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LESSONS OF DEMOCRATIC RESILIENCE:

**THE EU AND NATO
APPROACHES AGAINST
DISINFORMATION AND
PROPAGANDA**

LESSONS OF DEMOCRATIC RESILIENCE: THE EU AND NATO APPROACHES AGAINST DISINFORMATION AND PROPAGANDA

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Introduction

Background and Relevance

Hybrid/unconventional threats, exemplified by disinformation and propaganda, have gained notable significance within the security and political discourse of Western democratic actors since 2014. This heightened relevance follows the commencement of Russia's military aggression against Ukraine. The ensuing geopolitical development served as a compelling catalyst for the North Atlantic Treaty Organisation (NATO) and the European Union (EU) to address information-related challenges, given the unparalleled scale, impact, dynamics, and sophistication. Although hybrid threat methods are not new to warfare history, contemporary technological developments and the globalization process have introduced a novel and more intricate dimension to these challenges.

In the modern European and Euro-Atlantic context, the terms disinformation and propaganda have become closely associated with Russia's attempts to undermine democratic processes, systems, institutions, and shape public discourse in alignment with its (geo)political interests. It is noteworthy that Russia is not the exclusive actor in this sphere, as other non-democratic states and non-state entities within the Western realm are increasingly employing hybrid methods to pursue political objectives. Consequently, the combat against disinformation and propaganda serves as a significant litmus test for NATO and the EU. While these threats transcend national borders, collaborative efforts and the consolidation of resources among allied actors, notably the above-mentioned organisations, are imperative. Over the past decade, the Alliance, the Bloc, and their individual member states have undertaken various effective measures in this regard. Nevertheless, challenges and additional needs persist in the European and Euro-Atlantic spheres, whether on a micro or macro level. Given the evolving nature of hybrid threats and their profound implications, it is crucial for democratic forces in national and organizational domains, encompassing both military and civilian realms, to intensify their efforts. Adopting a comprehensive, 360-degree and whole-of-society approach is essential for more impactful engagement. Particularly in the current volatile geopolitical landscape, characterized by heightened competition in the "war of likes" and the quest to "win hearts and minds," such proactive measures are of paramount importance.

Objectives

The primary objectives of this paper are fourfold: (I) to examine and analyze the principal strategies adopted by NATO and the EU in countering disinformation and propaganda, (II) to evaluate the degree of collaborative efforts between NATO and the EU concerning the aforementioned hybrid threats, (III) to identify lessons learned from the experiences of the organizations represented, and (IV) to delineate the distinctions and similarities in their approaches. Consequently, the research questions formulated in this paper are derived from these overarching objectives.

Methodology

The research adopts a qualitative approach, drawing insights from primary sources such as official and strategic documents of NATO and the EU, along with political statements. Secondary sources, including analytical articles, academic papers, books, policy documents/papers, and news, are also utilized for a more comprehensive analysis. Furthermore, the research incorporates reports from NATO, EU institutions, and research organizations, which serve as a combination of both primary and secondary source materials. The paper is structured as a comparative analysis, aiming to elucidate the commonalities and distinctions in the approaches adopted by NATO and the EU.

Limitations

This research has certain limitations that warrant consideration. Firstly, the scale of the analysis is a notable constraint. The realm of combating disinformation and propaganda is a broad and dynamic phenomenon. Consequently, due to the complexity of the subject matter and the technical framework (word limit) of the paper, this study does not provide an exhaustive and in-depth analysis of all facets pertaining to EU and NATO strategies and collaboration. Instead, it concentrates on pivotal aspects of their approaches. Moreover, contextual differences must be acknowledged. The EU and NATO operate within distinct organizational contexts, each with different priorities and action plans. Consequently, the direct application of their approaches and best practices to the context of any given country or region may not work equally well. In this regard, it is essential to take into account such variables as the geopolitical context, social, cultural, and political characteristics, and the level of financial and human resources. However, certain universal approaches exist, adherence to which, at a foundational level, can yield positive outcomes. These include adopting a holistic strategy to combat disinformation and propaganda, incorporating a robust strategic communications component, and fostering critical thinking and media literacy.

Chapter 1. EU Approaches to Combating Disinformation and Propaganda

"Lies are a problem, but the biggest problem is that we believe lies."

