NATO'S "BACK TO THE FUTURE":

A Conversation with Dr. Benedetta Berti

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Interviewed by Akshat Dhankher

FLETCHER SECURITY REVIEW: Dr. Berti, you are an Eisenhower Global Fellow, a TED Senior Fellow, an Associate Researcher at the Free University Brussels (Vrije Universiteit Brussel), a Senior Fellow at the Foreign Policy Research Institute, you're a recipient of the 2021 Fletcher Women's Leadership Award, and since 2018, you are the Head of Policy Planning at the Office of the Secretary General at NATO. It's truly a privilege to have you join us today.

BENEDETTA BERTI: Thank you.

FSR: To provide some context, could you briefly discuss your role at NATO? How do you interact with the secretary general, and how do you use your role to balance different countries' expectations?

BENEDETTA BERTI: The Policy Planning shop I run is part of the Office of the Secretary General, and our main job is to provide him or her with policy recommendations, advice, and foresight-based analysis on virtually everything that affects NATO. It's about the current political dynamics, the security environment, the threats, challenges, and opportunities that the Alliance faces, and then it's also about the long term. In that sense, it's quite a unique position because we have the privilege of providing the secretary general with advice with the purpose of trying to see what is the best way to preserve Allied unity and fulfill the Alliance mandate.

The political considerations that you mention, of course, always come as part of the background when you work in a multilateral organization, but we always start with the analysis and with answering the question: what would be best for the transatlantic alliance so that the 32 countries together are greater than the sum of their parts?[1] When it comes to policy implementation, of course, you need to make sure that the policy recommendations reflect and respect the national priorities and interests of all the member states, but we always start with a set of analytical questions: what do we see in the security environment? What are the trends? How do we think these are developing, and what do we need to do to be ready? It starts more on the analytical side.

So that's what we do in a nutshell. We provide analysis, advice, and policy recommendations. We serve as a hub for policy innovation to think about what we are not doing that we should be doing. We stress-test some of our existing policies to see how they would survive in light of disruptions or changes in the security environment. So, it's basically an internal think tank with a political consulting function.

NATO soldiers prepare to raise the Finnish flag at the Meeting of NATO Ministers of Foreign Affairs at NATO Headquarters in Brussels, Belgium | UK Government Picture by Rory Arnold | CC BY 2.0

FSR: It sounds like a very hands-on position and experience. Speaking of your experience, you really carry such a diversity of experience in your career. You have a background in Middle East studies; you wrote your doctoral thesis at Fletcher discussing the political participation of extremist armed groups; you then spent several years focusing on internal conflicts, counterterrorism, and peacebuilding; and now, for the past six years, you shape transatlantic security policy with NATO. How do you think about the path you've taken in the security field, and what lessons do you bring to your work at NATO?

BENEDETTA BERTI: I recognize myself in the description of my career path you gave. I started working, prior to Fletcher even, on understanding considerations related to the protection of civilians and civilian-based security in the context of internal conflicts. Fletcher was a stepping stone for me to ground the more empirical work I had done in more rigorous research and to understand the academic literature on the issues I had experienced first-hand working on conflict in Central America. Then, for a few years, I tried to learn as much as I could about the role of non-state armed groups in the context of frozen and liminal conflicts, civil wars and really to think through the impact of their territorial control and governance on civilians living in areas under these groups' control.

That was, of course, grounded in security studies but at the intersection of several fields: the humanitarian field, the security field, and the human rights field. Very much based on that fieldwork and field observation, and after about ten-plus years, I transitioned to working for NATO, which is a very different setting. I mean, it's a headquarters, I'm not in the field, and I'm really looking at policies with a capital "P" at the macro-level more than what I was doing before. In my prior work, I looked more at the impact of policy on different communities, looking more at the micro- and meso-level.

I think it's very important for those who work in policy development, in academia, or in think tanks—in other words, outside the government and policy world—to also understand how things look from the inside and understand the different considerations, constraints, and opportunities—just how different things are once you are inside "the machine." I thought it would make my expertise a lot more grounded in reality to have this experience, so that was one of the main drivers behind my wanting to transition from academia and think tanks to NATO.

"What would be best for the transatlantic alliance so that the 32 countries together are greater than the sum of their parts?"

