The Russian Hybrid Gambit and Baltic Countermoves:

Hybrid War, Grand Strategy, and Whole-of-Society Defence

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University of Glasgow: 2701005M
Dublin City University: 21109303
Charles University: 86787043

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Supervisor: Dr. Nik Hynek
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Abstract:

This study explores hybrid warfare as a strategic choice for states under geopolitical pressure. This form of warfare, often covert and non-military, is not a new concept; history's prominent military theorists have long advocated for achieving political objectives through subversion and coercion rather than overt conflict. While not new, technology and a changing geopolitical landscape are making these tactics more prevalent, and the very nature of open democratic societies can make them vulnerable to hybrid attacks.

Russia's strategic challenges, following the dissolution of the Soviet Union, exemplify the conditions that stimulate the application of hybrid warfare. The loss of control over critical geographical invasion points, combined with Western encroachment on its borders, has led to Russia employing hybrid warfare in an attempt to regain strategic influence over former Soviet territories. The Baltics have responded by implementing whole-of-society defence, a strategy that encourages integrated comprehensive societal participation for national defence.

This research aims to understand and explore these opposing strategic dynamics. This study is guided by two key research questions: first, what is the role of hybrid warfare in grand strategy and how effective is it in accomplishing strategic goals? Secondly, is whole-of-society defence a viable response to hybrid conflict?

Using comparative case studies, the research examines Russia's application of these tactics in Georgia and the Baltics, and the corresponding effectiveness of the whole-of-society defence strategy employed by the Baltic states in curtailing such hybrid attacks. This research contributes to the understanding of evolving warfare strategies and suggests potential responses to non-traditional threats, a pressing need in today's global security landscape.

Key Words: hybrid warfare, whole-of-society defence, grand strategy, Russia, near abroad, Estonia, Lithuania, Latvia, Georgia, Gerasimov, Primakov, NATO, EU, post-Soviet

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Abbreviations & Figures:

Abbreviations:

AU: African Union
BA: The Baltic Assembly
eFP: Enhanced Force Presence
EU: European Union
DDoS: Distributed Denial-of-Service
DIME: Diplomatic, Information, Military, Economic
DNS: Domain Name System
GRU: Russian Main Intelligence Directorate
LAF: Lithuanian Armed Forces
LNG: Liquefied Natural Gas
MoD: Ministry of Defence
NATO: North Atlantic Treaty Organization
NGO: Non-Governmental Organization
RBN: Russian Business Network
UN: United Nations
USSR: Union of Soviet Socialist Republics
US: United States

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1. Introduction:

War is not a uniquely human invention, although the scale and destructive capacity of human war is unprecedented in nature. Human beings, regardless of location, creed, or ideology, have a long history with deadly group conflict. As Gwenn Dyer, the Canadian historian said, war has been our constant companion for the entirety of human history, spanning every known civilization in some capacity or another (Dyer, 2010: 65). However, he also points out that if war was just another component of developing civilizations it could be dealt with in much the same way as slavery, or the oppression of women. Perhaps not eradicated, but mitigated and controlled, accompanied by the sense that humankind is leaving such barbaric practices behind (Dyer, 2010). That has not been the case with war. The 20th C. saw the most destructive warfare in the entire history of humankind (Ferguson, 2006). Hundreds of millions were killed in the great wars between global superpowers. War was scaled and grew exponentially with the advent of industrialization, and rather than being mitigated by civilization, it began to permeate every aspect of the human experience. Carl Von Clausewitz was one of the first theorists to introduce the idea of 'total war,' in which the stakes of the conflict are so high that every aspect of society is mobilised towards victory, and therefore becomes a legitimate target for adversaries (Clausewitz, 1989: 77). The result of total war in the 20th C. was a catastrophe for civilians and societies alike.

Total war presents a paradox when it comes to the societal base of a given nation. Overt attacks are obvious and obviously damaging, and often

galvanise a society against an adversary. Nazi Germany's Blitz attacks, targeting civilians in the United Kingdom during WWII, almost certainly had the opposite of the intended effect. Rather than demoralising the civilian base, these attacks unified the targeted society against a common enemy. This societal level response to attack was perfectly embodied in Winston Churchill's famous speech after the allied defeat at Dunkirk in 1940 when he said: "...we shall defend our Island, whatever the cost may be, we shall fight on the beaches, we shall fight on the landing grounds, we shall fight in the fields and in the streets, we shall fight in the hills; we shall never surrender" (Churchill, 1940). Yet hybrid warfare, which by nature and design, is often unattributable to an enemy, may be even more dangerous than the V-2 rockets which showered London during the Blitz. Disinformation surrounding the dangers of Covid, and the effectiveness of a vaccine, could have a far greater death toll than 9/11 in a country the size of the United States (Martinez, 2022). By instrumentalizing civilians, who often are not aware they are being targeted and used, states with limited military capabilities can still inflict enormous harm on their adversaries, while largely avoiding the unified enmity of the affected state.

The 21st. C, has seen an expansion and reimagining of what war might entail. The digital revolution, globalisation, mass communication which can be targeted and delivered at the individual level through social media, have all conspired towards a dramatic shift in the centre of gravity of war towards the civilian base of an adversary. The one lesson seemingly learned from the catastrophe of the 20th C. is that there is much to lose when waging war between large industrial states. This sense of potential loss has redirected

conflict towards less overt, although potentially equally damaging avenues of attack. Hybrid war, the malign low level modern form of fighting is not a new idea either. In some ways it is as old as war itself, with virtually every great military theorist, from Sun-Tzu and Thucydides, to Machiavelli and Clausewitz advocating for winning political victories through subversion, prevarication and coercion, without resorting to military conflict. War is costly, and often rests on chance occurrences to determine the victor. These theorists argue it is better to apply strategy to achieve a nation's goals than risk the future of an entire state on what can amount to the cast of a die.

Since the dissolution of the Soviet Union in 1991, Russia has been strategically and geopolitically on the back foot. In addition to crushing economic hardship, and the military collapse which Russia suffered, there were also very real geographical ramifications after the breakup of the USSR (Marshall, 2022). The Soviet Union represented the first time in history that Russia overtly controlled all the geographical invasion points emanating from Europe, particularly the great European plain, which has acted as a flat highway for invading armies and which leads directly to Moscow, (Fig. 1., McDonell, 2023b). The Soviet Empire, at its height, controlled its geographic region to the point of finally achieving the desired strategic end state attributed to Catherine the Great when she said “I have no way to protect my borders but to expand them.” During the USSR era, Russia also controlled the critical deep water port in Sevastopol, uniquely ice-free in northern Eurasia, providing year round access to the global oceanic network. Given the historical experience of Russia, which suffered 3 major invasions - the Mongols, the French under Napoleon, and Nazi Germany - controlling incursion points and having access

to the power that comes with a blue water navy is of existential importance to the Kremlin (Marshall, 2022).

These two preoccupations, vulnerability on land and lack of warm-water ports, explains the Russian invasions of Ukraine in 2014 and 2022, but it also explains much of Russia's interference in the former USSR. The social and economic benefits of Westernisation are obvious to these former Soviet states, not to mention the defence and stability of the North Atlantic Treaty Oranisation's (NATO) security guarantee. To Russia however, this seems to represent yet another potential existential threat on its borders, similar to so many in its history. While Russia is not able to compete with the military power of NATO, or the US, it has tried to use other instruments of power to regain strategic control of former Soviet spaces. This paper is not meant to be an apology for the Vladimir Putin regime, nor is it meant to excuse the regime's actions which have increasingly operated outside acceptable international norms and laws. It is critical, however, for an impartial academic study to fully understand the strategic viewpoint of Russia and its adversaries in order to provide a nuanced analysis. It is also important to place hybrid warfare within these strategic imperatives to better understand why they happen, why they are effective, and where they are likely to be used.

How then can a targeted state respond, without themselves escalating to a more dangerous or overt conflict? Churchill's speech perhaps provides a clue; by fighting the enemy at every level of a society. By incorporating a whole-of-society approach to conflict and defence, it may be possible to nullify and even deter these insidious attacks. As the nature of warfare has evolved, it has become clear that traditional military strategies alone are not

always effective in addressing modern threats. While whole-of-society attacks are not new, technology and a changing geopolitical landscape are making them more prevalent, and the very nature of open democratic societies can make them vulnerable to hybrid attacks. A comprehensive or whole-of-society defensive strategy may be required to counter these encroachments. It is crucial to understand the evolution and development of whole-of-society defence strategies, which are often touted as a response to hybrid war, and their effectiveness in countering hybrid attacks and achieving strategic end states. Therefore this study will be driven by two interrelated research questions, using a comparative case study model for analysis. First, if hybrid attacks fit into grand strategy, and how successful hybrid warfare is in accomplishing strategic goals. Next, whether a whole-of-society defence model can be an effective response to hybrid conflict. To respond to these research questions this analysis considers how these tactics were used by Russia in post-Soviet spaces including Georgia and the Baltics, and the strategy and effectiveness of whole-of-society defence in the Baltic states at curtailing hybrid attacks.

Figure 1. *Russian Near Abroad and Geographical Points of Invasion* (McDonell, 2023c).

2. Literature Review:

Hybrid warfare has become a favoured tactic of many states due to the potential for these tactics to achieve strategic objectives without engaging in direct military conflict. Often used synonymously with asymmetrical, grey, or 4th generation warfare, some analysts tout this blended style of attack as something wholly new, and don't situate this form of low-level warfare within grand strategy. Consequently, hybrid war is often only addressed on the tactical or operational level. It is, however, more useful to view hybrid war as a component of long held tenets of grand strategy. An integrated response which transcends tactical and operational levels, and which functions at the strategic and societal level simultaneously is perhaps the most promising response to these whole-of-society attacks. Therefore the objectives of this literature review are three-fold; first, to investigate the currently available literature regarding the nature of hybrid warfare, the ways in which hybrid war may be considered a component of grand strategy, and how hybrid war has evolved and developed to achieve strategic goals. Secondly, to explore the context of Russia's hybrid tactics and to provide an introduction to the desired end states of Russian strategy. Finally, there will be a focus on literature regarding how a whole-of-society defence model can act as a viable response to hybrid war with a focus on the Baltic states. This literature review will provide an in-depth analysis of the key concepts of hybrid warfare and whole-of-society defence strategies, and their relevance to grand strategy. The review will help to shed

light on the strategies employed by various actors in hybrid warfare and identify potential avenues for response and deterrence

2.1 Hybrid Warfare and Grand Strategy:

Frank Hoffman argued that future conflicts will involve a convergence and combination of distinct challenges - traditional, irregular, catastrophic, and disruptive - and dubbed this synthesis "hybrid warfare." (Caliskan, 2019, Hoffman, 2007, McDonell, 2022). This was intended as an exclusively military term, with a limited view, but some analytic value. After the 2014 Russian invasion of Crimea, however, the term expanded and began to be used as a catch-all term for anything other than conventional military force (Caliskan, 2019). Critics noted the term was overused and as such it had lost value. Gray (2006) for example argued persuasively that hybrid war was better explained by Clausewitz and Sun-Tzu, than any modern theorist. He did admit the United States (US) military was too conventional and that the discussions around hybrid war might be an effective way to enact adaptation (Gray, 2006). While Hoffman (2007) asserts that the new sort of warfare he describes is consistent with Clausewitz's strategic theory, he provides no additional explanations for how, why, and when. According to Hoffman, hybrid warfare is the synchronised use of multiple “instruments of power,” both conventional and unconventional, in a unified campaign to achieve national objectives (Hoffman, 2007: 23). The term “instruments of power” begins to frame hybrid attacks as a component of grand strategy.

Grand strategy in international relations is a comprehensive, long-term plan developed by a state to protect and enhance its national interests using all available elements of national power, including diplomatic, information, military, and economic means. While there are many theoretical interpretations of grand strategy, a formative theory is realism, which focuses on the imperatives of planning and power (Silove, 2017: 34). Theorists such as Hans Morgenthau (1948) and Kenneth Waltz (1979) have argued that states, operating in an anarchic international system, act primarily in their own interest, often by accumulating and exercising power over weaker states, or by undermining more dominant states to achieve a balance of power. Conversely, neoliberal theorist Joseph Nye emphasises the role of alliances, international institutions, trade, and democracy in maintaining peace and achieving mutually beneficial strategic goals (Nye, 2004). The emergence of hybrid warfare, however, can pose significant challenges to these traditional understandings of grand strategy. Indeed, some critics even question the purpose or feasibility of grand strategies, particularly in light of hybrid threats. For instance, Richard Betts challenges the possibility of strategic coherence amidst the unpredictability and complexity of international relations (2000). Critics like Betts perceive grand strategy as a rigid, detailed plan, which might be impractical in the fluid and complex realities of international relations. However, grand strategy is better understood as a flexible guideline that sets overall objectives and establishes a broad framework for decision making, rather than dictating specific actions. A flexible grand strategy can adapt to changing circumstances, including the unpredictable nature of hybrid threats. While hybrid warfare's complexity poses considerable challenges, it does not

invalidate the need for a grand strategy, and these tactics themselves are best understood as mechanisms of flexible strategic thinking.

The Russian concept of hybrid warfare in particular has been the subject of much scholarly attention in recent years. The strategies and tactics employed by Russia in its hybrid warfare campaigns will be discussed below, but it is important to note these tactics have been informed in analysis by a range of political-military theorists, including Clausewitz and Sun Tzu as suggested by Gray (2006). Clausewitz's concept of total war has been applied to the tenets of hybrid warfare, which seeks to achieve political objectives through a combination of military, economic, and information tactics (Galeotti, 2018). In particular, irregular forces, propaganda, cyberattacks, and other non-military measures are used to achieve strategic geopolitical goals (Galeotti, 2014). Sun Tzu has also been crucial in developing the conceptual framework for understanding hybrid conflict. Sun Tzu's emphasis on deception, psychological operations, and non-military means to achieve strategic goals has been reflected in tactics like social media disinformation campaigns and "little green men," a tactic which effectively concealed Russian military involvement in Ukraine (Kaylan, 2018, Sun Tzu, 400 B.C.E.). Pavel Felgenhauer persuasively argues that Russia's 2014 military engagement in Ukraine was aimed at regime change in Kyiv, not merely annexing Crimea (Felgenhauer, 2014). The 2022 invasion of Ukraine further supports Sun Tzu's view that military power serves political ends.

Some analysts argue that hybrid warfare as a strategy departs in important ways from the classical theories of Clausewitz and Sun Tzu. Dmitri Trenin, for instance, claims the modern concept of hybrid warfare goes beyond

military, economic, and information tactics (2018). This new form of war includes emerging technologies and integrated societal attacks, and is deeply impacted by modern innovations like the 24-hour news cycle and social media, which classic theorists could not anticipate (Trenin, 2018). Trenin further emphasises that non-linear warfare is flexible and adaptable, making it difficult to predict or counter as it runs contrary to traditional notions of the concentration of military power (Trenin, 2018). It is worth noting that Trenin's reputation as an unbiased professor in the West suffered as a result of his pro-Kremlin views (Kirchick, 2015). However, in this case his analysis of hybrid tactics and strategies is valid because it is based on objective observations examining both Western and Russian hybrid tactics in tandem, and refrains from offering an opinion about the ethics or value of those tactics or strategies (Trenin, 2018). While Trenin is impartial in this case, the employment of credible academics to push a pro-Kremlin narrative is also a component of controlling the information space and is yet another example of hybrid methods.

Despite these differences in interpretation in the available literature, it is clear that the ideas of Clausewitz and Sun Tzu have played a significant role in shaping the analytical framework of hybrid warfare, as have the realist imperatives of Waltz and Morgenthau. The emphasis on the use of all available means to achieve strategic objectives, the importance of information and psychological operations, and the use of irregular forces all reflect the influence of Clausewitz, Sun Tzu, and realist theories on modern military strategy. There are several axiomatic statements in Clausewitz's writing which are often repeated as gospel by military analysts. “War is an act of violence

taken to an extreme, used to compel an enemy to do one's will", and "war as a continuation of policy" are two of the most often quoted (Clausewitz, 1989: 75, 87). Clausewitz's theory writ large is a means to describe what he viewed as the reality of war as a mechanism of grand strategy. Not just a single war, but all wars. Clausewitz describes three reciprocal actions: the utmost use of force, the aim to disarm the enemy, and an utmost exertion of power. Clausewitz also believed that defence is a more powerful type of war than offence, even though it serves the negative objective of denying your adversary access to something or achieving some aim, because defending requires less resources and is more efficient than attacking (Clausewitz, 1989: 357). There are numerous reasons for this according to Clausewitz, including physical, ethical, and psychological factors.

