорното балансиране се оказват далеч по-печеливши за САЩ отколкото меката сила. Позиционирането на доктрината Байдън в теоретичния дебат между реалисти и либерали може да бъде най-подходящият начин не просто за нейното осмисляне, но и за оборването на хипотезата, че *реалполитикът* е школа, която е остаряла и не е в състояние да допринесе за защитата на сигурността на САЩ и техните съюзници от НАТО.

Ключови думи: САЩ, Русия, Украйна, Война, Реализъм, политика

Introduction

Three decades after Francis Fukuyama declared the end of history, it seems that the forgotten lessons of Kenneth Waltz and Henry Kissinger emerged on the surface of international relations theories to prevent a major conflict between nuclear powers. The war in Ukraine, aside from its implications for the post-pandemic world order, provides a major test for the foreign policy doctrine of U.S. President Joseph Biden. While Biden co-sponsored Senator McCain to adopt the McCain-Biden Resolution that backed President Clinton to launch Operation Noble Anvil in 1999, liberal institutionalists like Andrew Moravcsik denounced the realist assumption that military force is perhaps the most important instrument of statecraft in the face of striking historical evidence to the contrary (Moravcsik

and Legro 1999, 21). As the Russian aspirations for the revival of the Soviet Union threaten to reshape completely the political geography in Europe today, the vast majority of policymakers shape their perceptions according to what Robert Jervis calls optimistic decision-makers who choose a policy because they think it will have some measure of success (Jervis 2017). The assumption that conventional warfare is dead and that the declining power of Russia would not allow it to challenge the post-Cold War status quo in Europe turned out to be a manifestation of wishful thinking. The fear of mutual assured destruction (MAD) remains the driving force of Putin's foreign policy, and yet, a few would object that its magnitude on the cognitive impact is far greater than it was during the Cold War.

In this article, I offer a structural explanation of the Biden doctrine and its future implications for the U.S. Foreign Policy. The purpose of the paper is dichotomous. First, I will try to explain and assess the doctrine by employing a standard approach that combines examinations of case studies with classical IR theories. Second, this paper seeks to prove that, although the preservation of the liberal world order is the cornerstone of President Biden's foreign policy, its driving forces originate from American *realpolitik*. In other words, the Biden doctrine provides us with a pattern of a foreign policy that is liberal by purpose but realist by means. Elaborated by a policymaker with considerable political experience, the doctrine is praised and denounced by scholars in international relations, but no detailed analysis has been offered so far. A more profound assessment of the present geopolitical realities indicates that the U.S. Foreign Policy under the Biden administration follows the ideal of Uncle Sam, leading the free world to face global challenges. Beyond the bound to lead motto, however, Biden's foreign policy tools range from undertaking defense commitments to Taiwan to the deterrence of Russia through offshore balancing. In both cases, the decisions of Washington derive from the structure of the international system – a realist postulate coined by Kenneth Waltz (Waltz 2001). Therefore, the Biden doctrine provides us with the opportunity to track and analyze how American foreign policy would operate in the post-unipolar world, where the tensions between major actors like the United States and China predetermine the distribution of power in the international system.

In assessing the Biden doctrine, this article joins three basic assumptions that discuss the post-unipolar structure of international politics. The one belongs to John Mearsheimer, who states that the international orders of the foreseeable future must be fashioned to serve the American national interests (Mearsheimer 2019, 50). The second claim is introduced by Christopher Layne, who assumes that the decline of the unipolar world order will lead to the end of *Pax Americana* (Layne 2012, 212). Finally, I remind the prophetic prediction of Kenneth Waltz, who concludes that the absence of threat permits the superpower's policy

to be capricious (Waltz 1967, 16). Because of the polarization in the academic debate, I have found it useful to pose the methodological question of whether the United States could still act according to the rules of the liberal world order, a fundamental dilemma for both realist and liberal scholars. I assume that the statements of Layne and Mearsheimer resemble the objective realities of the post-unipolar world. By following the logic of Waltz, however, this article draws a clear line between the decline of Pax Americana and the demise of the United States as a great power. This is not to say that I reject Layne's criticism about the concept of a revitalized international order and rebuilding an architecture of global governance (Ikenberry 2011, 353). I instead assume that as long as the fear of MAD deters nuclear powers from starting an all-out war and precisely because the United States is in possession of the deadliest weapons to oppose its adversaries, the American global leadership will transform into a coercive power that serves to prevent fundamental threats to the national security of the United States and its allies. The Biden doctrine is the practical edifice of this *coercive* type of realpolitik.

Back at the head through offshore balancing

In the first place, the Biden doctrine endorses a foreign policy that will put the United States back on the table – a phrase Biden himself used in his pre-election essay (Biden 2020, 71). The American Manifest destiny is so historically and politically mythologized that the U.S. Foreign Policy, as the post-Cold War Presidential doctrines promote it, usually reflects the vision of Joseph Nye, who postulates that, as a great power, the United States should deal with problems of interdependence (Nye 1990, 22). However, it is arguable that soft power and interdependence between state actors are sufficient to sustain the balance of power in favor of Washington in a world where non-rational leaders like Putin are most likely to form an anti-American and Soviet-inspired bloc with state actors like Iran and North Korea. Robert Jervis properly observes that the distributions of most forms of soft power will roughly correlate with the distribution of military and economic resources (Jervis 2009, 192). The American leadership thus becomes an involuntary subject to the dictates of realism. In other words, it can survive only if the United States can deal with all challenges that emerge from the post-pandemic structure of international politics. The existence of rising China and the probability of a nuclear scenario, however, reduces the positive effects of soft power and multilateral diplomacy as tools of American foreign policy.

A logical dilemma emerges from the post-unipolar realities: how could the United States get back at the head of the table to lead? First, it is essential to highlight that President Biden's vision of American leadership limits its prospects to the Cold War rhetoric of the free world (Biden 2020, 76). The emerg-

ing Sino-Russian bloc and the aggressive policy of its inner nuclear pets like North Korea is the ultimate evidence of the strategic shifts in polarity. Fareed Zakaria provides a robust example of the bipolar realities by stating that China emerges as a superpower, which differs from the Soviet Union (USSR) in terms that it is military under the United States, but economically and technologically is already a peer-competitor (Zakaria, 2020). The insufficient military power of China, however, cannot prevent Beijing from seeking a long-term parity with America which leads us to the rational conclusion that the threat of war between both nuclear powers will inevitably trigger a global armed race. In contrast to the Cold War, the race will be scorch because relations among the major U.S. allies in the Asia-Pacific do not presuppose establishing a military alliance similar to the North Atlantic Treaty Organization (NATO). To justify the use of force by threatening an adversary, opposing China with the use of hard power, or even attempting a regime change in Russia would not be a plausible option for the United States due to objective geopolitical realities such as the inflated cost of wars, the higher probability of MAD, or the fear of another economic recession. To sum up, the sacred obligations of the American power, as President Biden calls it, presume rational leadership that benefits the U.S. national interests in the emerging bipolar world instead of seeking ways to revive unipolarity, in which the United States would again succumb to the temptation of endorsing a hegemonic behavior.

The revised image of American leadership has its roots in the Obama doctrine. However, I assume that if President Obama sought to revitalize the liberal world order, the Biden doctrine has already come to terms with the damaged credibility of diplomacy. The constraints of American diplomacy derive from two realities: the emerging bipolarity and the difficulties Washington has yet to experience when giving credible promises to partners such as Ukraine and Taiwan. Therefore, the ultimate diplomatic approach remains coercive diplomacy that presumes non-military sanctions and a defensive strategy to back one's demand on an adversary with a threat of punishment that he will consider credible enough to persuade him to comply with the demand (George 1991). The Biden doctrine favors a diplomatic approach that does not merely reflect handshakes and photo ops (Biden 2020, 72). Therefore, Biden's diplomacy has a dualistic nature that embodies coercive diplomacy and neighborhood policy. The former empowers the United States to contain its adversaries, while the latter advances the American national interests among allies. If coercive diplomacy is used to prevent Iran from acquiring nuclear weapons, neighborhood policy seeks to improve relations with allies and remedy the tensions that undermined the trust in the American leadership during the Presidency of Donald Trump. In that case, neighborhood policy partially mirrors Obama's foreign policy, which sought to

refurbish America's image abroad, end involvement in wars, and pursue a policy of peace (Indyk, Lieberthal, and O'Hanlon 2012). In contrast to President Obama, whose remarkable optimism envisioned an American world where the use of force should have been limited and balanced by the growing number of allies and partners, the Biden administration was forced to favor coercive diplomacy over neighborhood policy for two reasons.

First, a more profound picture of the post-unipolar world order shows that Russia is far less inclined to cooperate with the United States and its allies than the Soviet Union was during the Cold War. For example, what credible threat could prevent Iran from obtaining nuclear weapons? The only alternative to convince Iran of the American warning's credibility is the potential U.S. military action (Jervis 2013, 110). The growth of mutual distrust between Washington and Moscow was sparked by the annexation of Crimea in 2014 and declined rapidly after Putin decided to conquer the rest of Ukraine. Some scholars even imply the relation between financial aspects of the crisis and Russia's utilization of a revised financial strategy (Yordanova 2023). The other side of the coin is that the sanctions imposed on the Russian economy provoked tensions among America's European allies, and even the U.S. energy support for Europe did not tear off states like Germany from its close relations with Russia. Doubts about Chinese intervention spread rapidly after Beijing and Moscow conducted joint military exercises during President Biden's visit to Japan. In addition, the primary difficulty with defining American politics toward Taiwan is the official U.S. support for the One-China policy. Washington has not yet taken a diplomatic step to recognize Taiwan.

Second, our world got to the point where the probability of MAD increased sharply after the Russian troops invaded Ukraine. Suppose that South China Sea is next. Although militarism is not the Chinese style, Beijing would not hesitate to bar its backyard in case Chinese policymakers decide that the U.S. military deployments on the island represent an existential threat to China's national security. The nuclear deterrence from the Cold War, now partially abandoned by the West, served as a source of strategic wisdom for the United States and the Soviet Union in their efforts to prevent a nuclear holocaust. With Russian officials like Dmitry Medvedev stating that Moscow's nuclear arsenal serves to prevent World War III, however, the post-Cold War nuclear consensus has been played out. I assume that a logical U.S. response presumes reassessment of the American nuclear triad's capabilities to secure a scenario in which Washington would be able to respond with limited nuclear retaliation (Roberts 2020, 78). Some leading scholars assume that state actors like the United States and China are interdependent in slowing the spread of WMD, and thus, totalitarian powers have become supporters of the international non-proliferation regime (Nye 2020,

9). Even so, it is arguable if the logic of interdependence applies to China, considering the selective nuclear diplomacy of Chinese leaders. Although China is a party to the Treaty on the Non-Proliferation of Nuclear Weapons, the state firmly abstains from entering into arms control agreements with Russia and the United States. Beijing's selective approach sets preconditions for the unconstrained boost of its military might and thus, determines the need for a strictly coercive line of the U.S. nuclear strategy.

This leads us to the essential concept that, I believe, shapes the driving force of the Biden doctrine – offshore balancing. The strategy of offshore balancing contends that the United States should abandon its efforts to remake societies and focus on preserving the American predominance in the Western hemisphere by encouraging other countries to take the lead and intervening only when necessary (Mearsheimer and Walt 2016, 71). It is essential to highlight that the concept does not preclude the American position as a superpower but instead seeks to preserve it by harmonizing the U.S. Foreign Policy and maintaining domestic stability. I assume that despite its realist origins, offshore balancing corresponds to the first pillar of President Biden's doctrine, and his vision of America is back. I offer three arguments in support of my assumption.

Argument 1. The Biden doctrine favors renewing democracy at home and foreign policy for the middle class (Biden 2020, 65-68). A central contention of Mearsheimer and Walt is that, by husbanding the U.S. strength, offshore balancing would preserve the American primacy far into the future and safeguard liberty at home (Mearsheimer and Walt 2016, 72). The Biden doctrine follows the logic of the American pacifier who should lead the free world against rogue states and oppressive regimes but prioritizes domestic issues such as defending economic security, ensuring equal access to goods, defending human rights, tackling corruption, and strengthening civil liberties. Many scholars consider American democracy permanently corrupted due to the striking polarization in the U.S. society and suggest that an FDR-style leadership would overcome the detrimental consequences of Donald Trump's policies (Avranitopoulos 2022, 98). Whether the Biden administration will succeed in reviving the trust in American freedom and achieve a New Deal is yet to be seen. For the purposes of this section, I will stress the historical truth that liberty can be sustained in democracies where policymakers have the political will to lead. Therefore, it would be untenable to reject that the Biden administration seeks to remedy the divisions which led the American society to the Capitol Insurrection in 2021. By doing so, the Biden doctrine aims to cement the foundations of American unity that demonstrate that the United States is still willing to bear the responsibility of great power.

Argument 2. The Biden doctrine backs allies to do their fair share, encourages them to take global responsibilities and comes onshore to respect the U.S. sacred commitments (Biden 2020, 73). Offshore balancing presumes the same logic, advocating America to stay offshore as long as possible and calibrate its military postures against rising hegemonies (Mearsheimer and Walt 2016, 73). The post-Cold War history of American foreign policy offers no better example of staying offshore and coming onshore than the Ukrainian war. While assessing relations between the United States and Russia after the collapse of the USSR, we cannot escape the obvious conclusion that, in contrast to the Chinese, Russians are far more prejudiced towards Americans due to the loss of the Cold War. Moreover, post-Soviet Russia sticks to the Neo-Eurasian philosophy of Alexander Dugin, who defines the confrontation between Washington and Moscow as imminent and natural (Dugin 2015). Applied to the present geopolitical realities in Eastern Europe, Biden's offshore balancing stands as follows: Washington backs and provides Ukraine with defensive weapons and money; encourages European allies to increase their defense spending, and would come onshore only if NATO invokes Article Five of the Washington Treaty. One might argue that offshore balancing seems less sensible because the presence of the American forces in Europe is to assure allies and deter adversaries (McKeil 2022). To assert that, by staying offshore, the Biden doctrine seeks to prevent MAD is neither to belittle the consistent resistance of Ukraine nor to miscalculate Russia's willingness to use tactical nukes in case of Ukrainian attack on Russian soil. It is to state a shred of rational evidence, whose relevance is far from clear, as the United States has neither the clear prospect of going onshore in Europe nor the freedom of squandering its power against China. What would be disastrous for the Biden doctrine would not be so much that Ukraine could lose Donbas to Russia but that in the absence of a red line, the conflict could spread within the borders of NATO.

Argument 3. The Biden doctrine advocates a foreign policy that affects the balance of power in regions, explicitly stated in the concept of Mearsheimer and Walt: Europe, Northeast Asia, and the Gulf (Mearsheimer and Walt 2016, 73). Here, although some of Biden's policies vary or differ from the original theory of the authors, the ultimate purpose remains to sustain the American leadership (Biden 2020, 76). Previous Presidential administrations did not, as they had purposely intended, terminate the costly American engagement in the Middle East and North Africa (MENA). The ostentatious use of hard power in Iraq and Afghanistan had a stunning impact on public opinion and the political consensus among American policymakers for undertaking future steps to build democracy through regional transformation. The prolonged use of military force, if it stands for more than a preemptive strike, causes the same detrimental effects on the U.S. Foreign Policy that misled the Bush administration not to consider the United

States a status-quo power (Jervis 2016, 305). Yet, the ultimate choice that the Obama doctrine faced – whether to keep struggling for America’s unipolar status or accommodate its foreign policy to the emerging multipolarity – predetermined the U.S. withdrawal from MENA. The Biden doctrine purports to follow Obama’s policy, but, in reality, it seeks to refine it. I use the word refine to indicate that the Biden administration predicates the ambitious mission of repainting the image of Uncle Sam by laying the roots of leadership upon the realist vision to go offshore. For precisely why President Biden faced strong criticism from liberals after the American withdrawal from Afghanistan, one should not tempt to attribute his actions to liberal interventionism. Although blamed for being chaotic and dispersed, it was far more effective than transforming the Middle East into a sea of pro-American democracies – a policy that eventually ended with the emergence of ISIS (Walt 2018).

To sum up, when assessing the first aspect of President Biden’s doctrine, it cannot but be obvious to conclude that it is deeply rooted in the realist concept of offshore balancing. If the similarities between Biden’s foreign policy and the realist approaches do not convince scholars of the interaction of both, the increasing critique on America is back for being realist by nature, would (Shifrinson and Wertheim 2021, 2). Once such theoretical objections are applied to President Biden’s foreign policy, they lead us to a practical contradiction: when the Biden doctrine encounters the present geopolitical realities, it is led by the liberal idea of renewing American leadership though, at the same time, criticized for its realpolitik design. I assume that most criticisms of the Biden administration are problematic at least because they do not take into account the conditions under which American foreign policy should operate in the face of Russia’s neo-imperial aspirations or, as Robert Jervis puts it in his first scenario – a world, in which national autonomy is further diminished, and the distinctions between domestic and foreign policies would continue to erode (Jervis 2013). In such a system, the tools of a state’s foreign policy do not follow codes of universal validity but rather seek to accommodate. Therefore, the Biden doctrine embodies an organic entity of its liberal patrimony and realist beliefs, serving the essential purpose of empowering the United States to be strong and smart at the same time (Biden 2020, 72).

Prevention through deterrence

The second pillar of the Biden doctrine is the prevention and deterrence of American adversaries from directly threatening the United States and its allies (Biden 2021, 8-9). Although the term prevention is primarily used to demonstrate Washington’s global commitments, there is a debate about its interpretation. Mark Trachtenberg defines the concept of preventive war as a policy based

on the idea that force can be used even if a country has not been attacked (Trachtenberg 2007, 29). Jack Levy further clarifies that the purpose of preventive war is to forestall an adverse shift in the distribution of power between two states (Levy 2011, 87). A third explanation contends that launching a preventive war is an ex-ante decision based on a good-faith belief that the target state poses an emerging threat (Luban 2004, 208). There is also a growing body of literature suggesting that economic and financial security are essential to manipulate the causes of war (Yordanova 2011, 2). The Biden doctrine, quite the opposite, advocates using force as a last resort only when objectives are achievable and appropriate resources are matched (Biden 2021, 14). It dictates a rational deterrence strategy that presumes to go onshore under three conditions: vital American interests are threatened by another party, diplomacy and sanctions do not work, and the use of military force presupposes a reasonable chance of success. In other words, the Biden doctrine draws a clear line between the advanced capabilities of the U.S. Military and the allurements of pursuing a hegemonic behavior in a nuclear world where Russia and China challenge the American leadership. For the purpose of this section, I offer a case study analysis that seeks to explain why deterrence remains the doctrine's ultimate tool for preventing American adversaries from posing existential threats to the United States and its allies.

I have chosen to assess the military pact between the United States, United Kingdom, and Australia (AUKUS) for two reasons. First, I assume that, in the post-unipolar world, the fear of MAD will be the coercive power to prevent nuclear powers from going to war. My presumption relies on the argument that nuclear weapons dissuade states from fighting wars more surely than conventional weapons do (Waltz 1990, 732). Since the United States failed to involve China in the post-Cold War architecture of arms control agreements and since both Washington and Beijing have rejected to sign the Comprehensive Nuclear Test Ban Treaty (CTBT), the ultimate strategy in the APAC remains deterrence. It is essential to highlight that the Biden doctrine favors nuclear deterrence over ideological and peripheral military containment. Although some formal commitments to Taiwan have been made under the Relations Act, it is highly unlikely that Washington would turn against the One-China policy unless a U.S. ally – Japan or South Korea – is attacked. Moreover, containment requires American military deployments overseas (Mandelbaum 2019, 126). Here, proponents of sending troops to Taiwan or backing protests in Hong Kong miss two essential aspects of Chinese politics. One is that Beijing does not seek to export socialism with Chinese characteristics, and the other refers to the historical reality that a regime change strategy will not work against a country with an uninterrupted tradition of centralized self-government. Although it is difficult to predict if de-

terrence would not escalate into war, projecting power through AUKUS is easier and wiser than reestablishing the collective security agreement with Taiwan.

Second, although the Biden doctrine is committed to the reduction of nuclear weapons, it does not preclude the deterrence against American adversaries that pose existential challenges to the U.S.-led system of alliances (Biden 2021, 14). Indeed, there is a slight nuance in the deterrent tactics, but in the absence of a constructive dialogue between the United States and China, deterrence is more beneficial than nuclear diplomacy. Chinese policymakers will choose a less risky alternative when the choice is limited to avoiding MAD, while, in a conventional scenario, Beijing would take a more direct action if the scope of options includes the opportunity of attempting unification with Taiwan militarily. Although militarism and the use of force do not occupy a central place in China's strategic culture in contrast to the Russian aspirations for reviving the Soviet Union, the Chinese see the American presence in the APAC in terms of how Washington saw the Spanish in 1898 and so, Beijing might take its chances to provoke the United States even if risking a loss. Mearsheimer properly observes that American policymakers should constantly remind the ever-present possibility of nuclear escalation in wartime (Mearsheimer 2021, 58). Nuclear weapons are always identified with deterrence. Yet, the war-proneness of the post-unipolar world will make the structure of international politics less tolerant of state actors that would risk MAD. Therefore, the Biden doctrine might be more peaceful than its predecessor, but its tools have less place for maneuvers.

AUKUS provides a perfect example of realist foreign policy under the guise of deterrence. This is not to say that the Biden doctrine completely neglects the proliferation of nuclear weapons as a threat to U.S. national interests. Biden's foreign policy promotes reducing the dangers posed by nuclear weapons but differs between challenges and existential threats (Biden 2021, 13). The former refers to common risks for American national security, including states of nuclear concern, while the latter addresses nuclear adversaries. Almost as soon as the illusions that China would abandon its nuclear ambitions dispersed, Uncle Sam found that The Dragon was a different country than it had been under Mao, with a better-developed arsenal that should be treated with caution (Talmadge 2017, 79). China's biggest historical rival in the region – Japan, quite the opposite, maintains limited military capabilities due to its post-World War II commitments under Article Nine of the Japanese Constitution. In a region of two competing nuclear powers – the United States and China – each is equally inclined to fear MAD, regroup its allies, and maximize its offensive capabilities. In other words, the smaller the number of peer competitors, the flimsier peace is. Here, Biden's foreign policy presents us with a refined version of the established realist claim that the gradual spread of nuclear weapons is better than no spread and better

than rapid spread (Waltz 1981, 101). The nuclearization of Australia leads us to the logical conclusion that possessing attack-class submarines will drastically change Chinese behavior for two reasons. First, through most of the post-Cold War period, Australia and China were not locked in the grip of nuclear deterrence, and thus, their foreign policy was limited to economic cooperation. Today, the behavior of Australia can be compared to that of the United States as Canberra's foreign and military policies are two of the most exponential. Second, China under President Xi Jinping achieved its most profound and considerable military buildup since the collapse of the Soviet Union. Chinese leadership undertook an extensive technological reform in the People's Liberation Army even though the balance of power in the APAC still favors Washington. Although the Biden doctrine advocates diplomacy as a primary tool of U.S. Foreign Policy, it follows the logic of nuclear deterrence in a region where a rival nuclear power rises to challenge the status quo. The policy, endorsed by the Biden administration, was quickly followed by the conservative Australian Prime Minister Scott Morrison, with the United Kingdom joining the geopolitical triad. With AUKUS established, the Chinese conventional capabilities are stronger than those of Australia, but the balance of advantage favors the latter due to its future possession of nuclear submarines. Under such a security dilemma, Beijing could spend even more on its buildup than Australia, but the Chinese nuclear advantage remains subject to a powerful deterrent.

Biden's deterrence strategy would be incomplete if it did not predict the possibility of a nuclear scenario and thus – calculate the balance between offensive and defensive postures in the U.S. Foreign Policy. This article joins the assumption that the Biden administration has approved an option to use nuclear weapons not only in retaliation to a nuclear attack but also to respond to non-nuclear threats (Kimball 2022, 32-33). One might argue that Biden himself criticized the nuclear policy of the Trump administration, and thus, it would be untenable to assert that the Biden doctrine could involve an offensive policy. I reject that view for three reasons. First, it is essential to stress the striking difference between the present geopolitical realities and the security environment during the 2020 Presidential election. The security dilemma in Europe shifted after Russia invaded Ukraine, and thus, NATO's military postures tilted in favor of offense. The nuclear capabilities of Washington and Moscow sustained the balance between both powers, but the shift in the regional security led to a condition in which the security dilemma operates because offensive and defensive postures cannot be distinguished, although the defense has the advantage (Jervis 1978, 212). Russia and the United States could not neglect the possibility of MAD and, in terms of a nuclear arsenal, are roughly equal in power. Both states share incentives to strike in case Article Five of NATO is in-

voked, although preemption is more attractive to Russia despite the guarantees of the U.S. nuclear umbrella. However, due to the rational nature of defensive postures under deterrence, America could achieve an even higher level of security with a policy, less prone to attack first. Therefore, a non-nuclear threat like the Russian invasion of Ukraine could easily nuclearize if the aggressor party is a nuclear state, determined to win the conflict at all costs. The Biden doctrine thus endorses a foreign policy presumed to restore the offense-defense balance in Europe but also inclined to cover nuclear scenarios under the mask of deterrence.

Second, in the context of deterrence, offensive weapons provide defense, and therefore, the Biden doctrine needs to find the balance between intrinsic interests, strategic interests, and commitments. The first two refer to the inherent values that state actors place on the issues at stake and the degree to which a retreat would threaten a state's position on other issues, irrespective of its obligations (Jervis 1979, 314). Commitments, if sacrificed by retreat, are manipulated by decision-makers to increase their costs of retreating and thereby improve their bargaining position (Snyder 1961). Since commitments reflect the two groups of interests, history shows that each U.S. Presidential administration after World War II has drawn a red line beyond which competition between the United States and its adversaries could escalate into a military confrontation. However, when commitments are defined as sacred obligations, policymakers face little need to explain their actions, gaining legitimacy from collective security agreements and confront less, if any opposition to justify their foreign policy against another nuclear power. Applied to the Biden doctrine, the analyzed equation stands as follows: inherent values that Washington places on issues at stake, such as the preservation of the U.S.-led system of alliances, are the sacred obligations to all American allies; the retreat on matters such as the war in Ukraine and Taiwan's independence would not affect commitments to allies although it could weaken America's global position; sacred obligations are the commitments that could be manipulated, or – if needed – sacrificed to achieve a rational bargaining position. Here, the doctrine's effectiveness depends on three variables that are typically used to indicate the willingness of a state actor to respect its commitments: strength of the American motivation, rational sense of urgency to achieve the particular goal, and adequate domestic political support (George and Smoke 1989, 553). Since sacred obligations are founded on the balance between intrinsic interests (sustaining alliances) and strategic interests (tactical compromises), we come to the conclusion that Biden's foreign policy follows the rational realist logic of calculating the ratio between geopolitical realities and commensurate resources. Although the United States is committed to providing more financial and military support

for Ukraine, it is highly unlikely that Washington would intervene militarily unless Article Five from NATO is invoked. Beyond the purpose of abstaining from using force, delineating red lines between the American-led and the Sino-Soviet bloc would benefit the United States better than risking a nuclear war with Russia. The presence of American troops in Europe, quite the opposite, still favors Washington for the simple reason that the potential U.S. withdrawal from NATO could trigger a security competition on the Old Continent (Jervis 2013, 25). With Europe divided, the balance of power could easily tilt in favor of the Sino-Soviet bloc.

A final clarification is needed to explain why nuclear deterrence is central to the Biden doctrine. With the Soviet Union defeated, the Russian Federation was forced to reshape its nuclear policy, especially after the dissolution of Yugoslavia. Russia's purpose was to revise the Soviet nuclear doctrines in a manner that would better benefit Moscow's foreign policy in a security architecture where the former USSR satellites joined NATO and allied with the United States. Defending Russian national security by deterring the American influence on Russia's borders required consistent nuclear diplomacy to compensate for Moscow's declining military capabilities. Russia mounted its tactical nuclear weapons (TNW) in an offensive posture because Kremlin presumed that Russian selective strikes using TNW would be justified if the opposite party faces the awful dilemma of either retaliating or stopping the aggression (Fedorov 1999, 146). It is a logic coined by the USSR during the Cold War but limited to the use of tactical nukes without risking MAD. Yet, no other nuclear state today entails or presumes the need for limited nuclear strikes against its adversaries, regardless of their possession of WMD. Therefore, the temptation of identifying the U.S. Foreign Policy with the security of Ukraine, as long as the latter does not hold realistic chances of joining NATO, challenges the United States to find itself in a war with Russia. While Washington is still inclined to follow the universal codes of ideological validity inherited from unipolarity, soft power and diplomacy would hardly dwell Moscow from undertaking unilateral actions in the name of its self-preservation. Russian foreign policy cannot be understood apart from Moscow's obsession with its defeat in the Cold War and aside from the post-unipolar shifts that provide Russia with the opportunity to expand its influence in the former Soviet bloc. More than his last four predecessors, President Biden follows the rational logic of nuclear deterrence, using the American nuclear umbrella to avoid a direct military confrontation with Russia. A more profound analysis of Biden's foreign policy would show that, in addition to his vision of America's place in world affairs, his doctrine reflects the President's political experience as a Cold War veteran aware of the risks of a potential nuclear escalation with Russia.

Hybrid containment

The third facet of President Biden's doctrine is a strategy I define as hybrid containment. I use the term "hybrid" to make a difference between the Cold War doctrine of containment and Biden's vision of how the United States should balance its most prominent adversary – China. As some scholars put it – the new generation of threats presume heterogenous hybrid tactics with conventional and unconventional tools (Yordanova 2018, 186). Back in the bipolar world, the Truman doctrine contends that the United States will support free people who resist attempted subjugation by armed minorities or by outside pressures (Kissinger 1994, 118). The U.S. Secretary of State Dean Acheson later clarified Truman's foreign policy, proclaiming that America should take steps to defend states threatened by Soviet aggression or communist subversion and that protecting the security of the United States is to protect freedom itself (Gaddis 1974, 390). As it shows later, containment fits primarily a policy of ideological confrontation, while deterrence occupies a central place in military rhetoric. Soviet policymakers failed to establish an attractive portrait of the World Revolution and fell victims to their own misperceptions of the U.S. Foreign Policy that had consistently depicted the USSR as the Evil Empire years before President Ronald Reagan delivered his speech to the National Evangelical Council. Because containment is designed to serve the American foreign policy in a bipolar world, there is a popular claim that a similar twenty-first-century triple strategy might benefit the United States against China by reframing the existing policies and helping restrain Washington's occasional impulses to do more or less by transforming other societies or retreat from global engagements (Mandelbaum 2019, 128). I assume the Biden doctrine partially endorses this hybrid form of containment, although it does not entirely reflect its tools. I offer three arguments for my assertion.

First, the doctrine reframes the American foreign policy by constructing a coherent national strategy based on defending and nurturing the underlying sources of American strength, promoting a favorable distribution of power to deter adversaries, and sustaining an open international system (Biden 2021, 9). These priorities are sufficient to demonstrate that neither liberal hegemony nor hawkish crusades could account for the inspiration of Biden's foreign policy. Instead, the doctrine indicates that part of its roots should be traced back to the Cold War when American policymakers reached a consensus that the United States was the USSR's strongest deterrent, and thus, Washington should decisively oppose communist expansion. Biden envisions China as the only peer competitor capable of combining its political, economic, military, and technological power to mount a sustainable challenge to a stable and open international system (Biden 2021, 8). The doctrine applies its policies to the post-unipolar realities and introduces a Soviet-style image of China to outline its arguments and thus – concede the

emerging bipolarity. However, given the foremost purpose of Biden's foreign policy – to sustain the American leadership – it is not surprising that its proponents have little if any understanding of what a Sino-American contested world would mean for the U.S. Foreign Policy. Although most post-Cold War Presidential doctrines rarely envision the conditions under which their policy will not apply and so presume that they would be undoubtedly successful, what their designers claim when discussing Washington's role in world affairs does not justify their policy. For example, when the Bush doctrine preached the war on terror, it did not provide a credible argument for how hegemonic behavior would benefit American leadership. Instead, it advocated a unipolar world order that could be maintained only if the dominant power behaves quite differently from the others (Jervis 2003, 376). Biden's interpretation of the U.S. primacy is far less missionary than Bush's, and the differences between both are produced not merely by their political affiliation. The Biden doctrine, quite the opposite, is not inclined to trade leadership for hegemony because it seeks an international order in which the United States is satisfied with the status quo without resorting to the use of force unless the U.S. vital interests are threatened. Thus, Biden's strategy views the emerging challenges as an opportunity for husbanding the American strength and, therefore, tilting the balance of power in U.S. favor rather than depicting them in the blossoms of military narratives.

Biden's endorsement of containment has another side – it purposely enhances the credibility of American deterrence and subsequently negates the challenges posed by major U.S. adversaries (Biden 2021, 19). Although the doctrine concentrates on many contemporary challenges to the U.S. Foreign Policy, its excessive focus on China is indicative when coupled with the firm belief that Washington should not allow Beijing to set the global agenda. In another sense, the United States is highly likely to stick to containment if Washington admits that, despite surpassing China militarily, the chances of Chinese retaliation are high, and a potential military conflict between both states would lead to World War III. Therefore, the psychological perception of America fighting a war on two fronts – against Russia and China – logically forces the Biden administration to revive containment as a solution and alternative to military coercion. Biden's motivation for enhancing the credibility of deterrence is not the purpose of containing communism but rather to avoid using force. What the doctrine attempts to prevent is also the short-term detrimental effects of China's rise, resulting in an increased Chinese influence in the APAC and the attitude that Washington would fail to provide enough support for its allies. The same logic applies to Russia in Europe. American allies like Germany and Japan will be far more prone to boost their military capabilities if they sense that containment rather than coercion shapes Washington's foreign policy. Once a military giant, Germany would be

even more likely to bargain with Russia if German policymakers could do little if any to counter Moscow's influence in Europe – a strategic impulse that the United States consistently neglects. Japan, quite the opposite, holds little dependency on China (Wang, Fan and Zhou 2022, 11). In times when Tokyo needs to deter the Chinese influence – as it has to the Sea of Japan – policymakers face the reality that an effective military deterrence against China would require a major reform in Article Nine of the Japanese Constitution. Containment, thus, remains the ultimate U.S. strategy for the Biden doctrine. If the United States could enhance the credibility of American alliances and sequentially lower the chances of colliding with the emerging Sino-Russian bloc militarily, it would seem that the doctrine has made rational calculations when assessing the post-unipolar balance of power.

Finally, it is essential to highlight that despite its liberal rhetoric, ideology is not central to Biden's policy of containment. The doctrine speaks favorably of revitalizing democracy and human rights at home but admits that the United States will be mindful of its values and interests when engaging partner nations in Indo-Pacific, Europe, and the Western Hemisphere (Biden 2021, 10). Tracing the impact of human rights rhetoric and policy of values in most U.S. Presidential doctrines after the Cold War presents plausible proof that the Biden doctrine is but a slight modification of how American policymakers used soft power. However, the number of differences between Biden's foreign policy and the liberal postulate that governments accept international binding human rights norms because they are swayed by the overpowering ideological and normative appeal of the values underlying them (Moravcsik 2000, 223). Because most post-Cold War U.S. Presidents adopted that statement, it is evident why they favored ideological containment of state adversaries over deterrence. In truth, by its conventional nature and accumulation of tensions among nuclear powers, the concept of deterrence faced significant criticism, blamed for being an outdated remnant of the bipolar world. The Biden doctrine endorses containment, combined with a more rational focus on deterrence and a less ideological aftertaste, introducing a strategic amalgam of both and producing leads for a realist behavior. Even if we assume that the doctrine sets the preconditions for liberal rhetoric, it is hard to assert that Biden's vision of containment is entirely ideological in the face of Russia's nuclear diplomacy in Europe. Instead, containment is far more inclined to deal with military and defense issues than criticizing Russia and China for human rights violations. The Biden doctrine draws inspiration from the American Manifest Destiny and envisions a U.S.-led international order but the existence of structural powershifts in international politics presupposes a rational, even if needed – pessimistic worldview to comprehend the geostrategic magnitude of China's rise and Russia's aspirations for Soviet revival. This is not to say that the doctrine po-

sitions American foreign policy on the losing side of a zero-sum game. However, when ideology cannot be used for offense, policymakers search for alternative tools if such policies properly served the national interests in the past. The realist understanding of containment here applies most efficiently for the simple reason that the leading party considers its adversaries aggressive and highly inclined to act offensively (Quester 1966, 10). Carried to this conclusion, Biden's foreign policy justifies the U.S. behavior toward Russia and China through the logic of containment but does not attach primary importance to ideology.

Will it work?