One thing I try to keep in mind from my prior work is the importance of integrating different perspectives in the context of policymaking and reaching out beyond just our institution—or even just the government field—and really trying to build bridges with other communities in the broader security and defense fields to avoid groupthink, to avoid blind spots, and to make sure that we don't inadvertently build policies based on assumptions that are not really warranted in reality. So I think

NATO leaders meeting at the 2022 Madrid Summit
U.S. Mission to NATO | June 29, 2022 | Public Domain

that my prior field-based experience and work in different sectors has taught me to try to be as inclusive as possible, especially in the analysis stage, so that we are able to map problems in a way that doesn't just reflect our instincts and assumptions, but really tries to dig a little bit deeper. I try to bring that.

FSR: You mentioned you're focusing more on macro-level policies now and working to integrate different perspectives, and that transitions well into our next topic here. As we understand, you had a leading role in drafting the Strategic Concept, NATO's guiding strategic document that hadn't been updated since 2010, and the Allies officially adopted the document at the 2022 Madrid Summit. Can you share with us how the new Strategic Concept reflects the Alliance's understanding of new developments in the security environment?

BENEDETTA BERTI: Great question. I'll try to be succinct because really you could do a PhD on this question alone. I always use this example because I think it's a good illustration of the changing mindset in NATO.

Since the establishment of the Alliance in 1949, you've had eight of these Strategic Concepts. These documents have been updated regularly almost every decade since the Alliance was established. For the first 40 years of the Alliance during the Cold War, these documents were essentially military. They were focusing on how NATO could prevent a conventional or nuclear war on Allied territory, with of course, the Soviet Union in mind as the main adversary. It was really focused on one mission: deterrence and defense, one theater, the Allied territory, and one adversary: the Soviet Union.

When the Cold War ended, we had 30 years of a "post-Cold War peace dividend era," during which Strategic Concepts were very, very different. They were less focused on the more traditional military and defense aspects. They were much more focused on security, and they were broader in describing the core tasks of the alliance. They spoke about the importance of partnerships. They spoke about the political elements of NATO. They spoke about security and really fostering our ability to protect against asymmetric threats like terrorism. They spoke about the importance of building the ability to do crisis management

NATO Boeing E-3A Sentry escorted by Lockheed Martin F-35 Lightning II | Mike Mareen
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operations. So they were very different because the security environment was different compared to that of the Cold War.

Fast forward to 2022, and I think this latest Concept is a "back to the future." Those 30-plus years of post-Cold War peace dividends—where we essentially thought the possibility of conventional war in Europe was simply not possible, and in which we thought that conventional defense was going to become less relevant—those years are finished. If you look at 2010, that Concept started by saying that the Euro-Atlantic area is at peace, the risk of conventional conflict is low, threats and challenges will come from out-of-area, and the rest of the document proceeds accordingly.

In 2022, the Concept was written right in the middle of Russia's brutal war of aggression against Ukraine. All of those assumptions that we had in 2010 simply don't work. The potential of conventional war cannot be dismissed. The notion that the Euro-Atlantic area is an area of stability and predictability—well, the reality is that those tools that provide for predictability and stability are all under tremendous pressure. So this Concept starts by saying: unfortunately, our security environment is the most complex that we've had for generations, and we need to act and prepare accordingly. One of the priorities is to rebuild the ability to ensure the territorial defense of Allies and to rebuild our deterrence and defense posture in a way that is credible for what is essentially a much more competitive world.

So that's a big change. It's just beyond words. If you accept that assessment, it requires a significantly more robust investment in defense, in rebuilding our militaries, in investing in the right capabilities, and in rebuilding our defense industry. So, it is a generational shift.

This Strategic Concept also talks about the fact that, unlike the Cold War years, where essentially we could focus on one main task and one main theater, today we live in a world in which threats and challenges are actually much more global and interconnected. That "luxury"—only focusing on one theater or one task—is no longer there.

In that context, I think it's important that the Strategic Concept talks about the rise of strategic competition as one of the most important trends reshaping our strategic environment. It talks about the systemic challenges posed by the People's Republic of China, not as a military threat but as a systemic challenge that still requires transatlantic convergence. And then it talks about all the other persistent crises and recurring shocks—for example, related to climate change—that, even though they're not traditional defense issues, have very much become central to ensuring the security of our citizens, which remains our mission.

"Our security environment is the most complex that we've had for generations, and we need to act and prepare accordingly."

So I say "back to the future" because it's back to the core business of NATO, but with the understanding that we are in a much different and much more interconnected and complex world, where some of the traditional distinctions we were able to make between civil and military and defense and security—those lines are simply blurred today. We need to look at all of these issues as well.