Clausewitz's theory on war and strategy seems to encompass a particular type of war and battle, specifically war originating since the emergence of the nation-state, and the development of Napoleonic strategy. The ideas he discusses, the trinity of variables contributing to the cause and the outcome of war, and the fact that war is intrinsically linked to political will, are useful ideas in the light of conflicts between modern political units as well as his own contemporary wars. The three reciprocal actions can initially seem to be contrary to the more limited scope of hybrid war, however upon closer examination, they are still consistent with these ideas if the added caveat of specificity is added. Aiming to disarm the enemy in *very specific ways*, with unlimited force for *narrowly defined goals*, and the utmost use of power *which is available*, is an effective definition of hybrid war in its own right. Clausewitz theories encompass a broad, politically based view of conflict, and

despite the constantly changing nature of war, Clausewitz described war as a chameleon, still providing a great deal of analytical utility (Clausewitz, 1989: 89).

The ideas Clausewitz presents are still a flexible and useful way of framing the causes and scope of war. Considering modern hybrid tactics, however, his idea that war is simply politics by other means seems to be inverted. Leon Trotsky said as much in a 1940 letter, arguing that "politics is war by other means," demonstrating a deep cultural appreciation of this inversion of classical military thinking within Russia (Trotsky, 1940). In addition, it has become increasingly clear defending against hybrid attacks is often far more difficult than planning and executing offensive hybrid war, another inversion of a classic Clausewitz adage. For example, a recent study discovered disinformation spreads at a substantially faster rate than the truth, thus requiring more resources to defend a hybrid attack than to initiate one (Dizikes, 2018). While hybrid and asymmetrical attacks fit within the framework of Clausewitz, these inversions of classical tenants beg the question, are these entirely new and innovative attacks, and do they require an equally novel strategic response to counter?

Johnson (2017) argues there are two fundamental schools of thought regarding hybrid war. The first conceptualises hybrid warfare as the use of conventional and irregular forces and sees only the merger of military and criminal components, as well as cyberwarfare, as somewhat new (Johnson, 2017, McDonell, 2022). The second school of thought also includes conventional and irregular forces, but incorporates an open-ended range of inventive techniques to negate an opponent's military supremacy and to

advance one's own strategic goals. Others in this school of thought define 'hybrid' as the numerous battlespaces in the information warfare domain where actors try to gain influence over populations in the combat zone, on the home front, and in the international community (Johnson, 2017, McCuen, 2011, McDonell, 2022). The novelty of hybrid warfare, and thus the obligation to evolve totally, is the unifying principle of this second school of thinking. While this novelty is certainly overstated, Gray is correct in arguing that hybrid warfare does require a more strategic response than what most of the West has been offering (Gray, 2006).

Whether this is a brand-new strategy, or an ancient way of fighting does not matter in a practical sense; these tactics are being used by both state and non-state actors to undermine the interests of their adversaries, while simultaneously bolstering their own agendas. Mansoor (2012) provides a response to the difficult theoretical question regarding the novelty of hybrid war, and perhaps the necessity to reimagine defence as a response to these tactics. This argument situates hybrid attacks within the framework of grand strategy implicitly and Clausewitz more specifically, emphasising the fact that hybrid war is not new. Mansoor (2012) defines hybrid war as a conflict involving a combination of conventional military forces and irregulars (guerrillas, insurgents, and terrorists), which includes both state and nonstate actors, aimed at achieving a common political purpose. This underlines the mixed nature of hybrid war. Hybrid war also includes conventional force, and state and non-state actors are using conventional attacks, and irregular warfare in tandem and in support of each other.

Mansoor (2012) discusses historical cases of hybrid war, including the attempts of Athens to cause a slave uprising in Sparta during the Peloponnesian War, and the use of deliberately crafted narratives during the American revolution designed to sway the opinion of both domestic and international audiences as classic examples of hybrid war. He also uses the American experience in the Vietnam War as an important example of how military success which is not in line with social and political will not lead to desired strategic end states (Mansoor, 2012). While he does not explicitly place these conflicts within the framework of grand strategy, the variety of historical examples employed does effectively demonstrate the effectiveness of hybrid tactics to achieve strategic end states. While regular military forces conduct conventional operations against the armed forces of their adversary, irregular forces attempt to gain control of the information space and shift the centre of gravity of the conflict towards the civilian population. By broadening military engagement to include civilians, hybrid forces increase their normally limited military strength and extend the struggle in both time and space, giving them a chance to win a lengthy battle of wills when a conventional military victory would otherwise be impossible. This approach is fundamentally about eroding the political and social will of an adversary to fight. To win in the arena of hybrid warfare, indigenous, home-front, and global audiences must feel the fight is over. In other words, military achievement must correspond with a matching political repercussion as seen by the affected people. According to Kokobobo, Leo Tolstoy's classic novel War and Peace can be viewed as a cultural icon when it comes to understanding how Russia views war and conflict (2022). One of the key ideas espoused by Tolstoy is that war

and peace, and tacitly victory and defeat, are only meaningful in the context of how they are understood by the population base. In his novel, Tolstoy argues that after Napoleon captured Moscow, the Russian population simply refused to accept they had been defeated, and as a result they were not (Tolstoy, 2000). This demonstrates Russia may have a cultural understanding that a population base is the crucial centre of gravity in a conflict, also a key component of hybrid strategy.

While this hybrid or asymmetrical means of combat is often viewed as a product of the 21st C., it is hardly a new form of fighting. The idea of an unrestrained approach to gaining victory is as old as military strategy itself. Classical military theorists from Sun-Tzu to Clausewitz have described the value and the means of achieving victory with a minimal commitment of conventional forces to the cause. Morgenthau (1948) described the amorality of states, and Waltz (1979) the imperative of balancing power, which together provide a clear explanation of why weaker states employ subversive hybrid strategies against more powerful opponents, and firmly situates hybrid warfare in realist theory and grand strategy. Mansoor provides a variety of examples to illustrate how the convergence of these complex ideas play out. Hybrid warfare is not new, it might be more accurate to say that the 20th C., and the fall of the Soviet Union, have lulled the West into a very narrow view of what constitutes ‘war.’ Or perhaps it would be more accurate to say Russia has better understood the modern reality of the inversion of some of the classical strategic tenets of war discussed above, and the shift in the centre of gravity from the conventional arms of an opponent towards their civilian base.

2.2 Russian Hybrid Warfare:

The Russian approach to modern hybrid warfare is often described as the Gerasimov doctrine, although even the man who coined the term, Mark Galeotti, felt it was overused and misunderstood (Galeotti, 2018, McDonell, 2022). The name is based on the 2013 article written by Russian General Valery Gerasimov analysing the broad scope of the modern battlefield (Gerasimov, 2013). This approach is an operational integration of methods and means, as well as a whole-of-government concept which merges hard and soft power across multiple fields and transcends peacetime and wartime barriers. (Galeotti, 2014, Gersasimov, 2013, McDonell, 2022, Rumer, 2019). The so-called Gerasimov doctrine might be better understood as a supporting component of the Primakov doctrine, based on the foreign policy of former Soviet Prime Minister Vegevny Primakov which has dominated Russian strategic thinking for more than 20 years (Rumer, 2019). The combination represents an effort to create an operational paradigm for Russia's conflict with the West. The Primakov doctrine provides guidelines for Russian foreign policy: 1) Russia should work toward a multipolar world governed by a coalition of powerful nations counterbalancing American unilateralism. 2) Russia should adamantly maintain its supremacy in the post-Soviet sphere and take the initiative in regional integration. 3) Russia ought to be against NATO expansion. Putin (2007) has publicly announced Russia's aspiration to regain its standing in a multipolar world, and created a narrative of Russia being a constant victim of other powers. Putin's famously provocative address at the

2007 Munich Security Conference, for instance, wasn't a turning point in Russia's relations with the West, but it explicitly voiced Russian dissatisfaction with Western unilateralism, reiterating the core principles laid out by Primakov and leading to various degrees of conflict. The Kremlin, and the Russian military, also appear to genuinely believe the West is pursuing a low-intensity conflict with the goal of overthrowing the Putin regime and implementing a Western-oriented political, social, and cultural system (Cordesman 2014, Gerasimov, 2013). Given these strategic tenets, it is clear hybrid war is a component of Russian grand strategy, and that most Russian aggression will continue to fall on post-Soviet spaces and NATO. By putting Gerasimov's theories into practice to fulfil this doctrine, this aggression is likely to continue as a hybrid threat for the foreseeable future (Rumer, 2019).

Herd (2022) provides an in-depth analysis of Russian strategic behaviour, arguing Russia's actions can be understood through the lens of its imperial strategic culture, which has been shaped by centuries of history and geopolitics. One of the key concepts he explores is the idea of Russia as a ‘besieged fortress,’ which is the view of Russia surrounded by hostile actors without the benefit of geographic protection (Fig. 1., McDonell, 2023c, Herd, 2022). This idea of Russian geographic vulnerability is echoed by many analysts, including Marshall (2022). These analysts note that an awareness of geography is a recurring theme in Russian history, and their subsequent strategy vis-à-vis Europe and the West. For example, Herd argues the idea of Russia as a fortress under siege implies that Russia has no choice but to maintain an aggressive strategic stance. Herd (2022) also discusses Russian hybrid tactics and argues they reflect a belief that Russia cannot win a

conventional military conflict against the West, and it must instead use asymmetric means to achieve its goals.

Mark Galeotti provides an extended commentary on the famous (perhaps infamous is a better term in the west) article by General Gerasimov. He first coined the term “Gerasimov doctrine,” although he acknowledges in a caveat that it is not new and it certainly should not be considered a doctrine (Galeotti, 2014). The term used by Galeotti (2018) is ‘guerilla geopolitics,’ a more appealing distinction as a broad terminology in many ways. Guerilla geopolitics refers to a nation which is overmatched in a conventional military sense, and perhaps politically and economically, and so uses a variety of tools which remain below the threshold of conventional war to achieve their ends (Galeotti, 2014). Galeotti discusses Gerasimov's argument which situates the “Arab Spring” as an example of these hybrid tactics being used by the West to pursue their own goals. The use of hybrid tactics by America is outside the scope of this paper, but it is important to note the analysis of US actions by Gerasimov signals how Russia is interpreting these geopolitical developments. Gerasimov then outlines how Russia can work to subvert and destroy states without direct, overt and large-scale military intervention (Galeotti, 2014). Galeotti also underlines an idea he finds particularly important: “the role of nonmilitary means of achieving political and strategic goals has grown, and, in many cases, they have exceeded the power of force of weapons in their effectiveness” (Galeotti, 2014, Gerasimov, 2013, Trenin, 2018). This is an explicit admission that all conflicts are really means to a political end, as Clausewitz argued. The actual forces utilised are inconsequential and in the current reality, Russia must increasingly rely on non-military tools to achieve

strategic end states. The information space, for example, provides numerous asymmetrical opportunities for decreasing the enemy's fighting potential. Gerasimov argues that during NATO's intervention in Libya, information networks were deployed to influence governmental structures and the populace. Gerasimov also argues private military contractors were used in direct interaction with opposition armed formations in Libya, where a no-fly zone was established and a naval blockade was implemented (Gerasimov, 2013). While these tools were undeniably used in Libya, whether they were novel is debatable (Galeotti, 2014). The crucial issue for Gerasimov is actions like the no-fly zone, traditionally viewed as the domain of humanitarian interventions, were used to favour one side of the conflict: the rebels, and tacitly the grand strategy of the US and allies. Libya serves as a convenient model for the types of hybrid operations the Russians are employing, whether of their own design or inspired by those of the West, in which the mask of humanitarian intervention and peacekeeping can shield aggressive actions and to achieve desired end states (Galeotti, 2014).

This analysis demonstrates the so-called Gerasimov doctrine is not a new development, but rather a shifting of weight between Clausewitz's trinity and Sun-Tzu's axiom that the best way to win is without fighting. War is still policy by other means, but those means are now shifting to a broader array of tools available in the 21st. C, particularly tools which facilitate the spread of information and influence, and new cyberattack capabilities all designed to avoid direct military confrontation. This shift seems inevitable since the end of the Cold War, with the US representing a monopolar global military force, and the only nation which could be considered a 'super-power.' This creates an

imbalance in military competition, with most states recognizing they cannot compete with the might of the US Armed Forces, or the combined military power of the NATO alliance. It therefore stands to reason that adversaries will find other, less existentially threatening means of pursuing their own interests, which again speaks directly to Waltz theory of balancing power (Waltz, 1979). In practice, the conventional hierarchy between strategic, operational, and tactical levels, and offensive and defensive operations, are being erased. This indicates a mild refutation of Clausewitz.

Hybrid war is notorious for transcending this strategic hierarchy, often functioning simultaneously on the strategic, operational, and tactical levels. Foltyn (2022) recognizes this and examines Russian hybrid war in a ground level tactical sense, while still keeping a broad strategic view for context. He argues the West in general, and the US in particular, are the leading global economic and military powers. Despite this strength, or because of it, adversaries are using a combination of existing internal divisions and Western media innovation, to exacerbate domestic conflicts and weaken the West. Social media reduces human cognitive processes to a tribal era of ‘us vs them.’ As the author indicates, from an evolutionary perspective it is better to be wrong in a group than to be right on your own, and this idea is often exploited by Russian troll farms pushing a fringe narrative which then appears to be widely accepted and even ‘true’ (Foltýn, 2022).

According to Foltyn, Russia is not looking for a conventional victory in conflict, but rather to create chaos and potentially enact regime change in the West. Russia uses aspects of Western culture, like a free and open press which have historically been viewed as strengths, as a kind of geopolitical judo,

turning an adversary's strength against them (2022). This is particularly true of freedom of speech on social media. Social media represents frequently unregulated opinions unfettered by academic or literal honesty and can function as an echo chamber. These social media echo chambers can lead to small group dynamics being amplified and permeating to a much broader reach, which can broadcast false information and undermine Western values like democracy and political integrity. The author does not advocate for a more draconian governmental approach to regulating speech (Foltýn, 2022). Working towards societal media literacy, or anti-trust laws, which diminish the monopoly of control from the social media giants, could be a more effective strategy, and reflects a broad 'whole-of-society' approach.

Winston Churchill once famously said "...democracy is the worst form of Government except for all those other[s] that have been tried.…" and as he intimates, there are inherent weaknesses in any liberal democratic country (Churchill, 1947). Civil disagreement and a multiplicity of views are existentially important to a functioning democracy, unfortunately they also represent the greatest weakness that may be exploited by adversaries. In many hybrid attacks the multiplicity inherent in a democracy is attacked at the root level, with foreign actors often funding both sides of an argument at the root of civil strife, with the goal of exacerbating tension, sowing discord and encouraging chaos. A unified and resilient society, with strong democratic institutions, a free and open press, and integrated civili-military strategy may represent the most effective way for a nation to be a truly indigestible target.

2.3 Whole-of-Society Response and the Baltics:

Johnson (2017) argues that most of the literature on hybrid warfare (from the West) lacks the presence of strategy (McDonell, 2022). It is critical to view the development and implementation of hybrid war, and whole-of-society defence as a strategic concern, and this remains an undertheorized subject in the literature (Käihkö, 2021). In many ways hybrid warfare constitutes a whole-of-society attack which remains below the threshold of direct military conflict, thus, a national strategic response is required. Grand strategic solutions are also absent from most of the literature, which focuses instead on tactical and operational responses; effectively treating the symptom rather than the disease. A whole-of-society defence, also used interchangeably with comprehensive or total defence, becomes crucial in the face of hybrid threats. The concept and implementation of whole-of-society defence corresponds neatly with Joseph Nye's grand strategic idea of "smart power," or the combination of mechanisms of soft power, like strategic communication, with elements of traditional hard power like conventional military defence (2004). Nye suggests the power to persuade and shape narratives can be as vital as military power in the modern information age, which speaks to both hybrid tactics and whole-of-society response in the framework of grand strategy, and is echoed by Gerasimov's analysis (Nye, 2004, Gerasimov, 2013). A grand strategy provides direction and purpose, helping to align the efforts of different sectors of society and ensuring resources are used efficiently and effectively. Without such a guiding framework, there is a risk of disjointed and counterproductive efforts, which can be particularly dangerous in the face of hybrid threats seeking to exploit

societal divisions and vulnerabilities. While the feasibility of grand strategy can be questioned by critics like Betts in the face of complex and unpredictable international relations, the integrated adaptability and comprehensive nature of a whole-of-society defence approach can provide a compelling rebuttal to such critiques (2000).