Věra Jourová,
Vice President of the European Commission
(European Commission, 2020)

Since 2014, the dramatic increase in information manipulation in Eastern Europe has compelled EU institutions to undertake effective measures to counteract disinformation and propaganda (Sanchez, 2021). Over the span of almost a decade, the EU has implemented a range of strategies and initiatives to address information challenges. Since 2014, approximately 30 different documents have been adopted in response to hybrid threats, encompassing not only member states but also the context of partner countries. Through an examination of the measures undertaken, it is revealed that the EU's approaches can be categorized into non-legislative and legislative domains.

A pivotal step in 2015 was the inception of the "Strategic Communication Action Plan," devised by the European External Action Service (EEAS) (European Council, 2015). Additionally, the establishment of the Strategic Communications Unit within the European Commission, housing the East StratCom working group (EEAS, 2015), marked a crucial development. The primary objective of this initiative was to employ communication channels and public diplomacy (Pamment, 2020) to counter disinformation emanating from the Russian government and media sources targeting Europe (Parkes, 2019). Simultaneously, it aimed to safeguard the EU's image in the Eastern neighborhood amid Russia's annexation of Crimea in 2014 (Jeangène Vilmer et al., 2018). A noteworthy project within this working group is EUvsDisinfo, serving as a comprehensive open database encompassing research, articles, and statistical data related to disinformation and propaganda (Serrato & Jacob, 2020).

Along with the increase in the scale of hybrid threats, the EU has expanded its geographical coverage. Today, the strategic communications working groups include the Western Balkans Task Force and the Bloc's Southern neighborhood (Task Force South), comprising countries in the Middle East and North Africa (MENA region). It is noteworthy that the European Parliament has advocated for the establishment of a similar group focused on China (the Far-East Task Force) in recent years (EU Monitor, 2021), although tangible outcomes are yet to be realized.

Criticism within European political and expert circles often targets the Strategic Communications Department for its perceived inadequacy in human resources and finances. For instance, the department, which incorporates the mentioned working groups, employs only 40-50 specialists (New Eastern Europe, 2023). Given the expanding scale and complexity of hybrid threats, there is a discernible need for reinforced efforts on the part of the Bloc in this domain.

Addressing a problem requires a systematic approach involving diagnosis, identification of causes, and determination of treatment methods, and the issue of disinformation and propaganda within the EU is no exception. In 2018, the EU took a significant step by releasing its inaugural "Action Plan Against Disinformation," which remains a foundational element of the Bloc's policy. This comprehensive strategy encompasses four thematic directions: (I) enhancing the capacity of EU institutions, (II) strengthening collaborative coordination, (III) mobilizing the private sector, and (IV) fostering public awareness (EEAS, 2018). Each direction comprises specific dimensions, and it is pertinent to briefly highlight a few of them based on their significance.

An unprecedented element is the "Code of Practice on Disinformation," a voluntary regulatory framework designed to mitigate the dissemination of disinformation online. Leading technology companies, including Facebook, Google, Microsoft, Twitter, Mozilla Firefox, and TikTok, have become signatories to this initiative (Szymański 2020; Stolton, 2020; European Commission, 2022). Another noteworthy move by the EU involves the initiation of the "Digital Services Act," a legislative measure targeting online platforms. The promotion of media literacy and critical thinking stands as a fundamental aspect of the EU's strategy. The establishment of the "European Digital Media Observatory" through the reinforcement of civil society and research organizations contributes to enhancing citizen awareness, anticipating threats, and facilitating informed political decisions (Bleyer-Simon et al., 2020).

Further positive steps include the introduction of the "European Democracy Action Plan" and the "Defense Democracy Package" (EUR-Lex, 2020). These initiatives focus on fortifying media freedom, promoting free elections, encompass measures related to the transparency of political advertising and the sources of political party funding (European Court of Auditors, 2020; Bogden, 2023). The Bloc has also implemented mechanisms such as the "Rapid Alert System" and the "EU Hybrid Fusion Cell" to enable early detection of disinformation campaigns, facilitate information sharing, and coordinate responses (Stolton, 2020; Kert-Saint Aubyn, n.d). It is crucial to note that maintaining a delicate balance between freedom of expression and the implemented measures is essential for the EU (Colomina, 2019) and it represents quite a controversial issue.