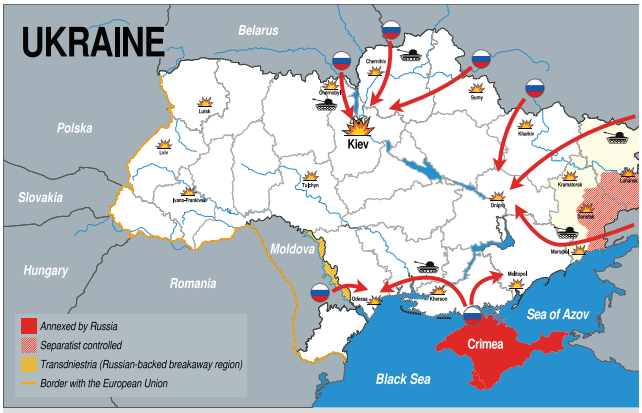
FSR: Based on what you've said, NATO's strategic remit has really expanded, though you also mentioned Ukraine as a leading force in shaping that Concept. Russia's invasion of Ukraine has clearly brought much of the focus back to Europe. Before we go into the policy, and before we really go into the response to the war in Ukraine, are you willing to share what your own experience and your initial reactions were? Where were you on February 24, 2022, and what was happening around you?

BENEDETTA BERTI: I've heard my boss, the secretary general, say this in a couple of interviews, and I think it's really perfect because it really encapsulates how we all felt. He said: "We were shocked, but we were not surprised." That's spot on because, on the one hand, of course, it was shocking to see the brutality, the devastation, the full-scale war that Russia started, the indiscriminate attacks on civilians—that was shocking. But unfortunately, it wasn't surprising because for weeks and months the intelligence was there.

From a NATO perspective, we actually had spent the weeks and months before this war fostering transatlantic convergence over that assessment, sharing intelligence, meeting day in and day out, until all Allies were seeing the same picture and were seeing these Russian military movements and deployments in and around Ukraine. The intelligence was overwhelmingly clear. The level of clarity and granularity of the intelligence that was available was exceptional. In that sense, there was a lot of foreboding that this was going to happen.

The United States decided to disclose some of that intelligence and make it public, and that made a big difference in terms of explaining to our citizens and populations why we were undertaking the type of discussions and preparations that we undertook in the days prior to the beginning of the war.

I was not at NATO in 2014 when Russia illegally and illegitimately annexed Crimea, but for us, that's a very important date because that process of resetting our deterrence and defense and realizing that we need to go back to basics really started in 2014. There was a lot of difference in comparing the two reactions. In 2014, it took longer to understand what was happening and to have unity and cohesion. I think the fact that we were able to act, I would say, very quickly after Russia started its full-fledged second invasion in 2022 was a result of the fact that there have been ten years in which the threat assessment and understanding improved quite dramatically. That's more on the policy side.



Map of the Russian invasion of Ukraine | alejomiranda Adobe Stock Education License

President of Ukraine met with the Ukrainian military in Bakhmut and presented state awards | President Of Ukraine from Україна December 20, 2022 | Public Domain

Of course, I remember where I was. I think all of my colleagues do because it's one of those days where you get called into work—I think it was around 4:00 a.m.—when we got the notification that it had started and we had to come in. It's something that we all knew, unfortunately, was going to happen. It was a few nights of staring at the phone with this really sickening anticipation that something terrible was going to happen. I remember it quite well.

FSR: Thank you so much for sharing that. It wasn't an easy time for anyone watching this closely, and I'm sure even harder for you and your colleagues who are closely involved.

BENEDETTA BERTI: It was, but we're not in Ukraine. They are the ones fighting, dying, and trying to ensure their country's survival. So, I certainly don't feel that there's any hardship on my part. I think we must do as much as we can to support them.

