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Reinforcing deterrence: assessing NATO's 2022 Strategic Concept

Zoltan Szenes 

University of Public Service Ludovika, Budapest, Hungary

ABSTRACT

At the June 29, 2022, NATO summit in Madrid the heads of state and government adopted a new strategic concept for the alliance. The eighth strategic concept is the official long-term vision of NATO, at the same time it is the second most important document after the North Atlantic Treaty. This document describes the security environment the alliance faces, reaffirms the purpose and principles of the organisation, as well as its core defence tasks for the coming decade. As a crucial NATO document, it has an impact on the security and defence policy of the alliance and its member states; and sooner or later its ideas, principles, and requirements described in the concept will be materialised in the form of different policies, priorities, and tasks. The article examines comprehensively NATO's 2022 Strategic Concept, compares it with the 2010 Strategic Concept and the NATO 2030 Report. Given that the new Concept was adopted in the wake of the Russian-Ukrainian war, the study primarily deals with the Alliance's new perception of deterrence and defence and its planned measures. The analysis concludes that the Strategic Concept represents a significant shift away from the previous one, although it is an evolutionary document, and it has brought NATO into a new era of great power competition.

KEYWORDS

NATO Summit; Madrid; new strategic concept; core tasks; deterrence and defence; NATO new Force Model

Introduction

The decision on outlining a new NATO's strategic concept was taken at the 14 June 2021 Brussels Summit,¹ while a semi-formal process began on 4 December 2019, when the London Leaders' Meeting mandated that the NATO Secretary General undertake a forward-looking process to assess ways to strengthen the political dimension of the alliance.² Although strategy-making in NATO has had its existing methods, procedures, and routines,³ every single strategic concept formulation has its own history, methodology, and procedure. In case of the 2022 strategic concept, there were two stages of concept development. First, the so-called Reflection group, appointed by the Secretary General, prepared its report titled "NATO 2030: United for a New Era." During this process, the group carried out extensive consultations, involving discussions with politicians,

CONTACT Zoltan Szenes  szenes.zoltan@uni-nke.hu

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civil society, the private sector, and academia. Many events, meetings, and fora were arranged for discussion, and the media covered the work (NATO HQ created a special website for this purpose). The method was very similar to the 2010 concept's preparation procedure. The expert group handed over its report to the Secretary General in November 2021 (made up of 67 pages, including 138 recommendations), concluding that NATO needed a new strategic concept.⁴ In the second stage, the NATO HQ's International Staff acted as "text drafter" and the North Atlantic Council in Permanent Session led the internal (International Staff, different committees, military authorities, and member states) and external (partners, international organisations, civil society, the media, etc.) actors' collaboration. Although this phase was an institution-led process, during this period the member states had a chance to shape the text and they certainly did so. Not only the major powers (the so-called NATO QUAD-countries, i.e. the United States, France, Germany, and the United Kingdom), but other member states as well. Hungary, for example, was also satisfied with the result, because migration was included in the concept as a security threat. As usual, the draft concept was modified many times before it was presented at the summit.

NATO was not in an easy situation when it had to develop a new strategy for the third decade of the 21st century. Nevertheless, this is not unusual for the alliance, as during its almost 75 years of existence it has experienced success, as well as difficulties and ceaseless adaptation.⁵ Since 2014, NATO's security environment was put under pressure by the Ukrainian crisis and the emergence of the Islamic State of Iraq and Syria (ISIS). As the security situation deteriorated in Europe – witnessing the migration crisis, terrorist attacks, the erosion of arms control regimes, and the Covid pandemic – NATO got involved in dealing with more and more complex (including hybrid) threats as well, generating new NATO policies and actions to step up against international instability and insecurity. The top of this protracted crisis being Russia's unprovoked brutal war on Ukraine since 24 February 2022, literally creating war within Europe.

NATO has always reacted with no delay to challenges to international security and allied defence, and made important decisions and measures at its summit meetings (Wales 2014, Warsaw 2016, Brussels 2018, London 2019, Brussels 2021). However, as it turned out, all these provisions were not sufficient to stop Russia from escalating its unjust military intervention in Ukraine. Although many decisions were undertaken about military issues, there were no shared ideas amongst NATO leaders how to manage the crisis. In those years, fierce debates took place in NATO, and there was a lack of the right political climate and the possibility of consensus building. Unfortunately, NATO-sceptic US President Donald Trump played a prominent role in this process. NATO's situation was not helped either by the famous statement of the French President, Emmanuel Macron who called NATO "brain dead" in an interview in *The Economist* newspaper in November 2021.⁶ NATO, maybe for the first time during its existence, was not able to develop a new strategy for the new decade on time. This disadvantage became evident when NATO Military Authorities came up with a new and classified military strategy⁷ in 2019. The reason why this document pre-dated political guidance, is because they could wait no longer due to the possible chance of military confrontation with Russia. As a result, conditions required a long-term warfare concept and the drafting of short-term operational plans.

This situation was further worsened by the escalation in Ukraine, thereby demanding immediate reactions and decisions. NATO was left with no other choice. Therefore, allied leaders held two extraordinary summits in early 2022 to adopt the necessary political and military decisions. At the online summit of February 25⁸ the North Atlantic Council (NAC) decided to activate the NATO Response Force, whereas at the meeting on 24 March,⁹ leaders extended enhanced forward presence to the Central and Southeast European countries. The four newly deployed NATO battlegroups in Slovakia (led by the Czech Republic), in Hungary (under the Hungarian Defence Forces), in Romania (led by France) and in Bulgaria (led by Italy) is part of NATO's enhanced vigilance activity, established as a response to the Russian attack on Ukraine.

Although the NATO HQ staff started drafting the strategic concept after the 2021 Brussels mandate, the drafters were able to avoid the trap of short-term war constraints obscuring the long-term horizon. It was facilitated by using "soft" language and outlining a "hard" military concept. After the publication of the new Concept, first the media evaluated the document, and then academic researchers also began to assess the new document. Among these analyses, the monograph of the NATO Defence College (edited by Thierry Tardy) stands out as providing a comprehensive analysis of the document from different perspectives.¹⁰ This article also applies the broad approach, although – in accordance with the new Strategic Concept – it pays much attention to the tasks of deterrence and defence.