Seemingly, the realist beliefs of President Biden's doctrine offer significant advantages to U.S. Foreign Policy. If, however, such policies seek a compromise between realist behavior and liberal rhetoric rather than rational decision-making, they would fail to face the challenges of the post-unipolar world. The liberal vision, still widely dominated by the prospect of reviving unipolarity, promises enormous outcomes for the United States and its allies, claiming that the war in Ukraine may facilitate liberal development by fragmenting the authoritarian international and by motivating investment in transnational institutions (Way 2022, 15). On a more detailed look, quite the opposite, it seems that the costs of sustaining the unipolar vision outweigh the benefits for the simple reason that changes in the system structure are distinct from the changes at the unit level (Waltz 2000, 5). In other words, foreign policy and state behavior are highly dependent on the global distribution of power. The historical prophecy of Hans Morgenthau, who predicted that America has become vulnerable, taking the risk of being powerful but not omnipotent has come true (Morgenthau 1948). Disguising realist beliefs under the mask of liberal rhetoric would remedy the unipolar syndrome that poisoned America's global perceptions, but, in another sense, it could deprive Washington's obligations of their sacred charisma. The reason lies in the potential failure of the American policymakers to comply with the circumstances under which the post-unipolar world will operate. Liberal rhetoric is useless for nuclear deterrence and coercive diplomacy because the distribution of most forms of soft power roughly correlates with the distribution of economic and military resources (Jervis 2009, 192). Thus, I assume that the Biden doctrine faces several challenges that could reverse the successful effects of its realist profile.

The first problem arises from a common temptation to most great powers – the export of values. The doctrine advocates upholding American values at home and defending them around the world but also implies revitalizing democracy overseas (Biden 2021, 19). If promoting values works so well with Eurasia as with Afghanistan, Washington should consider abandoning its vision of global Westernization. Otherwise, Biden's foreign policy will succumb to the tempta-

tion of imposing peace on the tortured politics of weaker societies (Snyder 2003, 29). In truth, authoritarian nuclear regimes like Russia pose a crucial threat to U.S. National Security. However, to assume that democracies must fight and win against their non-democratic adversaries is odd, especially when such arguments come from policymakers whose military adventures after the Cold War were very expensive to fund and ideologically inclined to identify foreign policy with moral categories. An objective judgment favors another political axiom, coined by Robert Jervis, who correctly observes that it is neither surprising nor evidence of misperception that those who start wars often lose them (Jervis 2017). Sincere beliefs that crusade in the name of human rights and democracy is justified typically align with the sustainment of the post-Cold War world order. However, this article contends that should Biden's foreign policy identifies the revitalization of democracy with the export of values, it will fail to advance the American national interests. I offer two arguments in support of my contention.

First and foremost, the policy of values will not work in a world where two nuclear powers – Russia and China – oppose the U.S. leadership as long as both states cultivate and enhance their abilities. As a result, the young generation's attitudes toward democratic values change in the sense of disapproving corruption and the lack of accountability. Second, international conflicts occur due to the absence of supranational authority to supervise political relations among nations. While international bodies might have become more influential after the collapse of the USSR, there has been no change in the natural instinct of state actors to struggle for survival, as evidenced by the war in Ukraine. Claims that conventional warfare is dead also miss the point because attacking the opposing party still attracts leaders like Vladimir Putin even more than the democratization of Russia. Therefore, maximizing and husbanding the U.S. military capabilities while advocating offshore balancing should be the first plausible strategy of the Biden doctrine to avoid the temptation of ideological overstretching.

A second miscalculation that could be detrimental to the American national interests refers to the unthrifty undertaking of global commitments. The Biden doctrine is clear when postulating that Washington's responsibilities to allies remain strong and credible (Biden 2021, 13). Biden's concept of sacred obligations thus is twofold: it reaffirms the binding agreements within the U.S.-led system of alliances and involves a mutual stand against global threats alongside both allies and partners. In his theory, Stephen Walt clarifies that alliances, as formal or informal commitments for security cooperation, are not collective-security agreements (Walt 1997, 157). During the Cold War, military confrontation between the United States and China over Taiwan seemed inevitable until President Jimmy Carter suspended the Sino-American Mutual Defense Treaty. Military conflict, at present, is an option but not a necessity. As a result of the U.S. support for the

One-China policy, the Chinese aspirations for reunification have evolved in the sense of Taiwan's sophisticated expression of the "all beneath the sky" concept that unites all people of Chinese blood (Youlan 1948, 25). However, Beijing's bids do not reassure solid and imminent preconditions for war with America because a complete military and technological parity between the United States and China seems unlikely in the next ten to twenty years. While much of the Chinese military capabilities have been developed and reformed by President Xi Jinping, there have been few improvements in the combat logistics system for more extensive campaigns. The uncertain prospect of America intervening or pressuring Japan and South Korea to defend Taipei leaves little if any place for the prospect of "Asian-style NATO". The security dilemma in the APAC, under which AUKUS deters the rising nuclear arsenal of China and North Korea, presumes that both parties are in possession of the capacity to inflict total damage on each other with a reasonable chance of avoiding MAD. In other words, the sacred connotation of obligations does not preclude the rational concern of a state actor with its survival for the simple reason that if the use of force presumes the state to pay the ultimate price in terms of its existence, requirements for respecting the obligations are absent in the face of complete devastation.

A final temptation that may spoil the Biden doctrine is its inclination to fight a two-front confrontation with Russia and China. Although President Biden is a proponent of meaningful dialogue with Moscow, his foreign policy presumes an all-catch strategy of investing in the economy and democracy by restoring the credibility and reasserting forward-looking global leadership (Biden 2021, 21). The idea that successful containment of major American adversaries presumes a corresponding response from the U.S.-led system of alliances is rational and already tested, but the likeliness of Russia to use tactical nukes if its existential security is threatened would force some American allies to switch from balancing to bargaining or even – bandwagoning. One might argue that nuclear weapons are not to rely upon for safety and security and that deterrence is the sole justification for keeping WMD (Wilson 2008, 435-436). The practical posture of such postulates is highly dubious because it neglects the argument that both proponents and critics of deterrence have stressed its reliance on calculated rationality that is obscured by the elemental drive of emotions such as vengeance (Jervis 2017). Furthermore, a state that is pledged to protect a third area that it could not defend with conventional forces would rely on nuclear deterrence on the threat to launch a nuclear strike in response to a conventional attack because that state cannot convince its adversary that it values the third area as much as it values its homeland (Schelling 2020). I assume that the arguments of Jervis and Schelling are still valid, and thus, it would be even more challenging for the United States to balance Russia and China sequentially for two reasons.

First, the balance of power in Europe will depend on the military parity between Moscow and NATO, the technological capabilities in their possession, the struggle to outsmart the opponent's leadership, and the willingness of both parties to fight a war. Western policymakers doubt that Putin will press the red button for many reasons. However, the increasing number of states opposing Russia would increase the cognitive temptation of the Russian President and limit the scope of his decisions. Shortly after Russia invaded Ukraine, Putin found himself paralyzed and trapped between the consistent support for Ukraine and the denial of his foreign policy – a position that led him to what Robert Jervis calls a lack of incentives for accuracy (Jervis 2017). For example, Putin's emulation of blitzkrieg in Ukraine originated from the expectation that Zelensky would flee Kyiv and the government would surrender to the Russians. Partially influenced by his clique, Putin's desires were rational but deprived of accuracy. The probability of Russian troops invading a NATO ally such as Romania is even higher if those expectations and desires continue to mismatch the geopolitical realities. The same logic applies to nuclear warfare. Some might argue that no decision-maker would advise Putin to press the red button. Even so, wishful thinking is a powerful stimulus, and if the actions of the other party pose an existential threat to its adversary, the latter could shape a cognitive reality that envisions, if not strategic, then at least – a tactical preemptive strike in case of a Ukrainian attack on Russian soil. A potential objection might argue that Putin's successor will be more inclined to negotiate peace with the West. My concern is that this fact this assumption is not enough to assure us of the peaceful future of Eurasia because its proponents ignore the distinct feature of post-Soviet autocracies not relying on reassuring structures and solidarity ethnos of a ruling party (Davis 2021, 206). The Kremlin's foreign policy could be supported and endorsed by the Russian policymakers and people only when their leader is determined to deal with Russia's adversaries regardless of the price Moscow would pay. In the Russian strategic culture, sacrifices are always preferred to humiliation.

This leads us to the second temptation that might corrupt the Biden doctrine – manipulating the One-China policy. Political flirts with Taiwan might be acceptable for Beijing as long as Washington does not initiate a collective defense agreement with Taipei. By doing so, the United States would face an increasingly hostile China with a skillful and sophisticated system that could negate the traditional U.S. advantages such as its second-strike nuclear capability that will be paired with an expanding range of antiship ballistic missiles as well as asymmetric capabilities in cyberspace and space (Kissinger 2012, 45). The real threat to the United States, therefore, is that the two nuclear powers could confront directly at the expense of Taiwan and would lead the world to the brink of another Cuban missile crisis. Presidents Barack Obama and Hu Jintao worked together to

ease tensions, but further cooperation did not continue under the Trump administration, and thus, the reaction of China to Trump's trade war opened the doors of the Thucydides trap. The danger of military collision between the United States and China will become real once America abandons decisively and completely its dialogue with Beijing or the nuclear deterrence under AUKUS. My contention derives from two observations. One is the statement of Mearsheimer, who warns about the gathering storm in APAC with China still abstaining from actions due to the American military preponderance in the region (Mearsheimer 2021, 58). The other belongs to Yan Xuetong, who predicts that China might abandon its policy of peaceful unification with Taiwan if Taipei announces *de jure* independence with more countries supporting it (Xuetong 2021, 45). Therefore, China could develop for the United States an image of an adversary that would make Chinese policymakers endorse a more aggressive foreign policy. The invisible border between military capabilities and cognitive emotions China has about Taiwan means that Beijing could resort to the use of force without calculating the chances of MAD. In such a situation, where calculations are primarily influenced by national pride and patriotic sentiments, the U.S. perceptions of China could mislead American policymakers to believe that their Chinese counterparts act by emotion. A position as popular as misguided. In truth, Taiwan is the only territory worthy of war between Washington and Beijing because both states are equally inclined to risk war rather than back down. The presence of American troops on Taiwanese soil generates an enormous sense of insecurity for the Chinese, similar to the Soviet amassing of nuclear missiles in Cuba during the Cold War and making China's leaders believe that the United States has the full pretense of using the island as a pivot to Mainland China. For Beijing, therefore, reuniting or at least – buffering Taiwan is a matter primarily predetermined of self-preservation. A slight Chinese concession on Taipei could lead the United States to the conclusion that it has contained Beijing's power and that it could prevent the rise of its most prominent adversary.

Paradoxically, the Biden doctrine could commit the same mistakes that Trump's foreign policy is attributed to. Both administrations underestimated Russia's ambitions to revive the Soviet Empire and neglected the fact that China did not resemble the ideological profile of the USSR. However, if President Biden's doctrine did not incorporate realist beliefs, its outcomes would be detrimental to American foreign policy because U.S. adversaries like Russia do not fear the U.S. cultural and military predominance. Their essential and most rational concern is with their survival, and the ultimate deterrent that serves as a source of fear to those states is MAD, not even the number of their nuclear arsenal. Washington's peer competitors would respect only one possible scenario for the U.S. behavior – nuclear deterrence through keeping existential threats to America offshore.

Ideological containment will not work against a state with no ambition to export culture and, even less – against a nuclear power like Russia. Some would argue that, to some extent, such behavior is equal to appeasement and leaves a place for the U.S. adversaries to expand their influence. I reject that view. With the collapse of the unipolar world order and lacking an empirical basis, proponents of the U.S. hegemonic behavior need to provide substantial proof in support of their arguments that high-cost military interventions and cultural overextension will not exceed Washington’s vital resources in a world order, where no supranational institution holds the actual power to supervise and sanction the foreign policy of the great powers. War and peace will, thus, become once again a privilege for the United States and its adversaries. When this happens, the unipolar liberal order should finally be considered to have provided us with the ultimate test, I hope not at a high cost, that the dream of eternal peace is too omnipotent to be sustained by a single superpower.

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NATO AND CRISIS MANAGEMENT

Elena Simeonova

Abstract: The text discusses the multifaceted concept of “crisis” within the realms of international relations and crisis management, emphasizing the distinct definitions and implications it holds in various contexts. Crisis is defined as involving perceived threats, heightened anxieties, and potential violence, particularly in international political scenarios where the risk of armed conflict is imminent. Scholarly perspectives differentiate between defining crises as static situations versus dynamic processes, highlighting how crises are intertwined with everyday life and the social systems in which they occur.

The text further explores NATO’s role as a crisis management agent, detailing its robust framework for responding to diverse crises—political, military, humanitarian, or stemming from natural disasters. It outlines NATO’s commitment to a comprehensive crisis management strategy, involving political and military collaboration among member states, grounded in the principles established in the Washington Treaty and subsequent strategic concepts.

NATO’s crisis management capabilities include preventive measures, peacekeeping, peace-making, and humanitarian operations, emphasizing the importance of multi-national cooperation and coordination with other international actors. Additionally, the text highlights the significance of civil preparedness and resilience, outlining how essential civilian sectors support military operations during crises and the importance of maintaining societal functionality in emergencies.

Overall, the text underscores the complexity of crises, NATO’s proactive approach to crisis management, and the necessity for collaborative efforts among international organizations and member states to effectively address and mitigate crises.

Key words: Crisis; NATO; Management; Cooperation; Resilience; International Relations.

Анотация: Текстът разглежда многостранната концепция за „криза“ в рамките на международните отношения и кризисното управление, подчертавайки различията в определенията и импликациите, които носи в различни контексти. Кризата е определена като включваща възприемани заплахи, повишени тревожности и потенциално насилие, особено в международни политически сценарии, където рискът от въоръжен конфликт е непосредствен. Академичните перспективи различават между определянето на кризите като статични ситуации и динамични процеси, подчертавайки как кризите са преплетени с ежедневиия живот и социалните системи, в които се появяват.

Текстът по-нататък изследва ролята на НАТО като агент за управление на кризи, описвайки неговата надеждна структура за реагиране на разнообразни кризи – политически, военни, хуманитарни или произтичащи от природни бедствия. Подчертава ангажимента на НАТО към цялостна стратегия за управление на кризи, включваща политическо и военно сътрудничество между държавите членки, основана на принципите, установени във Вашингтонския договор и последващите стратегически концепции.

Възможностите на НАТО за управление на кризи включват превантивни мерки, поддржане на мира, мироопазване и хуманитарни операции, акцентирайки на важноста на многонационалното сътрудничество и координацията с други международни актьори. Освен това текстът подчертава значението на гражданската готовност и устойчивост, описвайки как важните цивилни сектори подкрепят военните операции по време на кризи и важноста на поддържането на функционалността на обществото в извънредни ситуации.

Текстът подчертава сложността на кризите, проактивния подход на НАТО към управлението на кризи и необходимостта от съвместни усилия между международните организации и държавите членки, за да се справят ефективно с кризите и да ги смекчат.

Ключови думи: Криза; НАТО; Управление; Сътрудничество; Устойчивост; Международни отношения.

CONCEPTS OF CRISIS AND CRISIS MANAGEMENT – A BRIEF OVERVIEW

“Crisis” is a term that is widely used in various scientific fields, and in this sense, a general definition is practically impossible. For this reason, it is necessary that its content be specified according to the specific study.

In the context of international relations, a crisis can be loosely defined as a situation where there is a perception of threat, heightened anxiety, expectation of possible violence, and the belief that any actions will have far-reaching consequences (Lebow, 7–10).

In the scientific literature, the definitional approaches to crises also differ in whether they define the crisis as a situation or as a process. Rosenthal, Boin, and Comfort substantiate the concept that defines crises as a process. According to them, crises are an integral part of people’s everyday life. These are periods of upheaval and collective stress that disrupt the daily lifestyle and threaten the basic values and structures of the social system in unexpected and often incomprehensible ways. Crises are an element of the dynamic development of the social system. In this sense, modern crises are not isolated events, but a process that develops as disparate forces interact in unexpected and disturbing ways (Rosental, Boin, Comfort, 2001:5-6).

Definitions interpreting the crisis as a situation refer primarily to international political crises. In general, they are defined as situations related to “increasing risk of war”. For Snyder and Diesin, for example, an international crisis is a series of interactions between the governments of two or more sovereign countries that are in acute conflict, lacking actual war, but with a perceived dangerously high probability of war (Snyder and Diesing, 1977: 6-20). Richardson defines an international crisis as an acute conflict between two or more states, related to a specific disputed issue and involving the perception, on the part of the decision-makers, of a serious risk of war (Richardson, 1994:12). The wording “serious risk” refers to the subjective perception of the probability of war, which directly affects the political choices of the countries involved in the crisis situation.

Subjective judgment is also decisive in determining the beginning of the crisis. It does not always coincide in time for both parties. The reference to a certain controversial issue aims to distinguish the crisis from a period of high tension, which is characterized by, for example, the first years of the cold war.

These two definitions directly link international crises to the conflict within which they develop. Although international crisis and international conflict are closely related, they are not synonymous. Conflict is the broader of the two concepts. In the theoretical literature, the prevailing view is that the crisis is a stage in the development of the conflict. Thus, for example, within the framework of a conflict, multiple crises can arise, to be overcome, but the conflict essentially remains.

The manner of dealing with a crisis depends on its nature, scale and seriousness. In some cases, crises can be prevented through diplomacy or other measures, while other situations may require more robust measures, including the use of military force.

Crisis management operations typically address parallel challenges in the realms of security, governance and development. International crisis management differs from structural, long-term development initiatives, such as debt relief for impoverished countries, because it is a reaction to an urgent problem and the applied measures concentrate on having short- and mid-term impact. In addition, it can be distinguished from unilateral (military) actions undertaken by one or very few states, such as the US invasion in Iraq in 2003, because it includes or is endorsed by a significant number of states and international organizations. Crisis management operations involve crisis diplomacy as well as the deployment of military and civil personnel from numerous countries and international agencies (UN, NATO, EU and others) (Harsch, 2015:7).

NATO AS A CRISIS MANAGEMENT AGENT

NATO is one of the few international organizations that have the experience as well as the tools to conduct crisis prevention and management operations. Crisis management is one of NATO's core tasks for which it employs an appropriate mix of political and military tools to manage crises in an increasingly complex security environment. NATO's robust crisis management capabilities allow it to deal with a wide range of crises, which could pose a threat to the security of the Alliance's territory and populations. These crises can be political, military or humanitarian, and can also arise from a natural disaster or as a consequence of technological disruptions.

NATO provides the framework within which members can work and train together in order to plan and conduct multinational crisis management operations, often at short notice.

It can also train and operate with other actors where appropriate, for combined crisis management operations and missions. Allies decide whether to engage in a crisis management operation on a case-by-case basis and by consensus.

NATO has a holistic approach to crisis management, envisaging involvement at all stages of a crisis and considering a broad range of tools to be effective across the crisis management spectrum. To ensure effectiveness and resilience, these instruments are continuously adapted to the evolving security context. NATO has had the capacity to deal with crisis management and, more specifically, collective defense and disaster relief operations for a long time. At a later stage, during the 1990s, it became involved in non-Article 5 crisis response operations conducted in non-NATO member countries.

NATO'S CRISIS MANAGEMENT PROVISIONS

Provisions for crisis management by NATO are contained in Article 5 of the Washington Treaty and NATO's strategic concepts.

Article 5: Since its creation in 1949, the primary role and the greatest responsibility of the Alliance is to protect and defend Allied territory and populations against attack. Collective defense is at the heart of the Washington Treaty and is enshrined in Article 5. It provides that if a NATO Ally is the victim of an armed attack, each and every other member of the Alliance will consider this as an armed attack against all members and will take the actions it deems necessary to assist the Ally attacked. NATO did not conduct any operations – Article 5 or other – during the Cold War. The Alliance's focus during this time was ensuring the effective defense of NATO's territory through readiness, planning, preparations, and conducting exercises for possible Article 5 contingencies.

NATO's Strategic Concepts: Provision for crisis management measures had already been made in the Alliance's 1991 Strategic Concept for "the management of crises affecting the security of its members". It was reiterated in the **1999 Strategic Concept**, which states that NATO stands ready to contribute to effective conflict prevention and to engage actively in crisis management.

In addition, the **1999 document** states that these crisis management operations would include non-Article 5 operations.

The 2010 Strategic Concept broadened NATO's thinking on crisis management, envisaging NATO's involvement at all stages of a crisis: "NATO will therefore engage, where possible and when necessary, to prevent crises, manage crises, stabilise post-conflict situations and support reconstruction." It also recognised the imperative for a greater number of actors to participate and coordinate their efforts and considered a broader range of tools to be used. More generally, it adopted a comprehensive approach to crisis management that goes hand-in-hand with greater

emphasis on training, developing local forces, enhancing civil-military planning and interaction, and greater interoperability between NATO and partner forces.

It is in this spirit that **the 2022 Strategic Concept** refers to crisis management, with an emphasis on crisis prevention. It adopts an all-encompassing approach and states that the Alliance will continue to work to prevent and respond to crises, and to build on lessons learned over the past three decades to improve readiness, military and civilian capabilities, and civil-military planning and coordination. It also states that the Alliance will continue to prepare for the effects of climate change, food insecurity and health emergencies on Allied security, adding that human security is central to NATO's approach to crisis prevention and management.

Crisis decision-making at NATO

When a crisis occurs, no decisions on planning, deployment or employment of military forces are taken without political authorisation. Decisions are taken by the governments of each NATO member country collectively and may include political, military or civil preparedness measures, depending on the nature of the crisis.

In addition to the regular consultations that take place to move ongoing activities forward, at any given time, Article 4 of the Washington Treaty gives each Ally the right to bring issues to the table for consultation and discussion with other fellow members: *"The Parties will consult together whenever, in the opinion of any of them, the territorial integrity, political independence or security of any of the Parties is threatened."* Article 4 is critical to NATO's crisis management process, since consultation is at the basis of collective action.

NATO has different mechanisms in place to deal with crises. The principal political decision-making body is the **North Atlantic Council** (Council or NAC), which exchanges intelligence, information and other data, compares different perceptions and approaches, harmonizes its views and takes decisions by consensus, as do all NATO committees. It is the NAC that decides on a case-by-case basis and by consensus whether to engage in a crisis response operation. In this role, it is supported by the **Operations Policy Committee**, the **Political Committee**, the **Military Committee** and the **Resilience Committee**. Additionally, NATO communications systems, including a "Situation Centre" (SITCEN), receive, exchange and disseminate political, economic and military intelligence and information around the clock, every single day of the year.

Internal coordination and tools

Within NATO, the **NATO Crisis Response System** (NCRS) is the overarching process that articulates the Organization's crisis management role and ability to respond to crises. It coordinates efforts between the national representatives at NATO Headquarters, capitals and the Strategic Commands by providing a

comprehensive set of options and measures to prepare for, manage and respond to crises. It complements other processes such as operations planning, civil preparedness planning and others, which exist within the Organization to address crises. It was first approved in 2005 and is revised annually.

One of the core components of the NCRS is the **NATO Crisis Management Process** (NCMP). The NCMP breaks down a crisis situation into different phases, providing a structure against which military and non-military crisis response planning processes should be designed. It is flexible and adaptable to different crisis situations.

Standardization and logistics also play a crucial role in the crisis management process.

Standardization: countries need to share a common set of standards, especially among military forces, to carry out multinational operations. By helping to achieve interoperability – the ability of diverse systems and organizations to work together – among NATO’s forces, as well as with those of its partners, standardization allows for a more efficient use of resources and a greater effectiveness of the Alliance’s defense capabilities. Through its standardization bodies, NATO develops and implements concepts, doctrines and procedures to achieve and maintain the required levels of compatibility, interchangeability or commonality needed to achieve interoperability. For instance, in the field, standard procedures allow for the transfer of supplies between ships at sea and interoperable material such as fuel connections at airfields. It enables the many NATO and partner countries to work together, preventing duplication and promoting better use of economic resources.

Logistics: this is the bridge between the deployed forces and the industrial base that produces the material and weapons that forces need to accomplish their mission. It comprises the identification of requirements, the building up of stocks and capabilities, and the sustainment of weapons and forces. As such, the scope of logistics is huge. Among the core functions conducted by NATO are: supply, maintenance, movement and transportation, petroleum support, infrastructure and medical support. The Alliance’s overarching function is to coordinate national efforts and encourage the highest degree possible of multinational responses to operational needs, therefore reducing the number of individual supply chains. While NATO has this responsibility, each state is responsible for ensuring that – individually or through cooperative arrangements – their own forces receive the required logistic resources.

NATO periodically exercises procedures through scheduled crisis management exercises (CMX) in which the Headquarters (civilian and military) and capitals participate, including partners and other bodies that may be involved in a real-life crisis.

Coordinating with other international players

Increasingly, NATO contributes to efforts by the wider international community to preserve or restore peace and prevent conflict. It is committed to a comprehensive political, civilian and military approach to crisis management. As a consequence, it is building closer partnerships with civilian actors – including non-governmental organizations and local authorities – and is focusing on several key areas of work such as cooperation with external actors; planning and conduct of operations; lessons learned, training, education and exercises; and public messaging. In this context, the record of NATO’s sustained cooperation in the Balkans with the UN, the Organization for Security and Co-operation in Europe (OSCE) and the European Union (EU) stands as a precedent.

NATO’s partnerships are and will continue to be essential to the way NATO works. Partners have served with NATO in Afghanistan, Kosovo and other operations, as well as in combating terrorism and piracy. NATO has built a broad and cooperative security network that involves countries participating in the **Partnership for Peace Program**, the **Mediterranean Dialogue** and the **Istanbul Cooperation Initiative**, as well as with partners across the globe and troop-contributing countries that do not work with NATO through a formal partnership framework.

Depending on the nature of a crisis, different types of crisis management operations may be required.

A “crisis response” or “peace-support operation” are generic terms that may include conflict prevention, peacekeeping, peacemaking, peace building, peace enforcement and humanitarian operations. These are multi-functional operations conducted in support of a UN/OSCE mandate or at the invitation of a sovereign government involving military forces and diplomatic and humanitarian agencies and are designed to achieve long-term political settlement or other conditions specified in the mandate.

- **Conflict prevention:** activities aimed at conflict prevention are normally conducted under Chapter VI of the UN Charter. They range from diplomatic initiatives to preventive deployments of forces intended to prevent disputes from escalating into armed conflicts or from spreading. Conflict prevention can also include fact-finding missions, consultations, warnings, inspections and monitoring. NATO makes full use of partnership, cooperation and dialogue and its links to other organizations to contribute to preventing crises and, should they arise, defusing them at an early stage.

- **A preventive deployment** within the framework of conflict prevention is the deployment of operational forces possessing sufficient deterrent capabilities to prevent an outbreak of hostilities.

- **Peacekeeping:** peacekeeping operations are generally undertaken under Chapter VI of the UN Charter and are conducted with the consent of all Parties to a conflict to monitor and facilitate implementation of a peace agreement.
- **Peacemaking:** this covers diplomatic activities conducted after the commencement of a conflict aimed at establishing a cease-fire or a rapid peaceful settlement. They can include the provision of good offices, mediation, conciliation and such actions as diplomatic pressure, isolation or sanction.
- **Peace building:** peace building covers actions which support political, economic, social, and military measures and structures aiming to strengthen and solidify political settlements in order to redress the causes of a conflict. This includes mechanisms to identify and support structures, which can play a role in consolidating peace, advance a sense of confidence and well-being and supporting economic reconstruction.
- **Peace enforcement:** these operations are undertaken under Chapter VII of the UN Charter. They are coercive in nature and are conducted when the consent of all Parties to a conflict has not been achieved or might be uncertain. They are designed to maintain or re-establish peace or enforce the terms specified in the mandate.
- **Humanitarian operations:** these operations are conducted to alleviate human suffering. Humanitarian operations may precede or accompany humanitarian activities provided by specialized civilian organizations.

Civil preparedness of member countries

Military forces, and especially deployed troops in times of war, depend on the civilian sector for transport, communications or basic supplies such as food and water, to fulfil their missions. However, these assets are vulnerable to external attack and internal disruption.

Civil preparedness means that basic government functions can continue during emergencies or disasters in peacetime or in periods of crisis. It also means that the civilian sector in Allied countries would be ready to provide support to a NATO military operation. The combination of civil preparedness and military capacity constitute resilience. Resilience is a society's ability to resist and recover easily and quickly from shocks, combining civilian, economic, commercial and military factors. The individual commitment of each and every member to maintaining and strengthening its resilience reduces the vulnerability of the Organization as a whole. Members can develop resilience through the development of home defense and niche skills such as cyber defense or medical support. When

Allies are well prepared, they are less likely to be attacked, making NATO as a whole stronger and better equipped to tackle crises.

Some examples of crisis management by NATO

Invocation of Article 5

Article 5 was invoked for the very first time following the *Al-Qaeda* terrorist attack on the United States on September 11, 2001. Once it had been proved that the attack had come from abroad, the North Atlantic Council (NAC) considered it to be an act covered by Article 5. Several measures were put into place by NATO to help prevent further attacks, including Operation Active Endeavour in the Mediterranean, which helped to detect, deter and protect against terrorist activity in the area.

Engaging in non-Article 5 crisis responses operations

As soon as the Soviet Union collapsed and satellite countries regained independence in the 1990s, past tensions resurfaced and conflicts started among ethnic groups.

One of the first major conflicts following the end of the Cold War broke out in the former **Yugoslavia in 1992**. NATO initially provided air- and sea-based support to the United Nations (UN), enforcing economic sanctions, an arms embargo and a no-flight zone in Bosnia and Herzegovina; it also provided detailed military contingency planning concerning safe areas.

The measures proved inadequate to bring an end to the war. In the summer of 1995, after violations of exclusion zones, the shelling of UN-designated safe areas and the taking of UN hostages, NATO member countries agreed to take military action in support of UN efforts to bring an end to the war in **Bosnia and Herzegovina**. NATO launched a two-week air campaign against Bosnian Serb forces and, over the following months, a series of other military measures at the request of the UN force commanders. This helped pave the way for the signing of the Dayton Peace Accord on 14 December 1995. The Alliance immediately proceeded to deploy peacekeeping forces to the country, in accordance with the terms of a UN mandate, giving NATO responsibility for the implementation of the military aspects of the peace accord.

This was the first time that NATO became involved in a major non-Article 5 crisis management operation. Other non-Article 5 crisis management operations have followed – in **Kosovo**, in **North Macedonia** when it was a NATO partner (previously known as the former Yugoslav Republic of North Macedonia), in **Afghanistan**, the Mediterranean, off the Horn of Africa, over Libya and in support of the African Union.

NATO and disaster relief operations

Crisis management is a broad concept that goes beyond military operations to include, for instance, the protection of populations. NATO began developing civil protection measures in the event of a nuclear attack as early as the 1950s. NATO member countries soon realized that these capabilities could be used effectively against the effects of disasters induced by floods, earthquakes or technological incidents, and against humanitarian disasters such as the coronavirus pandemic.

In 1953, the first disaster assistance scheme was implemented following devastating flooding in northern Europe and, in 1958, NATO established detailed procedures for the coordination of assistance between NATO member countries in case of disasters. These procedures remained in place and provided the basis for NATO to conduct work in this field in subsequent years. They were comprehensively reviewed in 1995 when they became applicable to partner countries in addition to NATO member countries.

In 1998, NATO established the Euro-Atlantic Disaster Response Coordination Centre (EADRCC) to coordinate aid provided by different member and partner countries to a disaster-stricken area in a member or partner country. The Alliance also established the Euro-Atlantic Disaster Response Unit, which is a non-standing, multinational mix of national civil and military elements that have been volunteered by member or partner countries for deployment to the area of concern.

The EADRCC has coordinated assistance in many instances such as flood-devastated countries (Albania, Bosnia and Herzegovina, Czechia, Hungary, Romania and Ukraine); earthquake-stricken Türkiye and Pakistan; and countries afflicted by huge fires (for instance Portugal and North Macedonia). It has also supported the UN High Commissioner for Refugees in Kosovo, and supported Ukraine and the Republic of Moldova after extreme weather conditions had destroyed power transmission capabilities. More recently, it has supported NATO's efforts in assisting member and partner countries hit by the coronavirus pandemic. The EADRCC also conducts consequence management field exercises on an annual basis, bringing together civil and military first response teams to practise interoperability.

Natural, technological or humanitarian disaster operations

Operations to assist member and partner countries that are affected by disasters also fall under the scope of crisis management. In 2005, NATO assisted Pakistan when it was hit by a devastating earthquake that claimed the lives of an estimated 80,000 people. NATO also regularly responds to requests for assistance following natural disasters such as hurricanes, heavy flooding and forest fires, and has also helped to tackle the global coronavirus pandemic.

NATO recognises that the military alone cannot resolve a crisis or conflict, and lessons learned from previous operations make it clear that a comprehensive political, civilian and military approach is necessary for effective crisis management.

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THE VALUES OF NATO

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Abstract: The article examines NATO's core values in the context of the philosophical understanding of values and the specifics of political values. The following problems are subject to author's interpretation: (1) about the importance of values in the policy and activity of the Alliance; (2) on the nature of values as a philosophical problem; (3) about the specificity of political values; (4) what are the common values of NATO member states.

The position is defended that the topic of values and their role for NATO requires analysis and attention, because favoring them can lead to uncertainty and instability, and ignoring them – to a decrease in confidence in the alliance. The values declared as shared by the parties of the North Atlantic Pact – freedom, democracy, human rights and the rule of law – are examined in the context of the logical framework from “philosophy of values” and “specificity of political values” to the specific values determining the activity of The Alliance. It is concluded that shared values are political in nature and their observance ensures the support of broad public opinion not only among member states, but also across broad borders. That is why the common values of NATO can also be considered as a political responsibility of the participants of the Union, providing support and protection of the democratic processes in the modern world.

Key words: NATO, values, political values

Анотация: В статията са разгледани основните ценности на НАТО в контекста на философското разбиране на ценностите и на спецификата на политическите ценности. На авторска интерпретация са подложени следните проблеми: (1) за значимостта на ценностите в политиката и дейността на Алианса; (2) за същността на ценностите като философски проблем; (3) за спецификата на политическите ценности; (4) кои са общите ценности на страните-членки на НАТО. Защитена е позицията, че темата за ценностите и тяхната роля за НАТО изисква анализ и внимание, защото фаворизирането им може да доведе до несигурност и нестабилност, а игнорирането им – до намаляване на доверието в съюза. Ценностите, декларирани като споделени от страните на Северноатлантическия пакт – свобода, демокрация, права на човека и върховенство на закона, са разгледани в контекста на логическата рамка от „философия на ценностите“ и „специфика на политическите ценности“ до конкретните ценности, определящи дейността на Алианса. Направен е изводът, че споделяните ценности са политически по своя характер и спазването им осигурява подкрепата на широкото обществено мнение не само сред държавите-членки, но и в широки граници. Ето защо общите ценности на НАТО, могат да бъдат разглеждани и като политическа отговорност на участниците в Съюза, осигуряваща подкрепа и защита на демократичните процеси в съвременния свят.

Ключови думи: НАТО, ценности, политически ценности

The purpose of this paper is to examine the values of NATO in the context of the philosophical understanding of values and the specificity of political values. The stated purpose also determines the content of the text, which addresses the following questions: (1) importance of values; (2) essence of values; (3) specificity of political values; (4) common values of NATO member states.

(1). Why are values important? (or instead of introduction)

The problem of NATO's values, their role and importance is important because at the time of its creation, the Union defined itself as an Alliance of countries with the main goal of ensuring lasting peace in Europe and North America, based on the shared values of its members. – personal freedom, democracy, human rights and the rule of law.