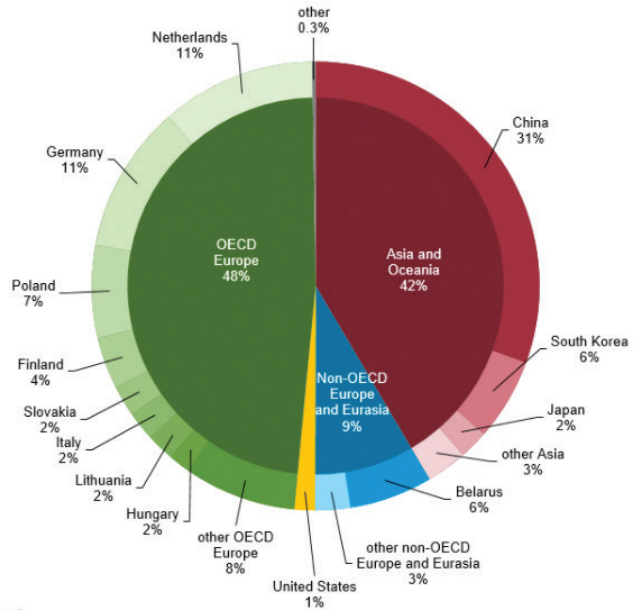
FSR: Absolutely. Looking at the policy side, you touched on the 2014 Crimean crisis, which prompted the Alliance to update its Russia posture and its readiness initiatives. The 2022 invasion has similarly compelled NATO to renew its readiness and Forward Presence postures, improve coordination on assistance to Ukraine, and even expand the Alliance. What new lessons is NATO learning this time as compared to 2014?

BENEDETTA BERTI: I like this framing because that process of military adaptation really did start in 2014, and there is no way we would now be where we are with eight battlegroups all across the Eastern flank, increased air defense, prepositioned equipment, higher readiness forces—there is no way we could have done that had we not started the work in 2014. In that sense, 2022 only stressed that those decisions that were taken back then were the right ones and that, if anything, we needed to accelerate exponentially on the rebuild of our deterrence and defense posture, and on defense spending. That's very important because, of course, in order to have more forces and capabilities, you have to have the funding to enable that. That also started in 2014.

> **"I think for NATO, it's very important to remain true to its original mission and mandate, and that is to ensure the freedom and security of Allies."**

If I fast forward to the last couple of years, firstly, it's very difficult to talk about lessons learned because wars are dynamic, and, as you know very well, there is the "fog of war." It's very important to keep in mind that there's so much we still don't know, and the war is still ongoing. At the most strategic level, I think there are some important lessons.

One that is obvious but bears repeating is the importance of reinvesting in and rebuilding our transatlantic defense industrial base. For decades, the signal we sent to the defense industry was to invest in being lean and able to deliver "just in time" rather than building redundancy and extra capacity. If you look at the needs that Ukraine has and the needs that we have for deterrence and defense, there is a gap, and to fill that gap we need



Russian oil exports destination | EIA | March 18, 2022
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to think seriously about how we can revamp and re-energize industrial production, but also how we can cooperate more effectively as countries so that we get economies of scale. That's something everybody talks about, but it is very important.

Another one that is just as important: if there is one thing that we underestimated at the beginning of the war, it was the resilience of ordinary Ukrainian citizens and their ability to withstand aggression and to push back. To me, that's such an important lesson for us to reflect upon: the importance of a whole-of-society approach to resilience and defense, and how to bring ordinary citizens much closer to understanding what the threats are, what their role could be, and what it takes to ensure security and defense. The whole notion of whole-of-society resilience is going to be very important in the conflicts of the future.

Another element I think we really need to internalize is the danger related to one-sided dependencies on authoritarian competitors or adversaries. When the war started, Europeans had an unhealthy, one-sided dependency on Russian oil and gas. We saw how Moscow used that, essentially weaponizing gas and oil supplies to try to blackmail us. I think the response was the right one, and over time, it will lead to irreversible decoupling. I'm not criticizing the response, but I would be very interested in understanding those risks and not repeating them when it comes to other potential dependencies—for example, on rare earth minerals or raw materials. The last two years showed us the importance of diversification, relying on trusted partners and allies, and really understanding the security vulnerabilities related to our economic policies in ways that, especially in Europe, we had not sufficiently done prior.

That's an important lesson; it's about defense and security but also transcends how we reinforce our democracies so that they can be strong in a time of strategic competition. If nothing else, if we learn these lessons, I think we will be on a good path.

FSR: That's a really helpful set of lessons. One lesson you mentioned was the recognition of the resilience of Ukraine and Ukrainian citizens, and that lesson was internalized at the Vilnius Summit last year when the Alliance agreed to

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simplify some of the requirements that Ukraine would have to meet in order to fulfill its bid for NATO accession. From your point of view at NATO, where does the debate on Ukraine's Euro-Atlantic future sit at the moment?