Novelty in the new concept

To discover the novelty of the new Strategic Concept, it is advisable first to compare it with the 2010 Strategic Concept adopted at the Lisbon summit, which has just "expired." There are numerous similarities between the content of the two strategic documents (2010,¹¹ 2022¹²) with regards to NATO's core tasks, development, and structure.

In the case of both documents, a long path – fraught with controversy – had led to the adoption of the new strategic concept that replaced it. It became clear quickly that the 1999 Strategic Concept adopted in Washington did not properly define the most important security threats at the beginning of the twenty-first century and did not put sufficient emphasis on terrorism. Although after the September 11 terrorist attacks there was a consensus amongst member states about the importance of fighting terrorism globally: hence Article 5 of the North Atlantic Treaty was activated for the first time, the Alliance was divided on the issue of how to support the US war in Afghanistan (2001) and Iraq (2003). This serious internal conflict made it impossible to develop a consensus-based new strategic concept in time, which would otherwise have been required by the changing security situation. This default was partly corrected by NATO in 2006, when NAC approved the Comprehensive Political Guidance,¹³ which in fact became a sort of "mini strategy" with defining the levels of military ambitions, defence planning, and force development requirements.

Emphases can be identified regarding the content of the 2010 concept. First, at the end of the decade, in the shadow of the 2008 economic crisis, it was already evident that new security challenges also appeared beyond the challenge of terrorism, like Cyber-security, energy security, the proliferation of ballistic missiles, a number of significant technologies that affected NATO function, and peace operations. Second, in addition to promoting

Euro-Atlantic security through a wide network of partner relationships, NATO at that time wanted to see a true strategic partnership with Russia (Russian President Dmitry Medvedev took part in the 2010 summit in Lisbon), and to establish new forms of collaboration and keep the door open for further enlargement of the Alliance. Third, it was considered that the Euro-Atlantic area was at peace and threat of a conventional attack against NATO territory was low. It was not a surprise that the 2010 Strategic Concept became much shorter than any previous ones, because the usual Chapter 4, “Guidelines for the armed forces” was omitted from the document. In this way it became a real political declaration, not giving military guidance for the future NATO forces. The main reason was the scarcity of resources across the alliance because of the 2008 financial crisis which had not been partly rebalanced until 2011/2012 through slow economic recovery. The political debate about NATO agencies reform, the streamlining of the command structure, the renewing of the resource management system, and NATO’s overall posture also contributed to the lack of force modernisation guidelines which lasted until the Lisbon summit.¹⁴ Solving these issues required another year or two. This approach features in the 2022 Strategic Concept as well, given that the new document does not include any concrete military requirements either. This is because NATO leadership did not want to risk debates about the short-term establishment of the Rapid Reaction Force of 300.000 troops, announced by the Secretary General, which could have jeopardised the Concept’s approval.

Further similarities between the two documents are, for example, that the development of both was preceded by a wide range of public political-professional discussion. In 2010 a team of 12 experts, led by the former US secretary of state Madeleine Albright, wrote a report with the title “Assured Security, Dynamic Engagement,”¹⁵ that served as a basis for the Lisbon Concept. In 2020 a team of 10 political and academic experts made preliminary studies under the leadership of former German defence minister, Thomas de Maizière, and former US assistant secretary of state for European and Eurasian affairs, Wess Mitchell. The result of the review process was the study “NATO 2030: United for a New Era,”¹⁶ that served as a basis for the 2022 strategic concept. The two reports, prepared in two different periods still have numerous identical or similar statements found almost on the very same pages (57, 67, respectively).

Many identical ideas can also be seen when comparing the structure of the two strategic concepts, as well as their content. The three fundamental tasks identified in 2010, collective defence, crisis management, and co-operative security were confirmed in the 2022 concept as well. The same principles (respect for democracy, the rule of law, individual liberty, and human rights) were formulated in the new strategic document. Both documents emphasise the defensive character of NATO, the shared value of the consultative system, the importance of the Transatlantic bond, the need to enhance resilience, and improve the alliance’s technological edge. However, the 2010 concept became outdated in a short time, as strategic partnership ambitions with Russia proved to be unrealistic. It did not take a long time to realise that the two parties failed to cooperate regarding ballistic missile defence, whereas the illegitimate annexation of the Crimean Peninsula in 2014, as well as the destabilisation of Ukraine, created a literally hostile relationship between them.

The replacement of the 2010 Strategic Concept, however, took a long time because of the lack of unity amongst members. The NATO principle of following a dual track

approach (strong defence combined with dialogue) maintained the hope that politics in Moscow might eventually change. As a response to the urging by Eastern flank countries, who have long been concerned about Russian threats, NATO announced the policy of defence and deterrence, but the military plans were executed slowly, at different speeds by the member states. Nevertheless, mainly because of Donald Trump's peculiar NATO policy and pro-Putin approach, there was no political consensus about the adoption of a new strategy concept reflecting the new political and security environment.

The structure of the 2022 strategic concept is very similar to its predecessor, the preface is followed by the description of purpose and principles (with practically no changes), then by the description of the strategic environment, which is fundamentally different from the 2010 security situation. While the three core tasks of the NATO are detailed separately in the Lisbon strategy, the new document deals with these important issues in only one section. The reform and transformation chapter, which addressed military capability development and resource management in the 2010 concept, is conspicuously missing from the 2022 document. Perhaps for this reason, the Madrid concept is shorter and more concise than the Lisbon document; although interestingly, the new concept still contains more paragraphs than the previous one. Finally, both concepts conclude with emphasising the importance of the alliance in the future.

