Research Article

Formulating Defense Policy: Main Considerations and Evaluation Criteria

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Abstract: This article examines the process of formulating defense policy by analyzing the key considerations and evaluation criteria that underpin effective decision-making. Drawing on historical developments from the post-Cold War era to current geopolitical challenges, the study emphasizes the importance of balancing strategic ends with available means within a resource-constrained and uncertain planning environment. It outlines the key elements in defense policymaking—defining objectives, strategy, and capabilities—and highlights how risk assessment plays a central role in aligning force structure with national security goals and resource allocation. Through qualitative analysis and illustrative figures, the study offers practical recommendations for policymakers, emphasizing the need for a systematic, adaptable, and transparent policymaking process. Ultimately, the article argues that a rational and disciplined approach to defining both ends and means, combined with creative exploration, is essential for preparing for the uncertainty of today's security environment. A follow-up study will focus on the processes, stakeholders, and cultural factors in shaping defense policy.

Keywords: policy goals, armed forces, security environment, threats, mission, level of ambition, defense strategy, defense capabilities, planning risk, evaluation criteria, uncertainty, good practice.

Introduction

In the 1990s, most countries in Eastern Europe, formerly members of the Warsaw Pact, struggled to adapt their armed forces to the post-Cold War security environment. Western partners willing to assist reform efforts launched outreach programs aimed primarily at helping establish civilian control over the

armed forces. These efforts focused on appointing a civilian defense minister, bringing civilians into defense ministries, ensuring the non-involvement of the military in politics, enabling legislative oversight of defense policy, increasing the transparency of defense expenditures, and encouraging public discussion on defense matters.[1] The new democracies welcomed this advice and quickly introduced changes to laws and the organization of their defense ministries. Yet, these reforms did not lead to the anticipated alignment of force structures with new security requirements or the reduced defense budgets. One reason was the lack of defense planning capacity, and the term *defense policy* was not even used.

In 1999–2000, I taught the first defense planning course at the "G.S. Rakovski" National Defense College in Sofia, Bulgaria. All students were senior officers—mostly full colonels—and yet the course had to begin with a thorough explanation of what *defense planning* is and how it differs from and relates to *operations planning*. At the time, references to *planning* in the military context almost exclusively referred to the intended use of available forces, or what was commonly known as *operations planning*. This is hardly surprising, as—unlike in NATO—defense policymaking and planning in the Warsaw Pact were fully centralized. With the exception of Moscow, the capitals had little to no knowledge or experience in defense policy and planning.

In addition, in the 1990s, the defense establishments in the former Warsaw Pact countries and ex-Soviet republics were only a small part of broader, immature, and generally weak democratic institutions. Even with the challenges of declining economies and the absence of an obvious enemy, senior political and military leaders preferred adhering to inherited force structures and force development models. One consequence was that, at the time of their accession, very few of the new NATO members were able to make a sizeable contribution to the Alliance's capabilities.[2]

This has changed significantly over the last two decades. Ukraine, a partner country, is now in the fourth year of its courageous fight to withstand and repel Russia's large-scale aggression. NATO members and partner countries, such as Georgia, have made substantial contributions to operations in Iraq and Afghanistan. In 2024, Poland and Estonia topped the list of NATO members in terms of defense expenditures as a percentage of GDP, with the United States coming third, while some "old" members still fall well below the two-percent commitment.[3]

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1   Ben Lombardi, "An Overview of Civil-Military Relations in Central and Eastern Europe," *The Journal of Slavic Military Studies* 12, no. 1 (1999): 13-33, https://doi.org/10.1080/13518049908430375.

2   See, for example, Jeffrey Simon, "The New NATO Members: Will They Contribute?" *Strategic Forum* 160 (Washington, D.C.: National Defense University, April 1999), https://apps.dtic.mil/sti/citations/ADA394521.

3   "Defence Expenditure of NATO Countries (2014-2024)," *News*, NATO, June 17, 2024, https://www.nato.int/cps/en/natohq/news_226465.htm.

Yet, many defense establishments in partner countries, as well as in some newer NATO members, still struggle with the concept of defense policy, the role of civilians in defense, the concept of capability, the linkage between plans and budgets, the relationship between force development, technological modernization, and personnel challenges, as well as the concept of responsibility.

This article is intended to facilitate an understanding of basic concepts and relationships in defense policymaking. It does not provide an algorithm or any one-size-fits-all templates for processes and documents. The figures included in this article are meant to illustrate relationships, not to present algorithmic steps. Nevertheless, I hope it will assist readers interested in the art of defense policymaking in assessing weaknesses and identifying opportunities for improvement in the process of articulating defense policy—supported by planning and force structure development—all balanced against the risks posed to even the best-laid defense plans by changes in the funding environment.

This text is a comprehensively revised and updated version of an earlier high-impact article in *Connections* by the same author.[4] It does not delve into the technicalities of defense planning—an important aspect of defense policymaking—but instead examines the processes, key players, documents, and evaluation criteria, along with a discussion of alternative discourses in defense policymaking.

The following section introduces relevant terms and definitions. The third section presents the key components of defense policy and their interactions within a rational model. Section four outlines criteria that can be used to evaluate a given defense policy. The article concludes by emphasizing the need for a systemic, rational approach to policy formulation. A subsequent article will explore the process and players in defense policymaking, typical defense policy documents, the limitations of the analytical model presented here, and the need to complement it with alternative approaches that consider organizational cultures and civil-military relations.

What Is Defense Policy?

There is no commonly accepted definition of *defense policy*. The current edition of the U.S. Department of Defense's *Dictionary of Military and Associated Terms*,[5] for example, does not provide a terminological definition. In 2018, NATO's *Glossary of Terms and Definitions* added the term *policy*, defining it as:

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[4] Todor Tagarev, "The Art of Shaping Defense Policy: Scope, Components, Relationships (but no Algorithms)," *Connections: The Quarterly Journal* 5, no. 1 (Spring-Summer 2006): 15-34, https://doi.org/10.11610/Connections.05.1.03.

[5] *DOD Dictionary of Military and Associated Terms* (Washington, D.C.: Department of Defense, March 2017), https://www.tradoc.army.mil/wp-content/uploads/2020/10/AD1029823-DOD-Dictionary-of-Military-and-Associated-Terms-2017.pdf.

