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PREPARING FOR THE NEXT WAR:

What NATO's Ankara Summit Still Missed

Conventional deterrence, hybrid threats, and NATO's next strategic adaptation



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The 2026 NATO Summit in Ankara marked another significant milestone in the post-2022 transformation of the Alliance. It focused on translating previously agreed political commitments into concrete investments, multinational procurement programmes, defence-industrial initiatives, and military capabilities. The decisions announced in Ankara, particularly those unveiled during the Defence Industry Forum, reflected an Alliance increasingly preparing for high-intensity warfare through unprecedented investments in air and missile defence, intelligence, surveillance and reconnaissance (ISR), long-range strike capabilities, strategic airlift, digital infrastructure, industrial cooperation, counter-drone systems, and emerging technologies.

Taken together, these initiatives demonstrate that NATO is strengthening the military and industrial foundations required to deter and, if necessary, fight a large-scale conventional conflict against a near-peer adversary. Yet the Summit also raises a broader strategic question: while the Alliance is investing heavily in capabilities designed for high-intensity interstate warfare, Russia has increasingly pursued its strategic objectives through hybrid threats, cyber operations, sabotage, information manipulation, and other forms of sub-threshold coercion intended to remain below the threshold of armed conflict. The central question, therefore, is not whether NATO is becoming militarily stronger, but whether it is preparing for

the form of conflict that Russia is most likely to wage.

BUILDING THE ARSENAL: NATO'S INDUSTRIAL TURN

One of the most consequential outcomes of the Ankara Summit was not a single capability announcement, but NATO's recognition that industrial capacity has become an indispensable element of collective defence and credible deterrence. The Alliance is increasingly treating defence production, supply chains, technological innovation, and industrial resilience as strategic assets instead of supporting functions of military power. This marks a significant departure from the post-Cold War assumption that defence industries could rely on lean production models and peacetime market dynamics. Instead, the experience of Russia's full-scale invasion of Ukraine has reinforced the understanding that military readiness depends not only on the sophistication of weapons systems but also on the ability to produce, replenish, and sustain them throughout a prolonged conflict.

The capability announcements made in Ankara reflected this broader strategic shift. Allied governments committed more than \$40 billion to counter-drone capabilities and drone training in response to the growing importance of unmanned systems on the modern

battlefield¹. Eleven Allies agreed to jointly procure the Saab GlobalEye airborne early warning aircraft to replace NATO's ageing AWACS fleet and strengthen airborne surveillance, command and control, and integrated air and missile defence². The Alliance also announced the acquisition of MQ-4C Triton intelligence, surveillance, and reconnaissance aircraft³ while launching multinational initiatives to expand long-range strike capabilities⁴, enhance strategic airlift⁵, strengthen space-based capabilities^{6,7}, and modernise NATO's digital infrastructure for multi-domain operations⁸. Beyond individual procurement programmes, NATO introduced a new Strategy for Industry Cooperation⁹, established the NATO Front Door for Industry¹⁰ as a central mechanism for engagement with defence companies, and launched

initiatives to stimulate private investment and deepen multinational industrial cooperation across the Euro-Atlantic area¹¹.

Collectively, these decisions demonstrate that NATO has moved beyond discussing deterrence toward constructing the industrial, technological, and operational foundations required to sustain it. The war in Ukraine has fundamentally altered Allied perceptions of modern warfare by demonstrating that industrial endurance has become as strategically important as battlefield performance. High-intensity conflict is no longer measured solely by the quality of military platforms but by the ability to replace battlefield losses, replenish ammunition stocks, repair damaged equipment, expand production under wartime conditions, and integrate new

¹ North Atlantic Treaty Organization, "NATO Allies Invest 40 Billion Dollars in Counter-Drone Capabilities and Drone Training," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-allies-invest-40-billion-dollars-in-counter-drone-capabilities-and-drone-training>

² North Atlantic Treaty Organization, "NATO's New Airborne Warning and Control System Is Announced," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/natos-new-airborne-warning-and-control-system-is-announced>

³ North Atlantic Treaty Organization, "NATO Expands its Intelligence, Surveillance and Reconnaissance Fleet with the Purchase of Triton Aircraft," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-expands-its-intelligence-surveillance-and-reconnaissance-fleet-with-the-purchase-of-triton-aircraft>

⁴ North Atlantic Treaty Organization, "Allies Meet Strike Capability Requirements with Multinational Initiatives," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/allies-meet-strike-capability-requirements-with-multinational-initiatives>

⁵ North Atlantic Treaty Organization, "NATO Allies Expand Strategic Airlift Capacity," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-allies-expand-strategic-airlift-capacity>

⁶ North Atlantic Treaty Organization, "NATO Deputy Secretary General Announces New Initiatives in Space,