The new reality in the security realm

The first part of the concept (preface, purpose and principles, strategic environment) describes the foresight on the security environment for NATO until the 2030s. The preface depicts the current world with expressions like “in critical times,” “contested and unpredictable,” a world in which NATO plays the role of being “the bulwark of the rules-based international order.” The alliance continues to protect its one billion citizens, defend its territory and safeguard democracy. The document includes the principal of 360-degree approach to security, which has defined so far two strategic directions: East/Russia and South/new types of asymmetric threats. Similarly, like the previous strategy, the 2022 Strategic Concept also emphasises: “As long as nuclear weapons exist, NATO will remain a nuclear alliance.”¹⁷ It frames the vision of the alliance, which evidently refers to the conflict with Russia:

We want to live in a world where sovereignty, territorial integrity, human rights, and international law are respected and where each country can choose its own path, free from aggression, coercion, or subversion. We work with all who share these goals. We stand together, as Allies, to defend our freedom and contribute to a more peaceful world.¹⁸

Not too many changes have been interpreted in the section “Purpose and Principles.” NATO's key purpose and greatest responsibility remains the same: to ensure collective defence of its NATO members. It anticipates practically the same three main tasks, deterrence and defence, crisis prevention and management, and co-operative security, which are explained later in a separate section. However, there is a significant shift in the understanding of the three core tasks as the concept underlines that “these are complementary to ensure the collective defence and security of all allies.”¹⁹ There is no alteration in the importance of transatlantic relations: NATO is the unique, essential, and indispensable transatlantic forum to consult, co-ordinate, and act on all matters related to collective

defence. This part also talks about new security challenges, which were described in detail in the NATO 2030 Report,²⁰ related to individual and collective resilience, the technological edge, promoting good governance, and integrating climate change, human security, and the women, peace, and security agenda across all NATO tasks.

In the past decade, the security environment has deteriorated, and NATO has experienced fundamental changes. The Lisbon concept was adopted in a time of unparalleled peace in the Euro-Atlantic landscape, when the possibility of a conventional armed attack on NATO territory was estimated as minimal. Today, however, a real war is going on in Eastern Europe, even though the word “war” is only written in one single place in the document. The Russian war breaks international norms and principles, and made the security of Europe fragile and unpredictable. This war does not only mean an armed struggle, but it runs in the areas of diplomacy, information technology, economy, energy, and Cyber-space as well, and it is also interconnected with a global strategic competition too. We cannot rule out the possibility of an attack on the sovereignty and territorial integrity of NATO states; moreover, due to the frequent verbal nuclear threat by the Russian leaders, the use of tactical nuclear weapons should be considered as a very bad escalation case in the war. Quite understandably, therefore, the new concept does not include the preceding usual formula: “The Alliance does not consider any country to be its adversary”²¹ anymore, and the previously overused word “adversary” occurs only three times in the text. The use of terminology is characterised by clarity: the concept talks high-intensity, multi-domain warfighting against nuclear-armed peer-competitor, although the opponent is not named, it can be recognised from the description. The new terms (space, Cyber, and hybrid) have been used with such a combined focus that they are valid for all three core tasks of their application. The strategic concept generally strives to ensure that the individual-specific task serves all fundamental tasks as far as possible. For example, arms control, disarmament, and non-proliferation moved from the task of co-operative security to that collective defence as well and can be part of a crisis management if necessary.

If we examine the strategic concept, in comparison with the NATO 2030 Report, we can see that the security challenges, risks, and threats most often named by the reflection report are also included in the concept. The experts’ study analysed security in three categories: from a geopolitical point of view (Russia, China, the South, space, and Cyber-space), from a sectoral aspect (military security, energy security, climate security and environment protection, human security, social security, the role of women in maintaining peace and security, pandemics, and nature disasters) and regarding the types of activity (new breakthrough technologies, terrorism, hybrid- and Cyber-attacks, strategic communication, publicity and misinformation activities).²² Only the assessment of Russia was more favourable in the reflection report than in the new strategy, since not even the commissioned experts thought that Moscow would wage a war in Ukraine in order to achieve its aggressive imperialist goals.

The new concept identified six security threats, six challenges and two risks (see [Figure 1](#)) which are discussed in a security matrix the better to understand the dangers and their importance and to distinguish amongst the categories of security threats, challenges, and risks. Certain security challenges compared to the NATO 2030 Report are missing, because these were simply left out of the concept, lacking consensus amongst member states. Neglecting suggestions (e.g. to develop a code of good conduct to abide the

Type of security problems	Characteristics	Ways and means of NATO action
Security threats		
Russian Federation	The most significant and direct threat to allies' security	No change in the legal and institutional arrangements
Terrorism	The most direct asymmetric threat to the security of citizens – Individual, regional, and global threat	The fight against terrorism contributes to all three core tasks
Irregular migration	Global and regional threat	Work with partners (EU, INGO) to tackle shared security threats
Military conflicts	The war of aggression against Ukraine gravely altered the security environment	Employ military and non-military tools in a proportionate, coherent, and integrated way
Malicious Cyber activities	Cyber-space is always contested	Enhance allies' Cyber defences
Hybrid threats	Hybrid operations against allies could reach the level of an armed attack in effect	Defend against the coercive use of all hybrid tactics; invoke Art. 5
Security challenges		
People's Republic of China	PRC challenges the interest, security, and values of NATO	Systemic challenges to Euro-Atlantic security
Instability outside the borders of NATO	Regional security challenges – the Western Balkans, Black Sea region, Middle East, North Africa, Sahel, Indo-Pacific	360-degree approach to security
Vulnerable critical infrastructure	National and regional security challenge	The importance of co-operation
Technological competition	Emerging and disruptive technologies – global security challenges	Defence Investment Pledge, DIANA program, Innovation Fund
Non-military security challenges	Energy security, human security, gender issue, pandemics emergency, food insecurity, malign interference, subversion, transnational security challenges	Enhance resilience
Enhance global awareness across all domains	Global security challenge	New space and Cyber-space policies
Security risks		
Lacking investment in defence against chemical, biological, radiological, and nuclear threats	Strengthen arms control, disarmament, and non-proliferation architecture	Reversing the systemic erosion of these regimes
Climate change	Profound impact on NATO security – global security risk	Climate Change and Security Impact Assessment

Figure 1. The assessment of the security environment based on the 2022 strategic concept (edited by the author).

spirit and the letter of the Treaty, to create a Centre of Excellence for Democratic Resilience), did not help reaffirm NATO's identity as an Alliance of democracies. The loss of a solidarity and cohesion complicates decision-making, weakens unified implementation, and ultimately work against the values stated in the preface of the concept and threaten the Alliance's future.²³