The common values are already stated in the preamble of the North Atlantic Treaty of 1949: the founders have “democratically elected governments that are responsible to their citizens, bound by the rule of law and protect political and civil rights”.⁸ Raymond Aron theorized the problem of shared common values, defining NATO as an “Atlantic community.”⁹ The importance of the role of values as a factor in ensuring strong public support for NATO is also noted in a policy paper by the Norwegian Center for Integrity in the Defense Sector (CIDS): “... if NATO is not seen as a community of values, the public support and mutual solidarity can easily be undermined”.¹⁰ A number of Union analysts emphasize the fact that NATO operates in defense of common values, maintains peace and plays “a key role in strengthening liberal democracies and building trust between countries that have spent centuries fighting against each other”.¹¹

Along with the above, in the last decade there have also been criticisms against the approach of favoring values and their importance for the Union. Delineating the difference between a “military union” and a “community of values”, Y. Parakilas notes that a value-based community is democratically governed, and can “defend and uphold its values without fatal opposition”; while the military

⁸ CA Wallander, “NATO's enemies within: how democratic decline could destroy the alliance”, *Foreign Affairs*, July/August 2018, <https://www.foreignaffairs.com/articles/2018-06-14/natos-enemies-within>

⁹ See: Durhin, N. NATO and its founding values: renewal of vows or conscious uncoupling?”, <https://www.jstor.org/stable/pdf/resrep26057.6.pdf>

¹⁰ Norwegian Center for Integrity in the Defense Sector (CIDS), “Towards Cardiff and beyond: NATO as a community of values”, CIDS policy paper, No.1, 2014, <https://cids.no/towards-cardiff-and-beyond-nato-as-a-community-of-values/>

¹¹ See: Wallander, “NATO's enemies within: how democratic decline could destroy the alliance”, *Foreign Affairs*, July/August 2018, <https://www.foreignaffairs.com/articles/2018-06-14/natos-enemies-within>

alliance has as its core “the ability to deter or coerce adversaries.”¹² Therefore, according to the author, a military alliance can be more flexible in terms of values, and too much focus on values can threaten NATO’s credibility and hinder its task of deterring adversaries.¹³

That is why the topic of values and their role for NATO requires attention: favoring them can lead to uncertainty and instability, and ignoring them – to a decrease in trust in the alliance.

(2). What is value?

The topic of NATO values (as political values) needs to be considered in the context of a philosophical understanding of the nature of values. That is why the consideration of values is based on the following basic propositions:

First. The category “value” is among the main philosophical categories. It is not by chance that it is interpreted alongside the categories “being”, “consciousness”, “truth”. On the basis of the philosophical understanding, the concepts of value as a social, political, economic category also arise.¹⁴

Second. The nature of values is neither absolutely objective (ontological axiologism) nor only absolutely subjective (absolute subjectivism). It should be seen as a unity of subjectivity and objectivity, i.e. of “the being of value” and “the value of being.”¹⁵At the level of values, the objective and the subjective exist as related and mutually determining phenomena. Therefore, today, the dominant approach in philosophy considers values on the basis of “subject-object relations.”¹⁶

Third. Values are implicitly related to (and the result of) human activity (in the sense of anthropic signifying activity). While being ideal phenomena, they have at their foundation also factors such as a spiritual community atmosphere, interpersonal communication (in-depth meetings of the Self and the Other/them, of I and We), the spiritual aspirations and efforts of the subject to reveal his potential possibilities, etc.¹⁷ It is in the activity that the life meanings and values of/ for the person are manifested and clarified. Through activity, values are objectified (but not necessarily) in social and cultural realities and thus “discovered” for cognition; and objectified, they acquire significance for the subjects. In the subject areas of various social sciences, values are concretized and verbalized,

¹² J. Parakilas, “Don’t count on NATO to save liberal values”, Chatham House, 4 April 2019, <https://www.chathamhouse.org/expert/comment/don-t-count-nato-save-liberal-values>

¹³ Ibid.

¹⁴ Blagoeva, Bl. Values versus interests in politics (problems of theory), IC-UNSS, S., 2022, p. 65.

¹⁵ Mikhaleva, N. Valuable and cognitive in science and culture, STENO, Varna, 2011, p. 58.

¹⁶ There.

¹⁷ See Batishchev, G. S. Peculiarities of the culture of deep education, In: *Dialektika obshenia*, M., 1987, p. 46-47.

and in philosophy, value is a fundamental category that expresses the specificity of human being and is defined as a subject-object relationship.¹⁸ In this context, it is important to emphasize that the bearer of value is not identical with the value itself.

Fourth. The nature of values manifests itself most distinctly in a situation of choice of the subject – person, group, society – because any philosophical choice is a deep existential act (and not just a reflection of a specific objective situation). Understood in this way, the choice requires not just rational thinking but volitional effort and personal reflection; it is in “subjective reality.”

On the basis of the mentioned frameworks, we offer the following working definition of values: they are ideal phenomena (ideas, beliefs) resulting from the anthropic political activity of man; they are formed historically and bear the specifics and peculiarities of the historical time and of the political and economic systems. In the process of their existence, they are objectified in concrete realities and, objectifying themselves, acquire significance for the subjects. They are subject-object relations, expressing the characteristics of man as a social being.

The mentioned understanding of values has a universal character and serves as a basis for considering political values (such as the values defended by NATO).

(3). What is the specificity of political values?

Political values are part of social values. Their specificity can be conditionally summarized in the following postulates:

First. Political values are the core of the main components of political activity, namely:

- ✓ of ideologies as systems of values and group preferences and beliefs;
- ✓ of political culture as models of orientation towards political objects (cognitive, emotional and evaluative) and political behavior determined by them;
- ✓ of political system as a complex of values and institutions organizing the establishment and use of political power;
- ✓ of political parties, international organizations and unions as associations based on shared values.

It is no chance that politics itself is often defined as a subjective allocation of valuable resources. In this sense, the role of political values is great, both for the development of societies, because they are a motivational basis in the search for a more harmonious and perfect social order, and for the development of international relations.

¹⁸ Blagoeva, Bl. Values versus interests in politics (problems of theory), IC-UNSS, S., 2022.

Second. A peculiarity of political values is their relationship with existing institutions in society. The indicated relationship is characterized by bidirectionality because, on the one hand, institutions are a reflection of shared and legitimate values, and on the other hand, institutions, in order to maintain their legitimacy, create conditions – legal and normative – for the successful existence of certain political values. Since the functioning of modern society is the result of interaction between the institutions of the state and those of civil society, a necessary condition for the effectiveness of the political system is the establishment of a “working equilibrium” between the values of the two types of institutions. When values diverge (or when differences are not taken into account), conditions are created for value conflicts, which usually have a dysfunctional result for the political system.

Third. Political values are characterized by diversity and form their own internally differentiated system, which is dependent both on the historical context and on national and cultural specificities. Along with the above, there are general human values that require political support and provision – the right to a decent life, to a healthy and ecological environment, to peace, etc. Democracy, political equality, social justice, freedom of expression and choice, party and political pluralism, civil control over the institutions of power, tolerance, patriotism, etc. are accepted as traditional political values of modern times. The specified and other values are a kind of society-desired option for solving problems in the person-state relationship.

Fourth. Political values are directly or indirectly related to economic and moral values. For example, the economic values of the free market and the market economy condition the values of democracy, and the values of the command-administrative system and the state monopoly over the economy, respectively, impose other political values. Core moral values, enjoying public support, also influence political values. Broadly, the question is related to what is morally permissible in politics, and in a narrow sense, it is about how and to what extent moral values affect the behavior and decisions of those involved in politics.

Fifth. Political values are also related to the social structure of society within the existing political system and, in this sense, can be state-wide, class-based, group-based, or corporate; depending on their level of production, they can be conditionally divided into those formed at the micro-level (of citizens and social groups) and those formed at the macro-level (of the state). Political values, on the one hand, reflect meaningful political experience and, on the other hand, are included in the structure of social psychology. That is why the same political phenomena can be interpreted differently, depending on the mentality and the existing value system. The subjects of political values are identified according to various criteria and can be individual, civil, party, group, community, etc.

The identification of subjects in the political process is carried out by means of political values. If the values are achieved, i.e. in fact, the activity is aimed at their preservation and maintenance, if they are not realized, but desired, i.e. unreal – political activity is oriented towards their achievement. Therefore, political values can be defined as fundamental mental formations, such as people's ideas about the due state of politics and the political; for the purposes of political activity.

The stated postulates provide a basis for the following additive (collective) definition of political values: Political values are ideal phenomena (ideas, ideas, beliefs) resulting from the anthropic meaning political activity of a man. They are historically formed phenomena bearing the specifics and peculiarities of historical time and political systems. In the process of their existence, they are objectified in concrete political realities and, objectifying themselves, acquire significance for political subjects. Political values are part of political culture and have a motivating force in political activity. They are subject-object relations expressing the particularities of man as homo politicos.

In the context of the cited definition of political values, we also place the values declared as shared by the countries of the North Atlantic Pact: freedom, democracy, human rights and the rule of law.

(4). Importance of NATO values (or rather conclusion)

In conclusion, the following could be said:

First. The stated common values shared by the NATO countries are defined by the main purpose of the Union – “to guarantee the freedom and security of its member states by political and military means” and its political dimension – to “promote democratic values and enable its members to consult and cooperate on defense and security issues to resolve issues, build trust and prevent conflict in the long term.”¹⁹

Second. Shared values are political in nature and are foundational values of liberal democracy as a type of political system.

Third. Observance of the stated values and the creation of guarantees for their protection are a basic condition for membership in NATO.

Fourth. The common values shared by the member states can also be seen as a political responsibility of the actors of the Union, which requires their participation in the implementation of NATO security operations.

Fifth. In recent decades, after the expansion of NATO, a significant problem of the North Atlantic Pact is to find working mechanisms to establish a balance between the protected common values, on the one hand, and the interests of the Union as a whole and of its member states, on the other.

¹⁹ https://www.nato.int/nato-welcome/index_bg.html

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USING MIGRATION AS A WEAPON

Boris Kostov

Annotation: This text examines the possible consequences of securitization of migration for the European Union, in particular the possibility of weaponization of migration against the EU. Accordingly, the question arises as to whether third countries successfully weaponize migration as a result of securitization within the EU, in order to achieve political goals. The starting point for the logic of the weaponization of migration is the Europe-wide institutionalization of migration as a security problem, which represents favorable environment for re-emerging perception (and use for political purposes) of migration as a threat. So if a third country causes or announces a mass migration movement to the EU's external borders, this triggers securitization within the EU member states, which in turn exerts pressure on the national governments. This gives third countries a powerful pressure point against the EU member states which may respond with a limited set of options – starting from enhancing, or even militarizing border defense, on one end, or entering negotiations with the third country in order to offer acceptable concession. The migration crises of 2020 (Turkey) and 2021 (Belarus) demonstrate that illiberal third countries at the EU's external borders in particular have been given the opportunity to instrumentalize migration and weaponize it in the context of securitization. In both cases, this has led to exceptional measures on the part of the EU and its member states, but not automatically to successes for the third states in bargaining, as can be seen in the case of Belarus. As these cases have demonstrated the EU public is highly sensitive to the migration problem and it is therefore necessary to develop a more efficient set of policies at EU and national level in order to deter third countries from further weaponization of migration.

Key words: Migration, Securitization, Weaponization, Extraordinary measures.

Анотация: Този текст разглежда възможните последици от секюритизацията на миграцията за Европейския съюз, по-специално възможността за използването на миграцията като оръжие срещу ЕС. Съответно възниква въпросът дали трети страни успешно използват миграционния натиск в резултат на секюритизация в рамките на ЕС, за да постигнат политически цели. Отправната точка за логиката на използването на миграцията като оръжие е общоевропейското институционализиране на миграцията като проблем за сигурността, което представлява благоприятна среда за възприемането (и използване за политически цели) на миграцията като заплаха. Така че, ако трета държава предизвика или заплаши с масиран миграционен натиск към външните граници на ЕС, това задейства секюритизация в рамките на държавите-членки на ЕС, което от своя страна оказва влияние върху националните правителства. Това дава на трети страни сериозен потенциал за оказване на натиск срещу държавите-членки на ЕС, които могат да отговорят с ограничен набор от възможности – като се започне от засилване или дори милитаризиране на защитата на границата, от една страна, или

започване на преговори с третата държава, за да се предложи приемливи отстъпки. Миграционните кризи от 2020 г. (Турция) и 2021 г. (Беларус) показват, че нелибералните трети държави по-специално по външните граници на ЕС са получили възможността да инструментализират миграцията и да я превърнат в оръжие в контекста на секюритизацията. И в двата случая това доведе до извънредни мерки от страна на ЕС и неговите страни членки, но не и автоматично до успехи на трети страни в договарянето, както се вижда в случая с Беларус. Както показаха тези случаи, обществеността в ЕС е силно чувствителна към проблема с миграцията и следователно е необходимо да се разработи по-ефективен набор от политики на ниво ЕС и на национално ниво, за да се възпира трети държави от по-нататъшно използване на миграцията като оръжие.

Ключови думи: Миграция, Секюритизиране, Въоръжаване, Извънредни мерки

Migration undoubtedly has been one of the most important political issues for the EU in recent years. The Eurobarometer survey in 2023 shows immigration as the third most important challenge.²⁰ Particularly during and after the European migrant crisis of 2015, in which an estimated 1.3 million asylum-seekers fled to Europe, the issue of migration and refugees has become one of the dominant political topics in Europe and has also fueled major national and international debates. The modality of the resulting public opinion in Europe is often described as legitimizing violence and is characterized by terms such as “flood of asylum seekers” or “dam breach”, thus linking the topic of migration and asylum with the image of a catastrophic event.²¹

This text examines the possible consequences of securitization of migration for the European Union, in particular the possibility of weaponization of migration against the EU. Accordingly, the question arises as to whether third countries successfully weaponize migration as a result of securitization within the EU, in order to achieve political goals.

The securitization of migration after 2015

In order to understand the securitization of migration, the term migration and the situation before and after 2015 in the EU must be outlined. The issue of migration is a complex process, which in the case of securitization refers particularly to the mass movement of undocumented migrants. This includes all undocumented migration, whether for economic or political (refugee) reasons. A distinction should be made between two periods, as the temporal context of the analysis – before and after 2015. Even before 2015, a large number of migrants arrived in the European Union, many of whom also crossed the external borders of the Union illegally. The highest number before 2014 was 141,053 in 2011. 33 million people of the EU population were born outside the EU’s borders in 2014. In 2015, the number of illegal border crossings at the EU’s external bor-

²⁰ European Commission, Standard Eurobarometer 99, p. 32.

²¹ Barlai, Fähnrich, Griessler, Rhomberg, p. 13

ders increased rapidly. Over 1,820,000 illegal border crossings were recorded in 2015.²² The trend of a sharp increase in illegal border crossings was also repeated in 2016 with 511,000 illegal border crossings.²³ In terms of the number of illegal border crossings, the years of 2015/2016 undoubtedly represent a critical point. The pattern of securitization of the topic of migration can be divided into two political logics. On the one hand, there is a distributive logic, which is primarily concerned with economic aspects (competition on the job market, social welfare benefits, accommodation, etc.). On the other hand, there is an identity logic, in which aspects associated with identity take center stage (ideology, religion, culture, national identity, political identity, etc.). In addition, it is not the actual impact of migration on one of the aspects, such as an impact on a distribution issue, that is relevant, but the presentation as a threat. Securitization can also take place in both arenas simultaneously, especially when more abstract reference objects are presented as threatened, such as national sovereignty or social order.

The key question when looking at the literature is to compare the state of securitization before and after 2015 in the EU. A review of the literature prior to 2015 clearly shows that asylum and migration policy is regarded as securitized by a large number of authors.²⁴ Some of them assume that securitization in the EU began in the 1980s, particularly in close connection with the progress of European integration. The literature on securitization after 2015 also emphasizes prior securitization processes in Europe, but the impact of over one million migrants created a new situation in Europe, which has transformed the securitization of migration from a state level to the level of the European Union as a whole. There has been a significant change in the level of securitization as well. The terrorist attacks in Paris and Brussels in 2015 and 2016 in particular established an image of migration in its connection to terrorism as a Europe-wide security threat. The consequence of this was the militarization of the measures taken, in particular border protection, which is a consequence of an intensification of securitization.

The weaponization of migration

The starting point for the logic of the weaponization of migration is the Europe-wide institutionalization of migration as a security problem, which represents a favorable environment for re-emerging perception (and use for political purposes) of migration as a threat. The impact on international negotiations follows the logic of the two-level game, whereby at the national level, various national groups pursue their interests and try to implement them in policy, while politicians are interested in retaining power and, therefore, seek alliances with

²² Frontex, Risk Analysis for 2016, p. 6

²³ Frontex, Risk Analysis for 2017, p. 6

²⁴ Léonard, p. 231, 232

the national groups. At the international level, governments try to cope with the pressure in their own domestic arena and at the same time react to developments in other countries.²⁵ So, if a third country causes or announces a mass migration movement to the EU's external borders, this triggers securitization within the EU member states, which in turn exerts pressure on the national governments. At the international level, these governments are now forced to react to the developments in the third country and to protect the interests of their own national groups.

This gives third countries a powerful pressure points against the EU member states.²⁶ In addition to a speech act by a third country, such as the announcement that migration is to be deliberately brought about or that migrants are to be allowed through the third country to the EU's external borders, an action without such a speech act could also be used to activate the migration chokepoint. This leaves the member states with a limited set of options – starting from enhancing or even militarizing border defense on one end or entering negotiations with the third country to offer acceptable concessions to end the migrant crisis. Accordingly, pressing such a weak spot can become leverage for competitive bargaining.

1. Turkey (2020)

The EU-Turkey Statement on Migration from 18 March 2016, was intended to offer a solution for the migration route via Turkey to Europe. Among other things, it was supposed to hasten the allocation of funds for the accommodation of migrants in Turkey.²⁷ One major consequence was the significant reduction in the number of migrants in 2016 compared to 2015, which, according to Frontex, was partly due to the agreement with Turkey and partly due to the closure of the Balkan route.²⁸ However, at the beginning of 2020, Turkey effectively broke this agreement. During the Turkish army's "Spring Shield" operation in northern Syria, the border with Greece was opened again to migrants at the end of February 2020. President Erdogan linked these events and called for further support in order to resolve the issue of migration, but also for support for the Turkish military operation in Syria.²⁹ In addition, there were reports that Turkey has deliberately brought migrants to the EU's external border and thus not only tolerated the flow but also actively encouraged it, which the EU interpreted as the abuse of migrants for political purposes.³⁰ The immediate response of the EU included support for the states at the external borders. For example, Frontex

²⁵ Putnam, p. 434.

²⁶ Drezner, Farrell, Newman, p. 30, 31

²⁷ European Council, EU-Turkey statement 18 March 2016

²⁸ Frontex, Risk Analysis for 2017, p. 6

²⁹ Léonard, Kaunert, p. 243.

³⁰ Council of the EU, Statement on the situation at the EU's external borders

was activated for rapid border intervention to support border security in Greece. The EU reaction also included measures such as the temporary suspension of the possibility to apply for asylum in Greece. In addition to such internal measures, however, there were also intensive consultations with Turkey. The EU's urgent reaction prompted Turkey to scale down the the migration pressure. In response, the EU pledged further financial resources for the accommodation of migrants in Turkey. This enabled Turkey to fulfil some of its demands towards the EU.³¹ As this case shows Turkey has used the securitization of migration within the EU and thus weaponized migration in order to gain leverage in bargaining. On one hand, Turkey has applied pressure on the EU through speech acts such as the announcement that over a million migrants will soon be on their way through Turkey to Europe, but on the other hand also by allowing and actively transporting migrants to the EU's external border. Turkey has brought a resolution to this issue by demanding more extensive financial support as well as support in connection with the Turkish military offensive in northern Syria. Turkey was particularly successful in its bargaining for financial support from the EU. However, the EU has also acted in accordance with securitization. Border protection was significantly increased and the possibility of applying for asylum in Greece was temporarily suspended, which clearly qualifies as “extraordinary measures”, using the securitization blueprint.

2. Belarus (2021)

By the summer of 2021 there has been a major deterioration of relations between the European Union and Belarus as a result of the mass protests and their suppression after the 2020 presidential elections in Belarus. The EU considered these elections to be fraudulent and condemned the repressions perpetrated by the Belarusian authorities. The trigger for the escalation of tensions in 2021 was the forced landing in Minsk airport of a transit flight in order to arrest Roman Protasevych – a prominent Belarusian activist. The EU responded with several packages of sanctions against individuals and Belarusian companies.³² Following this development, the Belarusian president Lukashenko started to issue threatening statements, that he would “flood” the EU with migrants and drugs. Shortly after, Belarus began to direct thousands of migrants to the border with Poland, Lithuania, and Latvia, at times by offering them transportation and instructing them to cross the EU's external border. The largest number of migrants were registered at the border with Poland. By November 2021, this amounted to over 30,000, which is not insignificant, but comparatively low numbers for the European Union compared to 2015 and 2016. Nevertheless, it must be noted

³¹ Léonard, Kaunert, p. 244, 245.

³² du Perron de Revel , p. 9

that EU states on the north-eastern external border in particular are not used to such migration flows.³³ The European Union and its member states responded with border protection measures. Frontex was stationed in Lithuania and its capabilities at the border were constantly upgraded. In addition, all three affected states have declared a state of emergency.³⁴ All this resulted in extended border protection measures, including the rapid construction of border fences in all three states. The EU openly accused Belarus of instrumentalization of migration for political purposes, in order to force the easing of recently imposed additional EU sanctions.³⁵

In any case, the EU has not eased the sanctions, but on the contrary, has decided on further punitive measures.³⁶

In contrast to the case of Turkey, Belarus could not achieve most of its objectives and negotiate a favorable deal with the EU. Despite the relatively small number of migrants involved, Belarus was initially able to use securitization and weaponize migration. This has happened both through speech acts such as Lukashenko's public announcements, as well as through explicit actions in directing and facilitating the migrant flows. The endangered states (Poland, Lithuania and Latvia) were hardly affected during the crisis of 2015 and 2016. The absolute number of migrants in 2021 was relatively small. Still, nevertheless, the immediate reaction to the threats of Belarus was as strong as possible – declaring a state of emergency and sending a large number of additional border guards, and building border fences. Eventually, Belarus was not able to utilize the weaponization of migration for bargaining success. Not only were the sanctions not lifted, but additional measures were adopted.

Conclusion

To conclude, it must be noted that the Europe-wide institutionalization of migration as a security threat as a result of the migrant crisis in 2015 and 2016 has led to an increased vulnerability of the EU and its member states. Illiberal third countries at the EU's external borders, in particular, have been given the opportunity to instrumentalize migration and weaponize it in the context of securitization in order to exert pressure on the European Union. The cases have shown that both speech acts and actions can trigger securitization. In both cases, this has led to exceptional measures on the part of the EU and its member states, but not

³³ du Perron de Revel, p. 9

³⁴ European Commission, Proposal for a COUNCIL DECISION on provisional emergency measures for the benefit of Latvia, Lithuania and Poland, p. 2

³⁵ European Council, EU relations with Belarus.

³⁶ du Perron de Revel, p. 34

automatically to successes for the third states in bargaining, as can be seen in the case of Belarus.

As both cases demonstrated the EU public is highly sensitive to the migration problem and It is therefore necessary to develop a more efficient set of policies at EU and national level in order to deter third countries from further weaponization of migration.

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THE ISSUE OF THE COLLECTIVE DEFENSE OF NATO AND THE BULGARIAN ACTIVITIES IN THE BLACK SEA REGION

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The 20th anniversary of Bulgaria's accession to NATO is a good opportunity to recall the basic mission and goals for which the North Atlantic Alliance was established. Especially in the face of various threats and dynamically changing international conditions, it is extremely valuable to recall the essence of NATO's collective defense. Collective defence is the core of the North Atlantic Alliance, its fundamental foundation. In the text, in addition to the characteristics of collective defense, I will also briefly present the actions that Bulgaria has taken in recent years to strengthen security in the Black Sea region as a full member of NATO.

The origins and purpose of the North Atlantic Alliance

The North Atlantic Treaty Organization (commonly NATO, the North Atlantic Alliance) was established on April 4, 1949, in Washington, D.C., by the 12 founding states (*The North Atlantic Treaty*). This treaty, commonly known as the Washington Treaty, is a document consisting of 14 articles defining the most important obligations of the allies towards each other individually and the Alliance as a whole. The twelve founding states of NATO are Belgium, Canada, Denmark, France, the Netherlands, Iceland, Italy, Luxembourg, Norway, Portugal, the United Kingdom, and the United States. Bulgaria became a full member of the Alliance in 2004 (*Процесът на присъединяване на България*).

At the time of NATO's creation, the main purpose of this organization was military defense against an attack by the USSR and its satellite states, which in 1955 organized themselves in the structures of the Warsaw Pact. After the collapse of the USSR and the dissolution of the Warsaw Pact in 1991, NATO began to play a stabilizing role (Бояджиева 2013, Райчевски, Чилов et.al 2006; Panek 2012, Kupiecki 2016), taking action to prevent the spread of regional conflicts. NATO also plays the role of a guarantor of the external security of its member states.

The main objective of the Alliance is to guarantee – through political and military means – freedom and security for all its member states. To achieve this objective, NATO performs specific tasks in the field of security:

- provides the means of deterrence and defense against any form of attack on the territory of any member state
- develops international security through permanent and active cooperation with all Partner States belonging to the Partnership for Peace (PfP) program and the Euro-Atlantic Partnership Council
- sends its military missions to countries in the territory of which an armed conflict is taking place, with the aim of resolving that conflict
- provides the foundation for lasting security in Europe, based on the development of democratic institutions and the peaceful resolution of conflicts

The issue of the Collective Defense of NATO

Collective defense is the main instrument of the NATO's security policy both in the deterrent role (a conscious capability) and in the real role (readiness to defend). It is the only undisputed platform of inter-Allied communication on the goals of joint action and their own defense policies. From Collective Defense and the related military capabilities, the consideration of other Allied missions regarding security begins. In all of its tasks except collective defense, NATO is replaceable by other international organizations.

Article 5 and Article 3 of the North Atlantic Treaty are particularly important in terms of state defense. Article 6 is important in determining the territorial scope of the alliance. Whether collective defense is considered in the context of NATO's Cold War activities or after 1989, it is uniquely and inalienably the only mission of this organization. In terms of its institutional and procedural foundation, continuity of solutions, military and political credibility, and longevity, it is unprecedented among modern defense alliances of states.

Article 5 of NATO is the basis for the functioning of the Alliance. This article states that any armed attack from outside directed against one or more NATO member states will be treated as an attack against all signatories of the agreement. The *casus foederis* formula contained in this article is a special type of military solidarity between members of the Alliance. This promise of solidarity, mutual military assistance of NATO stems directly from the provisions of Article 51 of the Charter of the United Nations (*United Nations Charter*). Article 5 guarantees states security, which can be ensured in various ways through the use of various means, including war. This article does not guarantee these states an immediate armed reaction from allies, but gives them the right to choose appropriate means to restore and maintain security in the treaty area.

Article 5:

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

Any such armed attack and all measures taken as a result thereof shall immediately be reported to the Security Council. Such measures shall be terminated when the Security Council has taken the measures necessary to restore and maintain international peace and security.” (*The North Atlantic Treaty*).

In terms of territorial scope, NATO generally includes:

- territory of any of the Parties in Europe or North America, the Algerian Departments of France, the territory of Turkey or the Islands under the jurisdiction of any of the Parties in the North Atlantic area north of the Tropic of Cancer (*The North Atlantic Treaty*):

It is worth noting here that there has been a discussion in the scientific discourse for years on the relationship between collective defense and another security mechanism of modern states, namely collective security (Kupiecki, Madej 2018, s. 63-93; Kelsen 1948, pp. 783-796; Linnan 1991, pp. 57-123). In my opinion, these mechanisms are conceptually different. Even if we assume that the interests of member states are similar in both mechanisms, they differ in several important respects. Let us note that, for example, if we take into account the theory of international relations, the explanatory paradigm for the concept of collective security will be liberalism/idealism, and for collective defense realism. This means that in the concept of collective security, norms and institutions are the source of international order, while in collective defense, strength and the aggregation of strength are a factor in the security of states. However, if we take the criterion of the spectrum of regulated matters, then in collective security the scope of matters is wide, and in collective defense narrow. For example, if we take the criterion of the source of the threat, then in collective security it will be a threat from within, and in collective defense from without. This means that the aggressor is clearly defined.

We can therefore see significant differences between these two mechanisms.

Table 1. Selected Differences between Collective Security and Collective Defense

Factor	Collective Security	Collective Defense
Explanatory paradigm	Liberalism and idealism-norms and institutions as sources of international order	Realism – the power and the aggregation of power as a factor of the security of states
The right for self-defense	Subordinated to the principles of collective security	The inherent right of states
Spectrum of regulated matters	Broad	Narrow
Scope	Global/regional	Regional/bilateral
Share (System Versatility)	Inclusion (universal membership)	Exclusion (Limited membership)
Source of threat	Comes from inside the system (Aggressor clearly unspecified)	Comes from outside the system (the aggressor is clearly defined)
Actions	After the emergence of a source of danger	Preparation and Planning Ahead
The usage of power	Strongly sanctioned internationally (legally and politically)	The right to individual or collective self-defense
Institutionalisation	Necessary	Not necessary (but NATO has it)
Functions performed	E.g. peacekeeping operations, humanitarian interventions	Protecting Member States from external aggression by military and political means

Source: Kupiecki, Madej 2018, s. 63-93.

In the context of the defense, the provisions of Article 3 of the Treaty are also important, according to which each state is obliged to strengthen its own and collective defense capabilities.

Article 3:

“In order more effectively to achieve the objectives of this Treaty, 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” (*The North Atlantic Treaty*).

A good example illustrating this obligation of member states to strengthen their own and collective defense capabilities is, for example, the issue of de-

fense expenditure (*Defense expenditure of NATO countries*). According to NATO guidelines, each country should allocate at least 2% of GDP for defense purposes. How has this situation changed in Poland? How has the situation changed in Bulgaria? In what respect, after these two countries joined the Alliance? This year, Bulgaria celebrates the 20th anniversary of joining the Alliance, and Poland celebrates the 25th anniversary. The situation has changed dramatically. Comparing the expenditures of these countries, Poland and Bulgaria, not only over the course of these 20 and 25 years, but even over the course of 10 years, it is clear that the situation has changed a lot. In the case of Poland, in 2014, slightly less than 2% was spent, and in 2024 it is already 4.12% – the most of all NATO countries, and in Bulgaria it was below 1.5% in 2014, and now it is 2.18%. This is a tangible proof that large investments are being made for the military. When it comes to equipment expenditure as a share of defense expenditure in %, with NATO guidelines being that it should be at least 20%, again, Poland spends the most, because in 2014 it was less than 20%, and now it is 51.1%, and Bulgaria spent 1 or 2%, and currently spends about 32%.

Bulgaria and the Black Sea region

Bulgaria is located in a region significant for the history of international relations of many countries. This is the Balkan Peninsula, which has been a place of competition for political influence for centuries among both Western powers and the countries of the Balkan Peninsula. The proximity of three cultural and civilizational areas speaks in favour of recognizing Bulgaria's geographical location as strategic: the Orthodox Russian Federation, Muslim Turkey, and Europe uniting within the European Union. Bulgaria's location in the southeastern part of Europe on the Black Sea makes the country an important actor in the Black Sea region. With the country's accession to NATO in 2004, its position on the international stage has significantly increased. The NATO members Bulgaria and Romania have a combined coastline of 670 km. This strategic location is highly beneficial for Bulgaria and Romania because of its role in trade, tourism and transport. The Black Sea also contains significant oil and gas pipelines crucial for the energy security of its littoral states. With its accession, Bulgaria became an important country on the Alliance's eastern flank and part of the Bucharest Nine (the Bucharest Format). NATO's eastern flank is an important element of European security, especially considering the Russian aggression against Ukraine in 2022. The southern part of the flank, which is formed by Bulgaria and Romania, is in turn crucial for maintaining security in the Black Sea region. In recent years, due to Russia's tough policy, Bulgaria and countries such as Turkey and Romania have also intensified cooperation in the region. Together with other NATO members, Bulgaria is implementing various activities in the Black Sea. As a part of

the reaction, NATO bolstered its presence in the littoral states, intensified Black Sea air policing and conducted several exercises and missions within the region, including Operation Atlantic Resolve.

Among the actions that Bulgaria has recently taken to strengthen security in the Black Sea region, it is worth mentioning:

- **Announcement of civil emergency response exercises – beginning in September 2025**

In September 2025, Bulgaria will host NATO's 20th civil emergency response exercise (*NATO and Bulgaria announce major emergency*). These exercises are among the world's largest and most complex training events in disaster response and the management of complex emergencies. The exercises are organised by NATO's Euro-Atlantic Disaster Response Coordination Centre (*EADRCC*). Participants in these exercises will face various scenarios related to natural and industrial disasters, complex emergencies and hybrid threats. The exercises will also aim to test procedures related to the organization and coordination of various activities and logistical support. The exercises are also intended to test the ability of personnel from different countries to cooperate effectively with each other. In a situation of constantly emerging new threats, such exercises are essential. They serve to build resilience and prepare for potential challenges, including those related to climate change.

- **Memorandum of Understanding to establish a Regional Special Operations Command for the Black Sea (HQ R-SOCC) signed between Bulgaria and Romania**

As a result of the Russian aggression against Ukraine, the threat in the Black Sea region has increased. In this context, increasing the defense capabilities of all Black Sea states is of particular importance. As a gateway between Europe, Asia and the Middle East, the Black Sea region serves as a critical security and defense frontier. On the sidelines of the recent NATO summit in Washington D.C. (summer 2024), Bulgaria and Romania signed a Memorandum of Understanding to establish a Regional Special Operations Command for the Black Sea (HQ R-SOCC) (Gallo, *Black Sea Security*). Through a new command and control structure (C2), Bulgarian and Romanian special forces will be integrated. The new command aims to improve the coordination and interoperability between NATO special operations forces in the region. The main task of the new body is to protect merchant ships and conduct inspections, which is intended to support the protection of NATO's strategic interests in the Black Sea region. HQ R-SOCC will be a key platform for the coordination of the Alliance's special forces in the region. The activities of the R-SOCC will primarily focus on increasing maritime

awareness, ensuring the safety of civilian vessels and conducting inspections to ensure order at sea, strengthening maritime security and supporting regional stability.

- **MCM Black Sea**

On the 11th of January 2024, Bulgaria, Romania, and Turkey signed an agreement on joint combating of sea mines in the Black Sea (*Turkey, Bulgaria, and Romania*). On the 1st of July 2024, a search for mines laid, as a result of Russian aggression against Ukraine, began. The aim of this action is to ensure the safety of navigation on the route where Ukrainian grain is exported. It has to be remembered that Russia and Ukraine are key grain producers, and the war has threatened the safe flow of goods. The initiative, which came from the Turkish side, is the first major joint action by the countries of the Black Sea region since Russia's full-scale invasion of Ukraine in February 2022. NATO countries are participating in the operation, but it is entirely peaceful in nature, and is carried out only by the agreement of the aforementioned Black Sea countries, and not under the auspices of the alliance.

Summary

In light of the above, the North Atlantic Alliance with its idea of collective defense seems to be an irreplaceable guarantor of the security of modern states. All states will significantly gain from their security by being part of the Alliance. Seeing only these numbers, illustrating the increase in defense expenditure, we can see that the involvement of member states is increasing year by year, and thus states are working to improve this collective defense. The ability to adapt to changing international conditions and threats from outside is currently crucial for the entire Alliance. The growing threat in the Black Sea region caused by the Russian invasion of Ukraine also requires NATO to adapt to this new situation. The Alliance's response to the situation in the region is the actions listed above. Bulgaria, as a full member of NATO, together with Romania and Turkey, are taking specific actions to increase the security of the region. Let us not forget that these are NATO frontline countries – forming the external border of the Alliance and therefore security in this area is particularly important in the context of the security of other NATO states.

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HUMAN SECURITY: FROM A NEW CONCEPT TO A PRIORITY APPROACH FOR NATO

by *Evelina Staykova*³⁷

Introduction

Human security is still a relatively new concept for NATO. Designed as a complement and expansion of NATO's traditional focus on military crises, this new paradigm signals a desire to change the way the Alliance addresses the dynamics and nature of security challenges. The contemporary context of conflicts and security risks accelerates the need for NATO to transform the political promises and statements from its highest forums into fundamental changes in the behavior of the Alliance and military actions on the ground. This text engages in an analysis of the existing human security paradigm within NATO's system, as well as an evaluation and forecast of its future impact on the dynamic international environment.

How New is the Human Security Concept?

Essential to the analysis presented in this text is the fact that elevating human security to a priority within NATO does not occur in a vacuum (Paillé, 2024). It

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is linked to the work of other international institutions such as the United Nations (UN), the European Union (EU), non-governmental organizations, and academia, within which human security is viewed as a powerful approach with significant potential regarding the most pressing peace and development deficits.

It can be said that human security became a key theme in political and academic debates in the early 1990s (Britannica, 2024). A pivotal moment occurred in 1994 when the concept was introduced for the first time in UN General Assembly Resolution 66/290. At that time, the goal of human security was formulated as achieving “*freedom from fear*” and “*freedom from shortage.*” It is understood as “*an approach to assist member states in identifying and addressing widespread, cross-sectoral challenges to the survival, livelihood, and dignity of their people*” (NATO, 2024, p. 5).