Strike Capabilities and Air Defence," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-deputy-secretary-general-announces-new-initiatives-in-space-strike-capabilities-and-air-defence>

⁷ North Atlantic Treaty Organization, "NATO Allies Join Forces to Develop High-End Space Capabilities," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-allies-join-forces-to-develop-high-end-space-capabilities>

⁸ North Atlantic Treaty Organization, "NATO Builds a More Agile and Resilient Digital Infrastructure," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-builds-a-more-agile-and-resilient-digital-infrastructure>

⁹ North Atlantic Treaty Organization, "NATO Releases New Strategy for Industry Cooperation," NATO, July 8, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/08/nato-releases-new-strategy-for-industry-cooperation>

¹⁰ North Atlantic Treaty Organization, "NATO Launches New Initiatives to Accelerate Defence Industrial Cooperation," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-launches-new-initiatives-to-accelerate-defence-industrial-cooperation>

¹¹ North Atlantic Treaty Organization, "NATO Launches Call to Action to Increase Private Investment in Defence," NATO, July 7, 2026, <https://www.nato.int/en/news-and-events/articles/news/2026/07/07/nato-launches-call-to-action-to-increase-private-investment-in-defence>

technologies at operational speed. Modern deterrence therefore depends not only on military capability, but also on resilient supply chains, sustained production capacity, secure access to critical materials, and the ability of Allied industries to support long-term military operations. In this sense, industrial resilience has become an essential component of NATO's deterrence posture.

Ukraine occupies a particularly significant position within this evolving security architecture. Since 2022, Ukraine has often been viewed primarily as the recipient of Western military assistance, yet Ankara suggests that this understanding is increasingly incomplete. Ukraine has emerged as the world's most experienced practitioner of contemporary warfare, possessing unparalleled expertise in drone operations, electronic warfare, battlefield innovation, distributed command systems, civilian resilience, and adaptation under conditions of sustained missile attacks, cyber operations, and hybrid pressure^{12,13,14}. At the same time, Ukraine has demonstrated an exceptional capacity to accelerate defence innovation by rapidly developing

and deploying new technologies under combat conditions, significantly shortening the cycle between operational necessity and technological adaptation^{15,16}. As NATO modernises its armed forces and prepares for future conflicts, Ukrainian experience should become an institutional component of Allied military transformation rather than remaining confined to wartime cooperation or bilateral assistance.

More broadly, Ankara reflects an emerging understanding that Europe's security architecture can no longer be built solely through increased defence spending or expanded force structures. It also requires an integrated transatlantic defence-industrial base capable of sustaining prolonged competition, accelerating innovation, and ensuring strategic resilience against future crises. In this transformation, Ukraine is gradually evolving from a beneficiary of Allied support into an active contributor to NATO's future military adaptation. Its battlefield experience, technological innovation, and operational lessons have become strategic assets for the Alliance itself, reinforcing the principle that collective defence in the twenty-first century will depend not only on the forces

¹² Matthew Slusher, *Lessons from the Ukraine Conflict: Modern Warfare in the Age of Autonomy, Information, and Resilience* (Washington, DC: Center for Strategic and International Studies, May 2, 2025), <https://www.csis.org/analysis/lessons-ukraine-conflict-modern-warfare-age-autonomy-information-and-resilience>

¹³ Kateryna Bondar, *Unleashing U.S. Military Drone Dominance: What the United States Can Learn from Ukraine* (Washington, DC: Center for Strategic and International Studies, July 18, 2025), <https://www.csis.org/analysis/unleashing-us-military-drone-dominance-what-united-states-can-learn-ukraine>

¹⁴ Kateryna Bondar, *How and Why Ukraine's Military Is Going Digital* (Washington, DC: Center for Strategic and

International Studies, October 6, 2025), <https://www.csis.org/analysis/how-and-why-ukraines-military-going-digital>

¹⁵ Jack Watling, *Emergent Approaches to Combined Arms Manoeuvre in Ukraine* (London: Royal United Services Institute, October 23, 2025), <https://www.rusi.org/explore-our-research/publications/insights-papers/emergent-approaches-combined-arms-manoevre-ukraine>

¹⁶ Kateryna Bondar, *How Ukraine Rebuilt Its Military Acquisition System Around Commercial Technology* (Washington, DC: Center for Strategic and International Studies, January 13, 2025), <https://www.csis.org/analysis/how-ukraine-rebuilt-its-military-acquisition-system-around-commercial-technology>

NATO fields, but also on the industrial ecosystem capable of equipping, sustaining, and continuously adapting them.

PREPARING FOR THE WRONG CONFLICT?