> Agreed principles, approach and general objectives, set out in a document, to guide the achievement of specific outcomes.[6]

It also noted that policy in NATO is typically developed based on a given concept and can be accompanied by an implementation plan. It further defined *concept* as:

> An agreed notion or idea, normally set out in a document, that provides guidance for different working domains and which may lead to the development of a policy.[7]

Among the various authoritative definitions of *policy*, the following two from *Merriam-Webster's Dictionary* are particularly relevant to our discourse:

1. A definite course or method of action selected from among alternatives and in light of given conditions to guide and determine present and future decisions.
2. A high-level overall plan embracing the general goals and acceptable procedures, especially of a governmental body.[8]

Summarizing these differing perspectives, the following definition of *defense policy* is accepted in this article:

> A course of action or conduct, as defined by senior executive leadership, intended to influence and determine decisions, actions, and other matters relating to and including the conduct of military affairs, consistent with the [nation's] security strategy.[9]

In line with the second Merriam-Webster's definition, several online dictionaries define *defense policy* as "a program for defending a country against its enemies," where *program* is further defined as "a system of projects or services intended to meet a public need." [10]

Key Defense Policy Components and Relationships

The two definitions given above do not contradict each other; rather, they are complementary. A good starting point in a discussion on defense policy is to clarify that the term *defense policy* encompasses *ends* (what needs to be achieved),

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[6] *NATO Glossary of Terms and Definitions*, AAP-6 Edition 2019, NATO Standardization Office, https://www.coemed.org/files/stanags/05_AAP/AAP-06_2019_EF.pdf.

[7] *NATO Glossary of Terms and Definitions*, AAP-6 Edition 2019.

[8] "Policy," Merriam-Webster's Dictionary, accessed October 14, 2024, www.merriam-webster.com/dictionary/policy.

[9] "Security strategy" may refer to the strategy of a nation, as well as to that of an alliance.

[10] See, for example, Vocabulary.com, https://www.vocabulary.com/dictionary/defense%20program and Dictionary.net, https://www.dictionary.net/program.

ways (how we intend to achieve it), and *means* (the instruments with which those ends are to be achieved).

Regarding policy as it relates to defense and military matters, there are two distinct issues:

1. How to use *available means* to reach the desired ends, for example, in the event of military aggression against a country

2. Defining the means that would allow a nation to deal effectively with likely future threats and challenges.

The first task encompasses issues from both the strategic and operational realms, including deliberate and contingency planning, as well as the direction of troops in combat. It is often referred to as *force employment*. Defense policy in this regard relates mainly to decisions to conduct or contribute to a certain operation, defining the mandate of the participating forces, and establishing rules of engagement.

The second task is the primary focus of defense policy and the subject of this article. It can be approached in various ways. In goal-oriented (or "top-down") approaches, desired ends drive the design of future forces. Bartlett et al.[11] and reports from NATO's Science and Technology Organization [12] examine other approaches to linking goals with force structures. Without delving into details, it is important to note that the formulation of defense policy requires substantial planning efforts to align goals with available forces within a constrained decision-making framework.

Although it may be obvious to many readers, the premise that defense policy requires the definition of both ends and means is not easily understood and readily accepted everywhere, particularly in post-Soviet countries. One reason for this is language.[13] In several languages—quite possibly in all Slavic languages—there is only one word, *politika*, which is used to translate both *policy* and *politics*. This word carries strong connotations of everything "political." [14] As a result, a common perception is that defense policy resides in the realm of pol-

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[11] Henry Bartlett, G. Paul Holman, and Timothy E. Somes, "The Art of Strategy and Force Planning," in *Strategy and Force Planning*, ed. Richmond M. Lloyd et al., 4th ed. (Newport, RI: Naval War College Press, 2004), 17-33.

[12] See, for example, *Handbook on Long Term Defence Planning*, RTO Technical Report 69 (Paris: NATO Research and Technology Organization, 2003); *Risk-Based Framework for Strategic Planning: Case Studies*, STO-TR-SAS-093-Part-II (STO, 2018); and *Conceptual Framework for Comprehensive National Defence System*, STO-TR-SAS-152 (STO, 2024).

[13] It is certainly not the most important one, however. A lack of civilian expertise, prevalent patterns of civil-military relations, and cultures of secrecy, among other factors, also contribute to the opacity and inefficiency of defense policies, planning, and plans. See Daniel Nelson, "Beyond Defense Planning," in *Transparency in Defense Policy, Military Budgeting and Procurement*, ed. Todor Tagarev (Sofia: Geneva Centre for DCAF and "George C. Marshall–Bulgaria," 2002), 17-26.

[14] As far as I am aware, this is also the case in Romance languages (*politique*, *politica*).

iticians, but the term is understood narrowly as referring only to making decisions about the ends – that is, setting the objectives that the armed forces must be able to attain.

On the other hand, given the frequent lack of knowledge on military matters among politicians and their civilian staff in post-Soviet states, it is often taken for granted that only the military possess the knowledge and authority to define what forces are needed to meet the set objectives – a process that is understood as implementing the policy determined by politicians. According to Soviet terminology, this is referred to as the "build-up" (*stroitel'stvo*) of the armed forces. In the post-Soviet era, this understanding is often disguised under the rubric of "military policy" or, more recently, "force development strategy."

The main thesis of this article is that defense policy encompasses both ends and means and that the desired ends drive the creation of adequate means (i.e., forces). Several adjustments need to be made to render this thesis useful in practice.

Defining the Ends

The definition of defense policy goals is based on the values and interests pursued, an analysis of the security environment to identify and anticipate challenges and threats, and the consideration of security objectives and strategy, including commitments to alliances and partnerships. It also includes the elaboration of defense missions—that is, the roles of the armed forces and the broader defense sector—and the levels of ambition (Figure 1).

Figure 1: Defining the *Ends* of Defense Policy.