It should be noted that, to this day, the vision for safeguarding human security is subject to various interpretations (Britannica, 2024). As Nikolai Slatinski reminds us through Daniel Dudney’s successful comparison, “*human security*” is akin to the concept of “*sustainable development*” – everyone is “*for*” it, but few understand what it truly means. According to him, this is due to overly broad definitions encompassing everything from physical security to psychological well-being, complicating the clear prioritization of objectives and resource allocation for its assurance, as well as the focus of meaningful academic debate (Slatinski, 2010). This is associated with the overarching difficulty in overcoming relative understandings of what constitutes a threat, how the intensity and consequences of a given threat can be measured (historical data or future forecasts), and what possible means may be employed to prevent or eliminate the threat (Britannica, 2024).

Nevertheless, there is a more widely shared contemporary understanding of human security, which is largely attributed to the UN and specifically to the 2003 report “*Human Security Now*” by the UN Commission on Human Security (Sidova, 2022). In this report, the goal of human security is articulated as follows: “*...to protect the vital core of all human lives in ways that enhance human freedoms and human fulfillment. Human security means protecting the fundamental freedoms – freedoms that are the essence of life. It means protecting people from critical (severe) and pervasive (widespread) threats and situations. It means using processes that build on the strengths and aspirations of people. It means creating political, social, environmental, economic, military, and cultural systems that together provide people with those building blocks necessary for survival, livelihood, and dignity*” (UNCHS, 2003).

Within the UN framework, the approach to human security serves as a proven analytical planning framework that supports more comprehensive and preventive actions across various sectors, developing context-specific solutions, and fos-

tering partnerships to help build a world free from fear, want, and humiliation (UNTFHS, n.d.).

The development of this concept, particularly influenced by its incorporation and modeling within NATO, is also linked to the European Union, especially with the evolution of the European Security and Defense Policy in the early 2000s, which strongly emphasized an individual rights-oriented approach. It can be summarized that, according to this vision, human security is what individuals benefit from in human rights-based, rule-of-law societies. It is assumed that the state will protect individuals from existential threats and that emergency services—including ambulances, fire departments, and police – are part of state provision. In a global context, human security is associated with the expansion of individual rights beyond national borders and with developing capacity at a regional or global level to provide emergency services that can be utilized in situations where states either lack capacity or themselves pose sources of existential threats (Kaldor, 2022, p. 2).

Another strong factor in the development of the concept within the Alliance is the increasing emphasis on the protection of civilian populations during military interventions. Pressure from civil society and human rights advocacy groups, particularly in the context of actions in Afghanistan, culminated in July 2016 with NATO’s adoption of a comprehensive policy for the protection of civilians (Kaldor, 2022, p. 2).

As noted in the introduction to this analysis, human security is still a relatively new concept for NATO or at least has been articulated more clearly in recent years. It was first mentioned as a concept within the Alliance in the Declaration from the Wales Summit in 2014 as a topic of practical cooperation with partners to address common security threats (NATO, 2024). In 2019, within the Office of the NATO Secretary General, a Department of Human Security was established (Kaldor, 2022).

Since the NATO summit in Brussels in 2021, human security has consistently been mentioned in special paragraphs within the summit communiqués. The communiqués from the Madrid and Vilnius summits respectively held in 2022 and 2023, also emphasized the cross-sectoral significance of human security for NATO’s three main tasks – deterrence and defense, crisis prevention and management, and cooperative security (NATO, 2024).

As the Alliance is committed to protecting and promoting the principles of democracy, individual freedom, and the rule of law, human security lies at the core of NATO’s shared values. Therefore, over the past decades, human security has been integrated into NATO’s activities and structures, aligned with the needs and mandate of a military-political organization.

However, more specifically, guiding principles were only established in 2022, at the Madrid summit, to provide the Alliance with a common understanding

of human security. For NATO, this encompasses five areas: combating human trafficking; protecting children in armed conflicts; preventing and responding to conflict-related sexual violence; protecting civilian populations; and safeguarding cultural heritage (NATO, 2024).

What is NATO's Approach to Human Security?

The traditional approach of “*national security*,” focused strictly on protecting the integrity and sovereignty of the state – its borders, institutions, and values – is necessary, but insufficient on its own (NATO, 2024). This necessitates a change, which is reflected in NATO’s policy, where human security emerges not only as a concept but, particularly considering recent events, transforms into a leading approach.

The modified approach to security is driven by the growing wave of complex, interdependent, and transnational crises, such as terrorism and environmental issues, combined with the rise of civil wars and intrastate and urban conflicts. This leads to the understanding that contemporary security challenges must be addressed inseparably from considerations for the civilian population. In this context, a new and broader security paradigm brings human security to the forefront, precisely within the framework of the concept of human security. This is a multi-sectoral approach that focuses on protecting individuals and communities from a range of threats and vulnerabilities. Human security allows for the consideration of root causes, contributing factors, and means that exacerbate conflicts and instability, recognizing that security is not solely related to military threats but also to fundamental social, economic, and political factors that contribute to it (NATO, 2024).

Since the concept’s emergence in the 1990s, the nature of conflicts has changed. The inclusion of non-state actors, a complex interplay of dynamics in interstate and intrastate conflicts, environmental degradation, and the use of new battlefield technologies, such as drones and artificial intelligence, are just some of the changes that have occurred. Consequently, NATO’s approach to human security must reflect and adapt to the rapidly changing threat environment.

NATO's approach to human security is founded on seven guiding principles, namely:

1. To be people-centered, actively integrating a gender perspective and acknowledging the differentiated impact of conflicts and crises on various population groups, particularly individuals in vulnerable or marginalized positions.
2. To be oriented towards prevention and protection.
3. To take into account local customs and social norms within communities that engage with NATO in the context of the Alliance’s op-

erations, missions, and activities, while simultaneously respecting the common values and principles of the Alliance.

4. To be consistent with international law.
5. To respect and provide space for the neutral, independent, and impartial work of humanitarian actors, whose operational viability and safety are essential during armed conflicts and other situations of violence.
6. To fully respect the sovereignty and territorial integrity of states.
7. To strive for cooperation with relevant stakeholders, such as the United Nations, the European Union, the Organization for Security and Co-operation in Europe, the African Union, host nations, partners, and civil society (NATO, 2024, p. 7).

Designed as a complement and expansion to NATO's traditional focus on military crises, this new paradigm signifies a desire to change how the Alliance addresses the dynamics and nature of security challenges. Moreover, the emphasis on human security within the approach to crisis and conflict management would distinguish NATO from its adversaries, who deliberately focus their attention on civilian populations during periods of conflict or crisis.

What's Next?

As NATO marks its 75th anniversary, it reaffirms its commitment to human security and pledges to enhance its efforts in this area. This is illustrated by the increasingly prominent inclusion and significance of human security in the declarations and communiqués from the summits and its incorporation in the 2022 Strategic Concept.

To achieve its established goals, it is crucial for the Alliance to accurately assess the challenges and opportunities that the concept of human security presents in the context of contemporary security. Below are some of these challenges and opportunities:

Challenges:

1. Complexity of Threats: Human security encompasses various aspects, including economic, social, and environmental dimensions. This complexity complicates NATO's tasks, as traditional military approaches are insufficient to address urgent issues.
2. Multidisciplinary Approach: Successful implementation of the human security concept requires interaction with numerous stakeholders, including non-governmental organizations, local authorities, and international institutions. Coordination may prove challenging.

3. Diverging Priorities Among Member States: NATO member countries may hold differing views and priorities regarding human security, which can impact the Alliance's unity and strategic decisions.

4. Resources and Funding: Expanding the scope of security necessitates significant resources and investments. Linking military operations with development and social projects may exert pressure on NATO's resources.

Opportunities:

1. Enhancing Stability: By integrating the concept of human security, NATO can help prevent conflicts and violent radicalization by addressing the root causes of instability.

2. New Partnerships: Engaging non-governmental organizations and local authorities in security efforts provides opportunities for new collaborations and resource sharing.

3. Innovations in Strategies: The application of the human security concept may lead to the development of new strategies and tools that are more adaptable to contemporary challenges.

4. Improved Protection of Civilians: Focusing on the protection of individuals places a higher priority on human rights and humanitarian aid within NATO operations, which may enhance the Alliance's reputation.

The concept of human security represents a field of significant development potential for NATO. Its successful integration requires adaptation and innovation in the way the Alliance designs and executes its missions. In this regard, NATO should strive to further strengthen its political framework, integrate human security considerations into all its activities and across all three core tasks, and continue to work towards its implementation on the ground. This means enhancing partnerships with international organizations and civil society groups, as well as engaging with local communities to understand their needs and priorities. To achieve this, it is vital for NATO to fully understand the challenges and opportunities posed by human security, as well as its connection to all areas of work, including emerging threats. This process should involve the alignment of all relevant policies, doctrines, and guidelines so that the Alliance can effectively address both current and future security challenges (NATO, 2024, p. 40).

Conclusion

According to the UN estimates, in 2023, over 115 million people were forcibly displaced, and more than 33,000 civilians were killed in conflicts. These

alarming statistics reflect the ongoing deterioration of civilian security in conflict-affected contexts (Paillé, 2024). In this context, NATO must accelerate its reforms and adapt to the changing environment.

Implementing change is the more difficult aspect of conceptualizing it. NATO's greatest challenge is to transform promises and political statements into real changes in doctrinal behavior and military conduct. Adopting human security as a guiding concept for its operations necessitates modernizing NATO's values on and near the battlefield. The war in Ukraine serves as a critical test for the Alliance, representing the most significant challenge in decades. Demonstrating the importance of human security in navigating this pivotal moment will contribute to NATO's identity and coherence.

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NATO's HUMAN SECURITY – 2024 AND HUMANITARIAN RESPONSE IN UKRAINE

Denitsa Hinkova

*“If we can't change the future, then why waste time discussing it.”
-Yuval N. Harari*

Abstract: The article highlights key areas of action and reflects upon the main prospects for support outlined by the Human Security Agenda (2024) for the assistance, relief, and future recovery of Ukraine. The underlying hypothesis addresses the opportunities for Bulgaria to build upon and enhance its defense capabilities, resilience capacity, and preparedness for crisis management and disaster risk reduction, abiding by the priorities in the HS Agenda and through more active participation in the capability coalitions in Ukraine. The paper identifies the options for positive outcomes in the future Bulgarian engagement with the capabilities of Ukraine and missions in adherence to the core principles of the NATO Human Security Agenda and the recommendations of new policy documents. The analysis provides recommendations to bridge the gaps in Bulgaria's contribution to joint engagements for Ukraine's security, towards the horizon of 2025-2027. The main focus is on the ongoing missions, the Ukrainian Compact with joint humanitarian response, coordinated by UN-OCHA, European Union (ERCC) and NATO (EADRCC).

Keywords: *NATO, human security, preparedness, capacity, resilience, Bulgaria, Ukraine*

Introduction

Dedication to humanity is the sigh of hope that preserves solidarity in hardships as a moral compass to the ideal of peace. In turbulent times, it reminds us of the enduring power of people who make a difference to save others, thus saving humanity. For young volunteers and humanitarian workers in Ukraine, like Anna Savenets in Dnipro – an IOM Field Operations Assistant, dedication is the mission to preserve the community and deliver day-by-day help to vulnerable people, enlightened with “*état d'esprit*” – the *spirit* of humanity. In a world of extremes and dynamic disruptions, more than ever before, this “*spirit signifies being conscious of belonging to a cultural family and to have a willingness to serve that community in the spirit of total mutuality, without any hidden motives of hegemony*” (Schuman, 1949). Entrusted with the belief in shared common values and strategic culture, the 32 member states of NATO have adopted a more enhanced approach to human security in the year of its

75th Anniversary, reaffirming that “*security is a shared responsibility that requires cooperation and collaboration between states and other actors*” (NATO, 2024). In response to the increasing global uncertainty, escalation of violence and instability along the “arc of fragility”, the Alliance to be integrated humans security in its defense and deterrence policy and underscored its adherence to the international humanitarian law and three core principles of human security that are: “*freedom from fear, freedom from want, and freedom to live in dignity*” (Annan, 2005). The ontology of human security from theory to practice in the 21st century provides evidences on the evolution of the term from the “awareness of the anomaly” (Kuhn, 2012) – the problem of structural violence (Galtung, 1969) towards the through a paradigm shift as a “*fundamental change in the understanding, when earlier assumptions are disproven*” (Kuhn, 2012) in the field, towards a “*new security framework that centers directly on people*” (Hampson et al., 2002, Launtensach, 2021). Scientific transformation has led to a deeper understanding of the decisive efforts of international community (Thakur, 2010), not only to preserve the human rights and promote multilateralism, based on the international humanitarian law, but also to safeguard the “*shielding of people from acute threats and empowering people to take charge of their own lives*” (Ogata, Sen, 2003). In nearly 30 years of development of human security concept, since the HD Report (UNDP, 1994), scholarly contributions developed methodologies, tools, metrics and indices, for policy implementation in the multiple domains of politics, sociality, economics, health and environment (Launtensach, 2006, Penny, 2007, Kaldor, 2010, Thakur, 2010; Pelling, 2010; Bendell, 2011; Hampson 2011, Raskin, 2016, Lautensach & Lautensach 2020). Since then, it has been critically accepted by some scholars as conceptually ambiguous or as an institutional mainstream (Newman, 2005), especially with reference to R2P, however its positive impact may be objectively verified though impact assessment of the missions in the humanitarian domains. The dynamics and uncertainty of an *international order in transition* (NATO, ACT 2024) international relations, demand positive actions in several vectors, including humanitarian action and empowered human networks, focused on peace and resilience towards a balance in a multipolar world, (fig.1). (WEF, 2024).

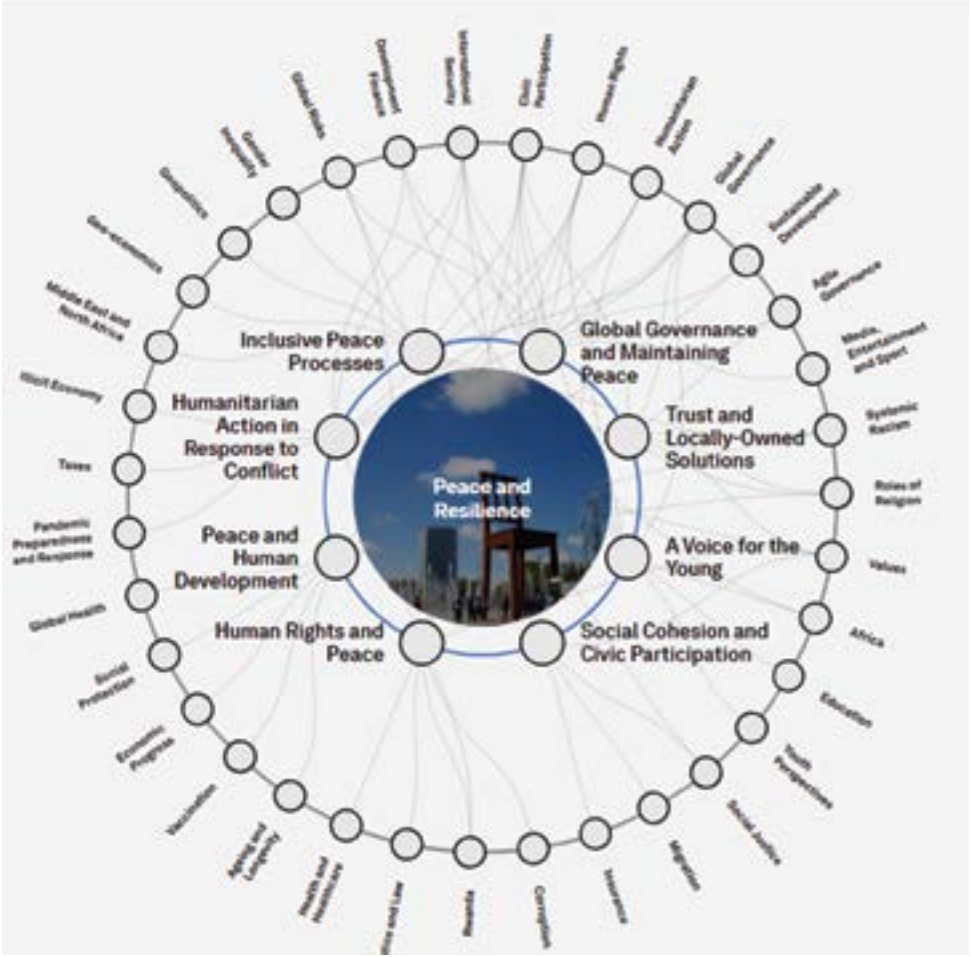


Figure 1. Transformation map Peace and Resilience. Source, WEF (2024)

Essential dimensions of human security (within resilience policy) are in accordance with the core values of NATO and the fundamental principles of Article 3 of the North Atlantic Treaty, promoting that *“building national and collective resilience is critical to a credible deterrence and defense policy, and vital to the protection of Allies’ societies, populations and shared values (NATO, 1949).* These objectives underlay the ongoing policy implementation in civic preparedness and CIMIC relations with increasing improvement and political support by member-states since 1998, especially under the mission of Strategic Concept of NATO in 2019. Resilience and human security aspects are integrated as critical domains within the 2022 Strategic Concept, with the purpose to level-up

the national capacities to address non-military threats and challenges to security and thus enhance the core tasks of “deterrence and defense crisis prevention and management *and cooperative security*” (NATO, 2022). The policy implementation activities in this area are coordinated primarily by the senior advisory unit -the Resilience Committee (RC), predominantly responsible for tasks in “*resilience and civil preparedness against natural disasters, disruption of critical infrastructure, or hybrid or armed attacks*” (NATO, 2024). Inherently dedicated to the core values and functions of NATO, the Resilience Committee has supreme responsibility for the overall strategic and resilience policy direction, planning and reports directly to the political decision-making body – the North Atlantic Council. It is responsible for translating the level of ambition for resilience into concrete actions and guidance at the national and collective level as set out primarily in the NATO 2030 Agenda and 2022 Strategic Concept, promoting a “whole-of-government” and “whole-of-society perspective across the full range of resilience-related activities undertaken by the Alliance” (RC-NATO, 2024). A significant part of the activities for humanitarian response and emergency operations, undertaken as decisions by RC, are operated actively in coordination with the Euro-Atlantic Disaster Response Coordination Centre – part of the Operations Division at NATO HQ and available 24/7 (EADRCC, 2024). Contributing to humanitarian relief and aid for over 100 emergencies around the globe, ever since 1998, the EARCC is the key mechanism to train, prepare capacity and respond to civil emergencies, natural and man-made disasters. It can also be activated during collective defence situations in the scope of Article 5 (EARCC-NATO, 2024). As a focal point of crisis and disaster management EARCC coordinates operations for international assistance, especially when emergency appeals are activated is in close collaboration with partner nations and organizations, mainly ERCC, EU and OCHA, UN; ICRC /IFRC-Red Cross, IAEA and other coordinating centers active 24/7. (fig2.)



Figure 2. EARCC coordination Clearing House mechanism. Source: NATO, 2024.

To enhance the interoperability of member states, planning operations require coordination within important Planning Groups for humanitarian response in the fields of Civil Communications, Civil Protection Energy, Planning Food and Agriculture, Joint Health, and *Transport area*. As well as there are seven baseline requirements that integrate the human security approach, accepted as critical for national resilience to measure the level of preparedness (table 1):

<i>NATO's Resilience – 7 Baseline Requirements</i>	
1	Continuity of government and critical government services (Decision-making and public communication)
2	Energy supplies: ensuring a continued supply of energy and having back-up plans to manage disruptions
3	Uncontrolled movement of people and to de-conflict movements from NATO's military deployments
4	Food and water resources – supplies that are safe from disruption or sabotage.
5	Mass casualties and disruptive health crises: civilian health systems, medical supplies, stocked & secure.
6	Civil communications systems- telecommunications and cyber networks under crisis conditions, back-up capacity, 5G, robust options to restore systems, priority access to national authorities.
7	Transport systems- ensuring rapid movement of NATO forces and transportation networks, even in a crisis

Table 1. Civil preparedness baseline requirements

The common understanding of members that “*human security is at the core of what NATO does and who NATO is*” (NATO, 2024), leads to collective efforts to build societal resilience and capacity for an *Article 5*-scenario and it provides meaningful context of the security environment (NATO, 2024). This policy framework has already been adopted by NATO as an outcome from the Wales Summit in 2014, resulting in practical cooperation between partners to counter common security threats (NATO, 2014). The common understanding of human security is enshrined as well in the Guiding Principles of Madrid Summit, 2022 (NATO, 2024). It entails measures for “*maintaining and developing national and collective capacity of societal resilience, to resist armed attack and to recover from shocks*”, as a reinforcing area to human security (NATO, 2024). NATO HS Agenda 2024 is focusing on the inclusive approach of civil preparedness and the priority to safeguard people and build civil preparedness capacity in the area of three core tasks: *1. continuity of government 2. continuity of essential services to the population 3. civil support to the military. (fig.3).*

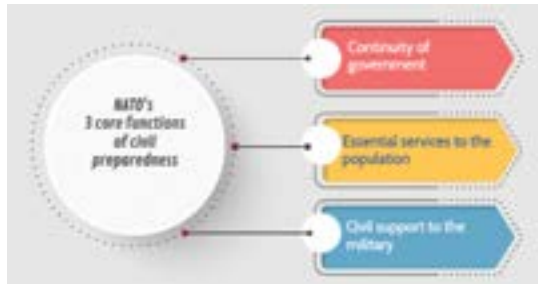


Figure 3. Core tasks of Human Security of NATO

The practical implementation of the *human security model of NATO* relates to “risks and threats to populations, where the Alliance has deployed operations, missions or activities, and how to mitigate and respond to them” (NATO, 2024). The core principles underline the importance of CIMIC collaboration in NATO’s actions to mitigate and reduce the impact of violence and insecurity on civilian populations in conflict zones conducting operations and missions else it may be conducting activities. According to NATO’s 2022 Strategic Concept: “*Human security, including the protection of civilians and civilian harm mitigation, is central to crisis prevention and management*” (NATO, 2022). Its comprehensive integration into non-military crisis operations, enhance prevention-oriented efforts against conventional and non-conventional threats and hazards, towards a sustainable peace in partnership with international and non-governmental humanitarian organizations (NATO, 2024). The new dimensions of the policy after the Washington Summit in 2024, propose advanced integration of civilian planning into national and collective defence planning in peace, crisis and conflict and deepening of the engaged humanitarian aid responsibility and commitment of international partners – UN cluster of originations and the European Union (NATO, 2024).The practically-oriented policy of NATO, encompasses five mutually complementary areas (fig.4).



Figure 4. Policy areas of Human Security -NATO

EU 2024 Approach “Safer Together” and the Humanitarian Response to Ukraine

From the European perspective, humanitarian aid has been a vital part of EU Civil Protection and Humanitarian Aid Operations policy for nearly 32 years, providing assistance ever since 1992 in over 110 countries and addressing the needs of millions (DG ECHO, 2024). The European Union is the greatest global donor of aid for vulnerable communities and humanitarian policy is greatly supported by EU citizens and volunteers. It is assessed as a positive contribution by EU to the work of UN Agencies and international NGOs in the main areas of action – nutrition, food, shelter, healthcare, water and sanitation (WASH), education and reaction in emergency situations. According to the standard Eurobarometer survey (Oct./Nov., 2024), the most important areas for EU priorities of action for the next 5 years, according to the European citizens, should be security and defense (33%), migration (29%) and climate (28%), (fig.5).

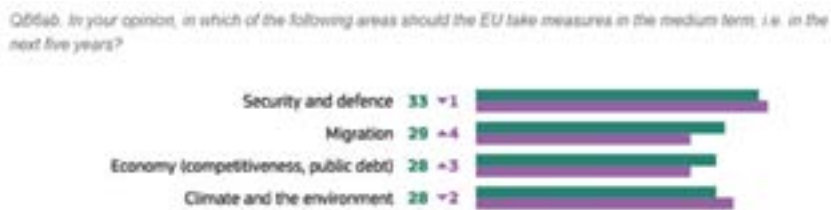


Figure 5. EU priority actions – next 5 years, Eurobarometer, 2024.

The European citizens identify as the main concerns the war in Ukraine (31%), immigration (28%) and the international situation (22%). The humanitarian action for Ukraine is supported as important in public opinion by 87% of respondents (EU 27). A higher majority of EU respondents (79%) support the common defense and security policy, with support ranging from 87% in Lithuania, Luxembourg, and the Netherlands to 57% in Malta, 64% in Ireland, and 65% in Portugal. (Eurobarometer 102 -Oct./Nov. 2024), (fig.6)



Figure 6. EU priority actions – next 5 years, Eurobarometer, 2024.

The EU policy on resilience and preparedness is intertwined with those of regional and global partner countries, focusing on the cross-border dimension of threats and hazards. To promote an evidence-based approach to policy for-

mulation and enhance the preparedness of EU citizens for complexity, a new framework of action has been adopted by the Commission in October 2024 “Safer Together”, in a comprehensive report by the EC Special Adviser to the President and former President of the Republic of Finland *Sauli Niinistö*, “in order to enhance the EU’s civilian and military preparedness and readiness for future crises” (EC, 2024). This is a landmark strategic document for the EU, enhancing CFSP and humanitarian response with several positive implications, focusing on the *preparedness-by-design* and proactive and cross-sectoral external action (Niinistö, 2024). The common task to strengthening “*mutual resilience*” and preparedness in an “*increasingly contested world*”, is the main international priority of shared among multilateral partners. The main actions to be undertaken by member states require investing resources and efforts in building capacities to reduce risks, prevent, withstand, respond, and mitigate extreme events, health crises, hybrid attacks, cyber threats, and armed conflicts (Niinistö, 2024). The policy model is based on anticipatory governance and scenario-based risk assessments to provide alternatives and better options to focus on vital immediate issues and geopolitical hotspots of primary importance for the EU involving EEAS. The report proposes a whole-of-government and whole-of-society approach to build civil capacity to resist future shocks and crises. The model applies foresight analysis and future planning to provide guidelines for risk mitigation and assistance to vulnerable people (Niinistö, 2024).

NATO and Ukraine – Mission for Ukraine (NSATU)

In accordance with the UN Charter and under the provisions of the Washington NATO Summit (July 2024), the NSATU Mission – *NATO Security Assistance and Training for Ukraine* will provide humanitarian response and military assistance to Ukraine. It is tasked to coordinate the delivery of military equipment and training to Ukraine from NATO member states and partners and *operate on the territory of NATO member states*, to support Ukraine’s self-defense (NSATU, 2024). The main activities are planned under the mechanism of enhanced political consultations within NATO-Ukraine Council. For the future recovery of Ukraine, NSATU mission operates in cooperation with partners and ongoing initiatives of the European Peace Facility and the EUMAM, Ukraine Defense Contact Group, including the work of the Capability Coalitions (EADRCC-NATO, 2024). In of all activities, this mission integrates the firm position on response to the war in Ukraine, reaffirmed by political leaders, at the G7 meeting in 2024, to safeguard the “*freedom, sovereignty, independence and territorial integrity of Ukraine for as long as it takes*” (G7, 2024). Under EARCC coordination, the mission has facilitated the delivery of humanitarian aid to Ukraine – ambulances, mobile X-ray machines and ventilators, provided training for capacity-building

of crisis management capabilities, paramedic training and medical evacuation operations from Ukraine (NATO, 2024).

EU Military Assistance Mission for Ukraine (EUMAM) and European Peace Facility

The most important strategic mission for the humanitarian response to Ukraine by the EU is the EUMAN – *EU Military Assistance Mission* in support of Ukraine (EUMAM, Ukraine), initiated in 2022. Its core tasks are to *strengthen the capacity* of the UAF to defend the territorial integrity of Ukraine within its internationally recognized borders and to *deter and respond to possible* future military offensives by Russia and other potential aggressors (EUMAM, 2024). As mentioned above, international partners and EUMAM share the collective responsibility and collaborate closely together in humanitarian aid and training support to the Ukrainian Armed Forces (UAF). **During the first 10 months of 2024, more than 630 partnering humanitarian organizations provided assistance to 7.7 million people across Ukraine, out of 8.5 million people in need targeted, including people affected by attacks, 2.4 IDPs, 1.6 returnees and 4.4 non-displaced, as well as newly displaced people (OCHA, 2024).** There is a strict requirement for EUMAM that “all mission activities are located on EU soil”. Until 2024, the training modules and capabilities have been allocated from 24 EU Member States, and they offer further humanitarian assistance through the “provision of equipment for lethal and non-lethal purposes to the UAF”, funded by the European Peace Facility (EPF, 2024). The main training of capabilities is primarily focused on medical assistance, CBRN, demining, logistics, and communication, maintenance, and repair. EUMAM Ukraine has already trained 63,000 Ukrainian UAF soldiers or 10 brigades, and it provides operational training, junior leadership training for battalions and brigades in collective maneuvers and tactics up to battalion level, and advice on the planning, preparation, and conduct of live firing exercises. Until the winter of 2024/2025, the mission will train an additional 15,000 troops, with a total number of defense capabilities trained to 75,000 by the end of this year. Just recently, on November 8, 2024, the Council of the European Union (EUCO) extended for 2 years the mandate of the EUMAM, Ukraine, until November 15, 2026, allocating funds of nearly 409 million EUR (Nov.14, 2024 – Nov.15, 2026) (Council of EU, 2024). The funding and military equipment for the mission is allocated through the mechanism of the European Peace Facility, which is a flexible instrument for operations under the CFSP, to speed up defense industrial production in the EU under the relevant instruments of the EU defense ecosystem (EFP, 2024). Since the beginning of the Russian aggression, the EU and its Member States have mobilized almost *EUR 122*

billion in support of Ukraine and its people. The Ukraine Facility entered into force on 1 March 2024, providing up to EUR 50 billion in predictable and flexible support for Ukraine for 2024-2027 to support its recovery, reconstruction, and modernization in line with its EU path. Of this amount, EUR 12.4 billion has already been allocated and disbursed, as next funding will be provided to the State budget on fulfilment of the Ukraine Plan for reforms and investment agenda for the country in next 12 months (European Commission, 2024). For the recently coming years, it is expected that EU defense planning will demand rebalancing in accordance with military capabilities, civil preparedness, logistics, and defense industry production in accordance with the pressing needs of member-states vis-a-vis the war in Ukraine and the conflicts in the Middle East, as well as a more systemic approach to enhance the critical operational capacities (EFP, 2024).

Capability Coalitions and Ukraine Defense Contact Group (UDCG)

The Ukraine Defense Contact Group (UDCG), also known as the “*Ramstein Coalition*” (from the meeting in the Ramstein Air Base) was established in 2022, and has initiated capability coalitions with its partners as an alliance of 57 countries (NATO all 32, EU and 25 other countries) sending military equipment and focusing on long-term perspective of defense planning and future military capability requirements, as well as battlefield operations support (US State Department, 2024). New cooperation frameworks for developing a common capability aim to cooperate in procurement, acquisition, and maintenance of specific military equipment and ammunition. Such an approach also offers additional benefits to participating nations through reduced common costs and increased interoperability (FEU Journal, 2024). Capability coalitions represent a very efficient and promising format of collective military cooperation, where partners look for ways to increase Kyiv’s efficiency on the battlefield and cut common costs. These multilateral arrangements make it possible to avoid the lengthy bureaucratic procedures of international organizations and at the same time focus on areas where the participating states have sufficient capabilities, relevant defense industrial bases or technologies, and financial resources. In 2024 there are 8 capability coalitions for Ukraine: 1) Artillery Coalition –led by USA and France; 2) Integrated Air Defense – led by Germany and France; 3) Drones Coalition – led by Latvia and Germany; 4) Armored Vehicles – lead by Poland, Germany and Italy; 5) IT Cyber Coalition – lead by Estonia and Luxemburg; 6) Air Force Coalition – lead by Denmark, USA and France; 7) Marine Security – lead by Great Britain and Norway and 8) Demining /Marine Clearance Coalition- lead by Lithuania.



Figure 8. *Capability Coalitions for Ukraine, 2024. Source –Rasmussen Center*

Below are some examples of the coalition’s activities based on online references and media publications in 2024. The Marine Clearance or Demining Coalition is one of the most important ones because data shows that Ukraine is the most heavily mine-contaminated state in the world. The Fact-based evidence from the UN Human Rights Monitoring Mission in Ukraine (HRMMU) reveals that unexploded mines contamination in Ukraine has killed 360 people since February 2022 and wounded 790. Mines not only imperil the Ukrainian civilian population and the military but also agriculture – according to data from the Tony Blair Institute, mine hazard causes the Gross Domestic Product (GDP) of Ukraine to fall by approximately. USD 11.2 billion on a yearly basis (URMMU, 2024). Another quite important capability is the Artillery Coalition, launched January 2024 in Paris and lead by USA and France, which aims to enhance the UAF’s capacity and establish interoperability with NATO, comprising of 14 nations with “*advanced technological capabilities to manufacture cutting-edge artillery systems, munitions, artillery reconnaissance assets, unmanned targeting systems, and fire control systems*”. There are plans that by 2027, the Artillery Coalition will provide integrated capability training and equipment to UDF that ensure interoperability with NATO (Ministry of Defense Ukraine, 2024). The Marine Security Capability Coalition is led by UK and Norway and has 13 participating states. Along with the Demining/Marine Clearance Coalition, both are essential for the mine countermeasures in the Black Sea Region-MCM. It is built around two vessels - *Cherkasy and Chernihiv Vessels* – two former UK Royal

Navy (RN) minehunters, HM Ships Shoreham and Grimsby (Ministry of Defense Ukraine, 2024), which were transferred to Ukraine under the UK/Ukraine/Norway Maritime Capability Coalition (MCC) program in 2023 (Naval News, 2024). Bulgaria may cooperate with partners of Romania and Türkiye to Ukraine for the future security and defense of the Black Sea environment so that the Ukrainian Navy could have the opportunity to integrate its MCM capability. In January 2024, these three countries established the Black Sea Mine Countermeasure Task Group (MCM Black Sea), reflecting NATO's need for allies to establish regional (non-NATO) partnerships. In the war, the navy's MCM activities have been crucial in keeping trade routes open, with over 4,000 ships using Odesa. Still Türkiye has closed the Bosphorus/Dardanelles straits (*under the 1936 Montreux Convention*), which means that ships *Cherkasy* and *Chernihiv* cannot yet sail to their new home. Only vessels already "*homeported in the Black Sea*" can transit the straits when it is closed. Instead, Ukraine uses uncrewed underwater vehicles (UUVs) for Black Sea MCM tasks. Ukrainian Navy is developing its new mine counter-measures (MCM) capability that has demonstrated this capability during Exercise "*Sea Breeze 2024*" Exercise, taking place off Scotland between 26 June and 5 July and ending up in Varna, Bulgaria in August 2024. (Naval News, 2024). The future development of capability coalitions in 2025 requires greater political and financial support to integrate new participating states and more collective engagements with the projects for "joint defense investments, procurement, and adaptation of defense industry capacities to long-term defense planning" (FEU Journal, 2024).

Opportunities for Bulgarian capacity in humanitarian response in Ukraine

In the course of 20 years of active partnership in NATO, Bulgarian contribution to collective defense and deterrence, peace, and crisis operations reveals a long path of dedicated engagement in missions such as ISAF, Resolute Support, and KFOR. The political support for joint international efforts to safeguard the security of the Ukrainian people is of critical importance for Bulgaria to express its true dedication to be actively involved in humanitarian short and long-term response to Ukraine. The official position of Bulgaria is that given the proximity of the war in Ukraine to Bulgarian borders and the importance of this conflict for the security of Europe, therefor the country reaffirms its engagement to international support for "*the independence, sovereignty and territorial integrity of Ukraine, within its internationally recognized borders*" (Council of Ministers, Bulgaria, 2024). In accordance with the statement of Bulgarian Delegation to the Washington Summit of NATO, 2024: "Bulgaria firmly supports Ukraine in its just cause to defend its right to freedom and independence and free choice of

its own security safeguards. A peaceful outcome of the war shall not be detrimental to Ukraine's territorial integrity. Russia shall abide by international law." To support this position with active engagement, Bulgarian institutions had to overcome the challenges of the political crisis in the country and the stagnating modernization of the military capabilities beyond the polarization in society. The comprehensive humanitarian response of Bulgaria for Ukraine refugees and IDPs has continued since 2022. In December 2023, the Bulgarian parliament approved the delivery of defective, or surplus, surface-to-air missiles and portable anti-aircraft missile systems. It also overrode a Presidential veto on the provision of 100 armored personnel carriers and instructed the Ministry of Defense to take the necessary measures to join the F-16 Air Force Coalition, including offering pilot training and the use of Bulgaria's airspace. Bulgaria has signed the G7 Joint Declaration, which sets out long-term security guarantees for Ukraine. Negotiations on that agreement were launched at the end of October 2024 (BTA, Bulgarian News Agency, 2024). In this respect, the Bulgarian Council of Ministers approved a decision in October 2024 for a security cooperation agreement between Bulgaria and Ukraine for specific bilateral arrangements between the two countries to provide Ukraine with political and practical support and to join the Ukraine Compact for capability coalitions, operating since July 2024, being initiated at the NATO Summit in Washington (Council of Minister, Bulgaria 2024). In 2024 Bulgaria participated and contributed to the Integrated Air and Missile Defense Capability Coalition in Ukraine. Bulgarian Armed Forces will participate since 2024 within the NATO Security Assistance and Training for Ukraine (NSATU), as the Bulgarian governmental decision from August 7, 2024 has authorized the participation of the Bulgarian military in the Alliance's initiative to train Ukrainian servicemen, corresponding to the efforts of other member states of the Alliance. During 2024, Bulgaria has also sent 50 soldiers for the EU Military Assistance Mission in support of Ukraine (EUMAM Ukraine), which was trained Ukrainian troops (BTA, 2024). A recent decision by NATO-EADRCC confirmed forthcoming Bulgarian participation in a joint resilience-building exercise, that will bring together Allies and partners, as well as other international organizations. Participants will be confronted with scenarios that include natural and industrial disasters, hybrid threats, and complex emergencies. They will be able to test procedures related to the coordination of different activities and logistical support. This is essential to building resilience and to preparing for potential challenges, including those related to climate change (EADRCC, 2024).