Regarding security threats, military force is needed to provide adequate answers in almost all threat categories. The "number one" security threat is Russia, which both the NATO 2030 Report and the new Strategic Concept agree. According to the concept: "The Russian Federation is the most significant and direct threat to Allies' security and to peace and stability in the Euro-Atlantic area."²⁴ It also declares that considering hostile Russian policies and actions, the Alliance cannot consider the Eurasian country to be NATO's partner. Although the strategy expresses a harsh criticism of Moscow;²⁵ such as the creation of influence zones, coercion, subversion, aggression, hybrid-warfare, nuclear blackmailing, and destabilisation of neighbouring countries, it still urges pursuing peace for the long-term future. It also mentions the well-known old principle that NATO does not seek confrontation and poses no threat to the Russian Federation. That said, Brussels is still willing to co-operate with Moscow: "Any change in our relationship depends on the Russian Federation halting its aggressive behaviour and fully complying with international law."²⁶ This position is widely supported in the International Relations literature (Robert Pszczel,²⁷ Andrew Monaghan²⁸), just as it has its opponents (Marcin Zaborowski).²⁹

The controversial attitude suggests that the approach of the member states to the Russian war and long-term NATO interests in relations with the Russian Federation differ, which is also manifested in the fact that they did not decide by consensus on arms deliveries to Ukraine. NATO did not declare the 1997 NATO-Russia Founding Act "null and void," and did not initiate the closure of the NATO-Russia Council as a body unable to perform its functions for many years. It seems to be that this compromise might come out as a wise decision in the long-term as it safeguards the possible future legal and structural co-operation framework for a post-Putin world. This approach is very important because without Russia participation, Europe's security cannot be managed satisfactorily. The indivisible nature of security applies not only to the two shores of the Atlantic Ocean, but also to the area between the Atlantic Ocean and the Urals. Stability and predictability both are needed, not only in transatlantic relations, but in the European and Russian connections, as well. Therefore, NATO is still willing to maintain communication channels with Moscow to mitigate and manage risks, to continue with arms reduction, disarmament, and non-proliferation negotiations.

The real novelty of the 2022 Strategic Concept is that China is included in the document for the first time, because it's stated ambitions and coercive policies challenge NATO's interests, security, and values. China is described in the concept as a security challenge for the Alliance. The document underlines the power ambitions of China and its coercive policies challenging the interests, security, and values of NATO. As the document states, "the People's Republic of China (PRC) seeks to control key technological and industrial sectors, critical infrastructure, and strategic material and supply chains."³⁰ NATO's relations with China, however, are also characterised by a controversial style in the new concept. On the one hand, NATO criticises Beijing because of its aggressive power-projection pursuits (increasing its global footprint, the conduct of

malicious hybrid- and Cyber-operations, subversion of the rules-based international order, etc.), on the other hand it remains open for constructive engagement with the People's Republic of China. However, there is no doubt that NATO's China policy in the strategy goes beyond the London Declaration (challenge and opportunity) and the PRC already poses a systemic security risk for NATO, especially when it is strengthening strategic co-operation with Russia, particularly after the Russian-Ukrainian war. "NATO will work together responsibly, as Allies, to address the systemic challenges posed by the PRC to Euro-Atlantic security and ensure NATO's enduring ability to guarantee the defence and security of Allies."³¹

It is interesting to mention that the new American national security strategy (NSS), published in October 2022, judges the two great powers' politics similarly, but discusses their importance in reverse order: out-competing China and constraining Russia.³² China is always discussed first, as the only competitor that not only wants to change the world order, but has the political, economic, technological, and military power to advance that objective. At the same time, Russia just is described as a "troublemaker adversary," who represents an immediate, persistent, and on-going military threat to regional security order in Europe, but it lacks capabilities across the full power spectrum. Great-power competition is discussed in the same way in the national defence strategy (NDS),³³ which calls strategic competition with China as the most comprehensive and serious security challenge to American national security. Russia represents an acute threat, a country that wants to re-impose its imperial sphere of influence. The NDS also clearly states that in the event of aggression, it gives priority to the Indo-Pacific region, where – if necessary – the PRC must be dealt with first, and dealing with the Russian threat in Europe will only follow that. The message here is clear, sustaining European security is primarily the task of the European member states of NATO, even if the US – as the former SACEUR, Gen. Tod Wolters recently stated³⁴ – "will maintain the rotation (semi-permanent presence) of the American forces in Europe for a very, very long time." This fact also shows that no matter how dominant the United States is in NATO, American and the Alliance politics are not identical. The United States, independently and in co-operation with NATO, strives to weaken the strategic partnership and mutual support between the two, revisionist great powers.

The new concept assigns terrorism as a "number two" threat, emphasising that "NATO's role in the fight against terrorism contributes to all three core tasks and is integral to the Alliance's 360-degree approach to deterrence and defence."³⁵ In the 2010 Strategic Concept, terrorism was only mentioned as part of the security environment and in relation to defence and deterrence.³⁶ In the last decade NATO adopted three key tasks: improving the Alliance's defensive capabilities, maintaining its ability to respond to crisis, and focusing on intelligence sharing. The new concept not only identifies terrorism, in all its forms and manifestation, but lists the regions affected by danger in the southern neighbourhood: the Middle East, North Africa, the Sahel-region – regions where political, security, and demographic challenges are worsened by the effects of climate change, fragile institutions, health crisis, and insecure food supply.³⁷ The document suggests enhancing co-operation with the international organisations, including the United Nations and the European Union, to tackle the conditions conducive to the spread of terrorism.³⁸ Policy alone, however, is not enough to reduce the threat from the contemporary terrorist environment, it must lead to action, whether in

strengthening the Alliance's defence, building robust information-sharing capabilities, or enhancing partnerships³⁹ Recognising these requirements, Allied Leaders tasked the Council at the NATO Summit in Vilnius to update NATO's Policy Guidelines and Action Plan on Counter-Terrorism.⁴⁰

Türkiye played a major role in keeping the fight against terrorism on the NATO agenda. The consistently tough representation of the Turkish position was shown during negotiations regarding the ratification of Finland and Sweden's membership (before the summits in Madrid and Vilnius, respectively),⁴¹ when their support was only given on the promise of decisive action against Kurdish terrorists. However, the fulfilment of Turkish security demands recognised by NATO as legitimate ones progressed slowly. Finland was the first to join the alliance on 4 April 2023, as if confirming the truth of US president Biden's statement: "Putin wanted to Finlandise Europe, but instead he got the NATOisation of Finland."⁴² Along with this, the ratification of Sweden's membership application by Hungary and Türkiye was completed in Autumn 2023, and the Northern European country joined the transatlantic alliance as the 32nd member in the ninth round of NATO enlargement.