Whole-of-society defence acknowledges national security is not just the responsibility of the military, but necessitates the cooperation of all parts of society, including government agencies, civil society, and private sector players. Whole-of-society defence aims to use the whole spectrum of national power to achieve strategic goals while also increasing civilian resilience and preparation. This comprehensive defence “includes all activities necessary to prepare a nation for conflict in defence of its independence, sovereignty, and territorial integrity, and it consists of both civil and military defence” (Swedish Defense University, 2019, Atmante, 2020: 1). This defensive strategy involves both military and civil defence planning. It entails structured collaboration between government departments, civic organisations, the commercial sector, and the general public, in addition to the military forces (Wiseman, 2002). Because the contemporary threat environment involves both military and non-military concerns, and the frontiers between war and peace have become increasingly blurred, an integrated whole-of-society approach to security is more vital than it was during the Cold War (Wither, 2020). Braw (2022) examines the difficulties nations must confront in protecting themselves against the current threat environment, including cyberstrikes and hybrid warfare. Braw explores the "defender's dilemma," which she describes as the difficult choice countries have to make while defending themselves against a

variety of dangers while simultaneously sustaining economic and societal stability. Braw contends these challenges are growing more apparent as threats become more sophisticated, asymmetric, and difficult to forecast. This makes it challenging for governments to fully prepare for prospective assaults since they may not even be aware of the nature of the danger until after it has occurred, indicating that wide social resilience combined with thorough defence preparation is the most sensible solution (Braw, 2022).

Atmante (2020) provides a thorough overview of the development of comprehensive defence in the Baltics, although the research fails to mention the unique challenges faced by these states, such as a shared history of Soviet occupation and a large domestic ethnic Russian population (Coolican, 2021). Inspired by the Russian military intervention in Georgia in 2008 and Ukraine in 2014, as well as numerous hybrid attacks in the Baltic region itself, the Baltic nations have undergone major changes to their defence strategies. Initially, after their accession to NATO in 2004, the Baltic states were focused on developing their armed forces to fulfil niche, ally support roles (Banka, 2019). Russian aggression in the former Soviet space, and targeted cyberattacks in Estonia in 2007 however, shifted national policy towards territorial defence. Russia's 2022 invasion of Ukraine further justified the strategic shift towards incorporating the whole-of-society in this territorial defence (Warzecha, 2022). The small population base requires the Baltic nations to view national defence as a whole-of-society endeavour, closely linking conventional military forces with emergency services, Non-Governmental Organisations (NGO) and non-military capabilities and policies. This is not necessarily a novel approach, Sweden and Finland have

long established whole-of-society, comprehensive approaches to defence (Szymański, 2020). The current geopolitical environment, with a variety of state, and non-state actors using hybrid attacks to undermine the security of the West, and to advance their own interests has also broadened the interest and discourse around the value of whole-of-society strategies. Where the Baltic nations are unique, however, is how deeply integrated their national defence strategy is across the spectrum of society, which makes the region particularly valuable for analysis of defensive strategies (Pabriks, 2020).

These countries have incorporated civilian armed and unarmed resistance into the fabric of their defence planning and strategies, as well as involving NGOs in strategic decision making. Lithuania, for instance, codified a law which states: “the defence of Lithuania shall be total and unconditional” (Republic of Lithuania, 1996). Unconditional defence includes more than just the armed forces and the intervention of NATO, but also requires the mandatory involvement of every citizen in armed and unarmed resistance against aggressors. Similarly Estonia’s National Defence Strategy from 2013 specifically lays out plans to incorporate guerilla tactics and civilian participation in paramilitary operations (MoD Estonia, 2013). Latvia has introduced a comprehensive defence plan most recently in 2019 and plans to coordinate civilian and military defence through state administration and the Latvian National Guard (MoD Lithuania, 2019).

The Baltics have also established wide reaching education programs meant to help civilian populations develop tools necessary to survive in case of an attack or civil emergency, and to actively contribute to territorial defence against foreign aggressors (MoD Latvia, 2020). These programs include basic

survival skills, a more significant link between civilians and military personnel, evacuation procedures, institutional resilience against cyberattacks, and individual resilience against disinformation. The education packets also include detailed instructions for civil disobedience and civil resistance, including advice on changing and removing street signs to confuse adversaries, and even more aggressive means of sabotage (Pabriks, 2020). There have even been conversations in Latvia about incorporating civilian hunting clubs into the defence planning and providing them with military training to support their involvement.

Whole-of-society defence is a mechanism of outreach and recruitment between the military and civilian populations, explaining the role and purpose of security forces and presenting the need and benefit of joining the military. It also creates a societal and political will for longer-term strategic defensive thinking and development. Most problems in modern militaries require years, or decades to address, and building awareness at the grassroots level could be an effective first step toward the type of commitment needed for systemic change (Ash, 2016). Whole-of-society defence is meant to increase the resiliency of a society, bolstering the ability of a nation to defend itself against a more conventional attack, or even against an unplanned disaster, by tasking certain emergency measures to trained civilians and NGOs (Atmante, 2020). Finally, a comprehensive defence presents a hard target to adversaries, shoring up vulnerabilities as a means of deterring attempted subversion (Atmante, 2020, Monaghan, 2022).

The significant gap in extant literature indicates a need for study into the convergence of hybrid warfare, whole-of-society defence, and grand

strategic thinking, as well as the efficacy of these measures. The literature also emphasises the potential benefits of adopting a whole-of-society strategy that includes all aspects of society, including civilians. This research will contribute to the understanding of evolving warfare strategies and evaluate potential responses to these non-traditional threats.

3. Research Design Methodology:

This study seeks to answer two interrelated research questions; 1) Is hybrid warfare a mechanism of grand strategy, and if so, how effective are hybrid tactics at achieving strategic end states? 2) Is whole-of-society defence an effective countermeasure against these tactics? This research adopts a realist ontology, viewing concepts like hybrid conflict, grand strategy, and whole-society defence not just as theoretical constructs but as aspects of an objective reality. While our understanding of these phenomena is shaped by theoretical constructs, the phenomena themselves exist independently of our perceptions and have observable consequences (Sayer, 1992). To respond to these questions this research employs a comparative case study methodology, and will first examine Russian strategic thinking in the near abroad and hybrid tactics in the 2008 Russo-Georgian War. Using the framework of Russian strategy and tactics established in the first case study, this research will next examine Russian hybrid tactics in the Baltic states with a focus on whole-of-society defensive strategies as a response. This will provide a comprehensive understanding of the various aspects of hybrid warfare and defence strategies.

Case study research is an empirical inquiry that investigates a contemporary phenomenon within its real-life context. Comparative case studies can provide deeper insight by exploring the phenomena across different contexts (Yin, 2009). This methodology has been chosen because comparative case studies are particularly effective in describing causal mechanisms, allowing for both within-case and cross-case analysis (George and Bennett, 2005). The comparison between Russian hybrid tactics in former Soviet spaces

and Baltic defensive responses will shed light on both the offensive and defensive tactics employed in modern conflict scenarios, particularly in the context of grand strategy, and will be supplemented with historical analysis.

Historical analysis in these cases will allow for an in-depth exploration of the case context, and provide insights into the longer term development of hybrid warfare tactics and defence strategies over time. Considering historical context is critical to understanding present realities and why a state behaves the way it does (Pierson, 2004). Alongside historical analysis, the application of discourse analysis will provide a more nuanced understanding of the role of discourse and information dissemination in the development of hybrid warfare tactics and societal defence strategies. This is particularly relevant in these cases because disinformation and strategic communications are important components of both hybrid war and whole-of-society defence. Discourse analysis also provides a method of interpreting signalling from governments and their representatives, an essential component of analysing international grand strategy.

3.1 Design Limitations

Comparative case study research has been criticised for its lack of generalizability and case selection bias (Gerring, 2007). However, these issues can be mitigated through careful design. Research based on comparative case studies is not necessarily meant to yield generalizable findings but rather to shed light on the unique dynamics of the cases under study (Ragin, 1987). Another potential drawback is that, unlike experimental designs, this approach

does not permit direct control over variables. This is less of a concern in case study research because the emphasis is on understanding the intricate interplay of variables in a real-world situation (Yin, 2009). This is especially pertinent in the study of national strategy, hybrid warfare, and defensive strategies, all of which entail a wide range of interconnected factors. The study will attempt to identify trends and commonalities among the examples, particularly in the setting of post-Soviet spaces. Case studies, according to critics, may also suffer from selection bias, in which instances are picked based on results (King, Keohane, & Verba, 1994). To mitigate this concern, the cases in this study were chosen for strategic importance and depiction of the phenomena being examined, not outcomes. Finally, hybrid conflict and whole-of-society defence, which influence nearly every element of society, can make comparative case studies difficult and time-consuming. To counter this, the study's scope will be narrowly restricted to focus on 21st C. Russian strategy and hybrid tactics in the post-Soviet near abroad.

3.2 Case Study Design

This research design involves an initial detailed historical analysis of the 2008 Russo-Georgian War as a study of Russian hybrid warfare in former Soviet spaces. This examination will include the tactical, operational, and strategic levels of Russian action, including but not limited to military operations, information warfare, economic pressure, and diplomatic manoeuvres. Sources for this analysis will include primary documents, such as military reports, government statements, and international media coverage, as

well as secondary sources like scholarly articles and books. The second case study will scrutinise how Estonia, Latvia, and Lithuania, as post-Soviet spaces targeted by Russia with hybrid attacks, have integrated the concept of whole-of-society defence into their national strategies. Particular attention will be paid to the efficacy of Baltic strategic responses to Russian hybrid threats, which were described and contextualised in the first case. The analysis will involve an examination of defence policy documents, strategic communications, and operational activities, and will compare findings with current literature to increase the validity and reliability of findings. This case study offers practical insights and strategic frameworks for coping with complex, modern security challenges.

The comparative case study methodology allows for a nuanced understanding of the dynamics of hybrid warfare and whole-of-society defence strategies. It acknowledges that each case is unique and influenced by its specific context, yet it allows for the identification of broader patterns and insights. This research design offers a rigorous and comprehensive approach to understanding Russian hybrid warfare and the defensive strategies of the Baltic states. It allows for a deep, contextualised understanding of the dynamics at play in each case informing effective responses to hybrid threats.

4. Russian Hybrid War Case Study: The Primakov Doctrine in Georgia and the Near-Abroad

The following case study examines Russian hybrid warfare tactics in the context of Georgia and the 2008 Russian-Georgian War, with a focus on the role of hybrid tactics in achieving desired strategic end states for Russia. Hybrid warfare has become a prominent feature of Russia's grand strategy and method of approaching both local and global conflict and competition (Galeotti, 2014). Russia has attempted to exert control and influence while placing opponents under persistent pressure, supporting Russian geopolitical interests and security concerns. The Georgian front was a testing ground for these tactics, and the desired end state was not necessarily traditional victory, but perhaps an attempt to undermine and rewrite the rules of international engagement. This study explores the multifaceted nature of Russian hybrid tactics, with an integrated analysis of the efficacy of this approach in achieving desired strategic end states. In order to properly triangulate Russian hybrid tactics within grand strategic thinking, two interrelated frameworks will be used for analysis. First, the Primakov doctrine will be employed to broadly define Russian desired end states. Russia's strategic use of hybrid tactics will then be assessed using Andrew Radin's suggested framework; nonviolent subversion, covert violence, and conventional military action and subversion (2017).

4.1 The Primakov Doctrine:

The Primakov doctrine, which draws from the foreign policy of former Soviet Prime Minister Yevgeny Primakov, has been a dominant force shaping

Russian foreign policy for over two decades (Rumer, 2019). Andrei Tsygankov offers a critical analysis of Russian foreign policy arguing Russian foreign policy is shaped in complex ways by various actors and interests, making it important to consider these factors beyond the scope of the Primakov doctrine (Tsygankov, 2016). Despite these criticisms, Tsygankov acknowledges the relevance of the doctrine in shaping Russia's approach to international relations. Tsygankov argues the doctrine represents a strategy of balancing relationships with different actors, such as the US, Europe, and other regional powers, while safeguarding Russia's national interests and strategic autonomy, particularly in the post-Soviet nations which represent its closest neighbours, both culturally and geographically (2016). The current Russian foreign minister, Sergey Lavrov, also described the lasting effect of the Primakov doctrine. In an interview with Russian state television (translated online) Lavrov said: “I believe that in the near future historians will coin a special term to describe Primakov’s role in politics. They may call it the Primakov Doctrine. The moment he took over…Russia left the path our Western partners had tried to make it follow after the breakup of the Soviet Union and embarked on a track of its own” (Lavrov, 2014). Some Western analysts view the foreign policy of Russia since the early 2000’s under Lavrov and Putin as a more assertive iteration of the Primakov doctrine, following the same tenets, but from a position of increased Russian geopolitical strength, and more direct antagonism with the West (Ramani, 2015).

While it is difficult to distil an entire nation’s foreign policy to a relatively simple doctrine, Primakov’s view of foreign policy is an effective starting point to uncover Russian desired geopolitical end states, as it has

informed Russian foreign policy across multiple administrations since the end of the Soviet-era. Eugene Rumer also argues the Primakov Doctrine continues to shape Russian foreign policy decisions and actions (2019). Rumer emphasises that while the Gerasimov Doctrine, which focuses on the combined use of conventional force and non-military means, gained significant attention in recent years, it should not overshadow the enduring influence of the Primakov Doctrine. The Gerasimov doctrine, which has become ubiquitous in analysis of Russian hybrid war, is best understood as the means by which the Primakov doctrine is implemented and made operational, rather than a doctrine in its own right (2019). The man who first coined the term 'the Gerasimov doctrine,' Mark Galeotti, made much the same argument regarding the actual influence Gerasimov's arguments have had in shaping Russian warfare (2018). The Primakov doctrine serves as a strategic framework for Russia's perceived and actual conflicts with the West, providing guidance for its foreign policy objectives.

According to the Primakov doctrine, there are three key principles informing Russian foreign policy. First, this foreign policy doctrine dictates that Russia should attempt to create and maintain a multipolar world (Rumer, 2019). Broadly speaking Russia attempts to achieve a world order characterised by multiple centres of power, where a coalition of influential nations counterbalance American unilateralism. This speaks directly to Waltz's theory of balancing power in international relations, particularly a relatively weak state like Russia confronted with the overt strength of America (Waltz, 1979). Russia's use of information warfare and disinformation campaigns in former Soviet countries, like Georgia and the Baltics, is a hybrid tactic to

shape public opinion, weaken pro-Western narratives, particularly those of NATO and the US, and promote a multipolar worldview.

Next, the Primakov doctrine dictates that it is imperative for Russia to retain influence or outright control over the near abroad, and to maintain supremacy in post-Soviet spaces (Rumer, 2019). The ‘near abroad’ is a critical concept to understand when analysing Russian foreign policy (Fig. 1., McDonell, 2023c). This term refers to nations and regions which were formerly under Soviet rule, and which still possess significant linguistic, cultural, and historical ties to Russia (Soroka & Stępniewski, 2020). The aftermath of the USSR's dissolution saw the emergence of 14 new, formerly Soviet, sovereign states. This grouping encompasses a diverse range of nations, including Ukraine, the Baltic states, and the republics situated in the South Caucasus region, and the Russian government believes these regions fall within its sphere of influence. This belief is rooted in Russia's substantial political, economic, and security stakes in the area, coupled with its objective of curbing Western influence within these nations (Soroka & Stępniewski, 2020). Control of the near abroad is particularly important in buffer states between NATO and Russia like Georgia, Moldova, and Ukraine, and the Primakov doctrine advocates for Russia to reestablish influence in states which have begun to integrate with the West, such as the Baltics. To establish this influence Russia employed a combination of both hybrid tactics and more conventional geopolitical tools to ensure the near abroad acts in accordance with Russian interests. Hybrid tactics such as information campaigns, cyberattacks, and support for separatist movements are employed to weaken

these governments and prevent them from pursuing policies that challenge Russian interests, or more closely align with the West.

The final tenet of Primakov's doctrine is Russia standing in direct opposition to NATO expansion (Rumer, 2019). Both Marshall (2019), and Herd (2022) describe how the geography of Russia creates a cultural level fear of encirclement. Herd describes this mentality of Russia as a besieged fortress, and NATO's expansion into former Soviet spaces is viewed as a precursor to possible invasion from the numerous points of incursion on the European plain, and is therefore an existential threat to Russia (Fig. 1., McDonell, 2023c). Russia uses hybrid tactics, disinformation, and conventional military build-ups on NATO's eastern flank to sow doubt within NATO member nations about the feasibility of defence, and to prevent new members from the region.

The Primakov doctrine is a broad set of objectives meant to protect Russia, and to force the international and regional community to better align with its strategic goals. It seeks to counterbalance perceived Western dominance, maintain regional influence, and safeguard its security by opposing NATO expansion. To gain insight into Russian activities in the former Soviet region and their desired outcomes through hybrid strategies this case study will focus on these three essential points: 1) Russia aims to promote a multipolar global order, where a coalition of influential nations counterbalances American unilateralism; 2) Russia is determined to maintain its dominance in the post-Soviet sphere and actively drive regional integration efforts; 3) Russia opposes the expansion of NATO (Rumer, 2019).

