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Exploring the New Concept of Open Defense

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Abstract:

In this paper, we introduce Open Security as a contribution to the collective defense narrative. Open Security is premised on the principle of active citizenry. Active citizens are recognized as both receiver and provider of security. To successfully operate within an unstructured and fluid environment, it is necessary to break free of constraints imposed by doctrine and dogma. The Joint Civil-Military Interaction (JCMI) Research and Education Network is a voluntary group of Human Security scholars and practitioners in the United States and Europe who have one goal: exploring the borders of Human Security, stepping away from the constraints of doctrine, and recognizing that the military cannot be the only voice speaking about and judging security and defense. Open Defense is a dynamic security mind-set based on the need and responsibility of individuals to protect themselves and their local community. Efficient individual and collective resilience is a precondition for context specific security and defense. A new view of Civil Defense as security partner is needed. The webinar organized on 15 February 2023 was a result of cooperation between Joint Civil-Military Interaction, Interacta Global Network, Middle Georgia State University, Euro-Atlantic Council of Slovenia, Multi-National Joint HQ Ulm and War, Peace, and Justice Institute. It was a small, but necessary step forward that contributed to conceptualization of the concepts of open security and open defense.²

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Introduction

The increasing need for specialists in addressing the on-going crises of our age cannot be denied. The problems we face are far too complex for a general approach to resolution. Specificity is required. The generalist is an endangered species. But the one space, which everyone is welcome to contribute irrespective of specialty or depth of knowledge, is individual and collective defense as part of a broader Human Security paradigm. Simply put, everyone has the right to life and to defend their life from a multiplicity of threats; violent and non-violent.

Individuals are granted the opportunity to have opinions regarding human rights, religion, culture, climate change, as well as the coffee around the corner. But when it comes to security, the mass of society is told they do not understand the complexities and nuances of defense in the modern world. Leave it to the specialists is the response. We posit this is a constrained and ineffective approach to security that wastes human capacity for collective defense. Needed is not less engagement of ordinary citizenry in security and defense, but more.

In this paper, we introduce Open Security as a contribution to the collective defense narrative. Open Security is premised on the principle of active citizenry. Active citizens are recognized as both receiver and provider of security. They perform their dual roles in an open and self-organizing environment that shuns hierarchical command-and-control approaches to providing security and focuses on horizontal and informal relationships that are demand driven. Ad hoc working groups organize around a need or problem and disband once the need no longer exists, or the problem has been positively addressed.

To successfully operate within an unstructured and fluid environment, it is necessary to break free of constraints imposed by doctrine and dogma. The Joint Civil-Military Interaction (JCMI) Research and Education Network is a voluntary group of Human Security scholars and practitioners in the United States and Europe who have one goal: exploring the borders of Human Security, stepping away from the constraints of doctrine, and recognizing that the military cannot be the only voice speaking about and judging security and defense. Voluntary groups such as JCMI are needed for active citizens to reclaim the security narrative and create a citizen-focused, vice institution-focused, approach to Human Security. JCMI recognizes that civil society has primary responsibility for human security and defense and that the military and state institutions must transition to supporting civil actors as opposed to past security paradigms that had citizens supporting the state and military.



Basic Elements

Over the past two years, JCFM members have been engaged in a Human Security research initiative focused on Open Security and Open Defense (OS&D). Open Security has no definition. Any definition is at the same time an end to Open Defense. Periods of profound peace are so rare that it seems as though we are constantly under a new threat to our freedom, democracy, way of life, values, well-being, and healthy environment. Are these threats real or only perceived? In 2012, the NATO Supreme Allied Commander Europe (SACEUR), Admiral James Stavridis, gave a noteworthy TED Talk. The essence of his talk is captured in the words written on the TED site itself: Imagine a global security driven by collaboration among agencies, government, private sector, and public. That's not just the distant hope of open-source fans, it's the vision of the former Supreme Allied Commander of NATO, who shares vivid moments from recent military history to explain why security of the future should be built with bridges rather than walls (<https://www.youtube.com/watch?v=QPiaadMporw>). He was advocating for a new approach, a different way of thinking, a new mindset – Open Source Security.

Open Defense has no definition as well. Naming it means shaping and bounding defense. Giving it limits. When it is no longer defense what is it? A definition leads to a wrong understanding on a next level. The challenge we take up in this paper is advancing the narrative regarding how we might further appreciate and promote Open Defense as a constantly adapting system of individual and collective activities (sub-systems) that ensure a resilient and sustainable Human Security ecosystem. In such an environment, individuals participate in contributing to their own individual and collective security by leveraging their knowledge, skills, and abilities to meet context specific threats.

Open Security and Defense differ from the military-centric approach that considers security as something that is granted to citizens and that individuals are expected to outsource their defense to the state. The military-centric paradigm needs to be replaced. Every individual has a right to defend themselves as well as participate in building their security. We call this new paradigm the Right to Defend (R2D).