It is noteworthy to mention that within European political circles, there is a recurring advocacy for the use of punitive measures, specifically sanctions, by both the EU and its member states at individual levels. This is in response to the dissemination of anti-European narratives by both state and non-state actors in the contemporary era characterized by soft power dynamics. Notably, a precedent for such measures exists; following Russia's full-scale military war on Ukraine in 2022, which prompted a surge in disinformation, official Brussels took decisive action by imposing restrictions on the Russian media agencies Russia Today and Sputnik (European Council, 2022).

In addition to the aforementioned initiatives undertaken by the European Commission, the European Parliament plays a pivotal and critical role in the collective effort to counter hybrid threats. It is noteworthy to highlight the significant contribution of temporary special committees, namely INGE and INGE2, since the year 2020. However, the mandate for these committees expired in August of the current year (2023), and the fulfillment of Parliament's request for the establishment of a permanent body remains uncertain. Additionally, it is unclear why the Bloc's above-mentioned disinformation action plan, which was formulated five years ago, is not being updated given the perpetual evolution, transformation, and increasing severity of hybrid threats.

Returning to the diagnostic aspect of the problem, it is crucial to acknowledge that Russia stands out as the predominant foreign actor detrimentally impacting European democracy and serving as the most flexible author of hybrid threats (Wiseman, 2022). In scholarly and expert discourse, a prevailing viewpoint has long held that the EU's soft approach towards Russia in previous years was a mistake. However, a notable shift occurred; until 2014, official documents classified Russia as a "strategic partner," whereas today, it is labeled a "strategic challenge" (Colomina, 2019). Examining the current foreign policy rhetoric of the EU and its high-ranking officials reveals a substantial reduction in the Bloc's perceived naivety towards Russia.

It is important to highlight that, concerning the dissemination of disinformation and propaganda, official Moscow is not the sole concern for the EU. A new entrant, China, has become a prominent presence in the European and, more broadly, the global public sphere. Beijing's capacity to generate and foster hybrid threats has steadily intensified over the past years (Veriter, 2021; Robin, 2023). From 2016 to the present, nearly all relevant resolutions of the European Parliament identify both Russia and China as significant threats. This consensus is further reiterated in the inaugural report of the EEAS, titled "Foreign Information Manipulation and Interference Threats," released in 2023 (EEAS, 2023). Furthermore, Iran, domestic far-right groups within Europe, and terrorist organizations are emerging actors in the realm of

information manipulation (Solon, 2018; Alba & Satariano, 2019; Dubowitz & Ghasseminejad, 2020; Luxner, 2020; Schneier, 2023).

What Possible Impact Could Disinformation and Propaganda Have on the 2024 European Parliament Elections?

As officially announced by the European Council, the upcoming European Parliament elections are scheduled to take place from June 6 to 9, 2024 (European Council, 2023). Recognized as the largest transnational election globally, this event is poised to significantly influence Europe's domestic and foreign political agendas, as well as the trajectory of European democracy on a broader scale. Ensuring the security of elections against information operations and cyber-attacks orchestrated by foreign actors is pivotal. Consequently, there are potential risks associated with both election day and the pre-election period. These risks pertain to the potential proliferation of disinformation or propaganda campaigns, strategically employed by foreign actors to manipulate election outcomes in alignment with their (geo)political interests.

Academic authors and researchers identify several risks associated with hybrid threats and external interference that may undermine the integrity of elections. These risks include the erosion of trust in the electoral system and democratic institutions (Wardle & Derakhshan, 2017), distortion of voter perceptions and manipulation of electoral decision-making processes (Guess et al., 2020), creation or exacerbation of social divisions and intensification of political polarization (Lewandowsky et al., 2017; Niu et al., 2020), undermining trust in the media and hindering citizens' ability to discern reliable from unreliable news sources (Pennycook & Rand, 2019), and cyber-attacks on electoral infrastructure and systems, with electronic elections being particularly vulnerable (Jeangène Vilmer et al., 2018). Additionally, the introduction of artificial intelligence poses a new dimension of risk, which, along with many benefits, also has the potential to spread and reinforce disinformation and propaganda (Schneier, 2023).