BENEDETTA BERTI: If I go back to the Strategic Concept and all the statements that NATO leaders have made since 2022, I think I'm on safe ground to say there is a complete understanding that a safe, secure, independent Ukraine is key to a safe, secure, and peaceful Euro-Atlantic area. So, the stakes are immensely high. It's very important to underline that there is an understanding that what happens in Ukraine has a direct impact on our security.

There is also a very strong understanding that if Putin's war of aggression was to succeed in Ukraine, that would not just be destabilizing for the Euro-Atlantic area, but it might also send very destabilizing signals to other authoritarian actors—for example, in Beijing—and that could, in turn, bring more instability and more pressure against the international order. There is a strong understanding that it's first and foremost about Ukraine and its right to survival as an independent state, but there are broader implications for all of us. I think that's the starting point, and that's why NATO leaders in Vilnius, as you say, reaffirmed Ukraine's Euro-Atlantic aspirations and took concrete steps to make that process toward membership more streamlined and simple.

General View of the meeting Foreign Ministry of Estonia at NATO on 28 November 2023
Estonian Foreign Ministry I CC BY 2.0 I https://creativecommons.org/licenses/by/2.0/

But more importantly—and I think this is where the focus has to be right now—Allies took steps to increase support because the priority that we have today is to ensure that Ukraine prevails as a sovereign, independent country. We need to enable that through our support. That's why that was a very strong component of the Vilnius Summit, and that's why we're looking at the next NATO summit in Washington, where I expect discussion on: how do we continue to support Ukraine? How do we look at support for the long haul? So, not just how to support Ukraine as it defends itself today, but also how do we support the transformation of the Ukrainian armed forces from Soviet legacy to full NATO interoperability?

> **"Allies took steps to increase support because the priority we have today is to ensure that Ukraine prevails as a sovereign, independent country."**

I think those concrete issues will remain front and center of how we talk about NATO support for Ukraine while also looking at continuing to strengthen political dialogue. But really, I think it's essential that the support—financial, humanitarian, and military—continues so that they can defend themselves.

FSR: Just to dig a little deeper on that, and looking beyond just the practical steps towards enlargement—at the Bucharest Summit in 2008, there was a situation

George W. Bush, Condoleezza Rice, 2008 Bucharest summit April 3, 2008 | Archive of the Chancellery of the President of the Republic of Poland
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where Georgia and Ukraine were offered membership without a concrete timeline. So in what ways are these discussions being approached with an eye to avoid a 2008 scenario? Also, how does the wave of elections taking place across the transatlantic space in 2024 factor into the planning here?

BENEDETTA BERTI: On the first point, yes, Allies have reiterated every year since the 2008 Bucharest Summit that Georgia and Ukraine will become members of NATO. That decision continues to stand. But of course, the important part, in addition to the political commitment, is to do the work to support Ukraine and Georgia through their necessary political and security reforms, to provide assistance, to strengthen cooperation, and to bring them closer to NATO in terms of interoperability and military culture. The important piece is the work to enable this to move forward, and that is happening. In that sense, I will go back to what I mentioned before: what I expect for Washington is really a sign of continuing to strengthen political relations with Ukraine and to enhance the practical support, especially looking at the long-term piece and how NATO can position itself to put that assistance into a sustainable, long-term footing, looking both at immediate defense needs, but also in the longer term building Ukraine's ability to do deterrence and defense. It's practical and very important, and I think that's going to be a big focus.

The second part is about how NATO is preparing for what is going to be a year dominated by politics for many of our Allies. For us, this is our bread and butter. This comes with the territory of being an alliance of democracies, so we are not preparing in any particular way other than continuing to meet our commitments and looking at how to continue investing in defense. From our perspective, especially since the beginning of Russia's war of aggression, we see that citizens in Allied countries overwhelmingly support NATO and NATO membership. That is something that transcends partisan lines. It's one of the few issues that, in most of our Allied countries, really transcends politics because most citizens see the value of being part of an alliance like NATO.

My homework is to make sure that we show that value and we show that it is in each and every Ally's national interest to have a strong Alliance, especially in a world

NATO Secretary General Jens Stoltenberg unveils 2022 Strategic Concept at Madrid summit | Sophia Wang—The Tech

in which threats and challenges are quite difficult to tackle on a national-only basis. For us, it's making the case and showing that this is not just a nice thing to do, but this is good for your national security interests. So I think that's how we will approach it.

FSR: With NATO's widening lens in terms of emerging security challenges, new and emerging domains of operation, expanded regional scope, and now with the return of mass war in Europe, some critics say that perhaps NATO today is taking on too many tasks. What is your reaction to this narrative? How do you view NATO's role in terms of taking on this level of task?