A further novelty in the strategy is that it describes illegal migration as a threat again, although the NATO 2030 report does not mention it at all. In the policy debate leading to the adoption of the concept, both southern European countries and Hungary argued the need to put migration on the list of potential threats, which was accepted and justified by defining its consequences, like regional instability, conflicts, and damage of the environment. The strategy provides a dedicated place to climate change, as well (climate security is one of the priorities for the Biden administration), and recognises it as a crisis and threat-multiplier, which can exacerbate conflict, fragility, and geopolitical competition.⁴³ Earlier climate change was identified as a challenge, by now it has become a real security risk; and NATO, for the first time, is dealing with climate security as a high priority problem. Climate change also effects the operation of the armed forces, their infrastructure, and equipment. The military has no choice but to operate in more and more extreme weather conditions and their contribution to disaster relief has become a constant task. Therefore, the aim is to cut emissions by NATO bodies and commands by at least 45% by 2030 and move towards Net Zero by 2050.

Nato's core tasks

The new strategic concept maintains the triple system of the core tasks of the 2010 strategy (defence and deterrence, security through crisis management, and promoting international security through co-operation), even though there have been several changes in the names of these functions. The new concept breaks with the previous detailed descriptive sub-headings, and simply calls the three core tasks deterrence and defence, crisis prevention and management, and co-operative security. An important change is that "these tasks are complementary to ensure the collective defence and security of all Allies."⁴⁴ In case of the first core task, the wording has changed; deterrence came forward, followed by defence, in contrast to the 2010 document – what is theoretically a justifiable correction considering its content. As the numbering of the core tasks does not mean prioritisation (even if the current focus is on deterrence and defence), the acute nature of security threats determines their importance: they can be implemented simultaneously,

supporting each other, and separately. There is no doubt that deterrence and defence dominate in the new concept, since 14 paragraphs (about 30% of the document) deal with the scope of this core task.

After the 2014, Russia's first military aggression against Ukraine, understanding of deterrence and defence in NATO has changed significantly. In the first period, a hybrid-war was in the focus, that Moscow; by avoiding open aggression and staying below the threshold of military intervention, would divide NATO member states, influencing the internal politics of neighbouring eastern flank countries, and discrediting NATO's security guarantees. At the Wales summit (September 2014), the Alliance adopted a Readiness Action Plan (RAP) and implemented assurance and adaption measures. The strength of the NATO Response Force (NRF), established in 2002,⁴⁵ was tripled and developed into 40,000 troops (land forces, air force capable of 300 sorties per day, the necessary naval capabilities, special operation forces, combat support and combat service-support units) ready to move and be deployed. Within this "enhanced NRF" quick-reaction land (Very High Readiness Joint Task Force – VJTF) and naval (BSRF – Black Sea Rotational Force) forces were created, the air defence of the eastern "frontline countries" was strengthened, and NRF's mission was expanded to include collective defence tasks. This represented an important change in the concept of NRF because its original function was designed for expeditionary peace-support operations. The Defence Pledge adopted in Wales politically commits member states to spend a minimum of 2% of their GDP on defence and 20% of defence budget on major equipment, including related research & development.⁴⁶

Later, there was growing concern that Russia would seize the defenceless Baltic countries with a surprise attack, presenting NATO with a *fait accompli*. This thinking was reflected in the 2016 war modelling by RAND Corporation,⁴⁷ or in General Richard Shirreff's book.⁴⁸ As a result, during a whole series of summits (Warsaw 2016, Brussels 2018, London 2019, Brussels 2021), NATO continuously made new decisions to strengthen the defence of its eastern borders and ensure security for member countries. As a next step (as of 2016), battalion-size battlegroups were deployed in the three Baltic countries and in Poland, new commands, and NATO force structure HQs were established, a new type of operational plans (GRP – Graduated Response Plans) was introduced, and military infrastructure was developed. NATO gradually strengthened its forward defence in the east (more troops, more headquarters) into forward defence, launched new initiatives (Framework Nation Concept – FNC, 2014, NATO Readiness Initiative – NRI, 2018), and extended its scope of Article 5 to Cyber (2016) and space (2021). In addition to defence, it has begun to build consciously its own deterrent power through increasing member states' defence budgets. NATO has continuously measured the defence expenditures of the member countries, and the Secretary General evaluates the achieved capability development results in his annual reports. After the approval of NATO's military strategy (2019), NATO military authorities have developed regional defence plans to strengthen Europe's military security. However, as it turned out, these efforts were not enough, because they could not prevent Russia from attacking Ukraine. NATO did not change its Ukraine policy (there was no decision to supply kinetic weapons to the Ukrainian armed forces) even when Moscow made a huge military build-up (170–195,000 soldiers) to the Ukrainian borders in 2021. The alliance was not prepared for the scenario that Russia would wage another full-scale war on Ukraine.