4.2 Hybrid War Tool Kit:

Hybrid warfare is notoriously difficult to define because it encompasses a wide assortment of aggressive, often malign actions, which fall below the threshold of outright war (Galeotti, 2014). These hybrid actions are meant to advance Russian interests while confusing, delaying, or preventing a response from adversaries. By examining the diverse array of tactics considered to be hybrid warfare, each with its own unique characteristics, it becomes easier to assess potential vulnerabilities to Russian actions, gauge the overall effectiveness of these tactics in achieving strategic goals, and evaluate the effectiveness of the responses by targeted nations. It is important to note that hybrid tactics are a mutually constructed idea operating in tandem with strategic goals, and resemble a spectrum of options, rather than specific categories. It is counterproductive in many ways to try to clearly delineate linear progressions of aggression, as the very nature of hybrid war is meant to be multifaceted, and to be inherently resistant to systematised analysis. That said, in order to better situate these hybrid tactics within the Primakov doctrine the framework of analysis suggested by Radin will be used to evaluate the tactics used in former Soviet spaces (2017). Radin, although specifically discussing Russian aggression and threats in the Baltic states, provides a broad description of Russian hybrid tactics which are applicable in multiple theatres of operation. He defines hybrid war through the lens of three components of hybrid aggression: nonviolent subversion, covert violent action, and conventional military forces supported by political subversion (Radin, 2017). This is a useful analytical tool to limit the scope of interpreting Russian aggression, and does a credible job of encompassing the malign strategic

competition which broadly defines hybrid war. This spectrum of hybrid tools is not meant to be a firm definition, and even in the framework of this analysis there is a great deal of overlap and blurring between tactics. There is a wide array of conventional and unconventional tactics employed by states to achieve their strategic objectives, and Radin's framework helps parse these actions into more understandable components. It is also important to note that hybrid tactics may represent the only way in which a nation like Russia might seek to achieve a balance of power with the West, and the amorality of these tactics is inherent in realist theories of international relations (Moregenthau, 1948, Waltz, 1979). Within Radin's framework, the following tools of hybrid warfare tactics can be identified.

4.2 (a) Nonviolent Subversion:

Nonviolent subversion tactics involve the use of nonmilitary means to undermine an adversary's strength or influence. This is the broadest and most difficult to define aspect of hybrid warfare, often overlapping significantly with less malign strategic competition. Strategic competition seeks to strengthen the position of a given state relative to others, without specifically intending to destabilise or disrupt competing states. Strategic competition typically involves overt actions such as diplomatic manoeuvres, trade policies, technology innovation, and alliances and broadly employs mechanisms of Nye's 'soft power' (Derleth, 2023, Nye, 2004). Nonviolent hybrid warfare tactics are designed to destabilise or undermine the target state, often by exploiting societal or political vulnerabilities and are intended to be less attributable or deniable (Derleth, 2023). While there can be an overlap

between non-violent hybrid warfare tactics and strategic competition, the difference lies in the intent to harm an adversary, and the tactics discussed will focus on nonviolent subversion which are inherently harmful in nature. Examples within non-violent subversion include disinformation campaigns, economic coercion, cyberwarfare, proxy influence and so called ‘passportisation;’ granting mass citizenship to the ethnic Russian populations in former Soviet states. (Radin, 2017).

Disinformation, often used synonymously with misinformation and propaganda, refers to deliberately conveying incorrect or misleading information. Disinformation can be transmitted via social media and traditional media outlets to influence public opinion, sow confusion, and divide the targeted population. Economic coercion can be used to weaken the enemy's economy and exert political pressure. Cyberwarfare uses digital means to attack key infrastructure, government networks, and public institutions to disrupt operations, steal sensitive data, and destabilise regimes. Proxy influence (distinct from proxy warfare) involves funding third party national, political, or social groups to influence and destabilise the targeted country. One clear example of Russia's use of nonviolent subversion is its 2007 cyberstrikes on Estonian government infrastructure (Pernik et al., 2018; Topor and Tabachnik, 2021; see also Baltic case study below).

4.2 (b) Covert Violent Action:

Covert violent action involves the use of special forces, often without insignia, operating in clandestine fashion to achieve strategic objectives while maintaining plausible deniability. This is a level of aggression below the

threshold of outright war (Radin, 2017). Examples of this tactic can include covert military operations, assassinations or targeted killings, proxy warfare, and covert sabotage. Sabotage involves conducting operations to disrupt infrastructure, communications, or military capabilities of the targeted state. Proxy warfare entails supporting and arming non-state actors or separatist groups to overtly attack, and destabilise a targeted nation. Another developing tactic in this category is the use of manufactured migrant crises on the Russian border, in which mass numbers of migrants are deposited at border crossings between Russia and its neighbours. Some of these migrants are genuine asylum seekers, while many have alleged ties to terrorist groups, or are covert operatives (Brennan, 2021). This is meant to overwhelm the infrastructure of a targeted state, to create a narrative which casts the targeted state in a negative light internationally, and to smuggle covert agents across the border to act as ‘provocateurs’ in Russia's interest (Whitmore, 2021). Manufactured migrant crisis represents another example of blended attacks which are difficult to isolate in a single category of analysis, while clearly representing Russian malign subversion. A more recognisable example of covert tactics is Russia's use of the now infamous “little green men,” armed Russian soldiers without insignia, who infiltrated Ukraine in 2014 while maintaining plausible deniability (Kaylan, 2018).

4.2 (c) Conventional Military Action and Subversion:

Conventional aggression supported by political subversion involves the use of traditional military force alongside political manipulation to achieve strategic objectives (Radin, 2017). Hybrid military tactics (which are distinct

from hybrid tactics not involving military action), are the combination of conventional military force with unconventional tactics like cyberattacks and disinformation campaigns used to create confusion, undermine the adversary's defences, and maintain plausible deniability, while manoeuvering or employing conventional forces in support. Political manipulation is also a key component of Russian tactics in support of conventional forces. This can include exploiting internal divisions, supporting separatist movements, or manipulating elections to install sympathetic leaders or influence political outcomes, again in conjunction with traditional military force (Kofman, 2018). In 2014, for example, Russia used conventional military force, disinformation campaigns, cyberattacks, and support for pro-Russian separatists to annex Crimea and maintain influence in the region, without inciting a significant military engagement (Kofman et al., 2017, Pernik et al., 2018).

Russia has also been known to employ nuclear rhetoric and military exercises as part of its strategy of combining conventional military force and political subversion. For example in his 2018 State of the Nation address, Putin showcased a range of new Russian nuclear weapons, including the hypersonic Avangard missile and the underwater Poseidon drone (Putin, 2018). The announcement was accompanied by rhetoric emphasising Russia's nuclear capabilities and its ability to overcome missile defences, signalling Russia’s willingness to escalate (Putin, 2018). In September 2020, Russia conducted military exercises in the Caucasus region involving units from its Southern Military District. These exercises included simulated nuclear strikes and showcased Russia's ability to rapidly mobilise and deploy its forces, particularly near its borders with Georgia, Moldova, and Ukraine (Coffey,

2020). These exercises and accompanying nuclear rhetoric are meant to create doubt and division regarding an adversary's willingness to respond to lower-level hybrid threats because of the obvious risk of escalation (Meyerle et al., 2014). While the rhetoric and posturing can seem callous, analysts argue it is often calculated to coordinate actual conventional capabilities with hybrid techniques in order to maximise benefits to Russian interests (Nilsson, 2021). This is another example of the amorality of states, described by Morgentheau (1948). In an anarchic world, less powerful states will inevitably act without the restraint of conventional morals in order to maximise the strength of their own position (Morgenthau, 1948). These examples illustrate the diverse range of tactics employed in hybrid warfare, combining nonviolent subversion, covert violent action, and conventional aggression supported by political subversion to achieve strategic objectives.

By combining the Primakov doctrine with Radin's broad examples of hybrid warfare, it becomes possible to both triangulate these tactics within Russian grand strategic thinking, and analyse the efficacy of these tactics in achieving strategic end states. This framework will be applied to the near abroad, the former Soviet spaces which Russia believes should fall within the sphere of influence Russia must control. The specific case of Georgia will be examined in closer detail with the above framework in mind. This former Soviet space represents an ideal nexus between Russia's desired strategic end states and the use of hybrid tactics to achieve these goals.

4.3 Georgia Case Study:

4.3 (a) Context and Case Selection:

Russian hybrid tactics in Georgia can be viewed as an operational level pursuit of the strategies espoused by the Primakov doctrine which advocates for maintaining Russia's influence in the near abroad, countering Western interference, and consolidating a multi-polar world order. Georgia represents a nexus of these geopolitical interests. Formerly a part of the Soviet Union, Georgia has strategic significance as it borders Russia and acts as a crossroads for energy and trade connections between Europe, Asia, and the Middle East (Koberidze, 2023). It has significant importance as a littoral Black Sea state, influencing or controlling key sea routes (Fig. 2., McDonell, 2023b). Georgia discussed membership with both NATO and the European Union (EU), which if realised, would bring Western influence directly to Russia's borders, a situation the Primakov Doctrine dictates Russia must avoid. One of Russia's key strategic concerns in Georgia was the 2003 'Rose Revolution,' which indirectly led to the 2008 war.

The Rose Revolution was a series of peaceful demonstrations protesting election misconduct, widespread corruption and the authoritarian regime of President Eduard Shevardnadze (Kandelaki, 2006). The protests were successful and led to a significant change in the political landscape under the newly elected President Mikheil Saakashvili, including a mandate to regain control of the Russian supported separatist regions of Abkhazia and South Ossetia (Kofman, 2018). The new government was oriented towards the West and pushed to align even more closely with NATO and the EU which Russia viewed as a direct challenge to its domestic sphere of influence (Kandelaki,

2006). Mass protests in authoritarian or semi-authoritarian governments, like the Rose Revolution in Georgia, are known as 'colour revolutions' (Cordesman 2014; Nikitina 2014). These rallies are typically sparked by charges of election fraud, corruption, or a desire for political reform. The Ukrainian Orange Revolution (2004) and Maidan Revolution (2013) are prominent examples of colour revolutions in former Soviet states which also eventually led to Russian intervention (Nikitina, 2014). In his landmark article, Gerasimov expressly stated that Western techniques of colour revolutions and soft power are particularly dangerous to Russian interests (Cordesman, 2014, Gerasimov, 2013).

Figure 2. *Georgia Strategic Importance* (McDonell, 2023b)

The most immediate cause for the war with Russia was an escalation between Georgia and the breakaway regions of Abkhazia and South Ossetia, with Georgia moving into Ossetia in August 2008 and shelling Tskhinvali, the capital (Tagliavini, 2009). The EU-sponsored fact-finding mission on the

conflict in Georgia concluded in its report that Georgia's actions triggered the war (Tagliavini, 2009). However, the report also noted the attack followed months of provocation, ceasefire violations, and Russia's illegal support for the separatist regions (Tagliavini, 2009). While Georgia initiated the military action, many Western analysts have argued Russia played a significant role in creating the conditions that led to war (Whitmore, 2008). At the very least Russia's engagement in the Georgian war was opportunistic and in violation of international law and norms. Georgia's escalation can be seen as a significant miscalculation because the Georgian military was not capable of quickly securing control over South Ossetia or preventing a Russian military response (Kofman, 2018). Saakashvili also overestimated the level of support Georgia would receive from the West, particularly America. Some argue the US gave Saakashvili false hope of direct support in case of a conflict with Russia, thereby inadvertently encouraging his decision to use military force (Kofman, 2018).

Georgia was selected over other former Soviet states which have also been subject to Russian hybrid tactics, like Ukraine, for a number of reasons. Georgia's geographic proximity to Russia and its historical connections make it an intriguing case study for examining Russian hybrid warfare and grand strategy. Compared to the protracted, multifaceted, and ongoing Russo-Ukrainian conflict, the 2008 war between Russia and Georgia offers a focused and relatively contained conflict that can be examined in-depth. Additionally, Georgia's historical ties with Russia and its location in the South Caucasus region make it a unique case for understanding the dynamics of Russian influence and intervention in the near abroad, and the Rose Revolution

represents a prototypical example of the type of Westernisation Russia is keen to avoid in its regional neighbourhood. The Georgian conflict presents an example of how Russian hybrid warfare aligns with grand strategic thinking, and the 2008 war provides a specific time frame and set of events that can be thoroughly analysed within the confines of this research. Analysing Russian hybrid war and grand strategy in the context of Georgia can also provide insights into the effectiveness of various tactics and strategies employed by Russia in achieving desired end states. This knowledge can then inform analysis of countries dealing with similar challenges, like the Baltics, which will be discussed in a further case study. This study explores the implementation of Primakov's strategic principles through Russian hybrid warfare tactics in Georgia, sub-divided into the broad components suggested by Radin: non-violent subversion, covert violent action, and conventional military action supported by political subversion. For the sake of this study, the timeline examined will be mostly centred on the build-up and aftermath of the five day Russo-Georgian War in 2008, although some of the tactics discussed began in response to the Rose Revolution in 2003, and some are still ongoing.

4.3 (b) Non-Violent Subversion in Georgia:

Russia employed malicious non-violent strategies extensively in Georgia, primarily through cyberwarfare, information warfare, economic leverage, political manipulation, and passportisation. Georgia was the target of cyberattacks in 2008, shortly before the Russian war, which is a notable instance of cyberwarfare (Buresh, 2021, Pernik et al., 2018). Distributed Denial-of-Service (DDoS) attacks are a form of cybercrime in which a

perpetrator floods a server with an excessive amount of internet traffic, rendering associated online services and websites inaccessible to users (Pernik et al., 2018). Georgia experienced significant DDoS attacks impacting 54 Georgian websites, including approximately 90% of state institution sites. These coordinated cyberattacks crippled Georgian government, media, and financial websites (Pernik et al., 2018). These attacks were traced to websites associated with the Russian Business Network (RBN), an organised crime group from Russia. While a definitive attribution was never established, multiple cybersecurity experts argue there were affiliations between the RBN and the Russian security services (Markoff, 2008, Pernik et al., 2018).

While these attacks did not cause any physical damage, they severely disrupted Georgia's information infrastructure, leading to widespread panic and instability, and this use of cyberwarfare exemplifies non-violent subversion. The cyberattacks utilised during the Georgian conflict represented a significant milestone, as they were the first digital attacks to occur in tandem with conventional military operations, further highlighting the challenge of pigeonholing these tactics into neat categories of analysis (Buresh, 2021). This transformative development in military thinking was discussed by cyber expert Kenneth Geers (2010), who claimed shortly after the Georgian War that virtually all political and military conflicts would now incorporate a cyber dimension (Pernik et al., 2018). By destabilising national digital infrastructure, attackers can induce considerable disruption and confusion without a single troop crossing the border or a single shot being fired. The cyberattacks occurred during a period of increasing tension between Russia and Georgia, partly due to Georgia's attempts to move closer to Western institutions like

NATO and the EU after the Rose Revolution (Hamilton, 2009, Kandelaki, 2006). By attacking Georgia's digital infrastructure, Russia intended to undermine Georgia's military capabilities and hamper its attempts to integrate with Western institutions (Hamilton, 2009). The cyberattacks on Georgia represent a form of non-violent subversion with its roots firmly planted in the strategic imperatives of the Primakov Doctrine. They were designed to compromise Georgia's political stability, hinder its Western aspirations, and assert Russia's influence, and these cyberattacks certainly achieved some of their intended aims.

The 2008 Russo-Georgian War was characterised by extensive deception and propaganda. Russia used disinformation strategies before, during, and after the war to create narratives to destabilise Georgia and sway international opinion, although how effective this was internationally is a matter of ongoing debate (Axe, 2008, Rogoża, 2008). Prior to the conflict, Russia conducted a disinformation campaign in the areas of Tskhinvali and Abkhazia, which were already fraught due to tensions fostered by Russian foreign policy and pre-existing ethnic and cultural conflicts (France-Presse, 2006). Russia exploited the delicate situation by holding a referendum in 2006 on the withdrawal of Abkhazia and South Ossetia from Georgia, which resulted in an overwhelming majority voting for independence in an election deemed fraudulent by Georgia and the global community (Fraser, 2022). This manipulation demonstrates how opportunistic Russian hybrid tactics can be, often leveraging pre-existing scenarios to align with their own interests. The Russian state was disingenuous about its subtle aggression in the region, and they attempted to justify their aggression by creating various explanations and

narratives, including Georgia's alleged ties to NATO. Russia also sought to rapidly establish a connection with the international audience by leveraging influential political figures like Mikhail Gorbachev to assert Russia had no desire for a war (Gorbachev, 2008).