Analysis of the Security Environment

Current security analysis emphasizes threats posed by, among others:

- The strategic competition and rivalries among democracies and authoritarian states, and the attempts of the latter to reestablish spheres of influence
- Russia's neo-imperialist ambitions, its invasion of Ukraine, an increased willingness to take risks despite human losses, and subversive activities against European countries and beyond
- Gray zone activities below the threshold of war,[15] including the disruption of critical infrastructures [16]
- Hybrid threats – for example, the willingness and capacity of malicious state actors to undermine democratic processes,[17] exert financial and economic pressure, and disrupt supply chains
- International terrorism and violent extremism
- Pandemics
- Transborder organized crime,

as well as various combinations of these threats. Other risks originate from illegal migration, climate change, the impact of disruptive technologies such as generative AI and synthetic biology, and the massive spread of disinformation and propaganda online.

Security Objectives

The objectives of a state's security policy address current and foreseeable security challenges and threats, reflecting the values, interests, and ambitions of the nation in the international security arena. For example, the 2022 National Security Strategy of the United States lays out a plan "to achieve a better future of a free, open, secure, and prosperous world." The document underlines that the strategy is rooted in U.S. national interests "to protect the security of the American people; to expand economic prosperity and opportunity; and to realize and defend the democratic values at the heart of the American way of life." It further acknowledges that these goals cannot be achieved in isolation and that the

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[15] Jim Derleth and Jeff Pickler, "Twenty-first Century Threats Require Twenty-first Century Deterrence," *Connections: The Quarterly Journal* 21, no. 2 (2022): 11-23, https://doi.org/10.11610/Connections.21.2.01.

[16] See, for example, Nedko Dimitrov and Kalin Karakolev, "Seabed Critical Infrastructures," *Information & Security: An International Journal* 55, no. 2 (2024): 133-148, https://doi.org/10.11610/isij.5566.

[17] Boyan Mitrakiev and Noncho Dimitrov, "The Need for Emotional Cues Analysis in OSINT in Countering Reflexive Control Information Warfare Campaigns: A Critical Review and Reconceptualization," *Information & Security: An International Journal* 55, no. 3 (2024): 275-298, https://doi.org/10.11610/isij.5514.

United States "will build the strongest and broadest possible coalition of nations that seek to cooperate with each other, while competing with those powers that offer a darker vision and thwarting their efforts to threaten our interests." [18]

Security Strategy

A good security strategy provides a clear, realistic, and effective concept for employing diplomatic, economic, military, and other instruments of power to achieve a nation's security objectives.

In 2022, the United States announced a three-prong strategy:

- Investing in national power to maintain a competitive edge, including implementing a modern industrial and innovation strategy, investing in people, and strengthening democracy
- Using diplomacy to build the strongest possible coalitions
- Modernizing and strengthening military forces.

It provides further guidance by elaborating on the main priorities:

- Out-competing China and constraining Russia
- Increasing international cooperation—even with competitors—on shared challenges such as climate and energy security, pandemics and biodefense, food insecurity, arms control and non-proliferation, and terrorism
- Shaping institutions, norms, and standards to govern international trade and investment, economic policy, technology, cybersecurity, and countering corruption.[19]

The security strategy of the United Kingdom, under review at the time of writing this article, is defined in the report from the Integrated Review of Security, Defence, Development and Foreign Policy, titled "Global Britain in a Competitive Age." It identifies sovereignty, security, and prosperity as the most important interests that "bind together the citizens of the United Kingdom." The document outlines a "strategic framework" with four overarching and mutually supporting objectives:

- Sustaining strategic advantage through science and technology
- Shaping the open international order of the future
- Strengthening security and defense at home and overseas
- Building resilience at home and overseas, [20]

and elaborates on the ways each of these objectives will be achieved.

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[18] *National Security Strategy* (Washington, D.C.: The White House, October 2022), p. 7.

[19] *National Security Strategy* (Washington, D.C.: The White House, October 2022).

[20] *Global Britain in a Competitive Age: The Integrated Review of Security, Defence, Development and Foreign Policy*, Presented to Parliament by the Prime Minister by Command of Her Majesty, March 2021.

Depending on assessments of security risks and threats, potential opponents' traditional strengths and weaknesses, and identified opportunities—along with assessing one's own and adversarial vulnerabilities—the security strategy may envision various roles for the armed forces and the wider defense sector among the instruments of power. These roles are often referred to as the "missions" of the armed forces.

Defense Missions

Many countries designate the missions of their defense and armed forces along three main types, with some variations:

- Protecting territorial integrity, sovereignty, and independence
- Shaping the security environment, e.g., by contributing to international peace and security
- Providing defense support to civilian authorities.

For example, the cited UK 2021 report provides a detailed elaboration on the following missions:

- Countering state threats: defense, disruption, and deterrence;
- External intervention in conflict to minimize opportunities for state and non-state actors to undermine international security
- Homeland security, including countering radicalization and terrorism, serious and organized crime, strengthening global arms control, disarmament, and counter-proliferation.[21]

In the Kingdom of the Netherlands, the missions or "core tasks of the armed forces" are legally defined:

1. Protection of national and allied territory;
2. Protection and promotion of the international rule of law and international stability;
3. Provision of military support to civilian authorities for the maintenance of public order, law enforcement, and disaster and crisis management.[22]

These missions can be further specified and expanded. Among the examples are the anticipated roles of the armed forces in countering terrorism at home and abroad, protecting land and sea borders, critical infrastructure protection, provision of essential services (e.g., during pandemics), contributions to cyber-security and the resilience of national information, communication, and navigation infrastructure, patriotic and civic upbringing, and technological and industrial development.

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[21] *Global Britain in a Competitive Age.*

[22] *2024 Defence White Paper: Strong, Smart, and Together* (The Hague: Ministry of Defence, 2024), https://english.defensie.nl/downloads/publications/2024/09/05/defence-white-paper-2024.

Levels of Ambition

The elaboration of "levels of ambition" intends to make defense goals and objectives more tangible and measurable. It has been widely used in reference to the operational roles of the armed forces, but is also applicable to all defense roles and components of defense policy.

In NATO, for example, the level of ambition defines "the number, scale and nature of the operations the Alliance should be able to conduct in the future." [23] A related term is *operational tempo*, which refers to the number and size of missions undertaken by a military force relative to its strength, taking into account the complexity and duration of these operations. A high operational tempo indicates a significant number of sizeable, ongoing deployments to multiple theaters.