It is noteworthy that instances of disinformation produced and disseminated by Russian sources during various elections and referendums in the EU have been observed (Jeangène Vilmer et al., 2018; Brattberg & Maurer, 2018; Taylor, 2019). Therefore, it is reasonable to anticipate that the 2024 European Parliament elections may not be an exception in this regard. As the elections draw nearer, official Moscow and Beijing are likely to intensify their efforts to transform potential risks into actual challenges.

Throughout the current year (2023), the European Parliament has consistently voiced concerns regarding potential threats of information manipulation originating from high-risk countries, specifically Russia and China. The Parliament has called for a coherent and coordinated strategy, accompanied by adequate financial support. This proposed strategy would enhance the resilience of the EU and its member states against external interference and hybrid threats (European Parliament, 2023). The Parliament's request is underpinned by compelling arguments rooted in the experiences of the 2019 European Parliament elections.

Drawing on the 2019 elections, a noteworthy surge in manipulative news related to Russia was observed in the months leading up to the elections, marking a substantial increase compared to the corresponding period in 2018 (Bayer, 2021). Additionally, the European Commission's report on the conduct of the 2019 Parliamentary elections identified disinformation and other forms of information manipulation as real challenges (European Commission, 2020). Despite these concerns, the Commission has not yet addressed the Parliament's request, nor has it presented an "Election Package" akin to the one introduced in September 2018. This package, which also included a sanctioning mechanism, was designed to safeguard European elections from information manipulation (European Commission, 2018).

Chapter 2. NATO Approaches to Countering Disinformation and Propaganda

"The best answer to propaganda is not propaganda. I believe that the truth will prevail, and facts, the truth, are the best way to counter propaganda and disinformation."

Jens Stoltenberg,
Secretary General of NATO
(NATO, 2020)

As a defense and security Alliance, NATO places significant emphasis on combating hybrid threats, aligning with the logical imperative of safeguarding its members and partner countries. The Alliance's most recent official documents, namely "NATO 2030" (NATO, 2021) and "NATO Strategic Concept" (NATO, 2022), delineate organisation's priorities and approaches for the current decade. Within these documents, addressing hybrid threats, including the augmentation of efforts against disinformation and propaganda, emerges as a focal point on the Alliance's agenda. Furthermore, the *Communiqué* from the Vilnius Summit in 2023 recurrently identifies disinformation as a challenge and explicitly adopts a stern stance toward its principal actors, Russia and China (NATO, 2023).

NATO advocates for a comprehensive crisis management approach that integrates both military and civilian mechanisms. In addressing disinformation and propaganda, since 2015, the Alliance has adopted a strategy grounded in three primary principles: (I) preparation, (II) deterrence, and (III) defense (Colom-Piella, 2022; NATO, 2023). Within the framework of readiness, NATO consistently gathers, shares, and assesses information to anticipate potential risks. Functioning as an expert hub, the organization employs training and educational components to confront hybrid challenges (Chłoń, 2022). The battle against disinformation constitutes an integral facet of NATO's day-to-day operations, employing a two-pillar approach: (I) understanding and (II) engagement (Shalamanov & Bankov, 2022). Consequently, the Alliance's strategies regarding hybrid threats align with the aforementioned organizational logic.

It is imperative to highlight NATO's pivotal focus on strategic communications, acknowledging that an effective countermeasure against disinformation and propaganda necessitates consistent and proactive communication efforts. NATO formally introduced the concept of strategic communications during the 2009 Strasbourg Summit, recognizing it as an integral component of the Alliance's effort

to achieve political and military objectives (NATO, 2009). From 2009 to 2014, this approach was mostly limited to political rhetoric, and the Alliance was prompted to take decisive actions in the face of Russia's information attacks in 2014, leading to the establishment of the "Strategic Communications Centre of Excellence" (Gonchar & Martyniuk, 2019). Presently, the center stands as a central pillar within the Alliance's framework for countering disinformation and propaganda (Hansen & Gill, 2021; Dragu, 2022). Its focus lies in generating and disseminating diverse intellectual resources, uniting military experts, civilian specialists, academic professionals, and representatives from the civil sector.