There is no local and collective defense without first individual defense. You cannot build a bridge by starting in the middle. With the end of the Cold War, the West slipped into a convenient naivety. Russia was viewed as a peace partner, and that engagement through commerce would result in Russia joining the community of nations as a full partner. But no one asked Russia about its understanding of events and its future. Russia's invasion of Georgia, annexation of Crimea, and initial military incursion in Eastern Ukraine did not deter the West from its path of dependency to a faulty logic. A logic that denied the facts on the ground. Defense and security were at the back of the line when it



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came to states' spending money on defense. NATO was questioned and one world leader called it "brain dead". Another, "unnecessary". In this environment, individual defense atrophied. While the West dismantled its defense, Russia followed a "Let's Make Empire Great Again" strategy. Empire replaced Marxist and Leninist doctrine. The Cold War years would be erased and history rather than being ended would simply be picked up with the pre-WWI Russian Empire. Time to go about and bring former regions of the Empire back into the fold. Georgia and Ukraine are examples of Russia's goal of rebuilding its empire.

Security cannot be ordered from Amazon and Google. Neither platforms nor militaries can provide safety and security to citizens. Increasingly, young people do not view the military profession as a promising career. In Western nations, the military has become something that is paid for by taxes and is watched on television or in the theater. The military is a form of entertainment for a disengaged citizenry. Roughly one to three percent of populations are skilled in military art and science. A shrinking portion of the population is expected to defend the increasing majority. With a reliance on professional militaries and without conscription only a small portion of any society has military skills. Generally, few nations are preparing individuals and local communities on how to respond to security threats. Needed are active citizens and communities able to contribute to resilience and self-defense. The future security Triad must be: civil protection, civil defense, and military defense. Civil Defense ought to become prominent and play an active role in security planning and delivery.

Concepts that Lost their Relevance

Global geopolitical challenges are stressing long held concepts of security and defense. The sovereignty and diplomacy promise of Westphalia is regularly tested. We have entered an age of the militarization of everything [1] in an Age of Perpetual Conflict. Kosovo, Georgia, and Ukraine are three examples of a breach of sovereign borders and the failure of diplomacy to prevent armed conflict. The international security system is increasingly uncertain, and it is now "necessary to think beyond the model of collective defense based on the transatlantic alliance". [2] Irrespective of a shifting geopolitical architecture, political and military leaders persist in following outdated approaches to security and defense that were applicable to a world that no longer exists.

Current threats on Europe's Eastern Flank require those engaged in Security Studies theory and practice to reimagine the role of civil and military interaction in peace operations, writ large. A secondary goal in this paper is to contribute to an open-ended dialogue focusing on the need for Whole-of-Society responses to Human Security. Regrettably, the soundness of an Open Defense strategy can only be known in reverse when we look back upon it. The soundness of the strategy is as a framework for constructing context specific responses to conflict up, down, and across society before, during, and after armed violence. Open Defense is a mind-set, not a doctrine.



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We approach our exploration of Open Defense with intellectual humility. We recognize there are more questions than answers when investigating security and defense issues in constantly shifting geopolitical space. Certainly, Human Security is more a concept than a rigid outline dictating behavior. And resilience is more a continuous process than a clearly defined end-state. We also recognize the fluid nature of modern security concerns. In our highly connected, technologically oriented world where defense concerns include land, maritime, air, cyber, space, and human domains where access to information regarding security challenges is measured in milliseconds, civil and military professionals do not have the luxury of reflecting on lessons learned and crafting new policy, doctrine, and strategies to meet new demands. Today, security professionals are obliged to build the security boat while they are sailing it. All this, while mis and dis-information move about freely influencing the security narrative. Open Defense is a bridge between 2nd millennium defense thinking and an unknown 3rd millennium future.

An Open Defense mind-set cannot be nailed down. It is a fluid activity that adapts as necessary to rapidly changing environments. Open Defense recognizes the need to respond not only to conventional military dangers, but also hybrid threats and asymmetric warfare. And the combination of all three. Open Defense is the multi-dimensional field upon which security evolves across society. Open Defense responds not only to armed violence. It also adapts to meet the demands of threats resulting from climate change, pandemics, and the rise of non-state actors. There is No Open Defense Without an Open Mind.

Creativity versus Doctrines

We propose a key piece of the security puzzle is imagining new ways forward. When creativity is absent, it is easy to pursue a strategy of doing more of what we have been doing without regard to the fact that it is not producing the outcomes we desire. We recognize that questions of security and defense are multi-vocal, and that there is no single way to fashion Human Security.

Practice without theory can turn into action without reflection. Discussion of a theory of defense is necessary for the critique of Human Security practice. Are we doing the right things? What are the right things? Are we doing the right things wrong? How are we evaluating success and failure? These are some of the questions we raise in shaping the development of an Open Defense theory that guides development of Human Security practice. To begin, we need to know where we stand.