Likewise, the level of ambition of a country is defined in military terms as the number, scale, and nature of operations that it should be able to conduct on its own or as part of a coalition or alliance. For example, in a notional mission labeled "Contribution to International Peace and Stability," the level of ambition can be defined by the expected ability of the national armed forces to:

- {conduct on their own}, {be a lead nation}, {participate in}
- N (number of) operations
- of the type: {high intensity/ peace enforcement}, {stabilization, humanitarian, peacekeeping, etc.}
- with duration: {short-term / occasional}, {mid-term / 2–3 years}, {long-term / ~decade}
- with a {brigade}, {battle group}, {battalion}, {company}-sized formation and/or {specialization in certain capabilities}.

For instance, in the mid-2000s, Sweden defined its ambition regarding international operations in the following manner:

> … *to lead* and participate in *two large-scale* international missions, each requiring the deployment of an entire battalion, and *three smaller operations*. It shall be possible to undertake some operations with *little prior warning* and to *sustain* other operations *over a longer period* of time. The Swedish Armed Forces shall be able successfully to tackle *any crisis management task* given to them, from confidence-building, conflict prevention, humanitarian and peace-keeping tasks to peace-enforcement measures.[24]

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[23] "NATO Defence Planning Process," *What We Do*, last updated March 31, 2022, https://www.nato.int/cps/en/natohq/topics_49202.htm.

[24] *Our Future Defence: The Focus of Swedish Defence Policy 2005–2007*, Swedish Government Bill 2004/05:5, 14, emphasis added, https://www.files.ethz.ch/isn/155135/Sweden_eng.pdf.

With the resurgence of large-scale conflict in Europe and accelerating strategic competition,[25] countries are now less focused on international operations. The most recent defense policy document of Canada, the "Renewed Vision," declares the ambition to:

- Detect, deter, and defeat threats in, over, and approaching Canada – in the air, on land, on and under the sea, and in space and cyberspace
- Deter and defeat threats to the continent shared with the United States
- Assist in domestic emergencies, including disaster response and search and rescue operations, with the military able to respond when needed, as a force of last resort
- Continue to make valuable contributions to global efforts to deter major power conflict, confront terrorism and insurgency, and address instability by deploying and sustaining forces across a broad spectrum of military activities, from warfighting to peace operations to capacity-building
- Continue playing an important role in confronting Russian aggression through a steadfast commitment to NATO assurance and deterrence measures, including as the framework nation lead for NATO's Forward Land Forces in Latvia, the Canada-Ukraine Agreement on Security Cooperation, etc.
- Continue supporting like-minded partners through capacity-building efforts, helping them address internal challenges and build institutional strength, resolve regional disputes, or deter threats to a free, open, inclusive, and stable international order based on the rule of law.[26]

In another national example, the 2022 *National Strategic Review* report states that by 2030, France will be able to:

- Defend both metropolitan France and its overseas territories, and protect and involve its citizens
- Contribute to the defense of Europe and stability in the Mediterranean by having the capability to engage in high-intensity conflict and by assuming the role of a framework nation within NATO, the European Union, or an ad hoc coalition
- Act within balanced partnerships, providing security in an area stretching from sub-Saharan Africa to the Arabian Gulf, via the Horn of Africa
- Contribute, through its influence and with its partners, to the stability of the Indo-Pacific area

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[25] See, for example, Frank Hagemann, "The Myth of Bipolarity: How to Understand Strategic Competition in a Globalized World," *Connections: The Quarterly Journal* 23, no. 2 (2024): 7-20, https://doi.org/10.11610/Connections.23.2.00.

[26] *Our North, Strong and Free: A Renewed Vision for Canada's Defence*, Government of Canada, May 3, 2024, https://www.canada.ca/en/department-national-defence/corporate/reports-publications/north-strong-free-2024.html.

- Ensure its freedom to act in common spaces (cyber, space, seabed, and air-sea) and the security of its supply routes, together with its part-ners.[27]

In the process of defense policy elaboration, it is beneficial to define scales of ambition and discuss alternative levels of ambition. Figure 2 presents notional levels of ambition in the mission "Defense" (or "Sovereignty"). The same approach is applicable in deliberations of defense policy components, such as technological level, the role of the defense industrial base, the human factor, degree of efficiency, etc. Figure 3 presents a notional scale on the level of ambition regarding the technologies used in weapon systems, equipment, C4ISR (command, control, communications, computers, intelligence, surveillance, and reconnaissance) systems, and other defense infrastructure.

Such scales may be used to discuss and decide on what are the *wanted* (or *desired*) levels of ambition. They can be developed for the types of involvement of the armed forces and component policies of the highest interest to decision-makers. Figure 4 provides an illustrative example presenting the desired defense policy ambitions. It must be taken into account that such an exercise might be most useful at the beginning of the defense policy formulation process. As will be explained below, the actual policy ambition might be lower than the desired one.
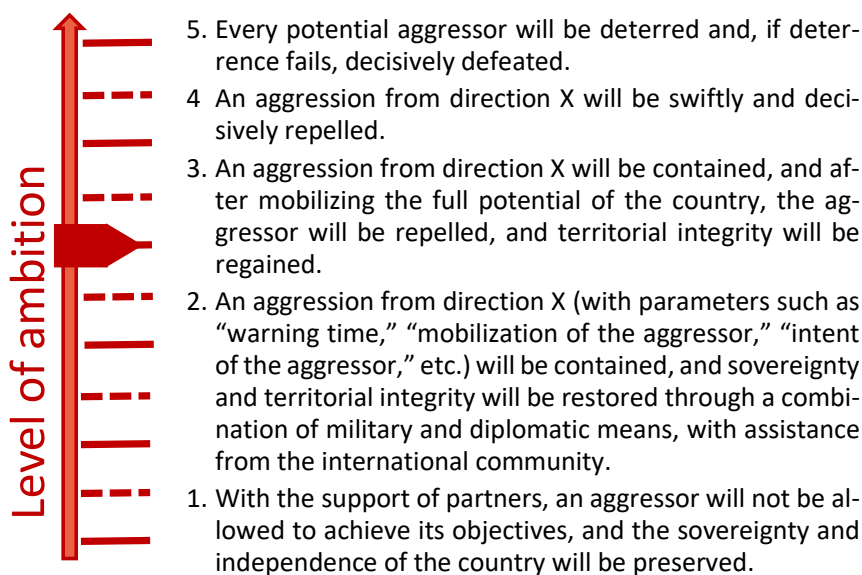

Level of ambition

5. Every potential aggressor will be deterred and, if deterrence fails, decisively defeated.

4 An aggression from direction X will be swiftly and decisively repelled.

3. An aggression from direction X will be contained, and after mobilizing the full potential of the country, the aggressor will be repelled, and territorial integrity will be regained.