Conclusion

As a manifest to the next generations for a peaceful future, the leadership of NATO initiated Human Security Agenda 2024 to advance further the bold vision

to mobilize solidarity, strengthen community resilience and enhance humanitarian engagement. The advanced model of human security till next horizon – 2030, is incorporated as well in recent strategic frameworks and policy implications of partner international institutions – UN (Pact to the Future, 2024) and EU (Safer Together, 2024). Its purpose is not only to raise global awareness but also to increase capabilities in a wider network for decisive humanitarian response in times of war and post-conflict reconstruction. In the year of its 75th Anniversary, NATO maintains its commitment to human security and is dedicated to advancing its efforts in this area. The Alliance recognizes the importance of setting standards on human security for its Allies and partners, as well as the dedicated responsibility for a humanitarian response to Ukraine, as this crucial “*steadfast support*” has been reaffirmed by the words of NATO Secretary-General Mark Rutte in Brussels, 2024 (VOA, 2024). NATO will continue to explore the nexus between human security and all areas of work, including in emerging domains, as this process entails future aligning of policy areas, doctrine, and guidance so that member states build resilience and address future security challenges (Niinistö, 2024). Beyond the reflections of the frescoes of *Francisco Goya’s “Los Caprichos”*, we may perceive the spirit of our times, but not through violence, rather than through visions of enlightened reason to be reborn. Hopes for positive tipping points in the near future reveal the demand for a more comprehensive, people-centered capacity-building and preparedness of citizens, implemented in the deterrence and defense approach and ongoing mission for humanitarian response.

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FULLY WESTERN BALKANS INTEGRATION AS A PRECONDITION FOR NATO'S EFFECTIVE ROLE IN THE REGION

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Abstract: Western Balkans region is a well-known politically constructed term within Brussels administration which implies political entities in the post-Yugoslav space, minus Croatia and Slovenia, plus Albania. Western Balkans region includes Belgrade, Skopje, Sarajevo, Podgorica, Tirana and Pristina. In the context of NATO, Skopje, Tirana, and Podgorica are already full members of this organization, while at the same time, Sarajevo and Pristina are tending to become members, and Belgrade has declared politics of military neutrality in the context of any potential membership in international or regional military and defense organization. The main thesis of this paper is that NATO is still incapable of establishing pervasive defense and security infrastructure within the region because of the partial integration from the perspective of ongoing challenges, risks, and threats, including those in cyberspace, as well as those, formulated as soft threats like imported malign influences, fake news, and institutional crisis. Further, the Western Balkans' comprehensive NATO integration will justify the NATO contributions in the region from a strategic perspective. Research questions would be: To what extent political disputes determine the comprehensive Western Balkans integration to NATO? What will happen, from the mid-term perspective, if further NATO integration of the region will miss? From theoretical point of view, contribution of the paper would be in the understanding the geostrategic concept on the case study of Western Balkans integration in NATO, respectively how much the geography, even in the modern, digital and cyber era, determines security and defense flows.

Key words: NATO, Western Balkans, integration, obstacles, geostrategic

Анотация: Регионът на Западните Балкани е добре познат политически термин от речника на Брюкселската администрация, който описва пост-югославското пространство без Хърватия и Словения, но включва Албания. Всъщност, Западните Балкани включват Белград, Скопие, Сараево, Подгорица, Тирана и Прищина. В контекста на НАТО, Скопие, Тирана и Подгорица са вече част от Алианса, Сараево и Прищина се борят за членство, а Белград е обявил политика на военен неутралитет и отказ от членство от всякакви регионални или международни военни съюзи. Основната теза на тази глава е, че НАТО все още не е способно да защитава убедително членствете си и да поддържа регионалната система за сигурност, поради предизвикателствата, рисковете и заплахите от ново поколение като кибервойните, хибридните войни, фалшивите новини и институционалните кризи. Интеграцията на Западните Балкани в НАТО ще помогне на Алианса да изясни приоритетите си в стратегическа перспектива. Основните изследователски въпроси в тази глава са: до каква степен политическите диску-

сии предопределят членството на Западните Балкани в НАТО и какво би се случило ако - в средносрочна перспектива Алиансът спре да се разширява? От теоретична гледна точка, основният принос на това изследване е че то анализира геостратегическата концепция за присъединяването на Западните Балкани към Алианса през призмата на новото поколение заплахи, произтичащи от дигиталната среда и киберпространството. **Ключови думи:** НАТО, Западни Балкани, интеграция, предизвикателства, геостратегия

Introduction

NATO, in the last decade, has faced contemporary challenges, risks, and threats that could not be compared with so-called traditional national threats related to territorial integrity. The majority of contemporary security challenges, risks, and threats are, first of all, connected to political sovereignty, which, in fact, implies institutional sustainability from the point of effectiveness and efficiency. Contemporary security challenges, risks, and threats are, therefore, systemic in nature. They do not directly threaten the territorial integrity of a sovereign political unit, but their impact and consequences are such that they make the institutional infrastructure unsustainable, even when it comes to preserving territorial integrity, as one of the postulates of statehood. In fact, current security challenges, risks, and threats are multi-layered and more complex than traditional ones. Traditional ones primarily involved the conquest/occupation of territory as a prerequisite for seizing power, as a key act of external aggression.

On the other hand, modern challenges, risks and threats destroy state systems through precise mechanisms infiltrated within those state systems that are the subject of external aggressive action. Most often, these are challenges, risks and threats without a physical and visible form, but with strong effects and consequences that collapse the state infrastructure from the inside.

When it comes to the Western Balkans, i.e. the post-Yugoslav area without Slovenia and Croatia, plus Albania, we will use established public discourses regarding the interpretation of civil wars in the post-Yugoslav area, then the Ukrainian War, as well as regional disputes and open issues, as variables, in order to provide a valid explanation for the research question posed – why the “selective” NATO integration of the Western Balkans prevents the full efficiency and effectiveness of this organization in the context of facing contemporary security challenges, risks and threats. In fact, in the case study of the Western Balkans, we will provide a comprehensive answer to the thesis that contemporary security challenges, risks, and threats do not imply a danger to territorial integrity as the first line of danger but rather imply sovereign territorial frameworks as a kind of hybrid space in which external activities with security and comprehensive consequences are carried out both within a single territorial framework, but also within a wider geographical area, which in a geographical context will provide us with an answer to the question of why NATO, in terms of the Western Balkans, also

has a necessary geographical component, i.e. integration. Political actors in the Western Balkans are particularly important in understanding the contemporary NATO security mosaic, given the limited resources – political, security, economic, and institutional – faced by these actors, some of whom are already NATO integrated, while some aspire to become part of it, and some implement a policy of military neutrality, as we stated in the study abstract itself.

Ukrainian War

The beginning of the Ukrainian conflict “revived” all existing animosities in the Western Balkans. Political actors in the aforementioned region did not use the growing conflict, which was less than 1,000 kilometers away, for the purpose of cooperation, coordination, and potential integration in dealing with contemporary security challenges, risks, and threats. On the contrary, the Ukrainian war was used to “reinforce imported” discourses from both the so-called political East and the so-called political West.

At the official level, Tirana, Skopje, Podgorica and Pristina followed the European Union’s policy towards the Ukrainian conflict. They unanimously joined the European Union’s sanctions against the Russian Federation, unanimously suspended the import of Russian energy resources, unanimously began providing financial, logistical, and military assistance to Ukraine, unanimously implemented ad-hoc measures against Russian diplomatic personnel, using the practice in the European Union member states. To prove their alignment, in 2023, Podgorica, Tirana, Skopje, and Pristina launched a new regional platform called “Western Balkans QUAD – 100 percent alignment with EU foreign policy” in the capital of North Macedonia. As stated, the theme of this framework is “full alignment of the four participants of the group with the EU’s Common Foreign and Security Policy in light of the new geopolitical reality, hybrid threats, energy crisis, and economic consequences caused by the Russian invasion of Ukraine.” In addition, it was noted that these four actors are “reliable partners of NATO and the EU,” and that “after Russia’s aggression on Ukraine, harmonization with the EU’s Common Foreign and Security Policy, but also more broadly with the positions and values of the democratic world, has become one of the most important priorities of countries aspiring to EU membership”, and that this is also a clear message where these actors belong (Al Jazeera Balkans, 2023).

On the other hand, Serbia did not join this regional format, but immediately after the start of the Ukrainian conflict, it presented its positioning through the “Conclusion of the National Security Council of the Republic of Serbia adopted in connection with the armed conflict on the territory of Ukraine that began on February 24, 2022.” There are two key points in this conclusion:

- Point 5: In accordance with its previous policy of advocating for consistent and principled respect for the principles of international law and the inviolability of borders, the Republic of Serbia provides full and principled support for respect for the principles of territorial integrity of Ukraine (Gjurovski, Arnaudov & Hadžić, 2024: 19);

- Point 8: Proceeding from the fact that its basic duty is to devote all its forces to preserving the peace and well-being of its citizens, the Republic of Serbia, when considering the need to possibly adopt restrictive measures or sanctions against any country, including the Russian Federation, will be guided exclusively by the protection of its vital economic and political interests. As a country that experienced Western sanctions in the recent past and whose compatriots in the Republika Srpska are suffering sanctions today, the Republic of Serbia believes that it is not in its vital political and economic interest to impose sanctions on any country at this time, not even its representatives or economic entities (Gjurovski, Arnaudov & Hadžić, 2024: 19).

Point 5 testifies to a kind of regional coordination at the Western Balkans level on the issue of support for the territorial integrity of Ukraine. But point 8 testifies to disagreements, because the participants of the so-called QUAD platform applied European sanctions as a mechanism for punishing Moscow for aggression on Ukrainian territory, while Serbia rejected the introduction of economic sanctions, citing its negative experience with the same, as well as its national and economic interests, as justification for such an anti-sanctions policy.

On the third side, there is Bosnia and Herzegovina, as a state “conditioned” by the compromise of the political leaders of Serbs, Bosniaks, and Croats, as the constituent peoples of this state, along whose ethnic lines the institutional infrastructure of this political entity is defined. Officially, Bosnia and Herzegovina has joined the European Union (EU) sanctions against the Russian Federation through the BiH Mission in Brussels, but, on the other hand, an advisor to the former Serbian member of the BiH Presidency claims that “there is no decision, by any BiH institution, on the situation in Ukraine, and especially on the introduction of any sanctions (Zvijerac, 2022).” This is also supported by the statement of the current Serbian President who has confirmed that Bosnia and Herzegovina had adopted sanctions against the Russian Federation, but that he did not think that this had anything to do with BiH entity Republika Srpska, stating that neither the leaders of Republika Srpska nor the then Serbian member of the Presidency of BiH, Milorad Dodik, were consulted about this (Al Jazeera, 2022). Unlike the Bosniak and Croat political leaders in BiH, the current president of the BiH entity Republika Srpska, after the beginning of the Ukrainian conflict, held several meetings with the current Russian president, where he pointed out that the

entity headed by him opposes “Western sanctions against Russia”, “that he does not want to join the NATO alliance,” that he “confirms the good relations that Republika Srpska has and cultivates with the Russian state and that he rejects any possibility of joining Western sanctions against Russia” (RSE, 2024).

The Ukrainian war is a textbook example of the lack of cooperation, coordination, and alignment of Western Balkan actors towards current security challenges, risks, and threats. In fact, there is a pronounced tendency of political interpretation and positioning in relation to the Ukrainian conflict while ignoring the real security challenges that the conflict has brought with it, such as energy sustainability, economic shocks, the potential for a domino effect due to open regional disputes, and finally the potential for nuclear consequences, due to the latest momentum of the conflict.

NATO’s role in the Western Balkans has not been strengthened due to the potential danger of the newly emerging circumstances, but rather, animosities towards NATO have been strengthened. Initially, within the Republika Srpska and Serbia, where the narrative emerged that it was actually a conflict between the West and the East, that the West, with its policy of integration with Ukraine, had actually forced Moscow to act aggressively, that Ukraine was merely collateral damage in order to avoid a direct conflict between the Russian Federation and NATO (Ranković, 2022). However, the root of the problem is deeper because a significant percentage of the population in North Macedonia also supports the military policy that Moscow is implementing in relation to the Ukrainian conflict (Libertas, 2022). Even political leaders in North Macedonia confirm the thesis that Macedonians are glorifying the Russian President Vladimir Putin on social media, but at the same emphasize that this is a consequence of the desire for a leader who will have a firm hand in the governance process and who will oppose “the injustices of the West” (Faktor, 2022).

Identical challenges are noticeable not only in NATO member states in the Western Balkans but also in the immediate neighborhood, in NATO and European Union member states such as Bulgaria. According to Bozhidar Bozhanov, Bulgaria’s e-government minister, the problem is difficult to solve because, as he explains, Bulgaria has shown systemic weakness to Russian propaganda long before the war began (Blic, 2022).

Such circumstances make NATO’s de facto strategic planning and action in the Western Balkans impossible. Given the strong influence of hybrid threats in state systems globally, and especially within weak and vulnerable systems such as those in the Western Balkans, NATO’s challenge is triple – geographical due to the lack of comprehensive integration, political, due to the strong influence of Russian propaganda in scoring political points, and institutional, due to weak and unsustainable institutions.

Interpretation of the past

The interpretation of the events of the 1990s represents one of the most significant challenges in the post-Yugoslav region as a whole, but also within the Western Balkans, as a term accepted in the administration of the European Union. In fact, the essence of the problem is not the interpretation as such, but the lack of a comprehensive truth, and a common position, at the regional level, on establishing the truth. Such circumstances have allowed, in the past 23 years, since the end of the conflict in the post-Yugoslav region, including the armed conflict in the northwestern parts of North Macedonia, for war events and facts to be adapted to political interests, and thus to become the subject of daily political struggle.

The most prominent example of this interpretation of events and the lack of real truth are the wars in the areas of present-day Croatia and Bosnia and Herzegovina. For example, the police-military operation by Croatian forces, during which more than 200,000 Serbs from the territory of Croatia fled their homes in fear, is a cause for celebration for some and for sadness for others (Anđelković, 2022). Today, “Storm” is commemorated in Serbia as the suffering of the Serbian people, and the police-military operation itself is assessed as “the largest ethnic cleansing since World War II”, while in Croatia the same operation is solemnly commemorated as a liberation action and the Day of Victory and Homeland Gratitude (Anđelković, 2022).

On the other hand, there are similar disagreements between Serbs and Bosniaks in Bosnia and Herzegovina and, more generally, between Serbia and the Bosniak-Croat leadership in Sarajevo. For example, the events in Srebrenica in 1995 are a point of incalculable disagreement because, on the one hand, it is claimed that genocide was committed against the Muslim population in that war zone, while on the other hand, it is claimed that it was a crime against humanity, and that genocide is being misused as a political qualification in order to damage the reputation and historical role of Serbs and Serbia. The extent to which this issue is a point of disagreement is evidenced by the Resolution adopted within the framework of the United Nations General Assembly – the Resolution on Srebrenica, which proclaims July 11th as the International Day of Remembrance for the Victims of the Srebrenica Genocide, condemns the denial of the genocide, as well as the glorification of war criminals (Maričić, 2024). Croatian member of the BiH Presidency said that the adoption of the Resolution on Srebrenica put an end to a decades-long process and that the process that began with the indictment of genocide continued with the pronouncement of final verdicts before international courts and finally ended with the adoption of the Resolution in the United Nations. In addition, he emphasized that “at the world level, after the legal consensus that was expressed through court verdicts, a political consensus was reached on the issue of the genocide in Srebrenica (Maričić, 2024). From

the other side, the Serbian president has asked whether this resolution will lead to regional reconciliation, as well as he reminded that “it has never happened in the General Assembly that the voting on genocide was not passed unanimously,” adding that “some people wanted to use political power and politicize this topic” (RTS/RTRS, 2024).

But, in order to have a comprehensive understanding, we must not ignore the existing animosities and interpretations of the armed conflict in the northwestern parts of North Macedonia. While for most political leaders of Macedonian nationality, it is a conflict whose main goal was the secession of parts of the country where the dominant Albanian population lives, on the other hand, political leaders of ethnic Albanians claim that it is a civil conflict that was forced as the last instrument in the fight for basic human and civil rights. Ljubco Georgievski, who was Macedonian Prime Minister during the conflict, says that the goal of the conflict was to conquer as much territory as possible (Arnaudov, 2021: 73-74). A similar thesis is stated by the then leader of the most influential Albanian party in the Republic of North Macedonia, the Democratic Party of Albanians, Arben Xhaferi, who says that the beginning of the conflict in that country was a great absurdity because, as he states, wars are not started over political or civil rights (Arnaudov, 2021: 73-74). On the one hand, it is claimed that the goals were separatist, namely the occupation of the northwestern parts of Macedonia and their annexation to the territory of Kosovo and Metohija, and that this was abandoned after the lack of international support and the response of the Macedonian security forces. On the other hand, primarily the Albanian political and intellectual elite believes that the conflict was exclusively a fight for human rights, namely for the civil and political rights of Albanians living in the Republic of North Macedonia (Arnaudov, 2021: 75).

Based on the above examples in Croatia, Bosnia and Herzegovina, and North Macedonia, we are witnessing far-reaching animosity and disagreement due to the lack of compromise for establishing the truth based on facts. The responsibility for the lack of truth lies largely in the circles of political elites, given the Machiavellian political struggle in the Western Balkans, which even exploits, or rather abuses, the aforementioned examples in daily political calculations.

In the context of security, these disagreements contribute to two negative consequences:

- the lack of truth and the political interpretation of events during the wars in the post-Yugoslav region make it impossible to achieve substantial regional reconciliation. Referring to the conflict on the Croatian territory, Denise Kostovic, a professor at the European Institute at the London School of Economics and Political Science, says that the greatest challenge in addressing the legacy of war crimes and suffering

in the conflict in Croatia in the 1990s is erasing the complexity of the dynamics of violence. She emphasizes that such erasure produces dominant national narratives on both sides that are short-sighted and strategically focused only on the suffering of their own side – while denying or marginalizing their own responsibility (Anđelković, 2022). Almost the same thesis can be done when it comes to other conflicts in the post-Yugoslav region, namely in Bosnia and Herzegovina, in the territory of Kosovo, and Metohija, as well as in North Macedonia. Today, we are witnessing dominant national narratives of the former conflicting parties that do not move their established positions. Animosity rises and falls depending on political circumstances, while negative peace has become a constant in a case study geographical area. As a result of political abuse and negative peace, trust as a basis for any form or level of regional cooperation, coordination and ultimately integration is absent. In the context of contemporary security challenges, risks and threats, especially in the domain of hybrid threats, these regional disagreements are being abused, and political entities in the Western Balkans are further vulnerable. Because modern security challenges, risks and threats (energy, economic, health, cyber) do not recognize state and national borders, and as such they become even more dangerous for the Western Balkan six due to the lack of cooperation, coordination and integration for coordinated action and potential joint response and confrontation.

- Vulnerability to external threats in the form of fake news and political manipulation is more pronounced because there is no regional consensus on key issues concerning the sustainability of the region as a geographical entity. Thus, we witness that the “great powers” support one or the other side that participated in the conflicts during the 1990s. Such support serves to increase the animosity that the great powers instrumentalize in pursuing their interests in the post-Yugoslav region. On the other hand, the positioning of fake news is also simplified due to the already existing disagreements and animosities. In the context of the Ukrainian conflict, on the one hand, the thesis is put forward that the peoples of the Orthodox faith are threatened in the Western Balkans, just as the Russians are threatened due to so-called Western imperialism, while on the other hand, the thesis is put forward that the Russian invasion of Ukraine is a repetition of the political discourse of the so-called West that will “justify” the actions of individual countries from the so-called West in the post-Yugoslav region.

In such a political, social, and geographical environment, NATO’s “room for maneuver” in terms of strategic security and defense is significantly limited. The

existence of open animosities on a daily basis, a strong negative peace, and the prevalence of fake news, narratives, and political manipulations make it impossible for NATO to act in a case study region, regardless of whether it concerns the Alliance's member states or the states with which NATO cooperates on the basis of the Partnership for Peace program. If the Western Balkans is analyzed as a political, economic, and security entity, NATO's role within these frameworks in the domain of security is reduced to ad-hoc actions and adjustments, with the absence of coordination and synchronization as a basis for dealing with contemporary security challenges, risks, and threats.

Ongoing regional disputes and open issues

Besides the unresolved questions from the period of wars during the nineties at the post-Yugoslav, within the Western Balkans there are substantial open questions closely related to the statehood of the political entities which also implies pervasive consequences in the context of the creation of regional sustainability from the security perspective which in contemporary international relations includes topics from the politics, defense, as well as economy, migration, health.

Dialogue between Belgrade and Pristina is the most prominent regional dispute, which implies pervasive consequences on the national, bilateral, and regional levels, as a whole. According to the Constitution of Serbia, official Belgrade does not recognize the official Pristina as a political entity with state attributes, but as an autonomy province within the territorial integrity of Serbia (Ustav Republike Srbije, 2006: 1). From the other side, current Pristina's authorities claim that they are democratic state, as well as referring that the dialogue between Belgrade and Pristina is not related to the status of Pristina, but to the status of relations between Belgrade and Pristina (Kossev Portal/Nova, 2024). Such diametrically opposed positions preclude any basis for potential cooperation. Although numerous agreements, status-undefined, have been signed between Belgrade and Pristina, the expressed animosities crowd out any format of closer cooperation that would "reach" the security domain.

We can see from the example of the regional initiative Open Balkan, which has caused numerous political classifications of the process, even at the beginning of its promotion. Although Serbian officials have declared that they do not object to Pristina's potential participation in the Open Balkan (Kosovo Online, 2021), on the other hand, Pristina refuses to join this initiative because, as the Pristina authorities state, Serbia does not treat Pristina as an equal party. However, it is not just a matter of refusing to participate, but also of attacking the existence of such a regional format, bearing in mind the statements of Pristina officials that "the Open Balkans looks more like an initiative for the influence of the East, rather than an initiative for a common regional market" (Arnaudov, 2023: 54 i 55).

On the other hand, except for a “bilateral” momentum between Belgrade and Pristina, the status of Pristina also represents the subject of regional disagreements. While Serbia, re-calling to UN Charter and UN Security Council Resolution 1244, claims that the status of Pristina is defined within the mentioned resolution and the Constitution of the Republic of Serbia, other regional actors (North Macedonia, Montenegro, Albania), except Bosnia and Herzegovina, are accepting the unilateral self-proclaimed declaration of independence adopted by temporary Pristina authorities in 2008 (Tanjug/RTV, 2022). In this regard, there are continuous tensions on the regional level when it comes to the participation of Pristina in certain regional processes or initiatives or the membership of Pristina in regional, European, or international organizations. However, in Pristina, there are continuous security tensions that represent a potential threat to the whole region, bearing in mind the experience from the nineties. Also, the current UN Secretary-General, in his annual report for Kosovo and Metohija, has reported that “the atmosphere in northern Kosovo remains tense, and the potential for escalation persists (Maroević, 2024). Bearing in mind the spillover effect from the nineties, ongoing war zones on the European continent, and, most important, persistent tensions on the territory of Kosovo and Metohija, especially in the northern parts, there are justified reasons for potential risks and threats to regional stability and sustainability. Such risks and threats are additionally reinforced by the strong regional mistrust, animosities, and the political speech of hate and blaming between different national, ethnic, and religious groups.

In the context of NATO, the alliance is not able to play a security mediator role due to three factors: 1) uncompromising regional disagreements; 2) different big powers are also interested in security flows in the region (as it is Russia with evident role and China with more diplomatic approach); 3) mistrust in the role of NATO as a common security denominator because of the different and opposite interpretation of local actors about the NATO activities in the region during the last 35 years.

Conclusion and recommendations

Security cooperation in the Western Balkans in the last 30 years, after the collapse of the Socialist Federal Republic of Yugoslavia, has been marginalized in such a way that there has always been a more pronounced interest in cooperation in this domain with partners outside the region, as opposed to a pragmatic approach and the creation of regional security infrastructure (Gjurovski & Arnaudov, 2024: 2). From today’s perspective, regional cooperation in the Western Balkans is conditioned and at the same time determined by political decisions. Regional cooperation, coordination, and integration are not the subject of logical decision-making processes but rather an instrument in the hands of political

leaders in daily political games. Although a significant degree of economic cooperation, coordination, and synchronization has been achieved, we could not mention deeper integration because it is already conditioned from the very beginning by open issues related to statehood issues and sustainability. In such circumstances, cooperation in the security domain is further limited. Although we are witnessing significant cooperation in the domains of confronting and preventing cross-border criminal activities, substantive cooperation in the domains of defense and security, and even when it comes to contemporary challenges such as migration, is, to a significant extent, limited and conditioned by political popularity. In this context, cooperation with NATO as a whole, but also between NATO member states in the Western Balkans region, as well as those that are not part of the Alliance, could be interpreted. Considering the conflicts of the 1990s, the inconsistent security policy between regional actors, the existing animosities, as well as the different relations with NATO over the past 35 years, we come to the conclusion that cooperation with NATO is limited at the level of the existing Alliance member states, and at the same time conditioned by interpretations of NATO's role in the past period.

In this context, NATO is not able, as a security and defense organization, to conduct strategic, long-term and comprehensive activities. First, due to geographical limitations. Second, due to internal regional disagreements. Third, due to the lack of a stable and sustainable relations between NATO and all six actors in this area.

Therefore, the authors of the study have prepared several recommendations that would contribute to a more efficient, and thus more effective, role of NATO in the Western Balkans region:

1. Relativization of the insistence on comprehensive integration of the region in the medium term.
2. Creation of programs that will enable integrated cooperation between member states and non-member states on security issues related to migration, hybrid threats, health challenges, and regional criminal and terrorist threats.
3. Revision of NATO's role in the region in modern history in the context of providing comprehensive and precise answers to all stakeholders as to why the Alliance took certain actions.
4. Project-based engagement of NATO through higher education systems within Western Balkans in order to provide better and clearer information for young people about what this organization is and what its purpose is.
5. NATO's impartiality in relation to regional disagreements and disagreements in order to create space for authentic regional interpretation of disputes and their overcoming.

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EU AND NATO: ACTING TOGETHER, SEARCHING FOR COMPLEMENTARITY (2014-2022)

Yavor Raychev

Abstract: This paper analyses the cooperation between NATO and the EU between the illegal annexation of Crimea and the beginning of Russia's large-scale war against Ukraine. It consists of two parts. The first one concentrates on the joint documents of both organizations, and the second represents part of the results of a survey carried out in 2022 among twenty security experts and politicians in Bulgaria.

Key words: NATO, EU, cooperation, complementarity

Анотация: В тази статия се разглежда сътрудничество между НАТО и ЕС в периода между незаконното анексиране на Крим и началото на пълномощабната война на Русия срещу Украйна през 2022 година. Тя се състои от две части. Първата се концентрира върху съвместните документи, които регламентират сътрудничеството между двете организации, а втората представя резултатите от изследване, проведено през 2022 година между 20 български политици и експерти в областта на сигурността.

Ключови думи: НАТО, ЕС, сътрудничество, взаимна допълняемост

NATO considers the European Union a unique and essential partner, and the EU is so, at least because it is the only organization with a legal personality that goes beyond its components. In the area of security and defense policy, the EU relies primarily on NATO; eventually, both organizations depend on intergovernmental cooperation between their member states. Due to the widely overlapping membership of their member states, shared values, and respect for the same basic norms (the rule of law and human rights), as well as due to their parallel development and specific "division of labor," the EU and NATO have good premises for cooperation.

The Alliance has a comparative advantage when it comes to military capabilities: deterrence and defense. The EU's military capabilities are not as well developed, but it has a significant advantage in civilian capabilities: "economic sanctions, building resilience in spheres such as energy and cybersecurity, tackling disinformation, humanitarian assistance and transport infrastructure." (Papaioannou, 2019). Considering that hybrid wars are fought with the deployment of kinetic and non-kinetic tools, it is clear that NATO and EU citizens can only

be effectively protected in the process of close cooperation between the organizations.

The European Union understands hybrid campaigns to be ‘multidimensional, combining coercive and subversive measures, using both conventional and unconventional tools and tactics (diplomatic, military, economic, and technological) to destabilize the adversary. They are designed to be difficult to detect or attribute, and can be used by both state and non-state actors’ (EU, Comisión Europea: A Europe that protects: Countering Hybrid Threats, 2018). NATO understands them as “those posed by adversaries, with the capacity to simultaneously employ conventional and non-conventional means in an adaptive manner in pursuit of their objectives”(Aaronson ,M et al.). Despite the differences, several shared ideas can be seen here: both organizations speak of conventional and non-conventional means and adversaries, that is, the same adversaries and the same means; also, both organizations share the same strategic challenges and the same values, and finally, both are aware that neither one nor the other has the full spectrum of tools to face emerging security challenges successfully.

The roots of the cooperation in countering hybrid threats could be found in the period after the illegal annexation of Crimea and the hybrid war against Ukraine, which was the first intent to return to power politics in the Old Continent after World War II. As a reaction to this hostile act, NATO reacted with a settlement of Assurance and Adaptation measures of the Readiness Action Plan (RAP). In this way, the Alliance guaranteed the security of all its EU members: ‘In order to ensure that our Alliance is ready to respond swiftly and firmly to the new security challenges, today we have approved the NATO Readiness Action Plan. It provides a coherent and comprehensive package of necessary measures to respond to the changes in the security environment on NATO’s borders and further afield that are of concern to Allies. It responds to the challenges posed by Russia and their strategic implications. It also responds to the risks and threats emanating from our southern neighborhood, the Middle East, and North Africa.’ (Press statements by the NATO Secretary General Jens Stoltenberg and the EU High Representative for Foreign Affairs and Security Policy, Federica Mogherini, 2015) .

Later, Stoltenberg devoted a significant part of his speech to hybrid warfare and hybrid threats, urging to find a strategy to prepare for and, if necessary, defend against them (Press conference by NATO Secretary General Jens Stoltenberg following the meeting of the North Atlantic Council in Foreign Ministers session, 2015) .

The EU and NATO have signed two Joint Declarations (2016 and 2018) in order to enhance their cooperation in the fields of maritime security, as well as cyber and hybrid threats. The first coincides with the publication of the European

Union Global Strategy (EUGS); the document, signed in June 2016, provided a solid basis for EU-NATO cooperation in the field of countering hybrid threats, which seems quite natural considering that 22 out of 28 EU members were also NATO members (now 21 out of 27). The Strategy takes into account that NATO is and will be the main framework for more EU members when it comes to collective defense. Even though the EU Global Strategy (EUGS) has the main objective of presenting the EU as a global actor fully capable of ensuring the security of its members, it recognizes the strategic nature of its cooperation with NATO, characterized as “the strongest and most effective military alliance in the world.” The keyword is “complementarity” of the capabilities and resources both organizations have to deal with hybrid threats, and their cooperation is based on shared perceptions of “Russia’s aggressiveness and recognition of the importance of their mixed and complementary set of skills in providing comprehensive security for the continent.”(Shared Vision, Common Action: A Global Strategy for the European Union’s Foreign And Security Policy, 2016) .

In December 2016 and 2017, the EU and NATO agreed a total of 74 implementation actions in seven strategic priority areas: 1. Countering hybrid threats; 2. Operational cooperation including maritime issues; 3. Cyber security; 4. Capacity building; 5. Defense capabilities; 6. Defense industry and research; 7. Exercises. (Union, 2016). 2017 measures focused on situational awareness, strategic communication, and the bolstering of resilience (EC, JOINT DECLARATION BY THE PRESIDENT OF THE EUROPEAN COUNCIL, THE PRESIDENT OF THE EUROPEAN COMMISSION, AND THE SECRETARY GENERAL OF THE NORTH ATLANTIC TREATY ORGANIZATION , 2016)

The 2017 measures focused on public awareness, strategic communication, and strengthening resilience. In a material published in August 2019 on NATO’s official website, it is stated that both organizations work “side by side” in areas such as crisis management, capacity building, and political consultations, as well as providing support to their common partners in the East and South. (EU-NATO cooperation: Council welcomes progress in the implementation of the common 74 actions , June) . A pesar de que las guerras híbridas no se mencionan implícitamente, explícitamente forman parte de todos los temas mencionados.

NATO Brussels Summit (11-12 July 2018) was dominated by dramatic debates over burden sharing and uncertainty on the USA position. However, it was fruitful in addressing the challenges the Alliance was meeting. Together with the important decisions to invite Northern Macedonia for membership, to continue its commitment to Afghanistan and support for Iraq, and to improve the readiness of military forces in the NATO Readiness Initiative, it recognized the need to counter hybrid threats – cyber-attacks, disinformation, and propaganda. Moreover, it was confirmed that NATO’s Article 5 common defense obligation can

be triggered in the case of a hybrid attack. NATO also announced the launch of Counter Hybrid Support Teams, which will provide allies with assistance when targeted by hybrid activities. Also, the opening of three new command centers was announced. The first, a Cyber Operations Center in Belgium, will help coordinate NATO's cyberspace operations. A new Joint Force Command center in Norfolk, Virginia, will assist the Atlantic Command and ensure open transatlantic lines of communication, while the final center in Ulm, Germany, will coordinate logistics within Europe. (NATO, NATO Deputy Secretary General and European Commissioner discuss cyber challenges, 2019). Durante la citada reunión se han reseñado los logros de la cooperación: cooperación en ciber dominio, comunicación de advertencias en tiempo real sobre amenazas cibernéticas, y establecimiento del Centro europeo de excelencia para la lucha contra las amenazas híbridas en Helsinki, centrado en contrarrestar los ciberataques y la propaganda. Como nuevos campos de cooperación se mencionaron los siguientes: mejora del intercambio de alertas e inteligencia, mejora en la seguridad de la cadena de suministro de productos de TI y atención a la cibernética como herramienta para difundir desinformación. (NATO, NATO Deputy Secretary General and European Commissioner discuss cyber challenges, 2019)

A material published in August 2019 on the official NATO website states that both organizations work "side by side" in areas such as crisis management, capability development, and political consultations, as well as providing support to their common partners in the East and South (Relations with the European Union, 2019). Although Hybrid wars are not implicitly mentioned, they are explicitly part of all mentioned issues.

The EU and NATO still have aspects to overcome in their cooperation against hybrid war. One of them is to foster the spirit of full mutual openness, transparency, and complementarity. A lack of will to share information, especially classified information, could be harmful to Euro-Atlantic security.

Another one is enhanced practical cooperation in operations, from coordinated planning to mutual support in the field. Broadening political consultations to include all issues of common concern in order to share assessments and perspectives is a challenge that needs to be answered. And finally, cooperate more fully in capability development to minimize duplication and maximize cost-effectiveness. What practically happens is that the EU and NATO do parallel actions instead of joint actions. As an example, the unsuccessful intent to create an EU – NATO Playbook on hybrid threats, "in part due to the EU's reluctance of associating its broad civilian toolbox too exclusively with NATO".

To conclude, I would say that the EU and NATO have come a long way towards a proper understanding of hybrid wars and threats. The response of the two organizations has intensified their cooperation in this field and raised awareness

that these are the same challenges. This awareness has provided a political impetus to consolidate the forms of cooperation and interaction. The coronavirus pandemic has tested the capacity of EU – NATO cooperation and achieved coordination and a robust response to the crisis. But some doubts still await resolution. For example, the need to clarify the relationship between the EU and NATO mutual defense clauses has become apparent. The materialization of the EU’s ambitions in terms of strategic sovereignty, *inter alia* through multiple defense cooperation initiatives, will also constitute a test of the resilience of EU – NATO cooperation.