During the war, Russia focused on promoting disinformation on a global scale to decrease support for Georgia. Russia presented itself as a protector against a humanitarian disaster, accusing Georgia of ethnic cleansing and genocide, and while these claims were ultimately dismissed, they were initially supported by Western media coverage (Allison, 2008, MoD Russian Federation, 2020). Russia combined disinformation with the process of passportisation to justify intervention and to create a narrative in which they were merely protecting their own citizens. Russia also targeted Western influence and attempted to portray itself as a victim of Western warmongering. They claimed the US had given Georgia the green light to initiate the conflict, despite reports suggesting the opposite (Kofman, 2018). Russia capitalised on existing controversy and uncertainty to deepen mistrust of the West and instrumentalize confusion within the narratives. Domestically, Russia targeted Georgia's limited communication capabilities and media outlets. They produced false stories compelling Georgia to react, making it difficult for Georgia to dispute the disinformation, particularly in areas with low internet access. Russia also launched cyberattacks, discussed above, disrupting communications, and hampering Georgia's ability to combat disinformation and mobilise international support. Russian media targeted Georgian President Saakashvili directly, blaming him for starting the war and spreading stories of alleged ethnic cleansing (Kofman, 2018).

Russian disinformation efforts involved state-controlled media, non-state actors, and paid individuals spreading false narratives across multiple platforms. Their "firehose" approach, utilising numerous media channels, created the illusion of credibility and legitimacy (Paul & Matthews, 2016: 1). Georgia struggled to defend against such a wide range of attacks and international media organisations were also drawn in, further spreading disinformation based on false Russian interviews (Axe, 2008). The Russo-Georgian War saw Russia employing various methods of disinformation before and during the conflict. They manipulated narratives, targeted Western influence, disrupted communications, and spread false information through state and non-state actors. These initiatives had a key influence in moulding foreign perceptions of the conflict and damaging Georgia's stance, as well as eroding Western institutions' legitimacy and support for Georgia. These tactics align with the Primakov Doctrine's goal of countering Western dominance and challenging the global balance of power. It is important to acknowledge that while these information tactics were eventually debunked, they were effective at blunting Western responses, and establishing a narrative supporting Russian control over its near abroad.

Russia's economic leverage is another significant aspect of non-violent subversion. As Georgia's top trade partner in the early 2000s, Russia imposed severe economic sanctions in 2006, banning key Georgian exports including wine and mineral water and placing restrictions on transportation and postal links, which effectively destabilised the Georgian economy (Gigitashvili, 2019). The immediate trigger for these sanctions was the arrest of four Russian military officers by Georgian authorities, who accused them of espionage,

which was seen as a serious provocation by Russia (Myers, 2006). As a result of these restrictions, overall Georgian exports to Russia fell from 18% in 2005 to 2% in 2012 (Gigitashvili, 2019). The economic sanctions acted as a reminder of Russia's control over Georgia, and by inflicting economic harm, Russia demonstrated its authority in the near abroad. As with the cyberattacks, this embargo was imposed during a period when Georgia was seeking closer ties with Western institutions. By destabilising Georgia economically, Russia sought to hinder these efforts and maintain Georgia within its sphere of influence (Hamilton, 2009). By using economic leverage as a tool of statecraft, Russia clearly understands its power in international relations is not solely military. Significantly, Russia was adamant about not attacking or disrupting energy corridors, though this would have had serious economic repercussions for Georgia (Allison, 2008). This was a means of signalling that despite regional conflict Russia is a reliable energy provider. While not a decisive factor in Georgia, energy coercion is a component of Russian strategy in the Baltics, discussed below.

Russia's economic leverage over Georgia in the 2000s epitomises a non-violent form of hybrid warfare that aligns with the strategic goals of the Primakov Doctrine. However, Gigitashvili (2019) suggests these sanctions might not be as harmful to Georgia's economy in the long run as one might expect, and may have effects which run contrary to Russia’s strategic aims. The Georgian economy is diversifying, lessening its dependency on Russia, and the nation is strengthening economic connections with the EU and other countries. The sanctions may have the unintended result of increasing Georgia's drive to enhance connections with the West while promoting

anti-Russian sentiment among Georgians. As a result, while the sanctions may present short-term obstacles, they are unlikely to seriously affect Georgia's long-term economic development or pursuit of deeper links with the West, both of which contradict desired Russian geopolitical end states (Gigitashvili, 2019). These types of economic sanctions represent another potential tool of pressure and influence Russia can wield over Georgia, reflecting the larger geopolitical dynamics between the two countries.

Another key element of Russia's approach is the use of passportisation as a form of non-violent hybrid warfare. Passportisation refers to the practice of issuing Russian passports to residents of another state, notably in regions where Russia seeks to extend its influence (Jacob-Owens, 2022). This is directly related to the 'Russification' policy of the USSR, in which ethnic Russians were forcibly moved to inhabit Soviet states viewed as less loyal than Russia itself (Dostál & Knippenberg, 1979). This is also relevant to the Baltic states, and will be discussed further in the next case study (Brewis, 2017). Abkhazia and South Ossetia, regions which the USSR attempted to Russify, broke away from Georgia in the early 1990s amid the chaos of the dissolution of the Soviet Union. Russia began widespread passport distribution in the early 2000s, which was further legislated on May 31st, 2002 in the Federal Law on Citizenship of the Russian Federation. Article 14 of this law enables people who "have had USSR citizenship, and having resided and residing in the states that have formed part of the USSR," to obtain Russian citizenship through a simplified procedure. (Jacob-Owens, 2022, Russian Federal Law, 2003). This law clearly speaks to the broader strategic goal of maintaining influence and control in former Soviet states. Passportisation demonstrates non-violent

hybrid warfare as it does not involve direct military engagement but still undermines the targeted state's authority and sovereignty. By issuing Russian passports, Russia extends a form of quasi-citizenship to residents in these territories, effectively blurring national boundaries and challenging Georgia's control over these regions (Jacob-Owens, 2022). Through the lens of the Primakov Doctrine, passportization advances several strategic objectives. By creating a sizable population with dual loyalties, Russia bolsters its influence and legitimacy in the near abroad, which can then be leveraged to justify Russian intervention on the grounds of protecting its citizens, as occurred in the 2008 Russo-Georgian War (Jacob-Owens, 2022). Through passportization, Russia generates persistent instability that hampers Georgia's NATO aspirations, as the alliance is unlikely to admit a member with unresolved territorial disputes (Hamilton, 2009). Russian strategy is to challenge the perceived Western-dominated global order, and passportization provides a diplomatic tool to control the geopolitical narrative in these contested regions. Russia's passportization policy in Abkhazia and South Ossetia serves as a potent example of non-violent hybrid warfare. This tactic, guided by the principles of the Primakov Doctrine, undermined Georgia's sovereignty and asserted Russian influence in the near abroad without resorting to overt military action.

Another example of hybrid nonviolent measures used by Russia to gain influence over Georgia is political manipulation. When separatist groups in Abkhazia and South Ossetia declared independence from Georgia, Russia was quick to support these movements in order to exploit ethnic disparities, political disputes, and to undermine Georgian sovereignty and continued to do

so despite international condemnation (Stubb, 2008). Russia's backing for separatist movements did not include overt military action at first, but even minimal Russian support considerably destabilised Georgia (Hamilton, 2009). During the Russo-Georgian War, Russia formally recognized Abkhazia and South Ossetia as separate republics, a decision widely criticised by the international world, which regarded these areas as sovereign Georgian territory (Medvedev, 2008, Stubb, 2008). Russia's decision to recognise these breakaway regions had important geopolitical context. In February 2008 Kosovo declared independence from Russia's ally Serbia. Much of the West recognized Kosovo as a sovereign state, a measure condemned by Russia. The recognition of Abkhazia and South Ossetia was a Russian response and can be seen as deliberate strategic posturing to exert similar global power projection, demonstrating a balance of power and resisting Western unilateralism (Medvedev, 2008). Russia employed passportisation and granted Russian citizenship to a majority of the residents of these territories, which provided them with access to social benefits, pensions, and the right to work in Russia. Russia also offered considerable financial assistance, investing in infrastructure, repairing roads, power plants, and public buildings, further integrating them with Russia (MoD Russian Federation, 2020). This large-scale support created a structurally weak economy in these breakaway regions, whose core industries depend on Russian investments, deepening Russia's de facto control (Sebentsov et al., 2022).

The support Russia provided to Abkhazia and South Ossetia is very much aligned with the key tenets of the Primakov doctrine, and successfully helped to reassert Russian influence in the near abroad. As mentioned,

Georgia's attempts to move closer to Western institutions, including NATO and the EU, was seen as a direct threat to Russia's regional dominance (Hamilton, 2009). By supporting separatist movements and generating continuous territorial instability, Russia deterred Georgia's integration with NATO, effectively achieving another key end-state of the Primakov doctrine. Russia's political manipulation in Abkhazia and South Ossetia was fluid, integrated, and underscores a persistent Russian narrative of upholding the rights of ethnic Russians in former Soviet states (MoD Russian Federation, 2020). Through supporting these separatist movements, Russia successfully achieved multiple strategic goals, all without resorting to conventional military engagement.

4.3 (c) Covert Violent Action in Georgia:

Covert violent action involves clandestine operations meant to destabilise an enemy state, or harm their interests. Passportization could conceivably fall under this heading as well, as it is often used as justification for more overt violent action. Even within the components discussed in this case study there is a consistent blurring of what constitutes violent or non-violent action. The lead-up to the Russo-Georgian War in August 2008 serves as an example of clandestine or deniable violent action when Russia used irregular forces and other indirect means to achieve strategic objectives, initially without overt military aggression. When Abkhazia and South Ossetia attempted to break away from Georgia, Russia took advantage of this domestic instability and supplied covert support to separatist groups in these regions, including weaponry and military training (MoD Russian Federation, 2020). Prior to the 2008 conflict, Russia boosted its military assistance for separatist

groups in Abkhazia and South Ossetia, escalating tensions and destabilising the area. There were also allegations that Russian special forces, such as the GRU (Main Intelligence Directorate) and Spetsnaz, were operating in South Ossetia and Abkhazia prior to the outbreak of the conflict, assisting separatist militias and potentially laying the groundwork for the upcoming conflict, though the nature of clandestine operations makes attribution difficult (Cohen and Hamilton, 2011). The role of Russian special forces in this war has received little attention academically and could represent a valuable line of research. According to Georgian accounts, there were several occasions where Russian troops, distinguished by their black uniforms, were deployed behind Georgian lines via helicopters (Cohen & Hamilton, 2011). It's suggested these troops may have participated in activities such as espionage and sabotage (Cohen & Hamilton, 2011). In August, Russia blamed Georgia for attacking South Ossetian civilians, many of whom were quasi-Russian citizens because of passportization, allowing Russia to claim to be acting in self-defence when providing support to these regions (MoD Russian Federation, 2020). However, international observers disputed the claim, suggesting Russia had manipulated the crisis to justify military intervention covertly (Cohen & Hamilton, 2011). Although Russia eventually intervened openly, the initial stages of the conflict were marked by this covert support.

The employment of covert action in Abkhazia and South Ossetia clearly demonstrates the use of hybrid warfare in accordance with the Primakov Doctrine's strategic parameters. Russia's covert support for separatist forces in Abkhazia and South Ossetia enabled it to influence events in Georgia, a former Soviet state, thereby reasserting its regional dominance. By indirectly

contributing to the conflict, or directly being involved but avoiding attribution, Russia influenced the regional geopolitical dynamics of the near abroad towards its own interests. Georgia's aspiration to join NATO and its pro-Western stance represented a threat to Russia's regional dominance. By covertly supporting the separatists, Russia could perpetuate instability, making Georgia's integration into Western institutions more complex, counteracting Western influence. Finally, Russia's use of covert armed action to safeguard what it perceives to be its legitimate interests in Abkhazia and South Ossetia promotes the tenet of Russian control in the near abroad.

4.3 (d) Conventional Military Action and Subversion in Georgia:

Russia's military actions in Georgia, coupled with political subversion, align with the principles of the Primakov Doctrine. By amplifying political dissent, Russia justified its intervention as a peacekeeping endeavour, obscuring its pursuit of strategic dominance, which is also an example discussed overtly by Gerasimov in his 2013 article, although at the time he was referring to NATO’s intervention in Libya (2013). A case in point of this combined approach is the outbreak of the 2008 Russo-Georgian War. The non-violent and covert actions discussed above coalesced into an outright war; the combined effect of these tactics muted a Western response, and successfully confused their Georgian adversary. Russian hybrid tactics leading up to the outbreak of conventional war may have been deliberately crafted to provoke Georgia to attack, thus giving Russia a strategic advantage in the information battle (Tagliavini, 2009). Russian disinformation during the war stressed the idea the war was unwanted by Russia and they were merely

protecting themselves and their diasporic citizens. The simultaneous timing of the cyberattacks discussed above and the physical invasion is often used as an example of the first instances of a combined cyber and conventional attack in warfare (Buresh, 2021, Geers, 2010). Russia also violated a 2005 treaty by amassing munitions in Georgian territory, breaking the peacetime agreement requiring them to disclose all weapons held in Georgian territory, further indicating the premeditated nature of the conflict (Peuch, 2006). By strategically recognizing Abkhazia and South Ossetia as independent states after the war, Russia ensured a continuous military presence, which could ostensibly be justified as a peacekeeping mission. To this day, Russia maintains a military presence in the breakaway regions, relying on agreements made with these entities without Georgia's consent. While Russia and a few other nations recognize these regions as independent states, the vast majority of countries consider them as integral parts of Georgia's internationally recognized territory (Rule of Law in Armed Conflicts, 2022). This military presence also serves as a strategic deterrent, intended to hinder Georgia's aspirations to join NATO, while reinforcing Russia's influence over post-Soviet states. In 2014, Russia signed a treaty integrating Abkhazia's military and economy with its own, and in 2015, signed a similar treaty with South Ossetia, giving it de facto control over both militaries (Soldatkin & Heritage, 2015). This creeping annexation further consolidated Russia's control and served as a constant challenge to Georgia's sovereignty (Khatchvani , 2019).

Military exercises and nuclear rhetoric also form a component of Russia’s combined approach to conventional threats and political subversion.

Russia frequently conducts military exercises near the Georgian border, showcasing its military strength. For example, in 2008, just before the Russo-Georgian War, Russia held military exercises in the North Caucasus region dubbed ‘Caucasus 2008,’ simulating an intervention in response to ethnic violence (Whitmore, 2008). This created significant pressure and stoked fears of an invasion within Georgia. Such exercises are used to intimidate a targeted state, to keep tensions high, to rehearse for potential conflicts, and to signal severe consequences for countering Russian interests (Whitmore, 2008). In addition, while Russia has not directly threatened Georgia with nuclear weapons, its overall nuclear rhetoric serves as a tool of intimidation in its hybrid warfare approach. While nuclear rhetoric alone cannot cause tangible damage, the psychological and political effects are substantial. Nuclear threats foster a climate of uncertainty, which can have an impact on political decision-making, foreign policy, and even internal stability (Meyerle et al., 2014). This also serves to muffle any response from NATO and the EU, making them less eager to collaborate with governments Russia seeks to control. The use of nuclear rhetoric goes well beyond simple deterrence, acting as a tool for coercion and political subversion (Arndt & Horovitz, 2022). By frequently reminding the world of its nuclear capabilities, Russia creates a threatening atmosphere for neighbouring countries like Georgia (Hamilton, 2009). Russian officials have stated that Russia is ready to use nuclear weapons to defend its interests, implying the readiness to escalate conflicts to the highest level if needed, particularly in the near abroad (Putin, 2018).

4.4 Comments:

The case of Georgia provides a detailed exploration of Russia's strategic use of hybrid warfare strategy, explained through the Primakov Doctrine. This approach combines non-violent subversion, covert violent action, and conventional military action supported by political subversion. It is important to note these tactics are not linear, nor do they exist in a vacuum. The key operational idea presented by Gerasimov is the *integrated* use of all available means, which can create a significant overlap of methods to achieve a desired end state (2013). For example in Georgia, Russia set the stage for interference with its passportisation policy and widespread disinformation about their intentions. During the war itself they coordinated cyberattacks with a physical invasion, accompanied by fire hose style disinformation, and provided political recognition and support for separatist regions. These tactics have allowed Russia to maintain influence over Georgia as part of the near abroad, challenge Western interference, and promote a multi-polar world order. Together this presents a multi-layered integrated and complex strategy, with multiple ways and means working toward strategic end states. The implications of this doctrine go beyond Georgia. As Russia continues to wield hybrid warfare tactics, understanding the strategies outlined in the Primakov Doctrine is essential to anticipating Russia's future actions in the post-Soviet space and beyond. It is also important to recognize that Georgia in many respects represents a prototypical example of Russian hybrid tactics, and their alignment with grand strategic thinking.