However, it has become more and more obvious that NATO's deterrence by punishment policy needs to be reconsidered in addition to defence, because denying the adversary's activities requires more and more in-place forces suitable for fending off the potential aggressor. After starting the war, extraordinary and upcoming summits (Brussels 2022, Madrid 2022, Vilnius 2023) already made the necessary decisions for the implementation of the new deterrence policy. Thanks to the long-term adaptation measures taken by the Readiness Action Plan (RAP), NATO was able to react immediately when the Russian invasion began on 24 February 2022. At the extraordinary virtual summit on February 25, proposed by eight Eastern European member states based on Article 4, the heads of state and government condemned the "brutal, unjust and unprecedented" attack, activated the NATO Response Force, and subordinated over 40,000 troops to the Supreme Allied Commander Europe (SACEUR).⁴⁹ At the extraordinary (in-person) summit in Brussels on March 24, NATO's leadership had already activated the NRF defence plans and decided to create new Enhanced Vigilance Activity Battlegroups in Slovakia, Hungary, Romania, and Bulgaria, ensuring strong defence from the Baltic Sea to the Black Sea. The alliance leaders also decided that the defence budget target of 2% of GDP should be reached by all members as soon as possible, and the Madrid Summit should take into considerations the effects of the war.⁵⁰ At the Madrid Summit, Allies committed to deploying additional robust, in-place, combat-ready forces up to 300,000 troops to NATO's eastern flank, and to be scaled-up from the battalion-sized battlegroups to brigade-size units. The NATO leaders agreed a new force model, which strengthens and modernises NATO's Force Structure. The Allies committed to deploy stockpiles, facilities, and military equipment to the Eastern flank to boost the credibility of NATO's deterrence. For the first time since the Cold War, designated forces will be dedicated to defending a specific Ally. At the Vilnius Summit, in July 2023, NATO allies agreed to Enhance further NATO's deterrence and defence posture in all domains, including strengthening forward defence and the Alliance's stability to reinforce rapidly any Ally that comes under threat. They approved a new generation of regional defence plans, a new multinational and multi-domain Allied Reaction Force, a new rotational model air defence systems and capabilities.⁵¹

The evolution of NATO policy and practice was reflected in NATO's new strategic concept, when it changed the sequence of tasks for collective defence, replacing the former "defence and deterrence" with the "deterrence and defence" tasks. The old approach, which claimed that "the Alliance does not consider any country to be its adversary"⁵² is no longer valid. What is more, the Concept clearly states that member-states "will individually and collectively deliver the full range of forces, capabilities, plans, resources, assets and infrastructure needed for deterrence and defence, including for high-intensity, multi-domain warfighting against nuclear-armed peer-competitors."⁵³ Therefore, the new concept formulated a dozen principles, tasks, and regulations to strengthen deterrence and defence (Figure 2).

The strategy also formulates a generally known NATO nuclear policy regarding the use of nuclear weapons (unique and distinct role of nuclear deterrence), but it is not difficult to recognise the determination of the Alliance in this issue, what is the consequence of the rhetoric nuclear threat of the Russian political leadership.

Deterrence and defence tasks

- 360-degree approach, integrated and credible deterrence and defence posture
- new NATO force structure (nuclear, conventional, missile defence, space, and Cyber-forces)
- forward defence with robust in-place, multi-domain, and combat-ready forces
- balance between in-place forces and reinforcement
- robust, resilient, and integrated command structure
- improvement of readiness, responsiveness, deployability
- strengthening maritime security
- digital transformation, investment in emerging and disruptive technologies
- extended application of Article 5 (to include Cyber, space, hybrid)
- credible nuclear deterrence posture
- development of CBRN forces
- continue to counter terrorism

Sources: The 2022 NSC, para. 20-34. (Edited by the author)

Figure 2. Deterrence and defence tasks. Source: The 2022 NSC, para. 20–34 (edited by the author).

Any employment of nuclear weapons against NATO would fundamentally alter the nature of a conflict. The Alliance has the capabilities and resolve to impose costs on the adversary that would be unacceptable and far outweigh the benefits that any adversary could hope to achieve.⁵⁴

The use of nuclear weapons still – according to the new Concept – seems remote, but NATO has the intrepidity and capability to use nuclear weapons. Although the revision of the NATO 2012 Nuclear Deterrence and Defence Posture Review was not addressed in the Madrid and Vilnius summits, this does not mean that there cannot be changes in the alliance’s nuclear policy and nuclear capabilities. It is likely that NATO will do some

adaptations, even if limited ones, to its nuclear posture as the “Steadfast Noon” annual nuclear exercise demonstrated it in October 2022. The training was used to enable military assets from non-nuclear countries in the north-western European Region to support the nuclear strike mission without being formally part of it. Obviously, the nuclear weapon states (the UK, France, and above all the US), have a big role to play in this, as they dynamically modernise their nuclear forces. In essence, it has already been decided that the current dual-capable aircrafts (F-16, PA-200 Tornado) will be replaced by F-35s. The US is modernising the B-61 nuclear bombs and nuclear storage facilities in the host-nation countries (Belgium, Germany, Italy, the Netherlands, and Turkey). Considering Russian aggression and the coming NATO enlargement, it cannot be ruled out that new countries will join the NATO nuclear sharing arrangements (for instance the United Kingdom, Poland, or possibly Finland) to increase strike ability, flexibility, and survivability of the allies’ nuclear forces.⁵⁵

NATO’s new deterrence and defence engagement is based on an appropriate mix of nuclear, conventional, and missile defence capabilities, complemented by space and Cyber-capabilities. The new strategic concept not only strengthens the possibilities of applying Article 5 in relation to Cyber-space and outer-space, but also extends it to hybrid-warfare if hybrid-operations’ effects reach the level of an armed attack.⁵⁶ It is not difficult to recognise military preparations against Russia in these tasks.

Crisis prevention and management remains an important task for NATO, because the allies have a shared interest in contributing to stability and managing conflicts together. NATO continues to work to prevent and respond to crises when these have the potential to affect allied security, as NATO has unique capabilities and expertise in crisis management. The concept emphasises the further need “to invest in crisis response, preparedness and management through regular exercises and leverage the allies’ ability to coordinate, conduct sustain and support multinational crisis response operations.”⁵⁷ It will expand its aid provision capabilities, urge the participation of partners in missions and peace-support operations, and pay attention to the requirements of human security. It further strengthens co-ordination and co-operation with the United Nations, the European Union, the Organisation for Security and Co-operation in Europe, and the African Union. Although the role of crisis management has decreased after the withdrawal from Afghanistan in 2021 (thus today KFOR remains NATO’s largest operation), this does not mean that there cannot be changes in ten years’ time. The inclusion of “prevention” in the name of the task, on the other hand, suggests that NATO now consciously handles crisis management with restraint, which can be explained only by the size of the forces committed against the Russian threat.