BENEDETTA BERTI: I've heard that argument, and I understand the reason behind it. But I think for NATO, it's very important to remain true to its original mission and mandate, and that is to ensure the freedom and security of Allies. That is the job.

What it takes to do the job changes depending on what the security environment looks like, and right now, we live in a security environment in which the threats and challenges are interconnected, and we see our potential adversaries and competitors use all the tools they have in an integrated way. Some of those tools are kinetic, but many of those are not. We talked about energy manipulation, disinformation, and economic coercion—all of those issues have an impact on our security and defense. Therefore, to me, it would be difficult for NATO to do its job if it was not taking into account those considerations.

The fact that we look at these issues doesn't necessarily mean that we need to be the one responding directly. For example, when it comes to economic coercion, NATO can play an important role in sharing intelligence, sharing information, and building a convergence between Allies so that they understand what the risks are, what the threats are, what they see, what the different policies are, and what works. Then, many of those policies will be implemented nationally and will be implemented through the EU. But because we are the transatlantic community—and I strongly believe our security is interrelated—it's important that we use NATO as a political forum to have these conversations.

So I would say that we're not expanding our remit. We are simply covering all the key areas that are needed for us to fulfill our key job, which remains

the same, and the same is true when it comes to issues like climate change and security. NATO is not becoming the all-encompassing response to all the multifaceted challenges posed by climate change. We can't. We don't have the tools. But we have a responsibility to be cognizant and ready to adapt to the impact that climate change has on security. We always bring it back to how it affects our core mission, and in that sense, it's a complex balance but one that I think we strike well. At the end of the day, does it affect our mission? If the answer is yes, then we need to at least know about it.

FSR: Absolutely. Just to wrap up, the Washington Summit takes place this year on the occasion of NATO's 75th anniversary. So, to conclude, could you share what your hopes and expectations might be for the Washington Summit?

BENEDETTA BERTI: Yes. I'll be brief because, on the one hand, I think all summits of NATO are about showing transatlantic unity, resolve, and credibility for the past 75 years. That objective is transversal.

In this particular context, that will mean strong, united support for Ukraine as it continues to defend itself against Russian aggression. I think it means sending a strong message that we are rising to the challenges of this contested security environment. So I expect that we're able to showcase the adaptation of our military posture, additional funding for defense, new initiatives to continue to ramp up industrial production—those issues we discussed before. I expect those to play a very important role. I also expect continued focus on defense spending as necessary to underpin our military adaptation and to contribute to transatlantic burden sharing, which remains important for NATO. Every Ally needs to feel that it is part of an Alliance where everybody is pulling its weight.

I also believe we're going to have to talk about strategic competition and the systemic challenges posed by the PRC. In that sense, there will also be a role for continuing conversation with our partners. Again, showing that security is interrelated, and in that sense partners in the Indo-Pacific are an important part of that picture. That's just a rundown of some of the key topics, but there will be more of course.

FSR: Thank you so much for your time. It's been such an excellent discussion.

ENDNOTES

1 NATO consisted of 31 member countries at the time of the interview, however this figure has been updated to reflect Sweden's accession by the time of publication.

ABOUT THE AUTHOR

Dr. Benedetta Berti is Head of Policy Planning in the Office of the Secretary General at NATO. She is also Associate Researcher at the Centre for Security, Diplomacy and Strategy at Vrije Universiteit Brussels, Visiting Professor at the College of Europe, and a Senior Fellow at the Foreign Policy Research Institute. An Eisenhower Global Fellow and a TED Senior Fellow, in the past decade Benedetta has held research and teaching positions at West Point, The Institute for National Security Studies and Tel Aviv University, among others. Dr. Berti is the author of four books, including *Armed Political Organizations: From Conflict to Integration* (Johns Hopkins University Press, 2013). Her work and research have appeared, among others, in *Foreign Policy*, *Foreign Affairs*, the *National Interest*, the *Wall Street Journal* and *The New York Times*; as well as in *Civil Wars*, *Democratization*, *Government & Opposition*, *Mediterranean Politics*, the *Middle East Journal*, *Parameters*, *Studies in Conflict and Terrorism*, *Terrorism and Political Violence*. She holds a BA in Oriental Studies from the University of Bologna, and a MA and PhD in International Relations from the Fletcher School at Tufts University.