From history we can learn how many improvised models of Open Defense were developed when kingdoms, states and institutions were not able to organize citizens in a defensive posture and provide security to its citizens. Civil unrest, civil resistance, and civil defense are well known models when



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states no longer maintain the capacity to provide protection of civilians. Ukraine is the latest theatre where civil defense, civil unrest, and military defense are working together. Its final shape depends on many elements: geography, human resources, material resources, training, and above all the brave hearts of people. The past made up of information operations and psychological operations has merged with the present of hybrid threats and cyber-attacks, to present an asymmetric future. A future that will require all hands for defense and security.

During the Cold War, specific approaches to Civil Defense were developed with the goal of protecting and defending populations in case of nuclear attack or war. After the collapse of the Soviet Union in 1991, the Cold War was mistakenly declared as history, but as we can observe since the beginning of Putin's era only the Pan-West believed it was over. Clearly, Russia never accepted it as a geopolitical fact. A lethal miscalculation by the West is today multiplied with the increase of authoritarian regimes, with China leading in the field of militarization. Liberal democracy as a societal model is not what authoritarians have in mind even when holding free elections – free elections are no guarantee of freedom and liberal democracy anymore. This is the current environment in which we are obliged to fashion new Whole-of-Society approaches to security and defense.

Collective, Total, and Comprehensive Defense are not the same, but they have some common elements that link them to the state and government. We have already noted two important changes in approaches to defense. First is that states no longer hold a monopoly on violence, and secondly, states are increasingly waging violence on their own citizens. At issue is whether-or-not the military can be relied upon to protect civilians, provide for their wellbeing, and maintain the peace? Is Protection of Civilians doctrine relevant when war is amongst the people and hybrid threats and asymmetric warfare dominate?

Military Defense is a massive money consuming activity that is not adjusting to the hybrid nature of current and future threats. Military defense doctrine has not made the shift from collective to individual action, from schools to platforms, from doctrines that are obsolete the moment they are published, and from a static understanding of reality to a dynamic 24/7 observation of what is occurring.

War amongst the People Needs Solutions amongst the People

Open Defense is a dynamic security mind-set based on the need and responsibility of individuals to protect themselves and their local community. Protection is a mutual reinforcing activity where individual defense is a precondition of collective defense. Transgenerational conflicts, pandemics, and climate change are pushing us in this direction. Are we neglecting the role of a state, government, parliament? Not at all, we are only suggesting that the role of the state must be modified: states and



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politicians must provide funds to train and equip individuals, organize local communities, connect them, digitalize communication, tell the military that they are only a part of human security and defense, and that in a comprehensive defense they have a role that supports civil society actions. National Defense should be a balanced development of Civil Defense (in a new sense of the meaning) and Military Defense that supports Whole-of-Society defense and security initiatives.

At the end: NATO, EU, and others ought to follow a new open policy. It will be painful for many, but not moving in the direction of Open Defense will be unimaginably far more painful. Following a war amongst the people paradigm, hybrid threats and asymmetric warfare dominate the multi-dimensional conflict space. Hybrid threats and asymmetric warfare also shift citizens from passive objective recipients of security to subjects active in providing their own defense.[3]

The defining characteristic of Open Defense is the inclusion of citizens and informal networks as security actors. Presently, “the relationship between formal institutions and informal social networks is not yet adequately conceptualized”. [4] Open Defense is part of a Hybrid Security System that recognizes citizens as the end-state users of the security system, not states.[5] In an Open Defense environment, the emphasis is placed on developing and enhancing individual resilience. Resilient individuals are at the center of Open Defense.[6]

Our goal is to move beyond the intellectual limits imposed by notions of Industrial Age warfare and Second Millennium thinking. As hypotheses of security and defense continue to evolve it is important to agree upon some common definitions.

Conclusion

In exploring the new concept of Open Defense, we are proposing an alternative way of thinking about security and defense. Seeing security and defense as cascading from above through traditional governmental approaches and evolving bottom-up from individuals and loosely formed local networks. We do not propose substituting one concept for another; rather, we propose viewing security and defense as multi-dimensional where a one-size-fits-all approach is inadequate. Security and defense are developed and maintained at levels of society, simultaneously. Individual Defense, the right to life, is the primary right of all human beings and the human right on which all others are anchored. As citizens, individuals jointly create Collective and Total Defense arrangements.[7]

Advocating only one concept of security and defense is inefficient and unacceptable from a Human Security perspective. Security and defense attend to multiple domains: land, sea, air, space, cyber, and human. The defense tasks are too many and too complex for one security approach alone.



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Traditional management principles are challenged and often fall short as they attempt to manage pieces and miss the fluid and uncontrollable nature of modern conflict.

One of the oldest proverbs suggests "to fight fire with fire" and it has the same value today as it had at the time of the Westphalia Peace. A highly specialized world needs highly specialized interaction, cooperation, and openness to develop appropriate and on time hybrid responses to conflict. Efficient individual and collective resilience is a precondition for context specific security and defense. A new view of Civil Defense as security partner is needed.

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