2. An aggression from direction X (with parameters such as "warning time," "mobilization of the aggressor," "intent of the aggressor," etc.) will be contained, and sovereignty and territorial integrity will be restored through a combination of military and diplomatic means, with assistance from the international community.

1. With the support of partners, an aggressor will not be allowed to achieve its objectives, and the sovereignty and independence of the country will be preserved.

Figure 2: An Illustration of Possible Levels of Ambition in the Mission "Defense."

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[27] *National Strategic Review 2022* (Paris: Secrétariat général de la defense et de la sécurité nationale, 2022), p. 27, www.sgdsn.gouv.fr/files/files/rns-uk-20221202.pdf.
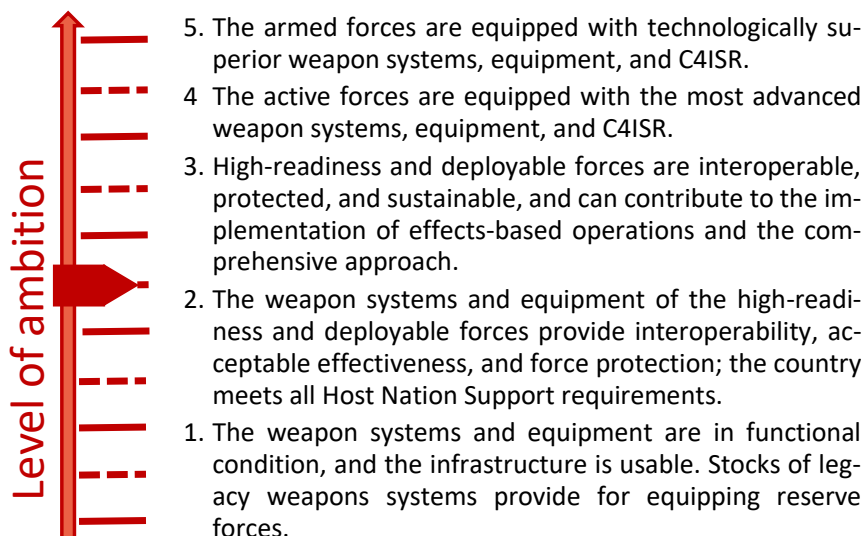
Level of ambition

5. The armed forces are equipped with technologically superior weapon systems, equipment, and C4ISR.

4 The active forces are equipped with the most advanced weapon systems, equipment, and C4ISR.

3. High-readiness and deployable forces are interoperable, protected, and sustainable, and can contribute to the implementation of effects-based operations and the comprehensive approach.

2. The weapon systems and equipment of the high-readiness and deployable forces provide interoperability, acceptable effectiveness, and force protection; the country meets all Host Nation Support requirements.

1. The weapon systems and equipment are in functional condition, and the infrastructure is usable. Stocks of legacy weapons systems provide for equipping reserve forces.

Figure 3: An Illustration of Possible Levels of Ambition in Terms of Technologies.

Figure 4: Illustrative Example of Desired Levels of Ambition along with Types of Operations and Component Policies.

Defining the Ways

The elaboration of defense policy requires (re)consideration of the *ways*—or the *strategy*—to achieve the desired ends. Bartlett et al. discuss strategies as "game

plans" for "achieving desired ends with limited means," emphasizing the coordinated use of economic, diplomatic, and military instruments of national power to achieve national goals.[28]

Other instruments can also be considered, particularly in hybrid warfare or "gray zone" scenarios, where potential adversaries operate below the threshold of lethal conflict.[29] One model gaining traction is designated as DIMEFIL, which involves the coordinated use of Diplomatic, Information, Military, Economic, Financial, Intelligence, and Law Enforcement instruments of power.[30]

The strategy underlying the defense policy of Poland, for example, builds on its membership in NATO and the European Union, regional security cooperation formats, and capable armed forces. More specifically, it focuses on: [31]

- Ensuring that NATO remains the world's most powerful military alliance, a guarantor of peace and prosperity in Europe
- Continuing the military and political engagement of the United States
- Enhancing regional military cooperation, especially in the Baltic Sea, among the members of the Visegrad Group, with Romania, and with all other countries on NATO's Eastern flank
- Strengthening the partnership with Germany and, jointly with other Allies, enhancing and maintaining the allied command and control infrastructure in the region
- Investing in the Polish Armed Forces, which by 2032 should become one of the most modern and numerous militaries in Europe
- Ensuring effective coordination between the military and other state institutions.

The 2024 white paper of the Netherlands defines a "strategic course for strengthening defense" that builds on:

- Credible deterrence and collective defense agreements; strengthening NATO capabilities in Europe, and enhancing defense cooperation within the European Union and between the European Union and NATO
- Bilateral and multilateral cooperation, including contributions to military missions, operations, and stability efforts in the Western Balkans, the Red Sea, and the Gulf and Indian Ocean regions

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[28] Bartlett et al., "The Art of Strategy and Force Planning," 19.

[29] Peter Dobias and Kyle Christensen, "The 'Grey Zone' and Hybrid Activities," *Connections: The Quarterly Journal* 21, no. 2 (2022): 41-54, https://doi.org/10.11610/Connections.21.2.03.

[30] Katerina Oskarrson and Robin Barnett, "The Effectiveness of DIMEFIL Instruments of Power in the Gray Zone," *Open Publications* (Allied Command Transformation) 1, no. 2 (2017).

[31] *Polish Defence in the Perspective of 2032* (Warsaw: Ministry of National Defence, 2017), www.gov.pl/web/national-defence/polish-defence-in-the-perspective-of-2032.