What is the opinion of Bulgarian politicians and security experts concerning the cooperation between NATO and the EU?

The Bulgarian respondents answered the question: “Do NATO and the EU have a strategy against hybrid warfare?” in different ways. According to one of them, “NATO is already talking about special targets that should be neutralized. To what extent will this be effective? I am not sure since political warfare is tolerated in the Alliance, and not only in it, so I do not see it as something completely new. At the time, there was Radio Free Europe, which was part of the political warfare against Russia. It was done every day. The Russians, in turn, also had a strong machine for that, but to what extent it was effective – that is another question. The EU is also struggling to do something, and they have already begun to spend money on these plans, on anti-hybrid war activities. Personally, I am not convinced that this is effective. Massive action, such as mass propaganda against Russian propaganda, must be taken to obtain a result. Propaganda as such has always been with us and will always be with us”.

Another expert is far more skeptical: he thinks that judging by the apparent results, neither organization has such a strategy. His arguments are as follows: “For example, I can give as an illustration a key and very worrying circumstance, which is even more so for Bulgaria. When Britain first notified Russian military intelligence of the attempted Skripal assassination, a number of countries, most NATO members and allies of Britain, expelled Russian diplomats, unlike our government, who said the evidence provided was not enough. But in addition, it was said that we would monitor the situation and if there were new evidence, we would review our position. What are we currently seeing? Not just a specification of the evidence, but a complete presentation of the evidence of the actual Russian responsibility for the attempt. What did the Bulgarian politicians do? No reaction at all. They uncovered the real name of one of them, which came from an infiltrated agent source. Things cannot be done only through analysis, although Viktor Suvorov claims that British intelligence has such a perfect system that only through analysis can they reveal the identity of the agents. It is impossible. Whatever the analysis is, it cannot reveal the name of the person. No way. But

back to the topic, the question has one answer – there is no strategy. If a NATO member like Bulgaria pretends that this (the attempt to poison father and daughter Skripal) means nothing, then there is no strategy, neither at the Alliance nor at the EU level. Hybrid war is not new. However, the Russian command is very innovative, while NATO, unlike Russia, is reverting to the old containment strategy and cannot resist the innovations of the Russian strategy. The return to the old Cold War models will not be successful. Countering the modern hybrid war should be sought in three components: stabilization of the Euro-Atlantic vision, concept, and security vision. This means reaffirming the euro and the Atlantic community. I have a word game (in Bulgarian). Euro-Atlanticism is a compound word. Euro and Atlanticism. At certain periods of time, it was written together, but there were also periods when it was written with a dash. We are currently in a phase where the Euro and Atlanticism do not even have a dash – their union of the term has been broken. Therefore, the first level of counteraction (of the hybrid war) is seeking the reconsolidation of the values of Euro-Atlanticism. Both as common values and as common security models. And the understanding that more security means more democracy rather than restricting democratic rights at the expense of security. The other thing that needs to be done and is stemming from this reconsolidation of Euro-Atlanticism as a concept and value system is to develop a modern Euro-Atlantic political language for communication with citizens. Any social system, any transnational or national values, are static until they are brought to life through dialogue. Not just through a monotonous didactic explanation but through a lively, mutually responsible, and mutually sensitive dialogue between societies and elites. They need to respeak the meaning of Euro-Atlantic democracy in a new way and new words. It is very important to create a community of Euro-Atlantic words. That is, the meaning of political speaking must be reintroduced. And perhaps the third condition is to develop new projects and new prospects for solidarity. New projects and new perspectives that complement others and complement each other. In other words, the Euro-Atlantic community should not be seen as an antithesis to other value and geopolitical areas of the world but as a multilateral, overflowing harmony of interests. Only in this way, it seems to me, that prevention against hybrid war will be constructed, but in practice, at some point in the world constructed in this way – the hybrid war – would gradually become meaningless. The paradox is that if we start talking now, we may have a very interesting conversation with you, but it may be impossible for me to talk to other people about it. In an attempt to recall the conceptual system of Soviet *perestroika* and thus to derive from that conceptual system formulas and models that we can use to counteract hybrid wars. You will see how strikingly innovative a part of the Russian *perestroika* of that time is and how it could be interpreted, which was related to the idea of co-establishing

peaceful co-existence through global dialogue. So, there is something to be done as long as there are people willing to think. ‘The question of whether the EU has a strategy for dealing with hybrid warfare is kind and likable but rather ironic. My answer is this: EU member states are waging a hybrid war between themselves. What common strategy can this be? NATO, as a defense alliance, has no such strategy. Not only does the EU not have one either, but the member states are waging hybrid wars between themselves.

Another Bulgarian military expert replies as follows: “There are various committees of NATO member states’ military, intelligence, and counterintelligence structures operating in NATO. Their main purpose is to discuss common threats and to develop common policies to address them. The EU security pillar is under development. There is good cooperation between Member States in the field of security, but there is also an understanding that establishing common structures and standards is required. For example, building a stronger EU cybersecurity agency and introducing an EU-wide cybersecurity certification scheme. On the other hand, on 8 June 2017, the Council agreed to establish the Military Planning and Conduct Capability (MPCC) within the EU Military Committee. In addition, the EU and NATO declare that they will focus their cooperation in areas such as military mobility, cybersecurity, hybrid threats, and the fight against terrorism.”

According to a former member of parliament, NATO and the EU have strategies, but Bulgaria, although a member of them, remains somewhat on the sidelines: “Five years ago, NATO did not have such a strategy. But after the suspected election interference in the United States, the attempts to interfere in Germany, Italy, and France, and even Brexit is said to be interfered by Russian services – NATO has realized that it is a very dangerous and global form of conducting hostilities on their territory and in 2016 the European Parliament adopted a document to deal with hybrid threats from Russia, ISIS and several other high-risk states and political entities. Unfortunately, there was no response in Bulgaria. We are the easiest country for a hybrid war. The inactivity of the Bulgarian people is the greatest help they provide (to the enemy) in the hybrid war waged on our territory. This is because, for the last 10 years, Bulgaria has not acted as a full member of NATO and the EU but rather behaved as a vassal of Putin. In Bulgaria, it is forbidden to say openly that Russia poses a threat to our national security. The only one who allowed himself to say it was Plevneliev, and you know what cannonade was unleashed against him. There was even a comic fact. Last year, when the national security report was received by the Committee on National Security at the Council of Ministers, it was said exactly that Russia was a threat to our national security. Of course, this was only hinted at, but even so, a very big debate in the parliament started, one which we could rarely see. The report was adopted, and so what? No measures have been taken, and Bulgaria has no way

to counter the hybrid wars ... As for the EU, a center has already been set up to deal with hybrid threats. Europe is aware and responsive. I would say that British people are leading the way, openly threatening Russia that if it continues with its cyberattacks, it will have a very serious backlash on its territory.”

Another expert points to the need to provide strategies with the necessary resources: “There is a strategy; how successful it depends on its implementation, the resource that is dedicated for it because, like any war, this one requires huge resources. Russia is devoting more and more resources through information invasion, the church, etc., to conquer the minds and the hearts of the people, which means that we, who try to defend, must also devote our resources to it. ... It seems that the EU has not created its own defense segment. There are no major developments in this regard. Rather, the resources of the EU countries are organized by NATO... I am a European patriot, and I believe that Europe is subject to a hybrid war from other countries. So it has to have stand-alone strategies and resources wherever they come from.”

An expert from the Ministry of Defense said: “Since 2014, different strategies for counteracting this kind of warfare have begun to develop in NATO. NATO already has a strategy in place to counter hybrid warfare and hybrid threats. However, the European Union is more concerned with this issue. It is not explicitly stated that the enemy is necessarily Russia, but the elements that must be present in every fight against every hybrid threat, regardless of the country of origin. NATO has never referred to Russia as its adversary, unlike Russia, which in its foreign policy doctrine refers to NATO as a foreign policy threat. ... It is not possible for a big organization like NATO to say, “This country is our opponent.” This would mean that our whole strategy has to be directed against this country. Russia made the mistake of pointing NATO, but NATO did not make that mistake. And this is very good because if it had happened, at some point, it might become required to focus everything on it or on any other state; in fact, that means that any state can be declared an enemy... I cannot say exactly what the strategy is because these NATO documents have not been published. But based on what is going on now, I can judge that NATO is focusing more on the military and the EU on civilian instruments. The EU has more instruments. It’s just two very different organizations. However, the two organizations also complement each other and cooperate. In this cooperation, all areas must be covered. But, the first and most important responsibility lies with the member states. International organizations should support this process. There is no way for NATO to develop a hybrid warfare strategy for a country that itself does nothing in this area and even pretends that the threat does not exist.”

Another respondent believes that the strategies of both organizations are under construction: ‘They are being built, I cannot say that there are any. The nec-

essary elements are slowly created. NATO, as a military organization, left these strategies to the countries, particularly on issues related to economics, propaganda, etc. However, the Alliance gradually began to take on such issues. It did a lot of operational activities and set up a cyber center, a center for cyber operations in Brussels. The parties remind each other that they are responsible for providing cybersecurity, and it's being said that specific forces are made that would assist anyone who is a victim of a cyber-attack. I don't know exactly what these forces will look like, the idea is with a little military effort to achieve great strategic effect.'

Several authors offer various steps that could lead to the improvement of EU-NATO relationships:

- the EU and NATO must adopt a proactive and integrated strategy and joint framework that encompasses all elements of soft and hard power and synchronizes the interagency community to employ their sources to wage and counter external aggressions.
- Given the different nature of threats, capabilities, and strategic interests of NATO and the EU, one of the organizations should have a leading role in determining a joint strategy against one of the challenges emanating from East and South. While NATO can better react against Eastern challenges with its collective defense capability, the EU can better cope with Southern challenges with its different wide-ranging tools.
- The joint strategy should include effective measures against rising illiberal and undemocratic tendencies within the member states.
- It is extremely important to go beyond bureaucratic issues and add formal substance to the cooperation in particular areas, such as assisting a rapid-reaction force deployment and a fast military build-up; combating organized crimes such as drug and people trafficking; intelligence fusion, crisis response; operation management; and smart burden sharing.
- The EU and NATO should combine their efforts for capacity-building in partner countries, including security sector reform, defense institution building, and allocation of resources.
- The EU should be included as an organization in the NATO Defense Planning Process (NDPP) that would facilitate EU – NATO cooperation on defense capability building; however, this would necessitate the non-NATO EU members to bear an increased burden. For reciprocity, PESCO should be open to all NATO member country industries.

- The EU (and to some extent NATO) must reduce the dependency of the US protection and power projection; in this respect, it is important to exploit the current trend of increasing defense spending.
- EU-Turkey relations, which can be seen as the main bottleneck due to the Cyprus issue, should be reformulated in such a way that it constitutes no longer an obstacle to the EU – NATO cooperation.
- The Consensus-based NATO decision-making mechanism might be improved in a way that furthers the Alliance’s common interests. (Blockmans, 2018)
- The EU and NATO should develop “legal frameworks, organizational structures,” for both and should be able to carry out “legitimate, high-speed, creative and tailored actions,” which would allow member states to act “according to their national interests or concerns, without slowing down the rest.”
- In the dynamic world and rapidly changing international system, EU and NATO cannot rely on long-term predictions and strategies; scenario building, “exercises and training in required at all levels; strategic, juridical and operational actors must play greater roles than it does at the present. In addition, states must implement these efforts at home.”
- NATO and EU should communicate more; “Doing so would display the EU-NATO partnership’s protective armor of shared beliefs, values, and loyalties.” (Shea et al, 2019).
- A better knowledge of the Russian concept of hybrid war and understanding its difference from the Western concept is obligatory.
- In their counter-hybrid war efforts, remember that Russia is not restricted by the same democratic mechanisms as NATO and EU countries are.
- Take into consideration that Russian efforts deliberately aim to undermine Euro-Atlantic security.
- Pay special attention to the support that can be given to those member states that are still dependent on Russia.

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PART 3
NATO, BULGARIA AND THE
HYBRID THREATS

ЧАСТ 3
НАТО, БЪЛГАРИЯ И
ХИБРИДНИТЕ ЗАПЛАХИ

IS HYBRID WARFARE CHANGING DUE TO CLIMATE CHANGE?

Borislav Bankov

Abstract: The terms “hybrid warfare” and “climate change” have recently become very popular. Even if they are popular individually, however, the two terms have rarely been linked. With only a few exceptions, no academic work analyzes the possible connections between the two phenomena. This article thus examines the extent to which hybrid warfare changes due to climate change. It argues that climate change can exacerbate already ongoing armed conflicts of a hybrid nature; climate change can also increase the risk of new such conflicts because it accelerates the development and adoption of doctrinal changes and technological innovations related to the conduct of hybrid wars. Thus, security analysts must consider climate change when researching hybrid warfare. This article aims to support their efforts by laying the foundations of a broader discussion on hybrid warfare in the context of climate change, outlining the key issues that future research could explore in greater depth.

Key words: hybrid warfare, climate change.

Анотация: Термините „хибридна война“ и „промяна на климата“ напоследък станаха много популярни. Въпреки това, двата термина рядко са били свързвани. С малки изключения нито една академична работа не анализира възможните връзки между двете явления. Тази статия разглежда степента, в която хибридната война се променя поради изменението на климата. Тя твърди, че изменението на климата може да изостри вече продължаващите въоръжени конфликти от хибриден характер; изменението на климата може също така да увеличи риска от нови подобни конфликти, тъй като ускорява развитието и приемането на доктринални промени и технологични иновации, свързани с воденето на хибридни войни. Затова анализаторите по сигурността трябва да вземат предвид изменението на климата, когато изследват хибридната война. Тази статия има за цел да подкрепи техните усилия, като постави основите на по-широка дискусия очертавайки ключовите въпроси, които бъдещите изследвания биха могли да изследват по-задълбочено.

Ключови думи: хибридна война, промяна на климата

INTRODUCTION

Since the end of the 20th century, the popularity of the concept of climate change has surged. The term has gained significant attention outside the traditional scientific circles and has entered various spheres of public and private life. For instance, the fight against climate change has led to the adoption of numerous policy measures in energy and transport, such as the European Green Deal of the

European Union (EU). In more recent years, the term has also been adopted by the security and defense sector. Different governmental and intergovernmental organizations in the field of security and defense started publishing reports and food-for-thought papers that study the potential links between climate change and current security challenges. For example, in 2023, the North Atlantic Treaty Organization (NATO) conducted a comprehensive analysis that concluded climate change is a significant ‘threat multiplier’ that can exacerbate armed conflict, state fragility, and geopolitical competition (NATO, 2023a).

Unlike climate, which has only recently become part of the agenda of the security and defense services, the term “hybrid warfare” has long been a centerpiece in their shortlist of policy priorities. The concept became very popular in 2014 as a result of the decision taken by the EU and NATO to define Russia’s illegal annexation of Crimea as hybrid warfare (Abbott, 2016, p.9; Bajarūnas, 2020, pp.62-63; Maronkova, 2018). It must be noted that as of late, academic and policy discussions on hybrid warfare have also started to make references to climate change. For instance, in a 2023 publication, the European Centre of Excellence for Countering Hybrid Threats in Helsinki reported that climate change is among the most critical challenges in the current security environment (Jungwirth et al., 2023, pp.43-46).

The abovementioned remarks lead to an important conclusion: a consensus is currently forming among policymakers that climate and security are inextricably linked. However, insufficient academic works examine the possible links between climate and security to substantiate those policy discussions. Moreover, the publications that do attempt to study the relationship between the two phenomena suffer from various methodological problems, such as solely relying on quantitative data (Abrahams & Carr, 2017; Adams et al., 2018; Gilmore et al., 2018, p.314). These large literature gaps become particularly obvious when the specific characteristics of hybrid warfare are considered. That is, while many separate scientific studies on climate change and hybrid warfare exist, the two terms have rarely been linked. No studies exist on the possible links between climate change and hybrid warfare. The only exception is the work of Briggs (2020), but the author argues that climate change cannot increase the overall risk of new hybrid conflicts. Instead, Briggs contends that climate change can only exacerbate already ongoing armed conflicts of a hybrid nature. This assumption unnecessarily restricts Briggs’ analysis; thus, there is a need for new academic examinations of the subject. Such studies would fill the gaps in science literature but would also have significant practical implications because many organizations, including NATO, are still shaping their approach to managing climate change-related security risks (Shea, 2022).

For this reason, this article examines the extent to which hybrid warfare changes due to climate change. The author argues that the changing climate can exacerbate already ongoing armed conflicts of a hybrid nature; climate change can also increase the overall risk of new such conflicts as it accelerates the development and the adoption of doctrinal changes and technological innovations that are related to the conduct of hybrid wars. Thus, analysts must pay due attention to the climate when researching cases of hybrid warfare. Due to its limitations, this article cannot conduct an in-depth analysis of a specific empirical case. Instead, it aims to lay the foundations of a broader discussion on the role of climate change in hybrid warfare by outlining the key issues that future research can explore in greater depth.

In its first part, this article introduces the concept of hybrid warfare by assessing if the authors of the term took climate into account when developing the conceptual framework. The second part will outline the topic of climate change in the context of contemporary security and defense issues. The third and main analytical part will link the two phenomena and explore how climate change affects hybrid warfare. The fourth part will briefly discuss the key academic and policy implications of the analysis. Finally, the conclusion will summarize the findings and accept, reject, or detail the original hypothesis.

HYBRID WARFARE

Frank Hoffman, an officer in the United States (US) Marine Corps, is the author of the first in-depth analysis of hybrid warfare. He offered a comprehensive examination of the phenomenon in his 2007 work titled “Conflict of the 21st Century: The Rise of Hybrid Wars.”³⁸ In addition to providing the first detailed definition of the term, Hoffman also examined the 2005 US National Defense Strategy. According to the military strategist, the text failed to capture the fact that many modern conflicts are characterised by the confluence of different military practic-

³⁸ While Hoffman was the first military strategist to thoroughly analyse the concept of “hybrid warfare”, he neither coined the term nor was he the first analyst to make similar observations about the changing nature of warfare. A more thorough literature examination reveals that the phrase “hybrid warfare” first appeared in 1998, when Robert G. Walker – also a US marine – used the term to describe today’s growing convergence between conventional and special military operations (Walker, 1998). Even earlier, in the middle of the 20th century, Evgeny Messner – a brilliant Russian military strategist of German origins, who devoted his life to the physical and intellectual fight against communism – spoke of the so-called “myatezhevoyna” or subversion-war. Similarly to hybrid warfare, in myatezhevoyna the main adversaries are the revolutionary movements led by terrorists, propagandists, and other non-state actors (Fridman, 2018). For this reason, some authors believe that if Hoffman is the “father” of the concept of hybrid warfare, then – figuratively speaking – Messner is its “grandfather” (e.g. Klus, 2016).

es. He argued that hybrid warfare can enrich the Pentagon's understanding of the new security environment. More specifically, he elaborated that:

“Hybrid Wars incorporate a range of different modes of warfare including conventional capabilities, irregular tactics and formations, terrorist acts including indiscriminate violence and coercion, and criminal disorder. These multi-modal activities can be conducted by separate units or even by the same unit but are generally operationally and tactically directed and coordinated within the main battlespace to achieve synergistic effects. The effects can be gained at all levels of war.” (Hoffman, 2007, p. 29)

It is evident that, according to Hoffman, the hallmark of hybrid warfare is the combination or “hybridization” of various methods of war to achieve a predefined set of strategic goals. In other words, an actor is waging hybrid warfare if they employ non-military methods in combination with traditional military (or kinetic) force in a coordinated manner. To illustrate his theoretical assumptions, Hoffman used the 2006 war between Israel and Hezbollah as a case study. During the summer of 2006, the Shiite Muslim political party and militant group fired more than four thousand conventionally armed missiles at various Israeli targets but also mounted a broad information operation against their opponent (Kalb & Saivetz, 2007). Hoffman examined Hezbollah's coordinated action plan to present his theoretical ideas in the most straightforward way possible. Despite Hoffman's efforts, however, the record shows that the participants in the scientific and policy discussions on hybrid warfare are often not sufficiently careful when using the framework. Namely, they refer to the concept not as a result of a thorough scientific investigation but simply because the idea of hybrid warfare is fashionable (Libiseller, 2023).

As mentioned earlier, the concept gained prominence in 2014 following the decision of the EU and NATO to define the illegal annexation of Crimea as a hybrid campaign. It is important to note that the decision of the two international organizations significantly affected how the theoretical framework is understood by the majority of scholars and the general public since, at that time, Russia had not yet launched a full-scale military invasion against Ukraine. Instead, in 2014, the Kremlin mainly relied on non-military methods. In order to mirror the empirical reality, the conceptual focus of the term shifted from kinetic to non-kinetic methods such as cyber-attacks, disinformation campaigns and election interference (Maronkova, 2018). The change in how the concept is understood has been so pronounced that, according to some estimates, nowadays, only 30% of all available publications use Hoffman's original definition of the phenomenon (e.g. Caliskan & Cramers, 2018, pp.30-33). The conceptual change of hybrid warfare has inevitably damaged the framework's perceived analytical value, resulting in much scholarly criticism towards the term (e.g. Caliskan, 2019, p. 51; Johnson, 2018, p.143). To offset these adverse academic trends, this paper adheres to the concept's original definition developed by Hoffman.

It should be acknowledged that the US officer made no references to the role of climate in his 2007 *magnum opus*. Therefore, Hoffman left the question of climate's possible impact on hybrid warfare open for interpretation. However, his work contains plenty of theoretical arguments, allowing us to conceptualise the role of climate change in hybrid warfare. Earlier, this article hypothesised that climate change may exacerbate existing conflicts of a hybrid nature but also may increase the overall risk of new hybrid wars. Hence, before proceeding to the main analytical part, this article will establish the causal mechanisms that, according to Hoffman, can exacerbate an ongoing hybrid war; it is also required to explore what conditions increase the overall risk of the emergence of new hybrid conflicts.

Firstly, what causes an active hybrid conflict to aggravate? In order to analyse these processes, this article needs to introduce the concept of "vulnerabilities". Using the case of Hezbollah, Hoffman argues that, nowadays, malign states and factions have mastered the art of identifying and targeting Western vulnerabilities (Hoffman, 2007, p.58). Many of these vulnerabilities have a physical dimension. For example, the power grid, an essential part of a nation's critical infrastructure, can become vulnerable if it is not resilient against cyber attacks. At the same time, a lack of critical self-assessment about the effectiveness of a country's defense policy and plans or, in Frank Hoffman's words, "mental rigidity or complacency" at the strategic level can also become a critical vulnerability (Hoffman, 2007, p.59). Obviously, such vulnerability takes a more abstract form. Malicious actors could target any or all such vulnerabilities to create political, economic and social chaos in the target country, making it even more prone to attacks. In other words, the presence of vulnerabilities creates conditions for the escalation of hybrid wars and may even predetermine how a conflict of this nature will conclude. Thus, this article should examine whether climate change creates vulnerabilities that malign hybrid actors could exploit.

Secondly, what circumstances increase the overall risk of facing a new hybrid war? Logically, before a full-blown hybrid war occurs, there first must be the threat of one. In this context it is necessary to refer to the term "hybrid threats". While hybrid warfare describes a situation when an actor combines different methods of war to achieve its strategic goals, a hybrid threat is the preliminary stage when said actor has achieved the operational readiness to organise such multimodal operations but has not yet put this expertise into practice (Pawlak, 2015). In other words, the actor has implemented specific doctrinal or technological innovations in their operational art that allow the actor to wage hybrid warfare if and when the need arises. However, at this stage, the actor had only demonstrated their operational skills during military exercises, or our knowledge of the actor's new skills had become available through intelligence. Hence, this article will determine whether climate change motivates the development of new

technological capabilities or doctrinal innovations that enable the simultaneous use of different warfighting methods to achieve a particular set of strategic goals. Such a causal mechanism would demonstrate that climate change may increase the overall risk of new hybrid conflicts in the future.

Given the abovementioned, it appears that theoretically speaking, there are possible pathways through which climate change could potentially impact hybrid warfare. The discussion so far confirms the need for an in-depth analysis of the impact of climate on today's hybrid conflicts. Before proceeding to the main part of this article, which will analyse the links between climate change and hybrid warfare, the text will briefly introduce the topic of climate change in the context of security and defense.

CLIMATE CHANGE

While the earliest scientific research on climate change dates back to 1896, when the Swedish scientist Svante Arrhenius attempted to measure the relationship between carbon dioxide concentrations in the atmosphere and air temperature, it took another century before the climate change topic gained political momentum. That is, in 1992, the United Nations (UN) adopted the Framework Convention on Climate Change, the first international treaty. The so-called Kyoto Protocol was also signed five years later, introducing legally binding targets for reducing harmful emissions. In addition, ever since 1995, the Climate Change Conference (more popular as "COP" by its abbreviation) has been held yearly.

Although climate change has become an integral part of the zeitgeist, the topic is not devoid of controversy. In particular, there is still disagreement as to whether the current rate of climate change is due to human activity or represents a natural process independent of anthropogenic factors. The debate on the topic has been raging for years, and so far, there is no clear winner, though the prevailing opinion is that humanity is the main culprit for the current pace of climate change (Berlie, 2018). Over time, the debate has also become extremely politicized, further complicating the discussions. As a result, most definitions of the phenomenon, adopted at the institutional level, consider both points of view and do not make a definite conclusion about the root cause of climate change. For example, the National Climate Change Adaption Strategy of Bulgaria contains the following definition of the phenomenon:

"Climate change refers to a change in climate which is attributed directly or indirectly to human activity that alters the composition of the global atmosphere and which is in addition to natural climate variability observed over comparable periods." (Ministry of Environment and Water, 2019, p.XV)

Even if they argue about the root causes of climate change, however, most scientists make the same climate prediction. They fear that extreme weather

events will become significantly more frequent. For example, the intensity of typhoons and cyclones will increase due to the higher sea surface temperatures. Floods, already a regular occurrence in certain regions of the world, are predicted to become even more intense (Espach, Zvijac & Filadelfo, 2016, p.91). Rainfall will also increase the flow rate of many rivers. Only last year, NASA declared July 2023 the hottest month ever recorded, with temperatures expected to continue rising in the coming years (McGuinness & Rohloff, 2023).

Logically, environmental changes can significantly impact any theatre of operations. According to many historians, climate change has always played an essential role in the degree of military tensions, at least in some regions of the world. For example, the Epic of Gilgamesh tells of severe flooding around the Tigris-Euphrates River system, leading to armed conflict over access to water and fertile soil (Briggs, 2012, p.1049). However, until the end of the 20th century, academic research on the links between climate and security was scarce. Only recently, parallel to the increasing interest in climate change, has the impact of climate on security and defense become a popular topic for scientific investigation. Many influential people, including politicians, have joined the public discourse, too. For example, during their mandates, respectively as UN secretary general and US president, Ban Ki-moon and Barack Obama regularly advocated that climate change is an emerging security challenge with enormous repercussions (Koubi, 2019, p.344). Consequently, already in his first term, Obama ordered the creation of specialized climate units in security agencies such as the Central Intelligence Agency (Briggs, 2012, p.1053). Still, some experts continue to question whether a causal mechanism exists between climate and security.

Indeed, there is some academic research that is very skeptical about the idea that climate change has implications for modern conflict (e.g., Hartmann, 2010). However, many of these works suffer from research flaws. First, some use unreliable sources or data (Scheffran et al., 2012, p.869). Specifically, the period, covered by the datasets under study, is a significant issue. Other authors apply problematic research designs that call into question the validity of their results (Mobjörk, 2016, p.289). For example, the so-called “streetlight effect” (Adams et al., 2018) is characteristic of many studies on the topic. The streetlight effect is a type of observational bias; it describes the tendency to research empirical cases that are easy to study but are not statistically significant. A third group of scholars use unclear conceptual formulations in an attempt to defend a specific stance on the contentious issue of climate. Meanwhile, they do not answer the question under what conditions climate does or does not impact security.

The latter issue deserves specific attention since – according to the majority of the publications on the topic – climate does, in fact, play a role in modern conflict but only under certain conditions (e.g. Brzoska, 2016, p.300; Koubi, 2019,

p.343; Schaar, 2018, p.4). The scholars and analysts who support this hypothesis often cite the civil war in Syria, the invasion of the Islamic State of Iraq and the Levant (ISIL) in Iraq and the prolonged conflict in South Sudan as empirical evidence to support their claims (e.g. McCarthy, 2017; Scott & Khan, 2016). The fact that climate potentially affects armed conflicts only under certain conditions does not mean that climate's impact on security and defense is insignificant. On the contrary, a thorough scientific analysis must uncover under what specific circumstances climate ceases to be a simple decor to military affairs and becomes a decisive factor in modern warfare.

However, this research topic is far too complex for the boundaries of a single article. To deliver a rigorous analysis, this article thus addresses the subject within specific parameters. Firstly, this paper does not delve into any specific climate-related questions. Instead, this article uses "climate change" as an umbrella term that covers a broad range of climate indicators (e.g. precipitation, air temperature, humidity, atmospheric pressure, etc.) and concepts (e.g. "global warming" and "climate variability"). Secondly, this article does not employ statistical research methods. Most existing works on the topic already offer quantitative analysis. At the same time, there is a lack of scientific investigations linking the empirical data, already gathered on the subject, to a specific theoretical framework, such as hybrid warfare. Such an approach would provide more context to the climate-security relationship and support future research. It would also facilitate the development of detailed policies to manage climate-related risks, which a statistical analysis could not do (Sakaguchi, Varughese & Auld, 2017, p.641).

THE ROLE OF CLIMATE CHANGE IN HYBRID WARFARE

The key takeaway from the introductory discussion on hybrid conflicts was that, hypothetically, there exist two ways climate could affect hybrid warfare. Specifically, climate change could exacerbate an already active hybrid conflict as well as increase the overall risk of new hybrid wars. The text below discusses the specific causal mechanisms in each case, providing references to empirical case studies.

Climate change as a factor for exacerbating ongoing hybrid wars

There are four different causal mechanisms by which the changing climate could exacerbate an ongoing hybrid war. Those mechanisms are connected to the fact that climate change mainly affects the civilian sector rather than the military industry. Examples of such civilian sectors are agriculture and energy. This feature of climate change is critical to our discussions due to the key role that civilians play in hybrid wars. Unlike traditional military operations, in which the professional armed forces take on a leading role, in hybrid warfare the civilian

population and infrastructure are just as crucial as the military personnel and the heavy military equipment.

Firstly, during a hybrid war, the warring sides deliberately target the most vulnerable civilian assets of the enemy. Hoffman claims that the goal of this exercise is to create political, economic, and social disorder in the target population in order to further weaken the opposing side's capacity to defend itself. Precision strikes solely against military targets would not produce the same societal disruption, so civilian infrastructure becomes a frequent target of such hybrid campaigns. The changing climate creates vulnerabilities in various sectors with direct civilian involvement, which can thus become targets of hybrid campaigns and exacerbate an ongoing hybrid conflict. In particular, climate change leads to different emergencies, such as severe floods and wildfires. In many instances, the warring sides have taken advantage of natural disasters raging on their enemy's territory. Instead of showing solidarity through humanitarian aid, as is the usual practice in normal circumstances, the opposing side tries to increase the destructive effect of the natural disaster in order to weaken their enemy's capacity to fight. For example, during a 2010 clash between the Taliban and Pakistan, the fundamentalists took advantage of the severe floods in Pakistan to damage their enemy's critical infrastructure. In an attempt to weaken Islamabad's strategic posture, the Taliban relied on the forces of nature but also actively deforested Pakistani valleys to increase the water inflow (Muzamil et al., 2020, pp.3-6). Another example is ISIL's operations in southern Iraq. The Salafi jihadist group has taken advantage of the fact that, in recent years, the region has experienced prolonged droughts. More specifically, ISIL was able to capture the dams, thus cutting off the supply of fresh water to the Shia population in order to sow turmoil and societal and economic chaos (Zingg, 2021, p.7). ISIL's ability to take advantage of the region's particular environmental features aided their strategic goals.

Secondly, while targeting infrastructure such as dams is an indirect way of causing harm to the civilian population, there are far more direct ways in which civilians can fall victim to hybrid warfare. On the one hand, hybrid conflicts are often accompanied by an illegal economy, which includes human trafficking in order to recruit soldiers. On the other hand, during a hybrid war, there are also many cases of indiscriminate violence, that is endangering the lives of civilians who have no role in the warfighting. Such violence is a by-product of targeting the civilian infrastructure or is a deliberate effort in order to cause further societal disruption. Climate change creates the conditions for increased human trafficking as well as indiscriminate violence, thus exacerbating hybrid conflicts (Bowles, Butler & Morisetti, 2015, pp.391-392). The so-called "climate migration" plays a critical role in both cases. Climate change leads to short-term emergencies such as wildfires but also to long-term reductions in the available sources of liveli-

hood. Scholars argue that short-term crises rarely cause people to leave their homes, but long-term challenges often do (e.g., Koubi, 2019, p.354). To refer to this type of migration wave, experts use the term “climate migration” (e.g. Chen, 2019, p.23). It is important to note that people who have left their homes and are travelling along a migration route are easier targets for violence and human trafficking. In other words, climate migration creates conditions for increased violence against civilians, and hybrid actors can take advantage of this opportunity. For example, there exist plenty of reports that the terrorist network Boko Haram traffics people who have received or are seeking asylum due to the desertification in central Africa (Briggs, 2020, p.48). The militants are recruiting some of the victims as combatants for the hybrid wars they are waging against Nigeria and other governments in the region (Falode, 2016).

Thirdly, when discussing civilian recruits, one needs to mention the role of irregular soldiers. That is, along with regular troops, many irregular soldiers take part in hybrid warfare. These are fighters who have not undergone professional military training or do not wear the usual armed forces’ insignia but still participate in the hostilities. Examples of such irregular soldiers are militias and private military companies. Their participation in hybrid wars can have many reasons, including the conduct of a proxy war. During a proxy war, non-state factions or smaller countries fight on behalf of larger powers; those larger powers have chosen not to get directly involved in the fighting but are still pursuing their strategic goals against their enemy on the basis of a covert and mutually beneficial relationship with a third-party actor. But what would motivate these third-party factions to fight for someone else’s strategic interests? Oftentimes, the answer is financial reward. To resort to such dangerous ways to make a living, many irregular soldiers had found themselves and their families in a state of absolute poverty. Climate change could create such poor living conditions, which in turn could aggravate hybrid warfare. That is, climate change is causing permanent damage to agricultural land, which is the only source of livelihood in some regions of the world, especially in Africa. In this sense, the changing climate significantly increases the pool of irregular soldiers who have chosen this “career path” in the absence of other livelihood options (Bowles, Butler & Morisetti, 2015, pp.391-392). According to some analysts, this is the case with Boko Haram, which we already discussed above (e.g. Vivekananda, 2019, p.17). In addition to increasing the manpower of non-state actors, climate change can also increase their legitimacy in the eyes of the local population. While central governments cannot provide humanitarian aid to those in distress, non-state actors offer a way out of the poor living conditions in exchange for long-term loyalty. Examples of such interdependencies exist in the territories of countries such as Libya, Algeria, and Mali (Gordon, 2022).

Fourthly, talking about winning the “hearts and minds” of the civilian population brings up the discussion about the information aspects of hybrid warfare. Unlike the mechanisms we examined above, which combine kinetic and non-kinetic activities, information operations are conducted solely through non-military capabilities. Earlier, we noted that Hoffman did not pay much attention to the non-kinetic methods of warfighting in his seminal monograph from 2007. Analysts began to link hybrid warfare to non-kinetic operations only after 2014, in the wake of Russia’s annexation of Crimea. It would thus be logical that information operations, a typical example of a non-military effort, would have been ignored by Hoffman. However, the information aspects are an exception to the rule and are examined even in Hoffman’s early work (Hoffman, 2007, p. 46). This speaks to their importance. Many authors argue that disinformation is crucial for waging hybrid warfare (e.g. Bachmann, Putter & Duczynski, 2023; Hoekstra & Jongema, 2016). Topics that attract a lot of public attention, such as climate change, offer opportunities for creating false or misleading content in order to manipulate public opinion (Ellison, 2023). This could exacerbate a hybrid war. An example of climate disinformation is provided by Briggs (2020), referring to Russia’s information campaigns, part of a long-term hybrid campaign against the West. The Kremlin’s geopolitical rivalry with the West includes a proxy war on the territory of countries such as Ukraine and Syria but also non-military efforts such as disinformation campaigns. Specifically, regarding the climate context, Europe’s green transition poses a strategic risk for Russia, as countries such as Germany will cease to be dependent on Russian gas or oil. To prevent the economic emancipation of the old continent, the Kremlin’s fake news factories spread false data that climate change does not exist. The implication is that European taxpayers should stop investing their money in the green economy transition. Climate issues present a good opportunity for the so-called “Russian trolls” because, as mentioned earlier, there is an actual scientific debate on climate change. However, the disagreements among the experts and policymakers are not concerned with whether or not there is climate change but rather with the current rate and the driving forces behind the phenomenon. These nuances are more difficult to distinguish for the lay audience; thus, the climate topic can become a tool for disinformation and hybrid conflicts.