Of notable significance is NATO's strategy for combating hybrid threats, which places emphasis on fortifying community resilience through civil organizations and informal activities (NATO, 2016). Another pillar in this mission is the Alliance's public diplomacy department, playing a constructive role in enhancing NATO's public image (NATO, 2022). The Joint Intelligence and Security Division, established in 2017, serves as a crucial element for monitoring and analyzing hybrid threats. Complementing these efforts are the Anti-Hybrid Support Groups, operational since 2018, providing technical assistance to countries as required (Colom-Piella, 2022). A noteworthy development occurred at the 2016 Warsaw Summit, where Alliance members unanimously declared that *"a hybrid attack (encompassing not only disinformation and propaganda) can be the basis for activating Article 5 of the NATO Charter"* (Zandee & Stoetman, 2023).

The Alliance underscores its commitment to addressing disinformation and propaganda by prioritizing the development of analytical tools and best practices through collaborative research and awareness-raising initiatives. This effort is exemplified by the establishment of the "Euro-Atlantic Center for Resilience" in Romania in 2021. In addition to its mandate to formulate and implement educational and training programs, including specialized courses for future experts in the field, the center serves as a platform for strategic discussions and facilitates the exchange of expertise among the business, civil, and academic communities (Euro-Atlantic Resilience Center, n.d).

It is imperative to emphasize that swift action is crucial in countering disinformation and propaganda. However, the institutional structure and complexity of NATO hinder the rapid decision-making process (Abbott, 2016). Recognizing this challenge, the Alliance effort to enhance the flexibility, speed, and efficacy of existing mechanisms, given the inherent difficulty in swiftly reaching a consensus among member states — an undertaking often likened to an "impossible mission." In this regard, the bureaucratic nature of NATO works in favor of the adversary.

Chapter 3. Transatlantic Cooperation: An Overview of the Joint Efforts of NATO and the EU

The collective effort to combat hybrid threats has evolved into a central mechanism for enhanced cooperation between the NATO and EU, driven by shared strategic interests and security challenges (European Council, 2016). The pivotal events of Russia's annexation of Crimea in 2014, the subsequent surge of disinformation and propaganda, and Russia's interference in the 2016 US election served as significant catalysts for reinforcing collaborative endeavors and individual initiatives. It is essential to underscore the West's collective strategic mistake during the years amid Russia's hybrid warfare, among other actions, that went unmet with a firm policy.

In 2016, both the EU *Communiqué* on Countering Hybrid Threats (EUR-Lex, 2016) and the Bloc's "Global Strategy" of the same year (EEAS, 2016) consistently emphasized the imperative to strengthen the partnership with NATO. It is noteworthy that the inaugural joint declaration of NATO and the EU in 2016 featured 20 out of 74 initiatives specifically addressing countermeasures against hybrid threats (Brethous & Kovalčíková, 2023).

Both entities on either side of the Atlantic Ocean share a similar perception of hybrid threats and their actors, with the EU identified as NATO's primary partner in addressing threats within the information space (Szymański, 2020). The joint declaration signed in 2023 affirmed that they "*achieved tangible results in the fight against hybrid threats*" (NATO, 2023). Transatlantic cooperation in this domain encompasses five thematic areas: (I) strategic communications, (II) resilience strengthening, (III) cyber security, (IV) crisis preparedness and response reinforcement, and (V) enhanced situational awareness through information sharing and best practices (NATO, 2023).

While both organizations express ambitious political rhetoric at the organizational level, reports suggest that there are areas with low dynamics in cooperation, indicating a gap between aspirations and reality (Zandee et al., 2021). Despite this, a concrete outcome of joint efforts is the "European Center of Excellence for Countering Hybrid Threats," established in 2017 through the initiative of Finland, which unites 35 member states of the EU and NATO. This center primarily serves a research and recommendation-sharing function, representing a platform for collaborative efforts (Rühle, 2019; Hybrid CoE, 2023). However, a challenge lies in the fact that not all NATO and EU member countries participate in the center's activities. The primary responsibility for countering hybrid threats rests with the states, and it