- Coordination with civilian partners and contributions to the protection of strategic and vital infrastructure
- Collaboration with partners on a whole-of-government and whole-of-society approach to societal resilience and military readiness
- Research and innovation, promoting "towers of excellence" in space technology, sensors, intelligent systems, quantum technology, and smart materials
- Digital transformation
- Strategic cooperation with industry to increase capacity, security of supplies, and resilience
- Support for Ukraine.

Defining the Means

Defense missions and ambitions, along with the selected "game plan," guide thinking on the required instruments, or *means*, and the respective human, materiel, and financial resources. As a rule, the armed forces provide most of the military and some additional instruments, for example, through defense diplomacy. However, in designing a defense policy, it is not the forces themselves that are important, but rather the capabilities they possess, or will possess, in relation to the nation's defense objectives (see Figure 5).

Furthermore, although most of the nation's defense capabilities are provided by formations of the armed forces (marked in Figure 5 with 'F'), there are cases where the requisite capabilities will be provided by or in collaboration with other organizations. These examples fall into several categories:

- Capabilities provided by other state agencies, such as non-military intelligence services or law enforcement agencies
- Allied capabilities, e.g., airborne ground surveillance,[32] air surveillance, command and control, battlespace management, and communications [33]
- Capabilities procured, operated, and maintained in a bilateral or multinational format, such as the Strategic Airlift Capability based on C-17 Globemaster III aircraft;[34]
- Outsourcing, e.g., maritime transport, satellite observation, or selected logistics capabilities;

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[32] "NATO Intelligence, Surveillance and Reconnaissance Force (NISRF)," *What We Do*, https://www.nato.int/cps/ua/natohq/topics_48892.htm.

[33] "AWACS: NATO's 'eyes in the sky'," *What We Do*, November 14, 2023, www.nato.int/cps/ua/natohq/topics_48904.htm.

[34] "Strategic Airlift," NATO, last updated March 7, 2024, https://www.nato.int/cps/ru/natohq/topics_50107.htm?selectedLocale=en.
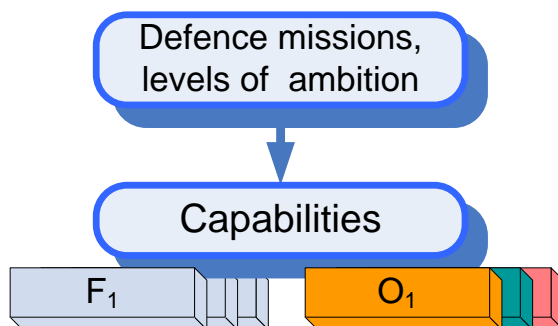
Figure 5: Capabilities as 'Means' in Defense Policy.

- Establishing public-private partnerships, e.g., in providing communications infrastructure or space-based surveillance.

In addition, and as the ongoing Russo-Ukraine war once again demonstrates, the capacity of research organizations and the defense industry to design, produce, upgrade, and supply armaments, ammunition, and equipment, and provide repair services, may significantly impact war efforts. The same applies to the capacity of enterprises to maintain critical infrastructures, such as transport and energy, and provide essential services to the armed forces and the population.

Capability is defined here as the capacity—provided by a set of resources and abilities—to achieve a measurable result in performing a task under specified conditions and to specific performance standards.[35] Therefore, the link between objectives and capabilities is not straightforward. The definition of the capabilities necessary to achieve the objectives depends on the situations, or scenarios, in which the armed forces might be used, and takes into account the way in which they will be used.

Planning Scenarios

In defense policymaking and planning, scenarios are used as planning situations, specified in terms of environmental and operational parameters. Planning scenarios are not intended to predict future situations and outcomes; rather, they are employed to support the process of specifying force structure and defense plans. They serve several purposes.[36] First, scenarios broadly describe potential missions based on challenges or threats faced in a ten- to twenty-year time frame – a duration comparable to the time needed to reshape force structures and develop and field corresponding weapon systems. Second, scenarios lay out

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[35] Tagarev, "The Art of Shaping Defense Policy: Scope, Components, Relationships (but no Algorithms)."

[36] Bent Erik Bakken, *Handbook on Long-Term Defence Planning*, RTO Technical Report 69 (Paris: NATO Research and Technology Organization, April 2003), www.sto.nato.int/ publications/STO%20Technical%20Reports/RTO-TR-069/TR-069-$$ALL.pdf.

assumptions related to the scope of a nation's aims and ambitions *vis-à-vis* its potential challenges and threats. Third, planners use them as a tool to define the capabilities required to conduct operations and as a testbed for assessing proposed operational concepts, capabilities, or system requirements against formulated mission objectives.

Policymakers and planners need to consider multiple scenarios to address the complex nature of military missions and select a set of scenarios that will be used to shape force development. This set should be representative of the security challenges outlined in the nation's defense policy. The selected scenarios, in combination, need to capture the full spectrum of missions, operations, objectives, and interests of the state. Finally, all selected scenarios must be sufficiently credible so that the resulting analyses and plans will be acceptable.[37]

In its defense policy and planning process, NATO develops several dozen planning scenarios, ranging from operations for non-combatant evacuation to forcible entry to major war, which are then used to inventory the capabilities required. However, the information on these scenarios is not publicly available.

Some national defense policy documents outline the scenarios used in policymaking. For example, the 2024 defense white paper of The Netherlands summarizes four main scenarios:

1. A Russian attack on NATO
2. A mix of covert military and non-military attacks
3. A China-U.S. war sparked by conflicts between China and its neighbors
4. Unrest and conflict on the borders of Europe and the Kingdom of the Netherlands.

In summary, scenarios are used to represent uncertainty, solicit the views of senior policymakers, describe operational considerations, and rationalize capability requirements.

This article does not examine the techniques for defining required capabilities.[38] Instead, the next section addresses the issue of balancing ends and means in defense policymaking.

Reconciling End and Means: The Role of Planning Risks

The rule in policymaking is that demands always exceed resource availability. Policymakers and planners work hard to balance goals, strategy, and means, with risk being the balancing factor. Realistically, policymakers recognize that all the main variables—objectives, strategy, means, and risk—are subject to modification until a good balance is achieved. Obviously, a balanced policy is sought in

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[37] Scenario selection is a critical activity. The need for detail and a broad spectrum of planning scenarios is inevitably constrained by the limited analytical ability of policymakers and planners.