Climate change as a risk for new hybrid conflicts

In the initial discussion on hybrid warfare, we revealed that hybrid operations are characterized by the coordinated use of different military capabilities, formations, and tactics. In military affairs, this approach to operational art is known as “combined arms”. With this clarification, the overall risk of new hybrid wars increases when actors introduce doctrinal or technological innovations that ena-

ble the conduct of such multimodal operations. In the event that a malign actor reaches operational readiness for combined arms, they pose a hybrid threat that, under certain conditions, can grow into a hybrid war. There are two mechanisms by which climate change motivates the development of such multimodal expertise. These processes stem from the fact that even if climate change mainly affects civilian industries, the climate still affects the organization, management, and conduct of military operations.

Firstly, some traditional heavy military equipment becomes unusable due to climate change. The decision to decommission said equipment can be voluntary or involuntary. Still, in either case, the respective actor's military doctrine must be updated to compensate for the lack of traditional military equipment by introducing more multimodal or hybrid operations. On the one hand, achieving zero carbon emissions is an ambitious goal that requires the active involvement of the military industry (Gilmore & Buhaug, 2021, p.2). The military-industrial complex is among the biggest polluters of the environment. This is why the 2015 Paris Agreement on tackling climate change tasked the military with reducing its harmful emissions. As a result, concepts such as "green defense" and "low-carbon warfare" started to gain traction (Depledge, 2023, p.669). The transformation required to achieve these ambitious targets requires a serious rethinking of the use of a range of traditional military assets such as tanks, aircraft, and warships. Some of these efforts are likely to be a publicity stunt on the part of the military, but some Western armed forces have already voluntarily committed to reducing the use of such heavy military equipment. Meanwhile, other actors, even those indifferent to international climate agreements, will be forced to follow suit. Their doctrinal transformation will not be the result of any commitments made to their constituents or the international community but a consequence of the actual impact of climate change on military technology. For example, warmer air, which has less density, could damage the torque of military helicopters (NATO, 2023a, p.9; Scott & Khan, 2016, p.83). Oxidation of seawater can harm warships. Rising global sea levels also threaten naval installations from flooding. This is why, in recent years, Russia has been forced to reconstruct its Arctic military bases (Stoetman et al., 2023, p.35). However, whether these efforts are forced or voluntary is of little to no importance. In either case, the result is that the military can no longer rely on some traditional operational capabilities. As a result, the armed forces must update their doctrines to compensate for the widening gaps in their operational readiness (Depledge, 2023, p.683). Defense policy analysts have argued that the likeliest outcome of the armed forces' transformation is an increased reliance on a combined arms approach to warfighting; such multimodal doctrine is advantageous since it does not rely on a single military asset but combines different capabilities that can compensate for the lack of heavy

military equipment. For example, Barry, Fetzek and Emmett (2022) argue that a combination of drones, precision-guided missiles, and enhanced radar systems can compensate for the absence of a large squadron of fighter jets (p.19). Any actor with geopolitical ambitions needs to adapt to the new climate realities and develop skills in conducting multimodal military campaigns. Having reached operational readiness to conduct hybrid operations can potentially lead to applying this expertise in real life, thereby raising the risk of new hybrid wars.

Secondly, the fight against climate change also leads to the development of new dual-purpose technologies, which are a particular type of technological innovation. That is, some technology products originally developed to counter climate change can be repurposed into weapon systems. This increases the range of operational capabilities that actors can use in their multimodal military operations, which in turn raises the risk of new hybrid conflicts. The low-carbon economy requires significant innovation in new scientific and technological fields, such as geoengineering (Sovacool, Baum & Low, 2023, p.2). Various innovative technologies are being tested to capture carbon dioxide, “fertilise” the oceans, and change the Earth’s albedo in an attempt to gain control over the climate. Some scientists believe that the exploitation of these technologies could lead to conflict, as a country that can control the weather on a planetary scale becomes a significant threat to its geopolitical rivals. For example, Russia’s spraying of aerosols over the Arctic increases the tensions between Moscow and Washington (Sovacool, Baum & Low, 2023, p.11). However, in this scenario, new climate technologies only have an indirect role in increasing the risk of conflict. Some scholars argue that these technologies cannot have direct military applications and become actual weapon systems (e.g. Horton & Keith, 2021). Analysts hold this opinion because climate technology is not precise enough and, unlike a missile launcher, cannot “hit” a specific military target. However, this argument rests on a traditional understanding of military affairs (Chalecki & Fleming, 2021). If we consider the conceptual framework of hybrid warfare, this technical feature is not a disadvantage but a significant operational advantage. As it has become clear, today’s malicious state and non-state actors do not discriminate between military and civilian targets but rather seek to maximise the destructive effect of their attacks in order to wreak havoc on the enemy side. Besides, there are many historical examples of attempts to manipulate meteorological conditions in order to achieve tactical and operational objectives. For instance, during the Vietnam War, the US induced cloud formation so that muddy water could make the Vietnamese road network impassable. In this sense, we can conclude that new geo-engineering technologies could become a weapon for waging hybrid wars and, hence, increase the overall risk of such conflicts in the future (Sovacool, Baum & Low, 2023, p.4).

SCIENTIFIC AND POLICY IMPLICATIONS

The above demonstrated that climate change could increase the overall risk of new hybrid wars. However, needless to say, an increased risk of hybrid warfare is not the same as a root cause of a hybrid conflict. Put simply, the fact that an actor has achieved operational readiness to conduct hybrid warfare is not a sufficient motivation for using these multimodal skills in real-life situations. Future scientific works must analyze whether there are still particular cases where climate change has not just increased the overall risk of new hybrid wars but has been the driving force behind the decision to go to a hybrid war in the first place. The concept of “climate wars”, which has recently gained popularity, necessitates having such discussions. The term suggests that climate change is causing the emergence of a new type of conflict as a result of the fight over the Earth’s depleting natural resources (Welzer, 2012). Subsequent research should analyze the extent to which these climate conflicts are of a hybrid nature while taking into consideration that the concept of “climate wars” has been subject to serious scientific scrutiny.

Separately, further research is required in several other directions. Firstly, subsequent scholarly works could conduct a more in-depth analysis of a specific empirical case study. For example, the Arctic deserves special attention because this region is particularly susceptible to the effects of climate change. In recent times, it has also become an arena of increased hybrid activity. In 2021, the European Centre of Excellence for Countering Hybrid Threats published a report calling for increased Western attention to the Arctic (Conley & Wall, 2021, pp. 3-4). Secondly, the question of how hybrid warfare affects climate change must also be addressed. There are arguments in favor of the hypothesis that the relationship between the two phenomena is bidirectional. For example, Darbyshire and Weir (2021) suggest that operations against civilian targets, which are an integral part of hybrid conflicts, could trigger ecological disasters and thus contribute to environmental and climate change. In particular, attacks on oil rigs can lead to oil spills, while those on nuclear plants can have even more severe consequences. Last but not least, one must not discount the possibility that, under certain circumstances, climate change could also positively impact the resolution of hybrid conflicts. More specifically, there is a hypothetical scenario in which a natural disaster threatens the livelihoods of both sides in an ongoing hybrid war. There are analytical works supporting the hypothesis that such natural disasters can lead to the de-escalation of military tensions, although this is usually of a temporary nature (Ide, 2023, p.39).

Even if the relationship between hybrid warfare and climate change needs further research, this article’s findings are sufficient to formulate several policy recommendations. One could split those into two categories: recommendations for the political level and recommendations for the technocrat level.

Firstly, strong political will is required to fully integrate the topic of climate change into the security sphere and, in particular, into the fight against hybrid threats. Politicians at the national level, as well as senior officials on the international stage who have a say in the international agenda-setting, must start discussions on the topic. For example, the EU High Representative for Foreign Affairs and Security Policy and the NATO Secretary General must use their regular bilateral meetings, which are often well covered by national and international media, to highlight the importance of climate change in the fight against hybrid threats. Another key tool at the disposal of political leaders is to add climate change to the strategic documents that set the priorities for foreign and security policy. Most of these strategic texts still do not contain references to climate, although there have been positive cases in recent years. For example, the Strategic Compass of the EU, adopted in 2022 to set the EU's overall course of action in the field of security and defense, notes that climate change exacerbates security challenges (European External Action Service, 2022, p.38).

In addition to codifying climate change in all future strategies, political cabinets should also commission an assessment of already adopted strategic texts. Many authors argue that, as a result of the ignorance about the role of climate in security, a number of policies adopted in the past not only do not address this topic but contribute to further complicating the issue (Gilmore & Buhaug, 2021, pp.1-3; Schaar, 2018, p.14; Wakdok & Bleischwitz, 2021, p.5). For example, declaring specific habitats as protected areas is a popular method of combating climate change. Yet, in certain situations, such action could cause public disorder and serious security problems (Buhaug, 2016, p.334). In such cases, other methods of environmental restoration and protection should be used, which take into account the specific levels of hybrid risks of each geographical region.

Secondly, technocratic work is required to translate political ambitions into concrete measures. To begin with, traditional probability models that determine – in many cases inaccurately – the current level of security risks are insufficient. Events such as the September 11 attacks have demonstrated that proactive efforts are also needed to eliminate these risks before they materialize. One instrument in this direction is to assess how vulnerable critical infrastructure is to climate change (Briggs, 2012, pp. 1055-1056). Every military and civilian asset of strategic importance to national security should be made as resilient as possible to natural disasters so that it does not become an easy target for hybrid campaigns. However, objectively, no such asset can be made entirely resilient. Therefore, the military must develop expertise in conducting humanitarian operations to be able to respond quickly and adequately to any crisis or natural disaster (Scott & Khan, 2016, pp. 85-86). As a result, malign actors will have fewer opportunities to use to their advantage as part of an ongoing hybrid conflict.

However, the military is not the only stakeholder. As it became clear, hybrid wars are characterized by the involvement of the civilian population. In this sense, civilian experts and the population at large must be involved in the development of emergency preparedness and response plans. Ideally, resilience at the national and international levels must be achieved by means of strong civil-military cooperation, leading to synergies that benefit security and defense. Partnerships between the military and the private sector would also lead to a better understanding of the risks associated with new technologies, as the government sector has long lost the technological race to business and needs its advice regarding innovation. As this article suggested, even though they are still in their experimental phase, certain climate technologies can be militarized and used in hybrid warfare. A proactive approach is needed so that these technologies can be understood and used to the benefit, not the detriment, of national security. Hence, NATO must add climate innovations to its portfolio of emerging and disruptive technologies, which already include unconventional technologies such as quantum computing (NATO, 2023b). Last but not least, long-term efforts are required to increase media literacy on climate change. EU initiatives such as the European Digital Media Observatory, which is creating a network of fact-checkers, must pay special attention to climate disinformation to make the population more resilient against hybrid campaigns on such topics.

CONCLUSION

This article investigated how hybrid warfare is changing due to climate change. We hypothesized that climate change creates conditions for exacerbating already active hybrid conflicts and that it could increase the overall risk of new hybrid wars. The analysis's findings confirmed and provided additional context to the initial proposition.

Specifically, there are four mechanisms by which climate change could exacerbate an ongoing hybrid war. Firstly, climate change increases the vulnerability of various civilian assets. This opens up new opportunities for hybrid actors, who are generally willing and also have the operational capacity to target civilian infrastructure in order to disrupt enemy cohesion. Secondly, climate change increases the risk of both human trafficking and indiscriminate violence, which are other regular practices of hybrid warfare. Civilians become an easier target for malicious actors as a result of climate migration. Thirdly, in certain parts of the world, climate change is creating the conditions for an increase in the size of local militias and other irregular military formations, which are often at the forefront of hybrid wars. Having lost their livelihoods to climate change, more destitute people are being forced to militarize in order to secure new sources of livelihood for themselves and their families. Fourthly, to the lay audience, the

current climate change debate can easily be turned into falsehoods for the benefit of certain malicious interests. In recent years, climate disinformation has been a real tool for waging hybrid conflicts.

Meanwhile, climate change also increases the risk of new hybrid wars since it accelerates the development and adoption of doctrinal changes and technological innovations related to the conduct of multimodal or hybrid operations. This particular possibility is overlooked in existing discussions about the impact of climate on hybrid warfare and military affairs more generally. On the one hand, some traditional heavy military equipment becomes unusable due to climate change, for instance, due to the increased oxidation of seawater. These challenges require the adoption of a new generation of military doctrines with a focus on multimodal or hybrid operations, which do not rely on one specific military asset but combine various military means. On the other hand, the portfolio of different technological capabilities to wage hybrid warfare is increasing, as some innovations in climate technology can be militarized. For example, geoengineering technologies could become a hybrid weapon system since they could affect a vast territory where various civilian and military installations are located.

The abovementioned findings confirm that scientists and experts should pay due attention to climate change when investigating cases of hybrid warfare. Although the topic needs further research to establish and analyze all interrelationships between the two phenomena, the hybrid security risks that arise from climate change must not be ignored. They must be met by concrete measures at the political and technocratic level, which increase the whole-of-government resilience against hybrid threats.

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HYBRID WARS, MEDIA, AND SECURITY

Andrey Velchev

Abstract: The article reviews the trends and crucial milestones in developing contemporary warfare strategies and tactics. The main processes are exemplified through cases and the possible directions for further evolution of the information and hybrid wars are clearly outlined. The narrative reviews the set of social, political, economic, and cultural prerequisites for the transformation in warfare and outlines basic theoretical ideas for the change in contemporary wars. The author is launching a hypothesis that there are no other options in the practice of war than increasing the quantitative application of hybrid tools combined with ever-growing “weight” as a crucial element of military victory.

Key words: information war, hybrid threat, media, propaganda, war in social media

Резюме: Статията прави преглед на тенденциите и ключовите моменти в развитието на съвременните стратегии и тактики на водене на война. Чрез казуси са илюстрирани основните процеси и ясно са очертани възможните насоки за по-нататъшно развитие на информационните и хибридните войни. Направен е преглед на набора от социални, политически, икономически и културни предпоставки за трансформацията във военните действия и се очертават основните теоретични идеи за промяната в съвременните войни. Авторът лансира хипотезата, че в практиката на войната няма други възможности освен увеличаване на броя на хибридни инструменти, съчетано с все по-голяма им „тежест“ като решаващ елемент от военната победа.

Ключови думи: информационна война, хибридна заплаха, медии, пропаганда, война в социалните медии

Waging War with the Media and Through the Media

Specialized scientific research indicates that global conflicts and the media are interdependent at every stage of conflict. The media serve as tools for persuasion and mobilization during military operations, help conceal or legitimize what has occurred, shape perceptions of victory, and suppress criticism.

Analyzing recent global conflicts reveals that armed forces demonstrate advanced skills in managing media relations. Instead of confronting journalists directly, they increasingly use gestures of transparency as a means to dampen public and media vigilance. Experts on the subject emphasize that, like other parties involved in conflicts, the military has successfully adapted to the demands of media-driven societies. They understand the necessity of professionalizing mechanisms for effectively communicating with journalists.

Experts further argue that the media are now an integral part of warfare. Military strategy incorporates the media as one of its objectives, and military operations are accompanied by media plans. Media relations are handled by professionals, and armed forces invest in internal training to ensure their personnel grasp the importance of managing media processes and cultivating strong relationships with journalists. This approach enables the military to provide tailored “products” (reports, photographs, etc.) that meet journalistic needs.

Military forces have long integrated the principles of the information society and the interconnected global media network into their operational planning. Controlling how war is portrayed has become as strategically significant as disrupting enemy communications.

While military propaganda is not a new phenomenon, the role of the media in warfare has grown in importance and operational complexity. Special units are now dedicated to addressing issues related to information production before, during, and after operations. This is seen as essential, especially in an era where total censorship is viewed as politically harmful and less effective in democratic societies. Consequently, efforts are needed to assess what has changed and what remains constant in media management during war, taking into account the dual dynamics of the relationship between war and media, soldiers, and journalists.

The scientific examination presented here does not claim to offer definitive answers but aims to stimulate academic and practical debates about the role of communication in political processes, particularly on media battlefields.

A common argument supporting reservations about targeted efforts to build public engagement in communications highlights the risk of not only slowing down decision-making processes but potentially stalling them altogether. However, public engagement, combined with the development of online communication and internet tools, does not replace formal decision-making procedures but instead supports and enhances them. By considering specific local circumstances presented by stakeholders, public engagement contributes to better-informed decisions.

Moreover, ensuring the full participation of stakeholders, despite current challenges, ultimately proves more effective. It prevents more significant issues and costs that might arise from serious conflicts later. For example, the role of experts in the decision-making process – who understand the technical nuances of counter-terrorism policies within their hybrid dimensions – cannot be underestimated. These experts possess the capacity to prepare actionable solutions rapidly.

A better understanding of people’s needs, values, and preferences is also part of this expertise. This underscores how knowledge of media and online environments can enhance the efficiency and effectiveness of policies by facilitating the early identification of media-driven warfare across various types of media. This process considers the added value of solutions with strong legitimacy in the eyes

of affected communities. Such considerations are particularly crucial in modern public services (e.g., health and education), which increasingly rely on active beneficiary participation to achieve their objectives.

Engaging Stakeholders in Combating Hybrid Wars

It has already been established that the early involvement of stakeholders is a core principle of communication programs aimed at fostering public engagement in combating hybrid wars, online terrorism, and media-based conflicts. However, it is essential to recognize the potential of differentiated involvement of stakeholders (network participants) in different phases or aspects of policy-making, such as countering online threats and propaganda in specialized military operations. Full engagement does not imply uniform or mechanical involvement, but tailored participation based on the specific knowledge and evidence each party can contribute.

Unlike classical bureaucratic models, today's era of total interdependence and an increasingly educated and informed society demands the inclusion of "non-professionals" in public governance, particularly in addressing hybrid threats. This is especially true when addressing numerous specific, local challenges for which universal solutions do not exist.

This shift does not undermine the importance of expertise, which remains crucial in modern public governance. The challenge lies in redefining the role of the "expert" within the context of new realities shaped by media battlefields. This role can now be undertaken by a broader range of individual and collective entities capable of contributing valuable insights, even if they differ from traditionally formulated knowledge.

Challenges in Public Engagement

Disappointment with initiatives to build public engagement often stems from a gap between rhetorical promises and practical realities. Grand announcements about stakeholder involvement in hybrid warfare processes frequently fail to provide meaningful opportunities for influence. This disconnect highlights at least three critical factors: a lack of experience, overly simplistic understandings of policy-making, and insufficient practical alignment between goals and execution.

Another complicating factor arises when media battlefields and online warfare become part of large-scale projects with significant environmental, financial, and social impacts. These projects intensify the demand for precisely defined results and efficiency indicators, often quantified. Yet, the most critical aspects of communication are intangible and not directly measurable. Tying media warfare and communication programs to quantitative metrics can lead to criticism, disappointment, and even distortion of their purpose. In the context of scientific research, it should be noted that an important aspect of a country's overall security policy lies in its sectoral state policies. These policies aim to achieve eco-

conomic and social security, spiritual integrity, environmental security, information security, and more. Among these, the security sector policy remains the most crucial, with the primary role being played by the state's power structures such as the armed forces, police, gendarmerie, national guard, intelligence and counterintelligence services, border police, customs authorities, and others. Equally important is the way these entities participate in the system for safeguarding national security/1/.

“For the first time, people in America and around the world were able to watch live images of missiles approaching their targets and B-2 bombers heading toward Baghdad. The allied forces wanted to demonstrate the precision of their weapons and how ‘civilian-friendly’ the operation was compared to the conflict in Vietnam. As this was a revolutionary step in the presentation of military operations, it was well received first by the news agencies, and then by the citizens, who could thus feel as if they were in the midst of the battlefield.”

Developing Effective Methods

This calls for the development of methods and indicators that can account for indirect and non-quantifiable effects. This approach does not challenge the need for reliable tools to demonstrate “what works and what doesn’t.” Instead, it highlights the importance of combining direct and indirect methods to measure positive developments, including the accumulation of social capital, which is a key factor in successful policy implementation in military actions.

Concluding Remarks

Theoretical and practical examples highlight the influence of new media on audiences and the challenges in measuring this impact. Despite differing perspectives among journalists, the professionalism of Bulgarian journalism serves as an example of how debate and discussion can lead to growth and development.

Researchers agree that no one today can imagine life without the internet or online media and social networks like Meta, Instagram, LinkedIn, and TikTok. Their influence will continue to grow, reshaping audiences in the process. While the pace of audience change may not match the speed of network evolution, it is clear that people will adapt rapidly.

Media as a Double-Edged Sword

The exploration of the connection between war and media reveals how media can either become targets (wars against media) or serve as tools of war. Based on this distinction, four key developments are identified:

1. Photography, which opened the door to manipulation and staged management.

2. Live technologies, which challenge journalists' critical distance from the material they broadcast.
3. Pressure on media and globalization, which have transformed propaganda strategies by political and military authorities.
4. The growing disrepute of censorship prompts authorities to develop new methods of controlling journalists.

Information control has become a strategic military objective, comparable in importance to disrupting the enemy's communications. Military propaganda has long been a practice, but today it has evolved into a more sophisticated and significant tool. Special units have been established to plan and manage information flows before, during, and after conflicts. In democratic societies, where total censorship is unacceptable, this requires precision and balance.

In conclusion, the text emphasizes the need for further research and debate on the role of communications in war and the media to better understand the changes and enduring elements in the management of information.

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STRATEGIC COMMUNICATION: BUILDING PUBLIC ADMINISTRATION AND SOCIETAL RESILIENCE AGAINST DISINFORMATION NARRATIVES IN BULGARIA

Georgi Georgiev

Abstract: Strategic communication is critical in fostering transparency, trust, and societal stability, especially in combating the growing threat of disinformation in Bulgaria. Disinformation, which includes fake news, conspiracy theories, and manipulative social media campaigns, undermines institutional trust, polarizes society, and reduces civic engagement. Public administration faces challenges such as limited resources and citizen distrust, necessitating enhanced strategic communication capacities. The essence of strategic communication lies in its structured approach to planning, implementing, and evaluating communication efforts. To counter disinformation, public administration must prioritize resilience-building measures. This includes creating comprehensive communication strategies, monitoring media environments, and training staff to recognize and address disinformation.

Key words: strategic communications, disinformation, communication strategies

Анотация: Стратегическата комуникация играе съществена роля в изграждането на устойчивост на публичната администрация и обществото към дезинформацията в България. Настоящият текст разглежда стратегическата комуникация като целенасочен процес за планиране и изпълнение на комуникационни дейности, целящи доверие и прозрачност между институциите и гражданите. Основните принципи включват прозрачност, последователност, адаптивност и целева насоченост. Дезинформацията, включваща фалшиви новини, конспиративни теории и манипулативни кампании в социалните мрежи, е значимо предизвикателство за публичната администрация. Тя подкопава доверието в институциите, увеличава поляризацията в обществото и намалява гражданската ангажираност. Препоръчва се разработване на цялостни комуникационни стратегии, включващи мониторинг на медийната среда и обучения за разпознаване на дезинформация.

Ключови думи: стратегическа комуникации, дезинформация, комуникационна стратегия

Introduction

In today's dynamic information landscape, strategic communication plays a crucial role in ensuring transparency, trust, and stability within society. In Bulgaria, as in many other countries, disinformation has emerged as a significant challenge, threatening institutional resilience and social cohesion. This lecture

explores the fundamentals of strategic communication, its role in strengthening public administration and society, and approaches to countering disinformation narratives.

The Essence of Strategic Communication

1. Definition and Importance

Strategic communication is a purposeful process of planning, implementing, and evaluating communication activities to achieve strategic objectives. It forms the foundation for building trust between public administration and citizens.

2. Key Principles:

- **Transparency:** Providing transparent and credible information.
- **Consistency:** Aligning words with actions.
- **Adaptability:** Reacting swiftly to crises and changing conditions.
- **Target Orientation:** Focusing on priority societal groups.

Challenges Facing Public Administration

1. The Role of Disinformation

- **Definition:** Disinformation refers to deliberately disseminating false or manipulative information to achieve a specific societal impact.
- **Forms of Disinformation in Bulgaria:**
 - Fake news.
 - Conspiracy theories.
 - Manipulative social media campaigns.
- **Consequences:**
 - Undermining trust in institutions.
 - Polarizing society.
 - Decreasing civic engagement.

2. Vulnerabilities of Public Administration

- Limited resources for monitoring and responding to disinformation.
- Citizen distrust toward public institutions.

Building Resilience in Public Administration

1. Enhancing Strategic Communications Capacity

- Developing comprehensive communication strategies, including:
 - Media environment monitoring.
 - Crisis response preparedness.
- Training administrative staff in recognizing and countering disinformation.

2. Digital Transformation

- Implementing advanced technological solutions for online content monitoring.

- Establishing specialized communication teams to respond to misinformation swiftly.

3. Collaboration with NGOs and Media

- Joint initiatives to promote media literacy.
- Building partnerships with organizations combating disinformation.

The Role of Society in Building Resilience

1. Promoting Media and Information Literacy

- Educational programs on recognizing disinformation in schools and universities.
- Public campaigns on critical thinking and fact-checking.

2. Strengthening Civil Society

- Engaging civic groups and opinion leaders in efforts to counter disinformation.
- Encouraging active citizen participation in public life and discussions.

3. Increasing Trust in Institutions

- Public administration must demonstrate transparency and accountability.
- Regular engagement with citizens through innovative and accessible platforms.

Effective Practices to Counter Disinformation Narratives

1. Preventive Measures

- Early identification of disinformation campaigns through trend analysis.
- Active communication with citizens to refute false claims.

2. Proactive Approaches

- Creating positive narratives that build trust in the administration.
- Collaborating with influencers and media to disseminate verified information.

3. Technological Tools

- Utilizing artificial intelligence to detect fake news.
- Maintaining active and interactive communication platforms with citizens.

Conclusion

Disinformation poses a significant threat to the resilience of Bulgarian public administration and society. Strategic communication, rooted in transparency, proactivity, and partnerships, is a key tool to address these challenges. Bulgaria can build a more resilient and informed society through coordinated efforts by institutions, civil society, and the media.

WHAT KIND OF EURO-ATLANTIC POLICY DOES BULGARIA NEED IN THE CONDITIONS OF RUSSIAN HYBRID WAR?

Momchil Doychev

Abstract: The need to change the paradigm of the Euro-Atlantic world's politics in the conditions of an intensified Russian hybrid war against our civilization hardly needs to be proven. The article analyzes in particular the question of what the Euro-Atlantic policy of Bulgaria should be in the main sectors in the conditions of a Russian hybrid war. The axiological war against European values is analyzed. The European, not Eurasian, character of Bulgarian values is proven. These are the values of democracy such as freedom, equality, justice, power limited by law, mutual power control.

Key words: Euro-Atlantic policy, European values, Russian hybrid war, democracy, authoritarianism

Резюме: Едва ли има нужда от доказване необходимостта от промяна на парадигмата на евроатлантическата световна политика в условията на засилена руска хибридна война срещу нашата цивилизация. Статията анализира въпроса каква трябва да бъде евроатлантическата политика на България в основните сектори в условията на руска хибридна война. Изследвана е аксиологическата война срещу европейските ценности. Доказан е европейският, а не евразийският характер на българските ценности. Това са ценностите на демокрацията като свобода, равенство, справедливост, ограничена от закона власт, взаимен контрол на властта.

Ключови думи: евроатлантическа политика, европейски ценности, руска хибридна война, демокрация, авторитаризъм

Countering Russian hybrid aggression in the form of propaganda and information warfare is undoubtedly the main task of every Euro-Atlantic government of NATO and the European Union countries. Russian ideological aggression is directed primarily against European values, against those values of Europe, thanks to which the skeleton of our entire modern civilization was built. The goal of the new dictators and authoritarians from the East is the destruction of European democracy, whose values are actually basic European values. European values are the basic democratic values that have made modern civilization possible. Therefore, the war against European values aimed to destroy the foundations of modern civilization. Ultimately, we are talking about a new type of hybrid war waged by modern barbarism and modern dictatorships against the values of civilization.

Today, we are witnessing an absurdity – the fact that Bulgarian values are European, not Asian or Eurasian, is being disputed. This is the opinion of all the figures of the Bulgarian National Revival, who, unlike today’s so-called “revivalists”, were fighting for Bulgaria to return to Europe, not to leave it. There were such “revivalists” back then, but it is no coincidence that none other than Levski calls them “Bulgarian degenerates”. Can some seriously claim that Bulgarians are against the main European values – freedom, equality, legality, justice? Do Bulgarians want an unlimited tyrannical-despotic system, such as has existed in Russia for centuries? Do they want a dictatorship that generates misery, social inequality, violence against the people, and lawlessness? Do Bulgarians don’t want to have a legal, just state and equality before the law? Do they want a dictatorship, not a democracy?

In this sense, Bulgaria’s Euro-Atlantic policy is the policy that protects, develops and improves the value basis of the modern liberal-democratic civilization.

Today we are placed in a situation of hybrid warfare against European Bulgaria. In such a case, the question arises what kind of Euro-Atlantic policy is necessary? Does it only mean the need to fight back Russian aggression? And how to fight it back? Should this policy, as it has been so far, be only reactive? Shouldn’t it be much more active, i.e. not only to counteract, but also to transfer the battle to the territory of the “values” of the aggressor Russia?

For example, the lack of real proactive actions by the Bulgarian governments – apart from the expulsion of Russian spies disguised as diplomats – means that Bulgaria is still unable to successfully counteract Russian hybrid aggression, leading to the undermining of national security and the effective cooperation with the services of allied countries. This aggression is carried out on Bulgarian territory by Russian agents of influence and spy networks located in key institutions of the Bulgarian state – the presidency, parliament, the government, the security services, the police, the prosecutor’s office, the courts, the oligarchic businesses connected to Russia, in the media, and in the state and municipal administration.

There are several main areas in which an active Euro-Atlantic policy should be carried out: education, the media, state institutions, constitutional and legal framework, national security and defense, law enforcement and the judiciary.

Euro-Atlantic Policy in the Spheres of Education and Media

The Russian hybrid aggression against Bulgarian identity and Bulgarian European values is not recent, it has been going on for more than three centuries. It began with the policy of the Russian Empire, which aimed to prevent the Bulgarian Revival and the creation of the Bulgarian national identity in the struggles of the Bulgarian people for their own church and education, for autonomy, and for national liberation. For this purpose, several imperial myths were created. The

main one is that the Bulgarians are some indefinite Slavic Orthodox mass without their own identity, which is fit to be Russified and joined to the Empire. Hence the myth of “liberation, thanks only to Russia”, the frauds about “March Third”, about “fraternal aid”, etc.

Today, a century and a half later, Russian policy has not changed significantly. In the form of modern information warfare, it is aimed at insinuating that Bulgarians are not Europeans but Orthodox Slavs-Eurasians, that the national values of the Bulgarian Renaissance are not European but Eurasian, and that the Bulgarians’ Euro-Atlantic choice is wrong. Ultimately, democracy is denied, and the Putin model of a reactionary authoritarian dictatorship is proposed instead.

Unfortunately, history textbooks have not yet been cleansed of neo-communist and pro-Russian rhetoric and propaganda, as well as anti-European and anti-democratic clichés that have nothing to do with science and historical truth.

For this, it is necessary:

- Review and correction of all history textbooks, of all publishing houses, in which the existence of Bulgaria is viewed exclusively from the position and through the prism of Russian and Soviet interests. Inclusion in the curricula of primary and secondary education of the facts and circumstances surrounding the 1944 occupation of Bulgaria by the Red Army and the resulting consequences for Bulgaria – the massacre of the national elite, the plundering of Bulgaria’s economic resources, the destruction of the agricultural model, general economic ruin, and the three bankruptcies of socialist Bulgaria.
- Change in the curricula of geography and Bulgarian language and literature, by including events and authors that reflect the truth about the development of the country and the role of the ruling communist party after September 9, 1944, such as the writer Georgi Markov, the poet Georgi Zarkin, etc.
- Significantly wider advocacy of civic education for children throughout the entire educational cycle to build aware and active citizens who understand the meaning and logic of democracy and the roles of institutions in a democratic state, citizens capable of resisting the manipulations of populism and political fraud and not succumbing to the propaganda of authoritarian states and despotic political regimes.

A negative example so far is the policy of the Ministry of Education itself, which for more than three decades has resisted and does not allow the consequences of the Soviet occupation and the communist dictatorship to be studied in secondary schools to make an objective, not seemingly neutral analysis of these historical periods, preserving the pro-Russian and pro-Soviet mythology instilled for decades. Our education forgets its main function is not only to educate, but

also to educate democratic values and active citizens rather than indifferent and politically illiterate subjects. So far, only partial de-ideologization has been carried out in Bulgarian schools, but not true decommunization and de-Russification.

A proposal by a number of civil society organizations to create a “House of Memory for Communist Terror”, in which life in Bulgaria after September 9, 1944 would be presented through documents and materials from the recent past, has not yet been accepted by the state. Another proposal to remove all Soviet occupation monuments from the country’s territory has also not been implemented. It is still forbidden in history textbooks to write about the fact that the Red Army occupied Bulgaria, and it is forbidden to mention the crimes of the communist regime after this occupation.

In fact, broad segments of Bulgarian society maintain a state of political and general illiteracy, and this cannot and should not be underestimated.

The general state of the media environment in Bulgaria does not differ significantly from the state of education. The media in Bulgaria as a whole are under oligarchic supervision, and quality and serious journalism has been absent or severely limited over the past two decades. The current media environment is seriously eroding the democratic achievements of the 1990s and creating negative authoritarian-populist patterns and stereotypes.

Today, it cannot be openly said in the national media that Russia is an aggressor and enemy of Bulgaria, not even today, but at least since it existed as an empire. Targeted pro-Russian, anti-democratic, anti-European, and, therefore, anti-Bulgarian propaganda is being carried out with impunity through various media channels. The Bulgarian institutions that should prevent this aggression are either blind or bribed not to work in this direction. A specific example is the Council for Electronic Media, which only registers but does not prevent or sanction the massive Russian anti-democratic and anti-Bulgarian propaganda in the media. In this form, it is obvious that the CEM openly protects and supports the Russian disinformation aggression against Bulgaria.

Therefore, it is necessary to immediately stop the targeted Russian propaganda in the national media by Russian agents of influence, representatives, and representatives of the so-called “Fifth Column”, supporting the war of the criminal Russian dictatorial regime against Ukraine. It is necessary to create a new state body that would coordinate and implement counteraction to the Russian propaganda aggression and in particular the “information-psychological special operations” that the Russian Federation carries out against the EU, NATO and Bulgaria from Bulgarian territory.

To this end, it is necessary to create a new institution for parliamentary, institutional and public control over the distributed media content in the Bulgarian language not only in some electronic media, but in all information networks.

Euro-Atlantic constitutional changes

Constitutional changes today are necessary due to the exhaustion of the constitutional model imposed after the collapse of the communist dictatorship and the beginning of the democratic process. This formally democratic constitutional model failed to overcome the heavy legacy of the communist lawless state and create a just, legal state.

As the communist state transformed into a post-communist one after 2001, the purposeful replacement of democracy with an oligarchic state began. Instead of aiming at finally overcoming the communist police state, the post-communist state excludes the possibility of a just state, a state of a “pure and holy republic,” which was the testament of Levski and all our national heroes.

The last two years’ experience has shown that changes in the Constitution should not be conjunctive and palliative. The changes adopted in 2023-2024 do not reflect the new realities in which we live today. There is no reasonable alternative to changing the ways government institutions interact. The President of the Republic cannot, through his caretaker governments, replace the parliamentary republic with a presidential government in a crisis situation and change the state’s direction without a parliament to oppose these power exercises. At the same time, the authorities are so divided and opposed to each other that we are left with the impression of their common subordination to an external illegitimate and irresponsible power center – the so-called backstage or “deep state”.

The fight against the internal enemy – the Bulgarian pro-Russian oligarchy and Russian dependencies in all public spheres is, first and foremost, a strategic goal. Without this, there is no way – for example – to chase Russian spies and not to catch Bulgarians embedded in the institutions, who have placed themselves in the service of a foreign enemy state, which has declared us an enemy and is waging an undeclared, but increasingly undisguised hybrid war against us.