5. Baltic Whole-of-Society Defence Case Study: Sleeping with the Russian Bear

In 1969, during a visit to Washington, Canadian Prime Minister Pierre Trudeau met with President Richard Nixon, and coined a phrase that would go on to symbolise the complex relationship between Canada and America. "Living next to you is in some ways like sleeping with an elephant. No matter how friendly and even-tempered the beast…one is affected by every twitch and grunt" (Trudeau, 1969). Trudeau's analogy serves as a poignant reminder of the shared experiences of nations living next to larger powers, and the complex challenges faced by countries like Estonia, Latvia, and Lithuania as they strive to secure their place in the international arena while safeguarding their national interests. Just as Canada's relationship with the US is characterised by sleeping with an elephant, the Baltic states live in close proximity to the formidable Russian bear. Despite any friendly disposition the bear may display, its presence alone holds the potential to significantly impact the stability and security of the Baltics, and Russia is not a friendly or even tempered beast. Like Trudeau's observation about the elephant, the Baltic states cannot escape the influence and potential dangers posed by their larger counterpart.

In this context, the Baltic states face the ongoing task of balancing their interests, sovereignty, and security concerns in the face of a powerful neighbour. This dynamic underscores the need for constant vigilance, diplomatic finesse, and strategic decision-making to navigate the complex relationship and ensure their own stability and prosperity in an ever-changing geopolitical landscape. The following case study will examine

whole-of-society defence as potential Baltic counter to Russian hybrid style threats, with an integrated analysis of the efficacy of this approach in achieving desired strategic end states. The Baltic states will be used to compare and contrast different approaches to whole-of-society defence within the same context of perceived and actual threats from the shared Russian antagonist.

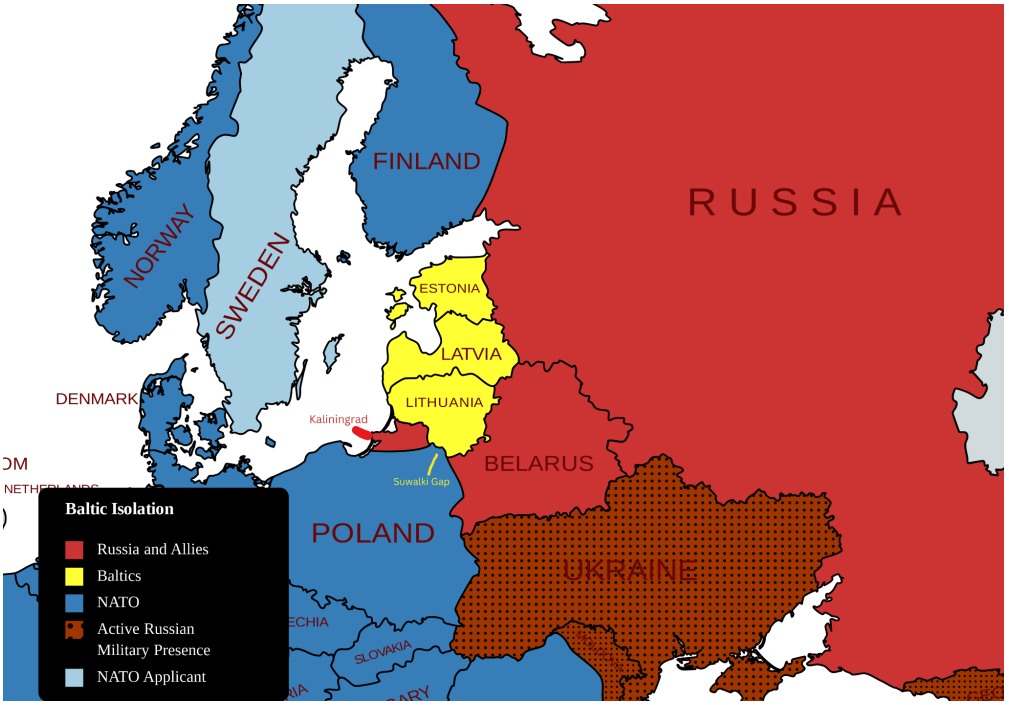
5.1 The Baltic Context:

Hybrid warfare tactics have shifted Clausewitz's centre of gravity away from conventional military contests, and towards the civilian base, necessitating a more holistic approach to defence. Clausewitz described the centre of gravity of war as "the hub of all power and movement," and this is a particularly important concept in contemporary warfare where the lines between military and civilian, state and non-state actors are disappearing (Galeotti, 2014, Clausewitz, 1989: 485). The concept of whole-of-society defence emerged as a robust response to this evolving threat landscape. This defence framework argues national security is not a responsibility that falls solely on the military, but rather is a collective responsibility that demands the participation of all societal sectors, including government bodies, civil society, and private industry actors (Atmante, 2020).

The Baltic region is of particular interest due to its unique strategic challenges. Geographically isolated and wedged between Russian ally Belarus, Russia's heavily armed Kaliningrad enclave in the west, and Russia itself to the east, the Baltic nations are perhaps the most at risk NATO members (Fig. 3., McDonell, 2023a, Letzing, 2022). The Baltic states also share significant

historical and cultural connections which make it necessary to examine them collectively when considering the whole-of-society defence approach. Together they spent much of the 20th century under Soviet rule, enduring repression, Russification, and mass deportations, which deeply affected their societal fabric and instilled the need for national resilience (Švedas, 2020). Due to geographical proximity and shared history of Russian aggression, the Baltics view their security as inextricably linked, and this historical relationship helped create a united strategic approach, reinforcing Nye's claim that cooperative security is essential to soft power (2006).

Figure 3. *Baltic Strategic Isolation* (McDonell, 2023a).



Russia considers the Baltics to be a part of its near abroad, and as such, they represent a geopolitical position Russia seeks to either influence or outright dominate (Fig. 1., McDonell, 2023c, Rumer, 2019, Soroka &

Stępniewski, 2020). These nations have adopted a whole-of-society approach to national defence due to their geographic isolation, small population base, and large Russian military presence across their shared border (Atmante, 2020, Bankauskaite et al., 2020). This strategy emphasises a change from conventional military postures to broader societal resilience. Russia's expanding use of hybrid warfare further complicates defensive strategies in the Baltic republics (Galeotti, 2014). The 2007 cyberattacks in Estonia and Russia's military incursions in Georgia (2008) and Ukraine (2014, 2022) have caused these states to reassess and adapt their defences. Despite its complexity, a comparative analysis of these states is a valuable analytical tool because of the shared geopolitical risks they face, the varied ways in which they have responded, and to better understand the geopolitical dynamics at play. Insight into their bloc stance toward the EU, NATO, and Russia can also be gleaned from this data. Both Braw (2019) and Nye (2006) stress the importance of international cooperation in preventing and responding to hybrid threats. Today's complicated security environment requires a multifaceted approach to defence, including alliances, social cohesion, and individual and collective fortitude. Together Estonia, Latvia, and Lithuania have created societal resilience strategies and whole-of-society defence approaches.

5.2 The Russian Threat to the Baltics

The Baltic states, with their shared Russian border, historical economic and energy ties, and significant Russian-speaking populations, are particularly vulnerable to hostile actions and hybrid warfare within NATO (Fig. 3.,

McDonell, 2023a, Bankauskaite et al., 2020). In line with the Primakov Doctrine, discussed at length in the previous case study examining Georgia and the near abroad, Russia has been employing various tactics to exert influence in the region. While this is a case study examining the Baltic responses to hybrid threats, it is important to define what those threats are, and how they play into Russia's geopolitical goals. Russian strategies in the Baltic region can be broadly considered malign, non-violent subversion, although there is a constant threat of escalation, which acts as a conventional threat underscored by political subversion (Radin, 2017). Though there is a distinct lack of violent action in this case study, the threat of escalation through Russia's regular military exercises near the Baltic borders serves as a coercive tool of psychological warfare, inducing tension and apprehension (Brauß & Rácz, 2021, Coffey, 2020). Russia's demonstrative naval exercises and regular violation of NATO-controlled airspace are symbolic and indicative of its potential willingness to resort to force (ERR News, 2022).

The Baltics seem to offer less fertile terrain for covert subversion compared to Georgia. While Russia managed to capture Abkhazia and South Ossetia through political machinations, subversion, and the dominance of its conventional forces, its covert operations had less success without the support of the military. The Baltic nations are fundamentally better equipped to resist and deter Russian covert activities (Radin, 2017). They exert more control over their territories than Georgia, largely due to the development of their internal security forces. Moreover, their NATO membership provides additional assistance from other NATO countries under Article 5. Unlike Georgia, where Western support was limited after Russia used conventional

forces to aid separatists, NATO members are obligated to respond to an attack on any Baltic state as though it was an assault on their own territories. The Baltic states have also expressed confidence in their capability to address covert Russian operations, attributing this to their domestic military capacity and NATO's effectiveness as a conventional deterrent (Stuttaford, 2015). Their strategy for covert Russian aggression is straightforward; they intend to kill Russia's "little green men." As the Estonian Chief of Defence explains, "If Russian agents or special forces enter Estonian territory, 'you should shoot the first one to appear" (Stuttaford, 2015). By clearly communicating this response and rapidly mobilising civilian and military forces to defeat Russian covert operatives, the Baltics aim to overpower Russian special forces, leaving Russia with the decision to either withdraw or risk escalation that would involve NATO in the conflict. The Baltics, therefore, rely heavily on NATO to provide a military deterrent, in hopes of preventing Russian action, again underlining the blurred nature of hybrid warfare, conventional forces and political strategy.

Given that covert operations are less likely to be effective in the Baltics, Russian strategy seeks to maintain and potentially amplify its political sway over the local populace, especially those who identify as ethnic Russians (Brauß & Rácz, 2021). Ethnic Russians in the Baltic states represent a large minority, particularly in Estonia and Latvia. According to Coolican (2021) they constitute 24.7% of the population in Estonia and 24.9% in Latvia, while Lithuania has a significantly smaller Russian-speaking population at 4.5%. The political status of Russians varies across the Baltics. In Estonia and Latvia, not all ethnic Russians were granted automatic citizenship following the countries' independence from the Soviet Union. Some hold 'alien' passports

and are non-citizens, while others have become naturalised citizens or have chosen to take Russian citizenship, which can be interpreted as an example of the passportisation discussed above in relation to Georgia (Coolican, 2021). The Russification policy of the Soviet Union is particularly evident in some regions of the Baltics (Brewis, 2017). For example the Estonian city of Narva, which borders Russia, and the Latvian capital Riga have particularly large ethnically Russian populations (Radin, 2017). These communities can represent a vulnerability to Russian hybrid tactics in several ways. Russia often uses its state-controlled media to spread disinformation and influence the perceptions of Russian speakers, to increase societal divisions and undermine trust in domestic governments. If Russia can stoke feelings of discontent or discrimination among ethnic Russians, it could potentially use this to justify intervention, as it did in Georgia. It was this line of thinking which also led to the 2007 cyberattacks in Estonia.

The Estonian government's intention to move a Soviet World War II memorial from central Tallinn, Estonia's capital city, to a military cemetery sparked the attacks (Buresh, 2021). The Russian government and media vocally opposed the move, portraying Estonian behaviour as bigoted against Russians, and Russian-language websites provided detailed instructions for subversive digital attacks against Estonia. These sites appeared centrally controlled by the Russian government, although attribution is always difficult with cyberwarfare. (Buresh, 2021). In similar fashion to the Georgian cyberattacks, Estonian attacks included DDoS, website defacement, and mass email spam targeting Estonian government sites (Buresh, 2021). The Estonian economy was significantly impacted by the cyberattacks, which affected trade,

industry, and governance that used information and communication technologies. Banks, media, government, and businesses were affected, and public administration communication and international information flow were greatly impeded (Buresh, 2021). While costly, the attacks were not successful in achieving Russian end states, as they strengthened Estonian ties with the West, promoted anti-Russian sentiment, and led to a dramatic increase in cybersecurity in Estonia.

Another example of political manipulation occurred in 2021, when Russian ally Belarus manufactured a refugee crisis by transporting migrants to the Belarusian border, and forcing them into the Baltic states (Whitmore, 2021). Thousands of unlawful border crossings were reported, including over 4,000 in Lithuania and 1,800 in Latvia (Whitmore, 2021). Western officials emphasised that Belarusian President Alyaksandr Lukashenka was not acting alone in this situation but was complicit with Russian strategic objectives (Brennan, 2021). Latvian Foreign Minister Edgars Rinkevics warned of Russian operatives being smuggled into Europe along with the mass of asylum seekers, and the US State Department suggested that Russia infiltrated Lithuania with agents during the migrant crisis (Brennan, 2021, Whitmore, 2021). While Russia vehemently denied these allegations, this seems to be an example of Russia utilising proxy influence; by instrumentalizing their Belarusian ally Russia avoided attribution while simultaneously destabilising the Baltic infrastructure and inserting their agents for the purpose of covert espionage, sabotage, or influence.

Russia also sought to influence the political choices of Russian speakers, both through its own direct messaging and by supporting

pro-Russian political parties and organisations in the Baltics (Bankauskaite et al., 2020). Russia pushes a pro-Kremlin agenda in the Baltics utilising local agents of influence, including NGOs, criminal organisations, journalists, and academics, some of whom may be unaware of being instrumentalized (Bankauskaite et al., 2020). These agents disseminate inflammatory narratives, such as the "resurgence of fascism," "rampant Russophobia," "ethnic cleansing of local Russian populations," and "drunk NATO soldiers," with the aim of tarnishing the reputation of Baltic governments, and undermining the Baltics goal of Western integration (Król, 2017). The objective is to create and amplify discontent with the current political, cultural, and economic model, ultimately discrediting Western values (Bankauskaite et al., 2020: 3). Russia is also cultivating influence within the political sphere, primarily at the local government level, including efforts to infiltrate, or manipulate decision-making processes in order to further Russia's interests or sow discord (Brauß & Rácz, 2021). This can also involve supporting and financing political groups and individuals advocating for a stronger bond with Russia or expressing scepticism about the Euro-Atlantic alignment of the Baltic states. These entities often question the efficacy and benefits of NATO and EU membership, pushing narratives that champion closer ties with Moscow (Brauß & Rácz, 2021).

Similar to the experience of Georgia, Russia has undertaken extensive military drills near the borders of the Baltic states, and regularly violates NATO controlled airspace, a symbolic demonstration of its military power and willingness to employ force (Brauß & Rácz, 2021, Coffey, 2020, ERR News, 2022). These tactics align with the tenets of the Primakov Doctrine, which

emphasises asserting Russian power and influence in the near abroad through a variety of means, many of which were discussed in the previous case study of Georgia. In light of the prevailing strategic landscape Estonia, Latvia, and Lithuania identified NATO as the only reliable guarantor of their security. The consensus was the military forces of these three nations would not be equipped to fend off a full-scale invasion by Russia, and would be better served aligning with NATO rather than directly challenging Russia (Brauß & Rácz, 2021). While NATO has global military superiority over Russia, the latter maintains a local edge in the Baltic Sea area. In essence, Russia could seek to achieve a fait accompli by occupying limited portions of the Baltics, and forcing NATO to choose between escalation to conventional war or accepting the new reality on the ground (Radin, 2017). Russia's consistent use of the threat of nuclear weapon use to 'escalate to deescalate' serves as an additional deterrent for NATO retaliation.

Since gaining independence from the USSR in 1991, the Baltic states have pursued the strategic objective of full integration with the West through their foreign and diplomatic policies, and have actively sought membership in international organisations such as the EU and NATO. These objectives are fundamentally misaligned with Russia's interests in the region (Bankauskaite et al., 2020, Rumer, 2019). Russia is intent on preserving and broadening its influence in this region, aiming for the so-called 'Finlandization' of the Baltics (Bērziņš & Vdovychenko, 2022). Finlandization is a Cold War term describing the relationship between Finland and the Soviet Union, in which a smaller country, in order to maintain its sovereignty and avoid conflict, modifies policies to accommodate the interests of a more powerful neighbouring

country, without formally losing its independence (Bērziņš & Vdovychenko, 2022). This concept has been discussed in relation to the Baltics and if these states were forced to adopt policies accommodating Russia out of fear, it would achieve multiple aspects of Primakov's doctrine simultaneously (Bērziņš & Vdovychenko, 2022, Rumer, 2019).

From the Russian strategic viewpoint, achieving the 'Finlandization' of the Baltic states is an attractive end goal. Russia's strategy is to nudge Latvia, Estonia, and Lithuania away from the Western orbit of influence and into the sphere of Russia's near abroad, thus eliminating the need for an expensive occupation, and securing Russian regional control (Bērziņš & Vdovychenko, 2022). Russia's broader strategy focuses on intensifying polarisation within the Baltics, degrading their socioeconomic status, undermining trust in Western establishments, and fomenting discord amongst allies to create exploitable opportunities. Given the Baltic states' reluctance to forge stronger ties with Russia, the Russian narrative insists their allegiance with the West is obstructing their progress. Russian political subversion is an attempt to secure the democratic election of a populist, anti-NATO, anti-EU, and anti-West politician as an eventual outcome, which speaks to Sun Tzu's argument that military force is merely a component of larger political goals (Bankauskaite et al., 2020, Rumer, 2019, Sun Tzu, 400 B.C.E.).