[38] The interested reader may refer to the NATO Science & Technology Organization's report on "Capability Planning," SAS-096, as a starting point on the subject.

the current and anticipated security environment and within resource constraints (as represented in Figure 6).

Hence, a realistic defense policy is based on the recognition that it is not possible to *guarantee* that all security and defense goals will be achieved against all potential threats. Instead, it relies on a risk management approach.

Risk is broadly defined as "the effect of uncertainty on objectives." [39] There are several types of risk associated with various defense activities. Of primary importance to the current discourse is the risk related to defense planning decisions and, by extension, to the design of defense policy. This is referred to as *defense planning* or *future challenges* risk, which concerns the future capacity to successfully execute missions and operations against a spectrum of prospective future challenges and threats. [40]

Figure 6: Balancing Ends and Means in a Resource-Constrained Decision Framework. [41]

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[39] International Organization for Standardization, "Risk Management – Principles and Guidelines," ISO 31000:2009.

[40] *The National Defense Strategy of the United States of America* (Washington, D.C.: Department of Defense, March 2005), 11. This version of the U.S. defense strategy defines (1) operational, (2) future challenges, (3) force management, and (4) institutional risks. For a more elaborate examination of relevant risks, see *Analysis Support Guide for Risk-Based Strategic Planning*, STO-TR-SAS-093-Part-I (NATO Science & Technology Organization, 2018).

[41] Also known as the Bartlett model. See Bartlett et al., "The Art of Strategy and Force Planning," 19.

Defense planning risk is measured through the impact or consequence of an unfavorable outcome, given the occurrence of a military event or other form of organized violence and the nation's defense capabilities. Thus, the measure of risk is probabilistic, defined by the likelihood of an event's occurrence and the estimated consequences should the event occur, with a given force structure in place.

Each force structure—or set of capabilities—is associated with a certain level of risk. Figure 7 visually presents the difference between two force structures under examination. Force Structure $_1$ is associated with Risk $_1$, and could be built and sustained if Budget $_1$ is allocated. When a given force structure is defined as necessary, defense planners (often implicitly) assume that the associated risk, i.e., Risk $_1$, is acceptable. When planners are tasked with finding a force structure that is "realistic"—one that could be built and sustained within expected budgets [42] (Budget $_2$ in the figure) and other resource constraints—they develop plans for a force structure associated with Risk $_2$.
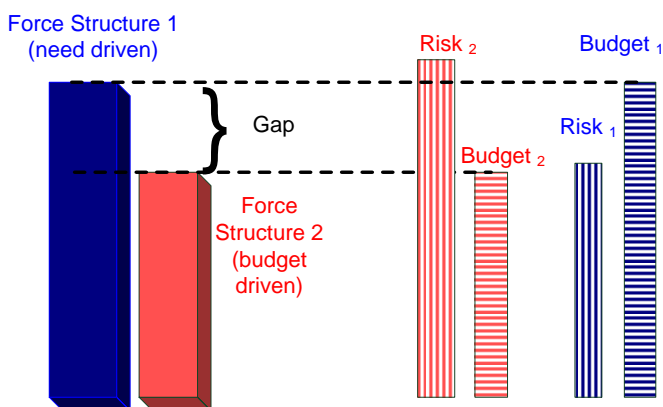

Figure 7: Force Structures, Risk Levels, and Budgets.

In practice, the mismatch between needs, or required defense capabilities, and resource constraints is inevitable. It creates a gap of unfunded capabilities. What could be done regarding that gap?

One opportunity is to seek a better force structure within Budget $_2$—a different set of capabilities and more efficient and effective use of resources—so as to lower the associated Risk $_2$. However, this is not always possible. Another opportunity is to reconsider the ways in which the armed forces operate. A third option is to reassess the nation's security strategies: seek entry into an alliance,

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[42] The budget allocations are not the only factor constraining policy decisions. Other constraints may include demographics, the educational level of the population, access to technologies, industrial capacity, and even the size of a state's territory.

enhance security cooperation, or attempt to shape the security environment, for example, by applying confidence-building measures with neighbors. A fourth option is to provide more funding, which would allow the nation to increase the size and/or readiness of its armed forces. A fifth option is to decide to reconsider the nation's security objectives and ambition levels. Finally, if all other opportunities are exhausted, we may have to accept the level of risk associated with the planned force structure.

Figure 8 provides an illustration of how the fifth option can be exercised. In deliberating ambition levels and using scales of the kind presented in Figures 2 and 3, policymakers can define desired as well as minimal levels of ambition and then seek trade-offs while a realistic force structure is identified.

Typically, a proposal for a force structure may be accepted if the associated planning risk is deemed acceptable (i.e., the likelihood of an event's occurrence is determined to be low) or if the likely consequences of such an occurrence are judged to be minor. An analysis of past experience, expert judgment, simulations, war games, and even field exercises can be used to assess risk. Regardless of the approach, in the end, the acceptance (or non-acceptance) of a planning risk strongly depends on the personality of the decision-maker. Some individuals are risk-averse, while others are more willing to accept risk. Thus, any risk management strategy is inherently subjective.

On the whole, risk assessment should be integrated into the process of making decisions and setting priorities among competing demands. Risk assessments
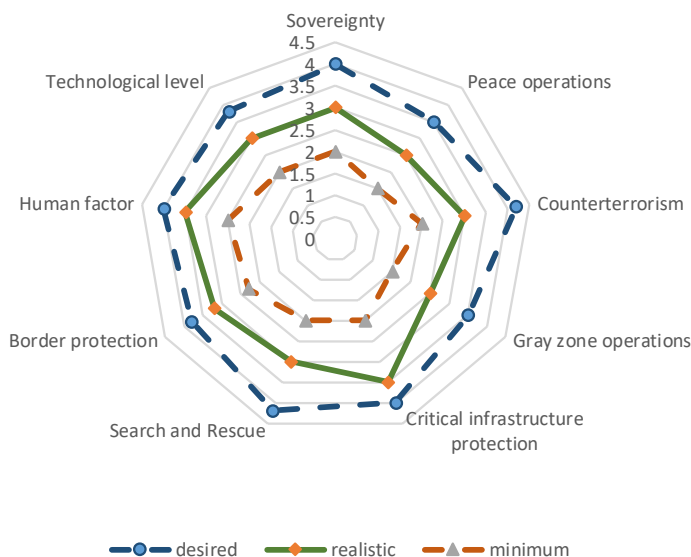

Figure 8: Illustrative Example of Desired, Minimal, and Realistic Levels of Ambition.

can, among other things, be used to assign risk management responsibilities along organizational hierarchies.