The section dealing with co-operative security is perhaps the most optimistic part of the strategic concept, which calls NATO’s enlargement a direct “historical success.” Today the alliance, which was established in 1949 with only 12 members, is a community of 32 member states from Europe and North America. NATO, with its various forms of partnership, anchors a security community of 70 countries on four continents. The strategy reaffirms “the Open-Door policy, consistent with Article 10 of the North Atlantic Treaty, as an expression of the alliance’s fundamental values and strategic interest in Euro-Atlantic peace and stability.” The door remains open to all European democracies that share the values of the Alliance, which are willing and able to assume the responsibilities and obligations of membership, and whose membership contributes to common

security.⁵⁸ The document makes it clear that decisions on membership are taken by NATO allies and no third party (Russia for example) has *droit de regard* in this process. NATO will continue to develop its partnerships with Bosnia and Herzegovina, Georgia, and Ukraine to advance its common interest in Euro-Atlantic peace, stability, and security. Furthermore, the document also confirmed the 2008 Bucharest Summit decisions regarding the future membership of Ukraine and Georgia. It also emphasises that a strong and independent Ukraine is of vital importance for the stability of the Euro-Atlantic region. The strategy makes further promises to candidate countries to improve political relations and security co-operation with them (strengthening their resilience, assistance in averting violent interference, building their capabilities).⁵⁹ These “mini article 5–like” promises seem to be just as optimistic as declaring that the NATO should become the leading international organisation in the combat against climate change.⁶⁰ Although there was a great expectation (especially in Kyiv) that Ukraine would be invited to NATO at the Vilnius Summit, this did not happen. The country received many gestures at the meeting (establishment of NATO-Ukraine Council, omission of Membership Action Plan status, additional bilateral and multinational support), but the finish line was not drawn. Instead, the summit communique stated, “We will be in a position to extend an invitation to Ukraine to join the Alliance when Allies agree, and conditions are met.” This was almost the same promise that was made at the Bucharest summit.

The strategy describes the geopolitical interests of NATO, including co-operation with its partners on shared security duties, risk, and threat management. Besides the Western Balkans, the document devotes strategic importance to the Black Sea region too, which is also the consequence of the Russia-Ukraine war. The Middle East, North-Africa and the Sahel region will also remain important zones. The Indo-Pacific appears as a new ambition, whose security problems might affect Euro-Atlantic security directly. The strategy promises “to strengthen dialogue and cooperation with new and existing partners in the Indo-Pacific to tackle cross-regional challenges and shared security interests.”⁶¹ To confirm this intention, NATO – for the first time in its history – invited Australia, South Korea, Japan, and New Zealand to attend the Madrid Summit.⁶² It is not difficult to identify American interests in this endeavour, but in the current crisis, the United States is doing so much to defend Europe, that the alliance must also appreciate this American interest. In any case, the invitation of Pacific countries intensified the discourse on the creation of an “Asian NATO” (North Atlantic and Asia Treaty Organisation – NAATO), against which Chinese President Xi Jinping strongly warned the transatlantic alliance at the BRICS (Brazil, Russia, India, China, and South Africa) Summit in June 2022.⁶³

The strategic concept devotes one long paragraph⁶⁴ to describe its co-operation with the European Union, whose member states share the same values with the alliance. The EU is a unique and fundamental partner for NATO, they play complementary, coherent, and mutually reinforcing roles in supporting international peace and security. The importance of co-operation is reflected in their third Joint Declaration (after Warsaw 2016 and Brussels 2018), signed in January 2023,⁶⁵ deepening co-operation on security and defence in Europe in the areas of resilience and the protection of critical infrastructure, emerging and disruptive technologies, space, and the security implications of climate change. These had been underlined not only by the new 2022 NATO Strategic Concept, but by the 2022 EU Strategic Compass⁶⁶ as well.

The document emphasises that as NATO defends the whole Euro-Atlantic area,⁶⁷ all countries are obliged to take part in defence efforts. NATO recognises the value of a stronger and more capable European defence that contributes positively to transatlantic and global security. The alliance welcomes initiatives to increase defence spending and develop coherent, mutually reinforcing capabilities, whilst avoiding unnecessary duplication. The combined defence expenditure of NATO members was \$1,189.88 billion, or 3.76% of GDP, in 2022, \$246.66 billion more than in 2014, during the first Ukrainian crisis. During the 2014–2022 timeframe NATO's collective defence spending was the lowest in 2015, at \$895.68 billion, but has increased every year since then, reaching over one trillion US dollars for the first time in 2019. Currently 11 countries fulfil the minimum of 2% of GDP defence spending, and there is a hope that 19 countries will exceed the target by 2024.⁶⁸ Unfortunately, some countries will not meet the 2% of GDP benchmark: Germany is expected to meet the requirement in 2026, Italy in 2028, Spain in 2029, Denmark and Belgium in 2033.⁶⁹ The spending of EU member states falls short of this; in 2014, 1.3% of their GDP was spent on defence, while in 2021, 1.5%.⁷⁰ The total European defence expenditure in 2021 amounted to € 214 billion (\$ 222 billion), marking the seventh year of consecutive growth. A record level of 24%, or 52 billion euros, was allocated to defence investment. It is expected to have significant growth in defence expenditure, up to €284 billion (USD 295 billion) by 2025. In 2022, for the first time, the European member states recovered from the decade-long wave of defence underspending. Increasing the defence budget is extremely important in the implementation of the new concept, as it is a decisive tool to achieve the goals.

The new NATO Force Model

The Madrid summit not only approved the new strategy, but it also started implementing the concept at the same time, with the decisions made on the topics discussed.⁷¹ Perhaps the most significant of these was to introduce the new NATO Force Model, which will differ from the current NRF system both in terms of size and readiness level. The NATO force structure and readiness system have constantly changed throughout the alliance's history, with the biggest transformation taking place after the Cold War, in the 1990s (introducing lower readiness, fewer commands, smaller forces). The new force model can be considered as one of the main tools for implementing the Madrid strategy.⁷² The guidance for the new NATO military adaptation is given by two strategic documents: the Concept for Deterrence and Defence of the Euro-Atlantic Area focusing on force employment do deter and defend now, and the NATO Warfighting Capstone Concept offering a vision to guide the Alliance's long-term warfare development to remain military strong in the future. The new Force Model aims to have a larger force than before (a total of 800,000 troops), with higher readiness (of which 100,000 troops have a 10-day, 200,000 troops a 30-day, and 500,000 troops a 180-day readiness) and a different structure (military, weapons, support, and combat service support). The new NATO force should be able to carry out multinational, integrated operations in five operational domains (land, air, sea, Cyber, outer-space). The readiness level poses a serious challenge to the member states, because even the current readiness levels (quick reaction forces deployed in