Corruption cannot be limited without institutional change, including through intellectual and political lustration of the Russian communist-police oligarchy, which is closely linked to Russian dependence, organized crime, the media under control, education, local government, and the legal-security and judicial authorities themselves. There is no reasonable alternative to expelling all Russian agents of influence from state institutions.

The adoption of a new Constitution of Bulgaria, which, among other issues, affirms Bulgaria’s democratic and Euro-Atlantic path of development, should establish a parliamentary republic by abolishing the direct election of the president and replacing it with an election with a constitutional majority by the National Assembly. Thus, there will be no more institutional wars between the president and the government. This is the opposite of what pro-Putin ideologists are now advocating – the creation of a presidential republic in which the National Assembly would play a limited role.

The half-hearted constitutional changes made a year ago did not abolish the retrograde institution of the president's "caretaker government." It can remain, but the government should play such a role in resignation until a new regular government is formed. The experience of recent years shows that a caretaker government should not make strategic and economic decisions without parliamentary control. It should only work on organizing and ensuring fair and lawful elections.

Recent experience shows that Bulgaria's transformation from a "republic with parliamentary government" into an effective classical parliamentary republic cannot be achieved without reducing the president's powers, improving parliamentary control over the government, and simultaneously affirming the executive branch's right to make independent decisions without constantly expecting sanctions from parliament.

Changes in the methods of electing the Prosecutor General, reducing the mandate of the Prosecutor General from 7 to 5 years, as well as changes in the election of members of the Constitutional Court are also imperative.

The proposal to amend the Constitution so that membership in NATO and the EU is written into the Basic Law of the Republic is reasonable and should be considered and adopted.

Euro-Atlantic Institutional Reform Policy

Institutional reform should be carried out based on the system of checks and balances of power. Constitutional changes should guarantee the functional independence of government branches and the public and institutional control of their competence and responsibility to society. In the current constitution, government branches are, in practice, separated but also opposed to each other without the possibility of effective mutual institutional and public control. This must be decisively changed with new constitutional changes that are not palliative in nature.

The very serious reform of law enforcement and the judiciary is needed. It can begin with the "Extension and Supplement to the Law on Declaring the Communist Regime in Bulgaria as Criminal". This is a current law of the Republic of Bulgaria, adopted by the XXXVIII National Assembly on April 26, 2000, and promulgated in the State Gazette, issue No. 37 of May 5, 2000, but without any legal consequences. This should change with the proposed changes and the adoption of a regulation by the Council of Ministers for their implementation.

Euro-Atlantic foreign policy

Euro-Atlantic foreign policy means strengthening and expanding Bulgaria's role in the EU and NATO. This means that Bulgaria should fundamentally change its approach towards the common foreign policy of the alliances in which it participates. There is no reasonable alternative to the transition to a proactive,

not reactive foreign policy. Bulgaria should play an increasingly positive, active, and constructive role with initiatives for developing European and Euro-Atlantic cooperation in Southeastern Europe and the Black Sea region, in the Mediterranean, in Europe, and throughout the world. It is high time to overcome the inferiority complex imposed on us during the Soviet-communist occupation, that we are a small and insignificant country and nothing depends on us.

Specific initiatives in this regard are:

- Radically improving relations with our immediate neighbors in the EU and NATO – Greece and Romania and with the neighboring bordering countries with us in NATO – Turkey, North Macedonia, and Albania. Bulgaria should also change its policy approach to neighboring Serbia, which is not a member of either NATO or the EU and is pursuing a pro-Russian and essentially anti-Bulgarian policy, including in North Macedonia.
- A proposal for a Balkan Euro-Atlantic Alliance between the three countries, members of NATO and the EU – Bulgaria, Greece and Romania to solve the problems with the EU integration of the RSM and Albania, as well as the prospects for the future accession to the Euro-Atlantic structures of Ukraine and Moldova. It is in Bulgaria's interest to accelerate the European and Euro-Atlantic integration of the mentioned countries while strictly observing the criteria for European membership.
- In this regard, even closer cooperation with Romania and Greece is necessary on the basis of our common interests – for Southeast Europe to be part of Schengen and the eurozone. Expanding cooperation with Greece and Romania on the basis of our common interest in eliminating border formalities can begin with the gradual introduction of common border control with Greece and Romania until our full accession to Schengen. Joint policies with Romania for the gradual optimization until the complete abolition of border formalities on the borders of Bulgaria with the Republic of North Macedonia and Romania with the Republic of Moldova.
- The gradual reduction of border formalities and improvement of joint control without border formalities, expansion of checkpoints, and opening of new ones in the north-south direction – to Greece and Turkey and east-west – to North Macedonia and Serbia.
- Active support for the process of the gradual accession of the Western Balkan countries to NATO and the EU through enhanced bilateral and multilateral regional cooperation.

- Directing national and European investments towards the construction of the strategic Corridor No. 8 for Bulgaria with a highway and high-speed railway line Sofia – Skopje – Durres;
- Active and consistent work of state institutions for the development of the “Three Seas” project, with the aim of building a strong line of cooperation in the north-south direction between the countries of the Baltic, Black, and Adriatic Sea regions;

Continuing targeted efforts to include Bulgaria in the U.S. Visa Waiver Program (VWP).

- On the basis of Art. 11 of the Vienna Convention on Diplomatic Relations, the composition of the diplomatic mission of the Russian Federation in Bulgaria should be reduced to the number of the composition of the Bulgarian diplomatic mission in the Russian Federation.
- Extraordinary attestation and selection of all Ministry of Foreign Affairs employees. Introduction of a mandatory confirmation hearing before the Foreign Policy Committee of the National Assembly of the Republic of Bulgaria for each ambassador and consul general nominee. These appointments should take place only after the National Assembly has given its mandatory approval.
- Declaration of incompatibility with holding a state or a technical position in the field of foreign policy, defense and security, due to a civil marriage or de facto cohabitation with a citizen of a country with authoritarian rule.

Euro-Atlantic policy in the spheres of national security and defense

For the last 20 years, we have been reporting serious problems with the deliberately delayed modernization of the Bulgarian professional army. Bulgaria was the last to professionalize the army. On the other hand, rearmament in all areas with modern Western weapons was extremely delayed. We have not yet received modern American aircraft, missile defense systems, and new modern defense systems such as drones and anti-tank missile complexes. Moreover, Russia still has enclaves in our territory, such as the Rosenets oil depot and the Kamchia Sports and Recreation Complex.

The lag and blocking of real reforms, which are necessary for the de facto integration of NATO in the field of defense, have led to a lag in a number of other, non-military areas of modernization.

The rearmament of the armed forces that began was not subject to a well-thought-out and elaborated security and defense strategy, to a military strategy

resulting from it followed by a strategic plan for the modernization and restructuring of the entire security sector, in particular the armed forces.

Instead, a number of opaque and highly corrupt transactions took place that are not justified from the point of view of whether they are a priority for national security and for the fulfillment of allied commitments.

Membership in the NATO Alliance is an occasion for building national self-confidence, because it is the fruit of the own efforts of the leaders and parties of change, of that part of the political elite that is faithful to the covenants of Rakovski, Levski, Botev, Stambolov, in fact, of all our national heroes, for Bulgaria to be a pure and holy European republic.

Thus, despite the enormous resistance and obstacles of all kinds, Bulgaria is a member of the NATO Alliance, which brings many new opportunities and continues to move the country in the right direction. In this regard, it is necessary to accomplish:

- Immediate and accelerated rearmament of the Bulgarian Army. Urgent disposal of morally and physically obsolete, inefficient and dangerous for exploitation Soviet weapons and combat equipment. Together with the allied countries and with maximum use of NATO agencies, acquisition and maintenance of modern weapons and combat equipment. Any increase in defense spending should be linked to a deep reform of the Ministry of Defense and the Armed Forces to guarantee the personal responsibility for the success in defense management, measured in the combat capability of the Bulgarian Armed Forces.
- Provision of the necessary weapons, ammunition, and equipment from the Bulgarian Army's available reserves for Ukraine, which is defending itself from Russian aggression. Demanding political responsibility from the individuals and political forces sabotaging NATO's policy of providing immediate assistance to the Ukrainian people.
- Expanded and accelerated inclusion of Bulgaria and the Bulgarian Armed Forces in all regional initiatives and structures of NATO, contributing to strengthening the Alliance's combat potential. Deployment of NATO forces and assets on Bulgarian territory to compensate for the existing deficits in combat capabilities, through a replenished, combat-capable and combat-ready land brigade, an Air Force squadron, an air and missile defense system, including modern radars and anti-ship coastal missile systems.
- Ensuring an increased presence of NATO forces in Bulgaria – land, air and naval, in order to strengthen the national and allied deterrence and defense potential. Transformation of the Alliance's emerging bat-

the group into a multinational land brigade, with all the necessary combat support and support elements. Active participation of Bulgaria in the construction of NATO's forward presence in its Southeastern flank.

- Extraordinary attestation and selection of the senior command staff of the Bulgarian Armed Forces. The Defense Committee of the National Assembly should conduct confirmation hearings to obtain the approval of the National Assembly for each nomination. The introduction of a mandatory legal requirement for such a procedure for all future appointments and promotions of the senior officer staff of the Bulgarian Armed Forces.
- Radical change in the security systems in the Ministry of Interior, with all employees being subjected to rigorous attestation for competence, honesty and professional ethics.
- Purging the Ministry of Interior and the security services of Russian dependencies. Investigating all possible breaches in the security services over the years and clarifying all suspicions of breaches in the services by foreign agents.
- Extraordinary attestation and new rigorous selection of all senior employees in the Ministry of Interior, DANS, DAR, NSO, as well as all other special services with responsibilities and obligations for protecting the national security of Bulgaria. Returning Military Intelligence from DANS to the Ministry of Defense.
- Conducting continuous parliamentary control over the special services and conducting periodic checks for loyalty. Attestation of employees in these services by appearing before the National Assembly to answer questions and receive approval for appointment and/or career growth.
- Establishment of Civil Boards, controlling the legality of the actions of the Ministry of Interior, the State Security Agency and the National Security Agency, composed of persons with impeccable civic authority.
- Increasing control over the issuance of tourist visas to Russian citizens, with particular attention paid to the motives for visiting Bulgaria by men between the ages of 18 and 60, capable of handling firearms and explosives and who have undergone military training;
- Verification by the Bulgarian special services of all Russian citizens who are owners of real estate in Bulgaria and have received visas with a simplified regime for entry into the country, for possible connections with the armed forces and special services of the Russian Federation;

- Creation of a specialized database in the National Security Agency, keeping a record of all real estate on the territory of the Republic of Bulgaria, owned by the Russian Federation and the countries of the former USSR and by private individuals – citizens of these countries. The database should also include luxury movable and immovable property, yachts, aircraft and the like. In this regard, we demand the immediate confiscation of the Kamchia State Security Center, which, in violation of the law, is still owned by the city of Moscow and which the Putin regime is using to create a Russian spy center covering Southeast Europe. The closure of the RKIC in Sofia and the House of Moscow in Sofia should also be immediately implemented.
- Immediate suspension of broadcasts on the territory of Bulgaria of all Russian television channels, as well as termination or blocking of the activities of dozens of Russian disinformation websites in Bulgarian;
- De-Putinization of the Bulgarian media and social networks. Closure of the CEM, which has become a defender and conduit of Russian hybrid influence on the Bulgarian media. Inspection of all television channels for broadcasts carrying out Russian hybrid propaganda against European and democratic Bulgaria.
- Active counteraction to Russian subversive hybrid propaganda by creating a Center for Combating Russian Anti-Bulgarian Propaganda. Given that the Russian Federation has declared Bulgaria an enemy state and is conducting informational-psychological special, i.e. aggressive operations in Bulgaria, there is no reasonable alternative to outlawing pro-Russian political parties and agents of influence in the state administration. It is necessary for the security services to work on revealing the mechanisms for their illegal financing and their connections with the Russian embassy, the GRU and the FSB.
- Restoring the Bulgarian character of the Bulgarian Orthodox Church. Establishing Bulgarian control over the so-called “Russian Church in Sofia”.

The initiative of CIVIL TRIBUNAL TO CONDEMN THE CRIMES OF THE BKP/BSP AS A TERRORIST ANTI-BULGARIAN PARTY should continue.

To this end, we propose changes to the LAW ON DECLARING THE COMMUNIST REGIME IN BULGARIA A CRIME, published in the State Gazette, No. 37 of May 5, 2000, which are directly related to the restoration and re-naming of cities, villages, streets, enterprises, military units and the removal of totalitarian propaganda monuments praising the Soviet occupation, the

totalitarian dictatorship and the subordinate position of Bulgaria to Russian and Soviet interests. The law should place all parties or public organizations originating from or connected to the former communist party and its repressive secret services, dependent on and serving foreign, anti-European, anti-democratic and anti-Bulgarian political and economic interests under a special surveillance regime.

Euro-Atlantic Policy for Energy Independence of Bulgaria from Russia

- Revision of all energy agreements concluded with the Russian Federation, including revision of terms and conditions of agreements for Russian gas transit through Bulgaria. Application of the diplomatic principle of reciprocity.
- Disclosure and publication of the losses suffered by Bulgaria as a result of the almost complete Russian energy dependence over the past 70 years.
- Removal of all artificially created obstacles to the development and use of Bulgarian gas and oil deposits – on the territory of the country and in the special economic zone in the Black Sea. Placing gas and oil storage facilities under state control.
- Removal of the moratorium on the exploration of shale gas deposits.
- Filing cases in the International Court of Arbitration against Russian energy monopolists for lost profits. Filing cases against the Russian Federation for the huge losses resulting from the systematic violation by the Russian side of agreements concluded with Bulgaria.
- Ending the monopoly position of Lukoil on the fuel market in Bulgaria by creating conditions for real competition and stimulating the import and distribution of petroleum products with supply sources other than the Russian Federation.
- Placing the Russian company Lukoil Neftochim Burgas (and any possible successor) under complete state control and supervision. Conducting a comprehensive audit for the last 15 years. In case of established damages in the billions due to incorrect tax and accounting practices, seeking criminal liability for the relevant management bodies.
- Final termination of the project for the construction of the Belene NPP.
- Starting active work on the expansion of the Kozloduy NPP and replacing the Russian nuclear fuel with another produced by a EU member state.

Euro-Atlantic policy regarding symbols

In domestic policy, the first priority is to overcome the chronic political crisis caused by the growing power of the pro-Russian nationalist and populist parties in the National Assembly and the inability of the systemic Euro-Atlantic parties to reach an agreement on the country's governance.

Overcoming this crisis cannot be done while the Bulgarian coat of arms continues to stand above the parliament building itself, the former party house of the Bulgarian Communist Party, as a remnant of Soviet-communist symbolism. This symbolically means that in practice, 35 years after the beginning of the changes, there is no Euro-Atlantic policy of unconditional and complete de-Russification and de-communization of the country. This cannot be done without removing all communist, Soviet and Russian symbols that dominate everywhere in the public space of the entire country.

The dismantling of all propagandist Russian and Soviet occupation monuments can be regulated by the "Extension and Supplement to the Law on Declaring the Communist Regime in Bulgaria as Criminal", which does not yet have legal consequences. This should be changed with proposed new changes, expanding the minimal changes voted on first reading in parliament in 2016, but not finally adopted. This is also related to the adoption of regulations by the Council of Ministers for the implementation of the proposed changes.

Restoration of the old Bulgarian names (or renaming when necessary) of cities, villages, streets, boulevards, enterprises, cultural sites, throughout the country still bearing the names of Russian-Soviet figures and communist figures who placed themselves in the service of a foreign enemy state.

Example: Renaming of sites, towns, villages, streets, educational institutions, localities, etc. bearing the names of outspoken Bulgaro-haters or national traitors such as Count Ignatiev, Ivan Aksakov, Radko Dimitriev, Lenin, Gen. Zaimov, Nikola Vaptsarov, Ivan Vinarov and many others.

Example: One of our demands is that the 3rd AirForce Base should no longer be associated with the name of the Bulgaro-hater, Russian chauvinist, and anti-Semite Gen. Ignatiev, but with the name of the Bulgarian national hero, the fighter pilot Spisarevski.

Example: The Atlantic Council of Bulgaria has long proposed that the Naval Academy "N. Y. Vaptsarov" in Varna should not bear the name of a person who betrayed his Motherland during war and placed himself in the service of an enemy terrorist state, but of the first and only Bulgarian Rear Admiral Ivan Variklechkov, commander of the Bulgarian Navy from 1937-1939.

Example: It is shameful to have a Memorial Complex near Sozopol dedicated to the memory of the crews of Soviet submarines who died off the coast of Bul-

garia during World War II, including the terrorist submarine that torpedoed the Bulgarian civilian ship Struma in the winter of 1942.

And why is there no Memorial for those German submarines that saved Varna and Balchik from the all-out shelling of the Russians during World War I and Soviet warships during WWII? For them – not a memorial, not a museum, not even a story about their saving role!

Restoration of the destroyed dozens of Bulgarian heroic, soldier and other monuments to deserving Bulgarians after the Soviet occupation and the establishment of a totalitarian communist regime – e.g. The war memorial in Sofia is known as the “Monument to the Fallen in the Wars of 1885, 1912-1913 and 1915-1918”, the impressive Macedonian Chetnik Monument in Gorna Dzhumaya/Blagoevgrad and many others described in previous ASB appeals.

Here are some other practical measures:

- The city of Borisovgrad (named after St. Tsar Boris the First-Baptist) – renamed in 1947 to Parvomay. (The same should apply to several villages with this non-Bulgarian name, to which the historical Bulgarian names should be restored); The city of Zhostovo – named after the national hero General Zhostov, renamed in 1947 to the communist activist D. Hadzhidimov; Kitka Mountain – until 1934 Alibotush – renamed in 1947 on Slavyanka.

- the town of Aksakovo, named after the Bulgaro-hater Aksakov, and the brilliant Bulgarian writer Zahariy Stoyanov, who opposed his anti-Bulgarianism.

- the village of Graf Ignatievo to adopt the name of Metropolitan Methodius Kusev, and the Third Air Base there – the name of the Bulgarian military hero pilot Spisarevsky.

For every Bulgarian patriot, it is clear that the largest Orthodox church in the country should not bear the name of a foreign ruler with controversial sanctity. Renaming/restoring the name of the church-monument “St. St. Cyril and Methodius”, now bearing the name of Alexander Nevsky – a Mongol vassal and a dubious Russian saint who has nothing to do with the history of Bulgaria. The church could restore its name to the holy brothers Cyril and Methodius, which it bore from 1916 to 1924, or adopt the name of St. Tsar Boris the Baptist, without whom there would be neither “Slavic” nor Bulgarian writing.

It is also unacceptable in an independent state that the largest monuments are dedicated to a foreign army that occupied the country in 1944 and established a criminal totalitarian regime. These monuments should also be removed or moved to Museums of Totalitarian/Socialist Art, and in their place the Prince’s Garden should be restored in its original form or a monument to the Invincible Bulgarian Army should be erected. The monuments to the occupying Soviet army in Plovdiv, Varna, Burgas, Ruse, Shumen and everywhere else should be removed.

In Sofia, for example, we propose to restore the name of Samokovska Street, a boulevard and a metro station named after the French Stalinist and pseudoscientist Joliot-Curie, to rename it after the names of Marie and Pierre Curie – the real scientists, with so many contributions to the science of physics. In Sofia, there are no monuments to the founder of the Bulgarian state, Khan Asparuh, and to any other Bulgarian ruler, except for the recently erected monument to Tsar Samuil. We do not have a Memorial to the Bulgarian Heroes, the Memorial Plates of the First Sofia and Sixth Pleven Regiments have not been restored, as well as many other Bulgarian military monuments demolished after the Soviet occupation and the establishment of the communist dictatorship.

In practice, there is almost no Bulgarian village that has changed the Russian-communist names of its streets – the main street continues to be Lenin, other streets bear the names of Georgi Dimitrov, Vasil Kolarov, Todor Zhivkov, Vladimir Poptomov, Ivan Mihaylov, Vasil Demirevski – Zhelyo, Stanke Dimitrov, Nikola Vaptsarov, Tsola Dragoycheva – a street and monument in Byala Slatina, Lilyana Dimitrova, Malchika, Tolbukhin, Zhukov – a monument in Strelcha, a monument to the Russian Admiral Ushakov; September 9; September Uprising; Commune and Communards, Bolshevik; Bulgarian-Soviet Friendship, Radko Dimitriev, Marin Drinov, Vasil Drumev, Dragan Tsankov and other Russophiles who pose and serve Russian, not Bulgarian, interests while holding public office.

It is urgent to remove the remains of the Soviet-communist coat of arms above the National Assembly building – in the former communist party house – a symbol of the dictatorship and the “limited sovereignty” of Bulgaria after the Soviet occupation.

Restoration of the Prince’s Garden in the form it had before it was destroyed with the monument to the occupying Red Army in 1952-1953. The remains of the monument should be transferred to the museum of totalitarian art.

Soviet occupation monuments and symbols should go to the museum and be exhibited in such a way that they show how a foreign state should not be allowed to rule Bulgarian public space again.

PART 4
STUDENTS' ESSAYS

ЧАСТ 4
СТУДЕНТСКИ ЕСЕТА

20 YEARS BULGARIA IN NATO: ENHANCING SECURITY THROUGH EDUCATION AND TRAINING

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1. NATO's Strategic Commitment: Strengthening Unity through Collective Defense, Education and Training.

NATO's fundamental and enduring resolution is the unity of Alliance efforts for collective defense and for the preservation of peace and security³⁹. Achieving this resolution requires collective and dedicated efforts from decision-makers and action-takers among allies, united in their commitment to the core principles of individual liberty, democracy, human rights, and the rule of law. As an inter-governmental organization with both political and military dimensions, NATO's latest Strategic Concept emphasizes its three core tasks: deterrence and defense, crisis prevention and management, and cooperative security.

To fulfill these three core tasks, the civilian and military components of all 32 NATO allies must collaborate and integrate their efforts to safeguard freedom and security. One essential approach to achieving this collective commitment is through Education, Training, Exercise, and Evaluation activities. These programs aim not only to enhance the cohesion, effectiveness, and readiness of NATO forces but also to uphold integrity, ensure robust deterrence, and maintain a decisive military advantage.

Since NATO's inception in 1949, collective education and training have become essential to the Alliance's capacity to provide security. This expansion has occurred both geographically, with NATO collaborating with numerous countries, and institutionally, through the establishment of NATO's Allied Command Transformation in Norfolk, Virginia, dedicated to leading transformation across the Alliance. By continuously adapting its education and training events and introducing new concepts and capabilities, NATO ensures its readiness to respond effectively to emerging security challenges.

NATO identifies four core dimensions in its ongoing transformation process. The first dimension encompasses education programs designed to enhance individual knowledge and skills while developing competencies to address a variety

³⁹ NATO Education, Training, Exercise and Evaluation Policy (2023)

of challenges. The second dimension focuses on individual training, which hones the specific skills required to perform designated tasks and duties. Next is collective training, which builds upon the knowledge gained in individual training by applying it practically during group engagements. Finally, the exercises serve to refine this training by testing the acquired knowledge through scenario-based live or computer-assisted simulations .



NATO Education & Training Facilities and Centers of Excellence Map

DISCLAIMER: The map is used only for NATO E&T information and is provided by Google Maps. Some borders and geographical names may not reflect NATO's standards and agreed documents.

(source: <https://www.act.nato.int/activities/nato-education-and-training/>)

Currently, NATO operates seven education and training facilities. NATO Defense College in Rome, Italy focuses on strategic-level education, including international security trends, and trains senior commanders. The School Oberammergau in Germany provides operational-level training, covering areas like joint planning, defense, logistics, communications, and civil-military cooperation. NATO Maritime Interdiction Operational Training Centre in Greece offers theoretical and practical training, including simulations, for maritime and special operations activities. The training of military and civilian personnel on NATO's communication and information systems is executed by NATO Communications and Information Academy in Portugal. Joint Warfare Centre in Norway has a focus on operational-level training to ensure interoperability and integration. Tactical-level commanders and Joint and tactical-level interoperability for NATO and partner forces are trained is the Joint Force Training Centre in Poland. And last but not least, Joint Analysis and Lessons Learned Centre in Portugal leads

in analyzing operations, training, and experiments, and shares lessons learned to improve strategic and operational effectiveness.

To elevate the quality of education and improve the effectiveness of training, NATO collaborates with a range of educational and training providers sponsored by member countries, national authorities, or civil organizations. These entities serve personnel from NATO, partner nations, and other organizations, fostering a comprehensive approach to professional development and training.

NATO's Centers of Excellence (COEs) are a prime example of this collaboration, alongside national, multinational, and non-governmental institutions such as military schools and universities. Sponsored either nationally or multi-nationally, COEs provide specialized expertise to support NATO's transformation initiatives. They enhance training, education, and doctrine development, promote interoperability, and test concepts through experimentation.

2. Enhancing NATO's Strategic Goals: The Pivotal Role of Centers of Excellence (COEs).



COEs serve as specialized hubs of expertise, focusing on specific functional areas where they act as subject-matter experts. Their work is organized around four key pillars and their contributions to doctrine development, lessons learned, education and training, exercise involvement, and experimentation are vital tools for driving NATO's transformation and ensuring its continued adaptability and effectiveness.

Though not directly funded by NATO or integrated into its command structure, COEs are nationally or multi-nationally supported. They form a collaborative network that promotes internal and external information exchange, enhancing the Alliance's capabilities. With 30 NATO-accredited COEs nowadays, these institutions play a critical role in advancing the Alliance's strategic goals.

Centers of Excellence – Locations



Source: https://www.nato.int/cps/en/natohq/topics_68372.htm

The NATO COEs are guided by a series of vital documents, ensuring their continued alignment with the Alliance’s goals. These policies provide structure, define processes, and reinforce the COEs’ role as drivers of innovation and transformation within NATO. MC 0685 – Military Committee Policy for Centers of Excellence (4 December 2019) is a cornerstone policy, updated in 2019, replaced the original 2003 concept. It outlines the framework for NATO-accredited COEs. MCM-0086-2022 (23 June 2022) establishes the criteria for COE assessment, covering initial accreditation, periodic reviews, and re-accreditation. There are three directives – BI-SC DIR 080-001, HQ SACT Directive 80-03 and HQ SACT Directive 80-05 provides Coordination guidelines between the nations and the COEs with the NATO’s strategic commands and comprehensive guide for establishing and accrediting COEs.

A NATO-accredited Centre of Excellence (COE), commonly known as “NATO COE,” undergoes three key steps to gain its designation. The first step involves a formal establishment by the Supreme Allied Commander Transformation. The second step is obtaining official endorsement from NATO’s Military Committee. Finally, the ultimate approval is granted by the North Atlantic Council (NAC), NATO’s highest political decision-making body.

Established in accordance with officially endorsed and approved NATO policies and directives, the NATO Crisis Management and Disaster Response Centre

of Excellence (CMDR COE) operates within the Republic of Bulgaria. As a proud member of NATO's network of Centers of Excellence, the CMDR COE serves as a vital hub for expertise, promoting the exchange of information, knowledge, and best practices in crisis management and disaster response. Collaboration is central to its mission, with the CMDR COE committed to fostering constructive partnerships and cultivating a dynamic community of interest. Through an inclusive, transformative, and capability-driven approach, the Centre aims to create the conditions necessary for a collaborative and effective response to crises and disasters, thereby reinforcing NATO's adaptability and resilience.

3. CMDR COE: Enhancing NATO's Crisis Management and Disaster Response Capabilities through Expertise, Education and Innovation.



CMDR COE, based in Sofia, Bulgaria, was officially established on 28 AUG 2013, and gained NATO accreditation on 31 MAR 2015, becoming the 21st NATO Centre of Excellence. It also achieved international status as a NATO Military Body under Article 14 of the Paris Protocol. It currently has one Framework Nation – the Republic of Bulgaria, and four Sponsoring Nations – the Hellenic Republic, Hungary, the Republic of Poland and Romania.

The mission of the CMDR COE is to serve as a catalyst for improving the crisis management and disaster response capabilities of NATO, its member nations, and partner countries through collaborative partnerships. To achieve this mission, the Centre offers subject-matter expertise and advisory support in crisis management and disaster response, contributing to both doctrine and concept development as well as experimentation. This is essential for developing capabilities that prepare for, predict, prevent, and respond to crises and disasters.

The expertise of CMDR COE extends beyond the CMDR domain, encompassing key cross-cutting topics such as societal resilience, climate change's impact on military operations, gender perspectives in decision-making, crisis diplomacy, radiological incident management, building integrity, and cognitive warfare. Although not an operational entity, the Centre plays a pivotal role in advancing NATO's capabilities through research, analysis, and tailored education and training for senior-level experts at strategic and operational levels.

As unconditionally accredited institution and quality assured by NATO the CMDR COE supports concept development, experimentation, doctrine creation, standardization, and the application of lessons learned. With a strong focus on innovation, the Centre leverages modern technology through its state-of-the-art

operational laboratory, equipped with advanced testing and validation capabilities. This unique combination ensures the CMDR COE remains a key contributor to enhancing NATO's readiness and adaptability in addressing global challenges.

The Centre's education and training programs are designed for a wide range of participants, including senior military and civilian leaders, staff members, and operational units and teams. The COE team aims to enhance the effectiveness of its training initiatives, ensuring that both civilian and military experts gain the skills and knowledge necessary for successful operations. All certified courses delivered by CMDR COE maintain 'NATO Approved' status as they respond to the Alliance's requirements.

The Centre's portfolio include courses from the main domain of crisis management and disaster response as well as cross-cutting topics covering programs regarding military contributions, interagency frameworks, and adaptive planning to enhance understanding, coordination, and evaluation of crisis response efforts. They also address resilience and civil preparedness as fundamental for NATO's Crisis Management and deepen understanding of the cognitive domain and its relevance to decision-making, and its role in the modern information environment. Broader security challenges, such as migration, climate change, and disinformation, are explored through courses, workshops, and conferences conducted in collaboration with the European Union and Center's national, regional and international partners.

The Center's growing recognition is evident through the high demand for courses delivered by CMDR COE Mobile Education & Training Teams in various international organizations and governmental entities. Recent successful sessions conducted at institutions like the Baltic Defense College in Tartu, Estonia, NATO Allied Command Transformation, Norfolk, USA, the Royal Police Academy and National Center for Security and Crises Management in Amman, Jordan and The General Inspectorate of Border Police in Chisinau, Moldova affirm the COE's commitment to be a widely acknowledged Education and Training Facility, vital in addressing global threats to the Alliance.

Recognizing the necessity for innovative solutions to today's security challenges, the CMDR COE actively harnesses the potential of young talent. The Centre's Internship Programme is designed to attract skilled and motivated young professionals, fostering knowledge transfer and encouraging innovative approaches to tackle complex security issues. This initiative not only empowers the next generation of leaders but also enhances current ability to respond effectively to evolving threats.

NATO's unwavering commitment to collective defense, peace, and security is underpinned by the unity and cooperation of its member nations. Its comprehen-

sive education, training, exercise, and evaluation programs ensure the readiness and effectiveness of its forces. As NATO continuously adapts to emerging security challenges and maintains its strategic advantage, the Centers of Excellence play a pivotal role in providing expertise and supporting NATO's transformation through education, training, and innovation. The integration of both civilian and military efforts is essential to achieving these goals and upholding the Alliance's core values of liberty, democracy, human rights, and the rule of law.

References:

NATO 2022 Strategic Concept

MC 0458/4 NATO Education, Training, Exercise and Evaluation Policy, 2023

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https://www.nato.int/cps/en/natohq/topics_68372.htm

20 YEARS OF BULGARIA IN NATO: BUILDING SECURITY, PROMOTING UNITY, SHARING VALUES

Victoria Fileva

I was born twenty years ago, exactly when Bulgaria was officially admitted to NATO. Until recently, this meant nothing to me. I grew up in the most beautiful city in Bulgaria – Varna. I am surrounded by love and friends, and the transformations related to my personal development have been more important than the transformation that Bulgaria has gone through. My generation was born in a world where everything is easily accessible. Information, travel, education and everything that we actually need, we simply take it for granted. We are not interested in what words like “war,” “peace,” “refugees,” “military strategy,” etc. mean. They are terms from history and geography textbooks and are associated with the boring past, numerous dates and events. The governance structures of the city, the state, and the world are boring and invisible to us. Living peacefully and calmly, one morning I woke up and saw on the news that less than 300 km. from Varna a war had started. My mother immediately joined a volunteer center for refugees from Ukraine and I saw through their eyes how you can lose everything overnight. There were pregnant girls a little older than me with a plastic bag of luggage, with no idea where they were going, where they would give birth to their children, where they would raise them, and with what means they would live. It was scary and hopeless and made me think about many things. I began to be interested in the outside world and Bulgaria’s place in it, and in this essay, I will examine the positive effects of Bulgaria’s membership in NATO, as well as the negative public sentiment while emphasizing the importance of public dialogue and education in addressing these concerns and building a supportive community.

Bulgaria’s accession to NATO has brought numerous benefits, including improved security, economic growth, military modernization, political stability, and progress towards European integration. As part of the alliance, our country has received a protective shield against potential threats from neighboring countries or regions, fostering a sense of security among citizens. Economic growth has been stimulated by increased foreign investment and trade, as investors perceive

our country as a more stable and secure destination. The modernization of the armed forces has allowed Bulgaria to improve its interoperability with allied forces. In addition, NATO membership was the main step towards Bulgaria's European integration and its accession to the European Union in 2007. However, many people, both then and today, have negative attitudes towards Bulgaria's membership in NATO. They fear the country's involvement in military conflicts and economic burden, highlight cultural differences and believe that they lead to the loss of sovereignty. They instill distrust in NATO and the European Union.

And only by increasing public dialogue and education to inform the public can these concerns be addressed.

For others, however, Bulgaria's NATO membership has increased a sense of unity and shared identity. Many people in the country are united in pursuing a common vision for the future, which is one of shared democracy, individual freedoms, the rule of law, and respect for human rights. As part of the alliance, Bulgaria is committed to upholding and promoting these values both domestically and internationally. Sharing these values is crucial for building trust and cooperation among NATO members and for promoting peace and stability in Europe and beyond.

Public dialogue plays a major role in this. By encouraging open discussions and the exchange of ideas among different stakeholders, institutions can help build understanding and agreement about the alliance's benefits and the country's challenges.

Education is another key tool for addressing negative public sentiment. By providing accurate and up-to-date information about NATO, its goals and operations, educational programs can help dispel misconceptions and myths that often fuel public fears. Furthermore, education can foster a sense of belonging and shared responsibility among citizens, thereby increasing support for Bulgaria's NATO membership.

Institutions play a crucial role in addressing negative public sentiment towards Bulgaria's NATO membership. By promoting transparency, accountability and engagement with various stakeholders, institutions can help build trust and support among the population. In addition, institutions should actively seek public feedback and consider its concerns when developing and implementing policies related to Bulgaria's NATO membership.

In this context, we should also note the influence of the media. They shape public opinion on Bulgaria's NATO membership. By providing balanced and objective reports on the activities of the alliance, as well as on the challenges and benefits it brings to the country, the media can help build an informed and engaged civil society. In addition, the media can serve as a platform for diverse

voices and perspectives, encouraging open dialogue and debate on Bulgaria's role and goals within NATO.

In conclusion, Bulgaria's NATO membership has brought numerous benefits, but it has also raised many concerns among some members of society. Through open dialogue, education, and engagement with various stakeholders, institutions can work to build consensus on Bulgaria's role and goals within the alliance. By addressing these concerns and continuing to appreciate the benefits of membership, we can ensure that our country continues to successfully benefit from the protection, cooperation, and opportunities offered by NATO. The role of public dialogue, education, institutions, and the media is crucial in addressing negative public sentiment and building a supportive community around Bulgaria's NATO membership.

And those with negative attitudes should simply be told that if Ukraine were part of the alliance, Russia would not have so irresponsibly started a war there, because that would mean an immediate activation of the security pact. If Ukraine were part of NATO, the whole world would not be supplying it with weapons and activating refugee assistance programs today. Ukrainian babies would be born in their homeland, mothers would have husbands and a future, and all invisible structures would be visible to them too. This is NATO visible defense after an invisible threat. Peace, unity, and cohesion, which we should all care about.

BUILDING SECURITY,
FOSTERING UNITY, SHARING VALUES –
BULGARIA IN NATO FOR 20 YEARS

20 ГОДИНИ БЪЛГАРИЯ В НАТО –
ИЗГРАЖДАМЕ СИГУРНОСТ, НАСЪРЧАВАМЕ
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