One of the main defense policy decisions is determining the future force structure. It is a good practice to describe it in terms of its main parameters, as exemplified in the 2014 U.S. Quadrennial Defense Review report.[43] This still leaves a certain degree of uncertainty due, for example, to factors such as shifts in capability, timeline, and cost of major acquisition projects, recruitment and retainment opportunities, or unforeseen expenditures during implementation. Yet, it also provides space for adapting policy decisions in subsequent mid-term (e.g., programming[44]) and short-term planning, thus further reducing the degree of uncertainty.

Evaluation Criteria

A (draft) defense policy document can be evaluated by a number of criteria. These can be related to:

- *Inputs*, e.g., envisioned budget allocations to defense, personnel strength of active and reserve forces, etc.
- *Outputs*, such as levels of training, number of joint and multinational exercises, deployable units, envisioned degree of achievement of capability targets (for NATO members), numbers of main combat platforms, budget distribution among main categories, etc.
- *Outcomes*, e.g., successfully performed missions, credibility with allies and partners, and public attitudes toward defense and armed forces.

Additional criteria and metrics can be designed along the *ends*, *ways*, and *means* perspectives on defense policy.[45]

This article does not analyze the issue of measurement and metrics in detail. Instead, the focus here is on those criteria that allow us to judge whether a stated defense policy—in a draft or final document—can serve its purpose, i.e., to guide and determine present and future decisions in defense. For this purpose, the set of A^3B^2 criteria provides useful guidelines. These criteria allow one to check whether a stated defense policy is *adequate*, *acceptable*, *affordable*, and *balanced* in two ways.[46]

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[43] *Quadrennial Defense Review 2014* (Washington, D.C.: Department of Defense, March 2014), https://history.defense.gov/Portals/70/Documents/quadrennial/QDR2014.pdf.

[44] A stage in the PPBE (Planning, Programming, Budgeting, and Execution) system, where applicable.

[45] For a comprehensive treatment the reader may refer to *Performance Management in Defence Organisations*, Technical Report TR-SAS-096-Part-I (Paris: NATO Science & Technology Organization, 2020), and in particular the summary in its "Appendix E-1: Strategic Statements and Performance Metrics."

[46] The author's thinking on this subject was inspired by the late Prof. David Greenwood of the Centre for European Security Studies in Groningen, The Netherlands, who spoke

First, a defense policy needs to be *adequate* to the security environment and its evolution. The formulation of policy needs to be based on rigorous analysis of threats and challenges and account for foresight-based elaboration of trends, optional developments (or "alternative futures"), and potential strategic shocks. This applies not only to security and military threats but to the overall strategic context, including geopolitics, ideology, technological and economic development, and demographic trends.

Second, the defense policy has to be *acceptable* from several perspectives, including:

- *International norms*, e.g., international law related to the use of armed forces, including in armed conflict, internationally recognized codes of conduct, and conventions. For example, a country that is a signatory to conventions banning chemical and biological weapons, anti-personnel mines, or cluster munitions cannot include such *means* in its arsenal.

- *Alliance commitments*. For example, in the first decade of this century, NATO adopted a requirement that 40 % (later increased to 50 %) of the personnel of the armed forces be deployable to a theater of operations away from the territories of NATO countries. A policy that does not guarantee the implementation of this commitment would damage the credibility of an ally.

- *Societal attitudes*, e.g., toward a policy to reintroduce mandatory conscript service or to significantly increase defense expenditures.

Third, the defense policy must be *affordable* in view of economic conditions and trends, financial forecasts accounting for economic growth, taxes and assumptions on public priorities, demographic trends, access to technologies, available defense industrial capacity and skilled labor, territorial constraints, etc. Key here is to assess whether the envisioned defense expenditures are sufficient to develop and maintain the planned force structure and other necessary means.

Fourth, ends, ways, and means need to be *balanced*, and residual planning risks must be understood and accepted. Policymakers must be confident that the *ways* are tailored to the *ends*, that the planned force structure aligns with the selected strategy, and that the defense capabilities will support its implementation.

Finally, there also needs to be a *balance* between doctrinal, organizational, human, technological, and other capability components. For example, one cannot plan to develop and maintain "in-house" cybersecurity and cyber defense capabilities if the remuneration in the respective units of the armed forces is several times lower than salaries in the national IT sector.

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with particular rigor on the adequacy, acceptability, and affordability of policy and defense decisions.

If the evaluation of a stated defense policy indicates that it does not meet one or more of these five criteria, it needs to be reformulated. Otherwise, discrepancies cannot be compensated in the implementation process, and hence, the policy will not serve its purpose of determining and guiding future decisions and actions in defense.

Conclusion

There is no universally applicable algorithm for defense policymaking. Nevertheless, there are good practices based on disciplined approaches to elaborating and deciding on the future force structure that share some common steps:

- Defining defense objectives, missions, and ambitions
- Elaborating a defense strategy
- Designing and agreeing on plausible planning scenarios
- Defining the force and other capabilities required to implement the strategy and achieve the objectives in the planning scenarios
- Balancing objectives, strategy, and capabilities while considering planning risks.

These steps can be performed in a variety of ways and will benefit from creativity. What is important is to adhere to a rational, disciplined approach to defense policymaking and the principles of transparency and accountability. The examples drawn from the experiences of democratic societies with mature defense policymaking mechanisms, as presented in this article, may assist partner states endeavoring to manage effectively the development of their armed forces.

The understanding of defense policymaking will benefit from an examination of the process and key players, typical defense policy documents, the limitations of the analytical model presented here, and the need to combine it with an understanding of the role of organizational culture and civil-military relations. A follow-up article will analyze these issues and provide further guidance to military and civilian defense officials embarking on the road of policymaking.

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