30–45 days, reaction forces in 90 days, low readiness forces in 180 days) represent a serious challenge for member states' armed forces, as we saw the primary results of the NATO Readiness Initiative (NRI) launched in 2018. The “4 × 30 requirement” decided at the Warsaw summit (30 heavy or medium manoeuvre battalions, 30 combat aircraft squadrons and 30 warships with a 30-day sustainability), could not be fulfilled by 2020, even though this would have served to ensure reliably the increased force requirements (40,000 troops) for the enhanced NATO Reaction Force (NRF). The new force model, as NATO Secretary General Jens Stoltenberg put it, requires the largest transformation of NATO forces since the Cold War,⁷³ as it, on the one hand, will abolish or transform the NATO Rapid Force existing for 20 years into the Allied Reaction Force, and, on the other hand, needs a force at least three times larger than the current one, both in terms of personnel and readiness.

The 100,000-strong immediate reaction force is likely to come out by considering the current 40,000-strong NRF (or pre-assigned forces coming from specific NATO members), plus the increased strength of the eight battlegroups – located in the Eastern flank – to the size of a brigade, 5,000 per country (totalling another 40,000 soldiers), and finally adding the newly arrived American reinforcement of 20,000 troops. The available national forces of the eastern flank countries, whose number, according to a June NATO statement, is 295,000 troops,⁷⁴ are probably included in the 200,000-strong 30-day readiness forces. The other version could be that the necessary number of troops will be provided from the forces offered to NATO by the member countries and pre-assigned to defend specific allies, which will probably relate to the currently ongoing operational deterrence and defence planning process. The operational plans are already being developed on a geographic basis, in line with the SACEUR's military strategic plan, which is broken down into regional plans by the Joint Forces Commands (Brunssum, Naples, Norfolk) incorporating individual national defence plans. At the 2023 Vilnius Summit, Allies approved a new generation of regional defence plans which will significantly improve the coherence of NATO's collective planning with national planning with Allies' national planning of their forces, posture, capabilities, and command and control.

NATO commands, like in the Cold War, will determine the territorial borders/defence zones and defence lines of forward defence to be defended by local (in place) national and NATO forces, and reinforcing/pre-assigned follow-on forces arriving from strategic depths. This concept differs from the “hedgehog strategy”⁷⁵ prevailing in the 1950s in that NATO forces are now deployed in the eastern flank countries already in peacetime, so it is not only national forces that must deal with the enemy's attack. The new strategic concept defined a number of principle requirements that should be considered as guidelines for developing the new force model: it should have an integrated and proportionate structure, reflect the alliance's 360-degree approach; its composition should correspond to the new strategic environment; strengthen readiness, responsiveness, deployability; have a digitised management and control system, as well as accept and creatively apply emerging disruptive technologies.

Conclusions

The strategic concept can be considered an evolutionary and revolutionary document at the same time, if we compare the results of the NATO 2030 reflection report and the

methodological solutions of the previous strategic concept development. It represents a significant shift away from the previous strategy and provides a vision to move forward in the future. The context of the document is affected by Russia's invasion of Ukraine, which modified numerous aspects of the politico-military context and approach that had previously been prepared. The renewed political discussion had a positive effect on the text, as this way all member states found what they wanted in the strategic concept, which met their expectations according to their national interests and political views. The new concept preserved NATO's purpose and values, maintained its triple core tasks, modified previous force development principles, and gave strong responses to the Russian threat, almost reminiscent of Cold War times.

The deterrence and defence tasks paint a picture of a robust multinational, integrated and combined military force capable and ready to fight a high-intensity, multi-domain war against nuclear-armed peer-competitors. This NATO force can conduct multidimensional operations in five operational domains (land, sea, air, cyber, space), while it is also ready to activate Article 5 in case of a major hybrid-attack, as a new task. NATO's new force model is supposed to "materialise" new requirements, and will be fully implemented in the coming years. It sends a strong message that it protects the entire territory of the alliance, preserves the sovereignty and territorial integrity of all member states, and can defeat any aggressor at any time and in any battlespace. In addition, several new innovative initiatives (e.g. the identification of the Indo-Pacific region as a "sphere of interest") appeared in the document. In terms of content, the strategy is much more realistic than its predecessor, free from exaggeration, although some overambitious goals also appear in the field of co-operative security.

The new strategic concept is the type of political document like its predecessors, it does not define specific military requirements, and even the "reform, modernisation, and transformation" section is missing from the text. This raises questions regarding its implementation, especially if we consider that the regional operational plans had been prepared in 2019, and the requirements have been rewritten in many respects by the Russo-Ukrainian war. One can only hope that NATO nations will be able to generate more military capacity, like during the Cold War. This is necessary so that one can talk about a long-lived concept, not only an interim strategic document as was the one published in 2010. Perhaps the new defence political guidance in 2023 will provide answers to the questions missing now from the concept, regarding NATO's military transformation. Let us be content that after 12 years, NATO again has a "compass to the future" which helps the alliance to return to its core business in a new era of the great power competition. As NATO secretary general Jens Stoltenberg said: "As the world changes, NATO will continue to change."⁷⁶

Notes

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Notes on contributor

Zoltán Szenes is a Professor of Security and Defence Studies at the University of Public Service Ludovika in Budapest, Hungary. He is a retired General and was the Chief of Defence of Hungary (2003-2005). He was serving with NATO as the National Military Representative of Hungary at NATO and the Western European Union (1998-1999), as J4 AFSOUTH Naples (1999 -2002), and as the member of NATO Military Committee during his CHOD tour. He was affiliated with ACT, Norfolk as the Senior Concept Developer (2005-2009). After his early retirement he joined the university and teach national and international security and defence subjects. His last edited book (in Hungarian) is *NATO Today: The state and tasks of the Alliance* (2021), Zrínyi Military Press, Budapest.

ORCID

Zoltan Szenes  <http://orcid.org/0000-0003-1686-2273>