is their prerogative to establish a comprehensive and consistent counter-disinformation and communication framework, which will then be transformed into a common approach or policy across the above-mentioned organisations (Chłoń, 2022). Countries are more vulnerable to the challenges posed by hybrid threats than international entities, as the originators of disinformation and propaganda tailor their methods to the individual context of the target country and society. The lack of political will among some member countries at the international level hampers the optimization of cooperation (Ballast, 2017). Notably, some member states, such as Cyprus, Hungary, Italy, and Slovenia, do not recognize disinformation and propaganda as significant challenges, resulting in fewer actions or difficulties in reaching consensus at the organizational or national level (European Values Center for Security Policy, 2018; Pamment, 2020). The perception of hybrid threats varies among nations based on national history, strategic interests, freedom of media, political culture, and, crucially, the current relations with Russia (Chłoń, 2022). Consequently, due to these differing perceptions, national approaches to combating disinformation and propaganda vary across Europe. The measures taken by countries are not constrained by their membership in the presented organizations; rather, NATO and the EU play a complementary role. The full use of the potential to combat these challenges is up to the countries themselves. It is noteworthy that states possess the capability to act more swiftly and coordinatedly than international organizations; at the same time, it is not possible to fight against hybrid threats with only national or local steps; unity and international partnership are crucial.

The increasing use of disinformation and propaganda by domestic actors within member states constitutes another growing concern for both the EU and NATO. The threat of information manipulation in Europe extends beyond external sources, as internal official sources within member countries of these organizations (such as Hungary and Poland) or political parties (as observed in Bulgaria) are identified as the disseminators (Bleyer-Simon, 2020).

Furthermore, it is crucial to acknowledge that in the current context, characterized by the "24/7 mode" of hybrid threats, the bureaucratic nature of both organizations tends to work in favor of the adversary, hindering the effectiveness of individual or collective mechanisms. Consequently, transatlantic cooperation falls short of expectations. However, it is important to underscore that the synergy between the EU and NATO in combating disinformation and propaganda can be evaluated most fruitfully in terms of international organizations' cooperation.

Chapter 4. Lessons Learned

Analyzing NATO and EU responses to the growing threat of disinformation and propaganda, several lessons, as well as differences and similarities between their approaches can be drawn.

One evident convergence between both organizations, at the political or operational level, is the strategic communications component. However, it is crucial to highlight that NATO's coverage spans the security and related spectrum, while the EU's mechanisms are diverse and expansive, reflecting the organizations' distinct natures. NATO operates as a military-political organization, while the EU functions as a Bloc with broad involvement in public life and legislative authority. Despite these differences, both entities share a critical need for research, analysis, training, and international cooperation. The establishment of specialized centers/departments by both organizations represents a notably effective approach.

It is noteworthy that, unlike NATO, the EU allocates significant attention and resources to election protection, regulatory and legislative measures, digital resilience enhancement, sanctioning mechanisms, support for free and independent media, promotion of media literacy and critical thinking, and strengthening civil and academic societies. Both NATO and the EU, as values-based organisations, adopt positive discourse approaches in addressing hybrid threats, refraining from countering disinformation with further disinformation. Both entities acknowledge the necessity of continuously adapting their policies and tools to mitigate threats in the information space. However, a significant observation is that, since 2014, the policies and measures taken by these organizations tend to be more reactive than proactive.

In recent years, a positive trend has emerged, showcasing synergy between NATO and the EU in the pooling of military and civilian resources. Nevertheless, the different political preferences of individual member states and organizational bureaucracies significantly hinder this cooperation. In addition, the mobilization of financial and human resources by the Alliance and the Bloc is insufficient in terms of combating hybrid threats. Noteworthy, both entities are progressively increasing their expenditures, recognizing that it is more expensive to repair the damage caused by disinformation and propaganda. This becomes especially critical with the escalation of strategic revisionism in the international system and the transition into a precarious phase of hybrid warfare.

Beyond these considerations, historical insights and experiences offer clear guidance and a straightforward conclusion: no country or organization is entirely immune to hybrid threats. Despite individual European nations taking individual measures against disinformation and propaganda, no singular actor or approach possesses the capacity to neutralize these threats independently. Collaborative and joint efforts are imperative, as they will amplify the Western powers' capabilities in countering the destabilizing actions of non-democratic actors.

While the EU and NATO currently play prominent roles in combating hybrid threats, there still remains considerable scope for enhancing transatlantic cooperation or individual efforts.

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