5.3 Whole-of-Society Defence:

The Baltic states, despite having distinct cultures, and languages, share several common geopolitical goals, particularly in light of the shared threat of

Russian hybrid war. It is possible to summarise these common goals in three major areas. First, Estonia, Latvia, and Lithuania recognize the value of powerful allies, and all strive for full integration and acceptance into Western alliances (Kallas, 2023, Nye, 2006, Paulauskas, 2006). While the three Baltic states are members of the EU and NATO, they are still aware that a more complete integration in the West would improve their geopolitical position vis-à-vis Russia, and there are ongoing concerns, fueled by Russian disinformation, that these institutions would potentially abandon them in the event of a Russian invasion. They view their association with these organisations as a guarantee of protection against external threats, notably Russia, and as a conduit for economic stability and prosperity (Atmante, 2020). Next, all three Baltic states share a strategic goal of fortifying their national security against potential external aggression, specifically from Russia (MoD Latvia, 2020b, MoD Lithuania, 2023, Republic of Estonia, 2023). In light of this, they've boosted their military spending, welcomed NATO's Enhanced Forward Presence (eFP), and regard NATO's collective defence commitment as pivotal to their national security strategies. Finally, the Baltic states have emphasised building a resilient society as part of their defence strategy. This involves not only traditional military preparedness but also the ability of societies to withstand various forms of hybrid warfare, such as cyberattacks, disinformation campaigns, economic pressure, and energy coercion (Kallas, 2023, Šlekys & Bankauskaite, 2023).

While there are nuances in each individual nation's geopolitical goals, Estonia, Latvia, and Lithuania have a unified set of objectives which can be understood as a shared Baltic strategic outlook in response to hybrid threats

from Russia. The components identified above: 1) a full integration with the West; 2) a stable and secure Baltic region with protection against Russian aggression; 3) a resilient and prosperous social base, will be used to coordinate analysis across the three Baltic states. In many ways these strategic goals can be viewed as the mirror image of the Primakov doctrine, and are an effective framework to view resistance to desired Russian strategic end states. In order to triangulate these strategic goals within the idea of whole-of-society defence, the DIME model will be used in order to discuss the wide array of tools used by the Baltics to achieve this resistance to Russian end states. The DIME model – an acronym for Diplomatic, Information, Military, Economic, – is a strategic framework integrating multiple aspects of national power. It provides a comprehensive approach to understand and analyse whole-of-society defence, especially in regions like the Baltics with complex and multifaceted security challenges (Bankauskaite et al., 2020, Kimsey et al., 2020). The DIME model serves as a means to distil analysis and focus on the actual policy meant to establish whole-of-society defence.

5.3 (a) Diplomacy:

Diplomacy is the first line of defence against malign adversaries, promoting peaceful resolutions and alliances, and the Baltics have been particularly successful in this regard amongst former Soviet states in the near abroad (Graney, 2019). Diplomacy is the cornerstone of the type of soft power described by Nye, and by actively engaging in international diplomatic relations, the Baltic states can significantly improve security (2004). In line with their stated goal of a more complete integration they have developed

significant multilateral connections with Western states. The Baltic nations' decision to join the EU, for example, shows a commitment to European values like democracy, human rights, and the rule of law (Graney 2019, Lainela, 2000). According to Lithuanian foreign minister Petras Vaitiekunas the Baltics "...will be safer surrounded by states that think the same way and accept the same basic values of European civilization as we do" (Vaitiekunas, 2008). This commitment effectively counteracted Russian hybrid warfare designed to undermine Western integration (Graney, 2019). For many ethnic Russians in the Baltics, the EU's open democratic cultures offer a more appealing alternative to Russian autocracy (Radin, 2017). As EU members, the Baltic states have been able to raise awareness of Russian hybrid warfare, lobby for collective countermeasures, and win regional and international backing for their security concerns.

Outside NATO and EU, the Baltics have established diplomatic relations internationally as a component of whole-of-society defence which also aligns with their shared security goals. Estonia, for instance, has pursued active relations with non-EU Western countries, and enhanced trade, technological cooperation, and shared democratic values through these relationships (Lawrence, 2023). Estonia has also consistently advocated for regional Baltic unity and cooperates closely with its neighbours. The Baltic Assembly (BA), which includes representatives from each state, is an example of this regional cooperation, a key component of shared societal defence in the Baltics, supporting Braw's (2022) and Nye's (2006) arguments that unified defence strategies are imperative to counter hybrid threats. The overarching goal of the BA is to coordinate regional political cooperation, prioritising

regional security and defence (Baltic Assembly, 2022). According to Prime Minister Jüri Ratas, Estonia further enhanced its global reputation through international collaboration mechanisms, such as the African Union (AU) summit on Digital Transformation (Ratas, 2017). Estonia acts as the framework nation for collaboration between the EU, the AU, and the United Nations (UN) in e-governance (Ratas, 2017). Estonia has situated itself as a global leader in e-governance and digital societies, sharing its expertise through its e-Governance Academy, which further bolsters its influence (Burke, 2020).

Latvia maintains close relations with Western countries, focusing on security, trade, and cultural exchange. Latvia and Canada, for instance, have a history of bilateral relations characterised by political dialogue, cooperation in international organisations, and diplomatic information-sharing (Belouizdad, 2022). There is also a history of ‘hockey diplomacy,’ with both nations recognizing the value in connecting over a shared love of the sport. This has been used as an effective form of cultural soft power between the two countries (National Defence Canada, 2023, Jarvie, 2021). Canada is the NATO framework nation for the Latvian eFP, which illustrates the direct connection between the soft power of diplomatic relationships and the hard power required for national security. Latvia's diplomacy also involves building relationships with nations like Norway to support its economic and social development. ‘Norway Grants’ fund projects enhancing social and economic equality, and along with other projects, Norway supports combating financial crime in Latvia. This is a key economic vulnerability discussed below, further

demonstrating the value of diplomacy as a component of whole-of-society defence (Norway Grants, 2017).

Lithuania has developed strong relations with America characterised by the countries' common commitment to issues of peace and security, democracy, and human rights. (US Embassy - Lithuania, 2021). There is a significant Lithuanian population in the US, with estimates at over 1,000,000 people, representing the world's largest diasporic Lithuanian population, further strengthening ties between the two countries (The Economist, 2018). Lithuanian President Gitanas Nausėda recently called on the EU to keep its doors open to Moldova, Georgia and Ukraine, reflecting its commitment to resisting Russian aggression and maintaining regional stability (Nausėda, 2023). Lithuania developed bilateral cooperation with neighbouring countries in Western and Central Europe, and more remote countries in Asia and Africa. They have implemented cultural and education cooperation agreements globally, with the aim of fostering a resilient social base. (European Commission, 2022).

In order to further their integration with the West and strengthen their regional security beyond the EU and NATO, the Baltics have employed a variety of diplomatic tactics. This is a powerful example of a whole-of-society approach that displays their widespread dedication to this integration and significantly strengthens their worldwide support against malicious interference and their ability to withstand Russian hybrid attacks. While obstacles remain, the Baltic states have been successful in countering Russian hybrid warfare through diplomacy. Their diplomatic initiatives have helped

raise awareness about these threats, build coalitions to counter them, and create norms and rules to constrain them.

5.3 (b) Information:

Nye (2004), and Gerasimov (2013) both argue that in the modern digital age, the power to persuade and change narratives can be as important as military strength. The Baltic states are aware of this importance, and as such, have emphasised transparency, strategic communications, and robust cyberdefence mechanisms as a counter to malign disinformation (Tardy & Lindstrom, 2019). Their integration into both EU and NATO information-sharing networks further enhanced resilience to disinformation (Tardy & Lindstrom, 2019). They have each taken proactive measures to mitigate and control the negative impact of malign narratives, although this remains one of the most challenging aspects of hybrid attacks.

The comprehensive national strategy of Estonia includes detailed plans to increase the digital literacy of their civilian base, fostering a resilient well informed society (Jākobsone, 2022, Republic of Estonia, 2023). This strategy includes implementing extensive media literacy programs, for both schools and the general public, to help develop critical analytical skills to detect false or misleading information (Jākobsone, 2022). Estonia also recognizes the particular vulnerability of their ethnic Russian population, and created ETV+, a Russian language news channel providing high-quality fact-checked information to counter targeted Russian propaganda (ERR, 2015). The potential vulnerability presented by ethnic Russians living in the Baltics underscores the importance of efforts by the Baltic governments to fully

integrate their Russian-speaking communities, both socially and politically. Seven out of eight Russian-speaking Estonians are now citizens or loyal permanent residents, a result of effective strategic communications emphasising the idea that security cannot be divided into security for Estonians and security for Russians (Goble, 2018).

Latvia's communication environment is complex, with 36% of the population speaking Russian as their native language, and 25% identifying as ethnically Russians, some of whom are still considered ‘alien’ residents (Vohra, 2023). There are few high quality Russian language news outlets in Latvia, meaning much of the Russian speaking population regularly consumes Russian produced media as their sole source of information (Vohra, 2023). To counteract this ongoing problem Latvia banned Russian state produced media with mixed results (Katamadze, 2023). Some Russian speakers have criticised the prohibition on Russian state TV, arguing the Latvian state shouldn't limit their media options (Katamadze, 2023). This highlights the complex task of countering disinformation amongst the significant ethnically Russian population, and represents an ongoing attempt by Russia to exert influence in the Baltics, particularly in the border regions. More controversially Latvia recently passed a law intending to make Latvian the exclusive language used in educational institutions by September 2025 (Camut, 2023). UN experts declared that Latvia's efforts to make Latvian the sole language used in schools are discriminatory towards its ethnic minorities, particularly its substantial population of Russian speakers (Camut, 2023). The new education bill is viewed as part of a broader effort to de-Russify Latvia, ensuring the Latvian language remains the official state language and common language in society.

This may have unintended consequences, potentially alienating Russian speaking Latvians, making them more susceptible to Russian disinformation. To help combat this challenging communication landscape, Latvia hosts the NATO Strategic Communications Centre of Excellence (StratCom COE), researching, training, and sharing skills in information operations, psychological operations, public diplomacy, and social media (StratCom COE, 2021).

In a more proactive line of thinking Lithuania implemented the Media and Information Literacy Strategy 2016–2020, intended to develop critical thinking skills and foster a media literate society (Urmanaitė, 2015). Lithuania has initiated several programs to increase media literacy, helping the public to identify disinformation and fake news, and implemented educational programs for children focusing on teaching students about propaganda and how to recognize it (Vilikanskytė, 2022). Prime Minister Ingrida Šimonyte regularly and publicly communicates Lithuania's commitment to Western democratic values, such as freedom of speech and the press (Šimonyte, 2022). The Lithuanian Armed Forces (LAF) has established communication units across its governmental and military apparatus to counter Russian hostile narratives. The military works with governmental and civilian agencies to foster resilience and resistance to Russian disinformation (Tremblay, 2021). Lithuania uses broadcasting regulations to limit the spread of identified Russian disinformation. The Lithuanian Radio and Television Commission (LRTK) recently banned the rebroadcasting of six Russian-language TV channels over their incitement to war and hatred, which were viewed as harmful narratives considered a threat to Lithuania's national security (Slapšys, 2022). Lithuania

is also home to the Baltic ‘elves’ initiative, a volunteer group, supported by the Ministry of Foreign Affairs to highlight and debunk Russian disinformation (Abend, 2022). The elves (so named because elves fight trolls), are civilians from every walk of life, representing a successful whole-of-society integration of the movement (Abend, 2022).

The steps taken by each country protect their societies from disinformation, and ensures a resilient citizenry capable of recognizing and rejecting false narratives. Nonetheless, challenges persist; Russian state-controlled media and a deep-rooted social divide make Russian-speaking minorities vulnerable to disinformation. Some initiatives to combat disinformation, particularly in Latvia, could have the unintended consequence of alienating ethnic Russians making them more susceptible to Russian coercion. These challenges are further complicated by the rapid evolution of digital technologies, which continually present new avenues for manipulation. Despite these evolving challenges, the Baltic states' strategies have largely been effective. Their proactive and holistic approach, engaging at the educational, societal, policy, and international levels provides a viable model for countering disinformation. The Baltic states’ experiences demonstrate that while the threat of disinformation can be mitigated, it requires sustained commitment, creative solutions, and international collaboration.

5.3 (c) Military:

While whole-of-society defence can often place a premium on civilians to become active participants in the security of their nation, conventional forces are equally important and can never be overlooked as a mechanism of

stability and safety. The Baltic nations have cooperated closely with NATO, contributing troops and hosting multinational battlegroups, and regularly outperforming the required 2% GDP contribution. This integration supports their strategic goals of regional security and full Western integration. Each Baltic state hosts a NATO Centre of Excellence (COE) that addresses their regional challenges. COEs support and enhance the alliance's capabilities, perform research and development, train specialists, develop doctrine, and experiment to prove concepts (NATO, 2022). These COEs support the Baltics' strategic aims of integrating more completely into Western institutions through NATO and solving regional security issues.

Estonia, known for its innovative digital society, experienced serious cyberattacks in 2007, discussed above (Pernik et al., 2018). In reaction to these attacks, the Cooperative Cyber Defence Centre of Excellence (CCDCOE) was founded in 2008 to educate, study, learn, and consult on cyberdefence, an increasingly critical aspect of regional stability (CCDCOE, 2020). Latvia's sizable Russian-speaking population makes curbing information warfare and propaganda efforts difficult, underlining the relevance of their StratCom COE. Since 2013, the Energy Security Centre of Excellence (ENSEC COE) in Vilnius, Lithuania has been solving energy security issues, which affect military capabilities and address energy coercion (ENSEC, 2020). This centre's focus matches Lithuania's capabilities, notably its strategic attempts to diversify energy sources and lessen dependency on Russia (Pekic, 2022).

More overt military options are also present in the Baltics. Analysts have identified that "Estonia…places the greatest value on the military" in its national power instruments against Russia and the importance of individual

involvement in the military is deeply embedded within Estonian society (Lawrence, 2023). Every Estonian male is conscripted to serve 8–11 months before entering the reserve, and the volunteer Estonian Defence League (Kaitseliit) has 16,000 active members and 10,000 more through linked organisations (Lawrence, 2023). Despite their sizable Russian minority, Estonia has a strong defence consensus; 75% of the public trusted the military in a 2018 biannual survey, 60% of Estonians would fight if attacked, and 91% think conscription is required (Kivirähk, 2018). Although the Estonian government stated "Estonia's military defence relies on NATO's collective defence" (2023), 47% of Estonians don't think NATO would help if Estonia was attacked, demonstrating some Russian disinformation has been effective (Kivirähk, 2018). To combat this perception, independent defence forces must be credible. Estonia emphasises its ability to domestically mobilise troops by regularly calling up reservists for unannounced training (Republic of Estonia, 2023). In 2023, Estonia spent over one billion euros on defence, 2.85% of its GDP (Kallas, 2023).

Estonia's ground army has 5,500 men, and except for "one professional high readiness mechanised battalion," these brigades are used primarily to train conscripts before sending them to the reserves (Republic of Estonia, 2023, Lawrence, 2023). Estonia has also taken steps to foster closer civil-military connections in response to the hybrid threats posed by Russia. The Kaitseliit actively participates in national defence education and in assisting the professional military, serving as a key example of strong civil-military relations (Lawrence, 2023). It encourages citizens' active participation in national defence, offering military training to civilians and fostering closer

relationships between the military and local communities. The league also helps enhance the readiness of the society for potential crises and increases the overall resilience of the nation.

The military readiness of Latvia appeared less certain in 2014 when, despite Latvia's larger population than Estonia (2 million compared to 1.3 million), the size of its forces was smaller, largely attributed to Latvia allocating 0.94% of GDP on defence, considerably lower than Estonia's defence spending of 1.93% in 2014 (O'neil, 2023). The first invasion of Ukraine was a significant turning point for Latvia. Since 2014 Latvia has steadily increased annual defence spending, to an all-time-high of 2.28% in 2021, and now has an even larger force than Estonia (O'Neil, 2023). The Latvian military abolished mandatory military service in 2007, but after the 2022 invasion of Ukraine have made a somewhat controversial decision to reimplement conscription (O'neil, 2023). This will increase the size of the army from over 22,000 soldiers to 50,000, including territorial defence and reserves (MoD Latvia, 2020b, Szymanowski, 2023). Public reaction has been mixed; a recent study reported 45% of Latvians supported conscription and 42% were against it. Among the younger demographic (18-24 age group), support was lower at 34% (Szymanowski, 2023). The National Guard (Zemessardze) is an integral part of Latvian Armed Forces serving as a platform for civilian participation in national defence (MoD Latvia, 2020b). There are also public education efforts, including training sessions and information campaigns, to ensure civilians are informed about potential threats and ways to respond (Szymanowski, 2023). Both strategies are meant to further bolster civil-military relations. Notably, there is scepticism among

some Western-trained observers in Riga regarding the force's ability to handle serious covert violence or a traditional assault (Radin, 2017).

Lithuania spent 2% of GDP on defence prior to 2020 to strengthen its military policy and according to the Defence Policy Guidelines for 2020–2030 they aim to spend 2.5% of GDP on defence by 2030 (MoD Lithuania, 2023, Šlekys & Bankauskaite, 2023). The reinstatement of compulsory military service in 2015, with yearly enrollment of 3,000 to 3,500 conscripts lasting 9 months, is another important choice well received by the public and is seen as a significant success for Lithuanian defence (Szymanowski, 2023). Lithuania has also begun an expansion program to improve its arsenal (Šlekys & Bankauskaite, 2023). Mobile artillery systems, armoured fighting vehicles, short-range air defence systems, tactical combat vehicles, and helicopters were purchased and LAF active personnel increased from 13,000 in 2013 to 20,000 in 2019 (MoD Lithuania, 2023, Šlekys & Bankauskaite, 2023). A NATO eFP further increased the LAF's capabilities and the paramilitary Lithuanian Riflemen's Union has been resurrected in recent years, with the annexation of Crimea in 2014 measurably increasing enlistment (Binnendijk and Kepe 2021, MoD Lithuania, 2023).

These initiatives indicate a strong emphasis on civil-military relations in the Baltic states, recognizing that defence against hybrid threats involves not just professional soldiers but also an informed, involved and prepared civilian population. Despite the growth and obvious commitment of the Baltic’s to conventional military defence, there are ongoing concerns that Russia’s larger military could overrun Baltic defences. The three Baltic nations have been clamouring for NATO to abandon its ‘trip-wire’ defence strategy, and commit

enough military power to serve as a deterrent by denial, rather than the deterrent by punishment which it currently employs (Monaghan, 2022, Whitcombe, 2022).

5.3 (d) Economic:

Since gaining independence in 1991, the Baltic states have been characterised by their liberal, open and diversified economies. They have actively moved away from the lingering dependence on Russian markets and energy and have made a concerted effort to integrate more fully into Western economies (Scrutton, 2012). In the early 2000's all three Baltic states made the strategic choice to peg their currency to the Euro in the hopes of eventually entering the Eurozone. Their efforts were successful, with Estonia joining in 2011, followed by Latvia and Lithuania in 2015 (Dandashly & Verdun, 2020). This success was not without challenges; adopting the Euro as the currency of the Baltics required complex changes including price conversions, societal shifts in monetary perception, and developing faith in a foreign currency (Dandashly & Verdun, 2020). The challenges associated with pegging their currency also required a great deal of fiscal control, which manifested itself in broad austerity measures, causing difficult societal ramifications. Reduced government spending, wage repression, and a widening wealth gap caused widespread public discontent. These negative consequences were exacerbated by spiking unemployment and were worsened by the global financial crisis of 2008 (Scrutton, 2012). Despite the hardship, these austerity measures were extremely successful, which in many ways demonstrates the societal resilience of the citizen base. The successful pegging and eventual adoption of the Euro

also acted as important geopolitical signalling to Russia. By integrating fully into the economy of the EU, the Baltics communicated that any attack was likely to have repercussions beyond the near abroad, and could spark retaliation from the EU and perhaps NATO. This is a case in point example of how economic decision making can be integrated into national defence, while simultaneously bolstering the stability and well being of the societal base.

Equally important is the Baltics' attempt to achieve energy independence from Russia. Russian energy coercion regularly undermines the sovereignty of nations in the near abroad and provides Russia with a powerful tool to leverage the international community (Howey, 2023). With this in mind, Estonia has been expanding and diversifying its energy supply, including investments in renewable green energy infrastructure (Howey, 2023). Estonia set a benchmark of having its annual electricity consumption entirely supplied by renewable energy by 2030 (Howey, 2023). In addition to energy independence, Estonia also vastly improved cybersecurity surrounding their economic infrastructure, learning a costly but valuable lesson after the cyberattacks it suffered in 2007 (Pernik et al., 2018). Estonia also shrewdly employed its position as a digital global leader to create an online economy, allowing foreign entrepreneurs to establish a presence in the EU through their e-Residency initiative (Tammpuu & Masso, 2018). While this diversified the Estonian economy there are ongoing concerns regarding the security of the program, and potential malign infiltration (Smeets, 2017).

Latvia has also worked to decouple from Russian energy sources by exploring domestic energy sources like biomass, and expanding its imports of natural gas from Western suppliers, reducing potential vulnerability to Russian

coercion, and more fully integrating with EU and international partners (Bazbauers & Cimdina, 2011, Howey, 2023). More than half of Latvia is forested, making wood biomass an attractive option, and Latvia is committed to diversifying its energy supply by exploring both renewable energy projects and a potential LNG facility (International Trade Administration, 2022). Another ongoing vulnerability of Latvia is the exploitation of their financial systems for the purposes of money laundering by both state and non-state criminal actors. Latvia is aware of this issue and has taken measures to strengthen its financial systems (Finance Latvia Association & Bajāre, 2023). While still a challenge, the efforts by Latvia to control illegal financial manipulation protects the nation from Russian economic subversion, and communicates a commitment to Western financial transparency and integrity. Latvia, along with its Baltic neighbours, also sought financial aid from the EU in order to expand its infrastructure. Projects like Rail Baltica, a high-speed rail connecting the Baltic nations to Europe is an example (Rail Baltica Global Project, 2023). This type of infrastructure project simultaneously achieves a closer integration with Europe, and decreases Russia's ability to exert economic influence. Some of the wealth inequalities which have manifested in many former Soviet states are also present in Latvia, and they have also taken measures to promote a degree of economic equality, such as increasing the minimum wage and improving social security benefits (Gauret, 2023). This helps to foster a more resilient and prosperous social base and can be a viable response to Russian attempts at passportisation, which uses Russian social security benefits as an incentive. Unfortunately, with a reported inflation rate of 20%, these measures may not be as impactful as hoped (Gauret, 2023).

Of all the Baltic countries, Lithuania has had the most success in decoupling from Russian energy dependence. In April 2022 Lithuania became entirely independent from Russian gas supplies, thanks to the liquefied natural gas (LNG) terminal in Klaipeda (Pekic, 2022). Like Latvia, Lithuania enhanced financial transparency rules and anti-money laundering regulations. It took action against several banks for inadequate controls, reflecting the government's commitment to protecting the financial sector from illicit activities, including potential Russian influence (The Financial Action Task Force, 2023). Lithuania also has a unique initiative known as the ‘Startup Visa’ program, which affords entrepreneurs a simplified immigration process. This type of program is an innovative solution to economic stagnation, promoting a fertile domestic technological startup ecosystem (Go Vilnius, n.d.). Lithuania's efforts to promote innovation fosters a resilient and prosperous social base by creating high-quality jobs and diversifying its economy.

The Baltics have taken significant steps towards energy independence, crucial for reducing their vulnerability to Russian influence. Lithuania's inauguration of the Klaipėda LNG terminal in 2014 provides a clear example (Pekic, 2022). Latvia's move towards domestic energy sources like biomass, helped diversify its energy mix and reduce its reliance on Russian gas (Howey, 2023). Estonia has become a global leader in the digital economy and digital advancements in public services, financial transactions, and the establishment of secure digital identities for its citizens showcase successful measures in countering cyberwarfare.

Despite the obvious success of some of these economic measures, there are still a number of issues. Latvia has faced challenges in securing its

financial sector from potential hybrid threats. The country's banking sector is under scrutiny for its lax regulations, allowing for money laundering activities and the channelling of illicit funds. Notwithstanding the steps taken to strengthen regulatory oversight, ensuring the long-term stability and integrity of the banking sector remains a challenge. The Baltic states continue to have some reliance on Russian energy sources, particularly in sectors harder to diversify like natural gas. By employing integrated economic strategies, each Baltic state aims to protect its economic stability and independence while countering potential Russian hybrid threats. While these strategies have proven effective, their success ultimately depends on the continued political and societal will to maintain them.

5.4 Comments:

Though their strategic goals converge, the Baltic states do diverge in the strategies used to achieve these end states. These differences are due to their unique historical, geopolitical, and social contexts, and this is particularly important to be aware of when considering whole-of-society defence. For instance, Lithuania has shown more initiative in achieving energy independence, striving to disconnect from Russian energy infrastructure. Lithuania has also been more proactive in engaging with citizen-based resistance to disinformation, with the Baltic elves acting as a truly grassroots resistance to malign propaganda. Estonia, on the other hand, having experienced major cyberattacks from Russia in 2007, advanced its strategy in cybersecurity and digital governance, and has become the most economically successful post-Soviet space, largely by investing in and fostering cyber

related business ventures. Latvia grapples with the challenge of a large Russian-speaking population and faces unique internal difficulties related to societal cohesion. As a result Latvia has developed nuanced strategies to balance the interests of different ethnic groups while maintaining a national identity and unity. These differences extend to their whole-of-society defence strategies. Estonia's comprehensive approach to national defence includes widespread conscription and a substantial voluntary Defense League. Lithuania has reinstated military conscription and has been focusing on strengthening its conventional capabilities. Latvia, too, has been improving its National Guard and promoting societal integration to ensure a cohesive response in the event of a crisis. These subtle differences in the context of their vulnerabilities have been translated into nuanced strengths which support the shared goals of the Baltics.

6. Conclusion:

The analysis of war, what causes it, how it is fought, and how to mitigate the damage which inevitably follows in its wake is a never ending process which has changed profoundly over the centuries. This research paper has provided an in-depth analysis of hybrid warfare, grand strategy, and whole-of-society defence, examining two interrelated research questions. First, what is the role of hybrid warfare in grand strategy and how effective is it in accomplishing strategic goals? Secondly, is whole-of-society defence a viable response to hybrid conflict? While some critics continue to view hybrid war as a tactical or operational concern, it is clear these attacks are mutually constructed with grand strategic precepts. Strategic end states dictate the use of hybrid tactics to achieve broad goals, while the end states themselves are often dictated by which hybrid options are available. This is a realist interpretation of hybrid war, and it is supported by the necessity to balance power internationally by any means available, in line with Waltz's theories (1979). The amorality of hybrid strategies supports the classical realist theory of Morgenthau (1948).

Whole-of-society defence is the mirror image of hybrid warfare. Using every means available to achieve security, while remaining within the bounds of liberal democratic ideals and international norms and laws, whole-of-society defence presents a credible defence which does not necessitate a moral compromise of national values to achieve. This horizontal integration of societal responses is an example of the 'smart power' described by Joseph Nye (2004). This combination of mechanisms of soft power, including diplomacy, strategic communications, and liberal open economies, with elements of

traditional hard power and conventional military defence is a pragmatic and effective response to hybrid threats and malign subversion.

The post-Soviet era exposed Russia's land vulnerabilities and scarcity of warm-water ports, factors that contextualise the invasions of Ukraine in 2014 and 2022 and Russia's interference in former Soviet States like Georgia and the Baltics. For these states, aligning with the West promised social and economic boons, bolstered by NATO's defence and stability guarantees. From Russia's perspective, this shift towards the West represented an existential threat. While unable to match NATO or US military power, Russia has sought to regain strategic control over former Soviet territories using alternative instruments of power. In Georgia, Russia's cyberattacks weakened digital infrastructure, and destabilised society, and were coupled with economic coercion and the propagation of disinformation to manipulate international perception. These strategies were implemented in line with the Primakov doctrine, and successfully reduced American unilateralism, stalled NATO expansion, and bolstered Russia's influence in the near abroad (Rumer, 2019). Economic sanctions against Georgia, however, were counterproductive to Russia's objectives. Georgia's growing economic diversification and deepening ties with the EU lessened its dependence on Russia, and these sanctions fostered pro-Western sentiment, undermining Russia's goals. Russia’s covert support and political manipulation in Abkhazia and South Ossetia exhibited the blending of political and violent aspects of hybrid warfare. By covertly supporting separatist movements, Russia achieved strategic goals with minimal open conflict. 'Passportisation' in this context was a highly effective political tool, justifying intervention to protect ethnic Russians, and creating

regional instability, impeding NATO's expansion. These tactics culminated in a conventional military engagement, which Russia won by executing a highly integrated hybrid strategy. Based on empirical evidence and analysis it is clear that Russia has effectively used hybrid tactics as a component of their grand strategy, and that these actions were partially or entirely effective at achieving desired end states.

The Baltics shared history of Soviet repression created a sense of solidarity and resilience which led to a collaborative whole-of-society defence strategy. This has manifested across almost every aspect of society in these nations. While their militaries cannot challenge Russia without significant support from NATO allies, the Baltic states have begun improving their regional and domestic defence with increased spending to develop conventional capabilities. Despite some public scepticism, particularly in Latvia, the Baltics' commitment to military security is strong. The Baltic states urgently require NATO to shift from a 'trip-wire' to a 'deny by deterrence' approach to adequately discourage Russia, requiring substantial military commitment.

Russia employs hybrid tactics extensively in the Baltics, with varying results. Russian disinformation and cyberattacks continues to compromise societal security, with Russian state-controlled media manipulating Russian-speaking minorities in Estonia and Latvia. In spite of Russian cyberattacks, Estonia was able to remain resilient due to improved security measures, strengthened ties with the West, and a strong digital economy. However, financial vulnerabilities still remain, and Latvia's banking sector struggles with money laundering and illicit fund transfers. Lithuania achieved

energy independence and counters disinformation well at the societal level, and Estonia leads in cybersecurity and digital governance. Latvia, on the other hand, struggles with societal cohesion due to a substantial Russian-speaking population, and overreacted in some regards to counter this. Despite varying approaches, their unifying goal is continued resistance against Russian aggression and hybrid warfare. The empirical findings generated by this research indicate that Baltic whole-of-society approaches, touching on every aspect of national power, are credible and flexible responses to Russian aggression, although due to geographic isolation their greatest vulnerability remains a conventional attack from Russia (Radin, 2017).

Examining Russia's hybrid warfare and grand strategy through the lens of its interactions with Georgia and the Baltic states, it is possible to draw several comparative conclusions regarding the strategic use of hybrid tactics and the efficacy of whole-of-society defence. Georgia and the Baltics are regions of strategic interest to Russia, located within its near abroad (Soroka & Stępniewski, 2020). Each region has experienced pressure and interference from Russia, but the nature, intensity, and design of tactics have varied. Russia's military power has been performatively displayed near both regions, with extensive drills at the borders of Georgia and the Baltic states, and occasional violations of NATO airspace, demonstrating Russia's willingness to escalate if necessary. Georgia's aspirations to integrate with Western institutions were curtailed by Russian military intervention and facilitated by Georgia's own strategic miscalculations and internal divisions. In contrast, the Baltics successfully joined Western organisations, acting as a significant deterrent to the type of military incursion Russia employed in Georgia.

In the energy sector, Russia's strategies diverge. While Russia avoided disrupting Georgia's energy supplies during their war, a sign of its desire to be seen as a reliable energy provider despite regional conflict, Russia uses energy as a tool of coercion in the Baltics (Allison, 2008, Matthew, 2021). Baltic efforts for energy independence have reduced this vulnerability to Russian influence; Lithuania's Klaipėda LNG facility is a key example of decoupling. Georgia was found to be vulnerable to covert Russian influence, whereas the Baltics have shown more resilience, attributed to effective territorial control. Russia seeks to exploit societal divisions created by the Soviet policy of Russification in both regions, and Russian influence is particularly prevalent among ethnically Russian populations. In the Baltics, Russia uses its state-controlled media to spread disinformation among Russian speakers, seeking to exacerbate divisions and undermine trust in domestic governments. Despite this, the Baltics' combined efforts have been largely effective in combatting disinformation.

Russia’s passportisation, used to justify intervention on the grounds of protecting ethnic Russians, has not been as successful in the Baltics as it was in Georgia. The Baltics economic opportunities and open democratic societies provide an attractive alternative to the poor economy and authoritarianism which accompanies Russian citizenship. Russia funded and recognized breakaway regions in Georgia to destabilise the government, and undermine sovereignty. In the Baltics, where no separatist movement exists, they created a migratory crisis for much the same reasons. This was a novel attack which overwhelmed Baltic infrastructure and possibly facilitated Russian covert infiltration. Despite a mostly effective whole-of-society defence strategy, the

Baltics struggled to respond effectively to this migrant crisis (Forti, 2023). Ultimately, Russia's strategic approach to each region is opportunistic and tailored, reflecting a flexible and multifaceted toolkit of hybrid warfare tactics. The whole-of-society strategy employed by the Baltics is equally flexible and multifaceted, but requires constant vigilance to maintain. As we progress further into the 21st century, the challenges posed by hybrid warfare are likely to escalate. It's imperative for states, societies, and the international community to continue learning, adapting, and preparing for these evolving threats.

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