Despite the significant achievements of the Ankara Summit, it also exposes a strategic imbalance that warrants closer examination. Nearly every major initiative announced by Allies focused on strengthening NATO's conventional warfighting capabilities through higher defence spending, expanded force readiness, industrial capacity, integrated air and missile defence, and advanced military technologies. These investments are both necessary and justified given Russia's full-scale invasion of Ukraine and the deteriorating European security environment. Yet they also reveal a conception of deterrence that remains predominantly centred on preparing for large-scale interstate conflict.

This emphasis appears increasingly paradoxical when contrasted with NATO's own assessment of the contemporary threat environment. The Secretary General's Annual Report identifies hybrid threats, cyberattacks, sabotage, foreign information manipulation and interference (FIMI), attacks against critical infrastructure, economic coercion, hostile intelligence activity, and other forms of sub-threshold aggression as persistent challenges

confronting Allied societies on an almost daily basis¹⁷. The Alliance therefore faces a strategic dilemma: it is becoming progressively better prepared to fight the war that begins after Article 5 is invoked, while its principal adversary is investing heavily in methods specifically designed to achieve strategic objectives without ever triggering Article 5.

Contemporary Russian strategy increasingly relies upon ambiguity rather than escalation, disruption rather than occupation, and cumulative political effects rather than decisive battlefield victories. Hybrid activities are effective precisely because they exploit uncertainty surrounding attribution, legal thresholds, political consensus, and proportional response. Rather than seeking to defeat NATO militarily, they aim to complicate collective decision-making, undermine public confidence, weaken democratic institutions, and gradually erode Allied cohesion over time. Their strategic value lies not in any individual operation but in the cumulative effect of continuous pressure applied across political, economic, informational, cyber, and physical domains.

This pattern has become increasingly evident across Europe since Russia's full-scale invasion of Ukraine. Between 2018 and 2025, Russian activity evolved from isolated covert incidents into a sustained campaign of sabotage, cyber operations, espionage, infrastructure interference, information manipulation,

¹⁷ North Atlantic Treaty Organization, *The Secretary General's Annual Report 2025* (Brussels: NATO, 2026),

<https://www.nato.int/content/dam/nato/webready/documents/publications-and-reports/annual-reports/sgar25-en.pdf>

and influence operations targeting NATO member states¹⁸. Critical transport networks, logistics hubs, energy infrastructure, military facilities, undersea telecommunications cables, airports, and defence industries have all emerged as recurring targets. Instead of relying on overt military force, Russian actors have increasingly employed proxies, criminal intermediaries, temporary recruits, and covert networks capable of conducting deniable operations while complicating attribution and limiting opportunities for collective retaliation¹⁹. The objective has been to create persistent insecurity, continuous pressure on Allied resilience, and to increase political, economic, and psychological costs without crossing the formal threshold of armed conflict.

Importantly, this assessment is no longer derived solely from academic literature or policy commentary but is increasingly reflected in the official threat perceptions of Allied governments and intelligence services. Germany's 2026 Military Strategy explicitly states that Russia is already conducting hostile hybrid activities against NATO member states while simultaneously preparing for the possibility of future conventional confrontation with the Alliance²⁰. Similarly, the national security assessments of Estonia, Lithuania, and Latvia identify espionage, sabotage,

cyberattacks, hostile intelligence activity, attacks on critical infrastructure, and information manipulation as enduring elements of Russia's long-term strategy²¹. These assessments are particularly significant because they originate from different national contexts yet converge on the same conclusion: Russia's challenge to Allied security extends far beyond conventional military power.

Although NATO has progressively strengthened its recognition of hybrid threats²², its collective response has remained largely centred on resilience, monitoring, attribution, information sharing, and political declarations rather than on clearly articulated deterrence measures capable of imposing predictable strategic costs on persistent sub-threshold aggression. Unlike conventional deterrence, where force posture, capability targets, and military planning provide visible mechanisms for signalling resolve, NATO has yet to develop an equally coherent framework defining thresholds, proportional countermeasures, or collective consequences for sustained hybrid campaigns. Consequently, a gap persists between the growing awareness of the threat and the development of credible mechanisms to deter it.

¹⁸ Megi Benia, "Deterring the Undeterrable? NATO's Warfighting Focus and the Challenge of Russia's Hybrid Threats," *The Georgian Foundation for Strategic and International Studies – Estonia (GFSIS-E)*, May 21, 2026, <https://gfsise.ee/deterring-the-undeterrable-natos-warfighting-focus-and-the-challenge-of-russias-hybrid-threats/>

¹⁹ Ibid

²⁰ Ibid

²¹ Ibid

²² North Atlantic Treaty Organization, "Countering Hybrid Threats," NATO, last updated May 7, 2024, <https://www.nato.int/en/what-we-do/deterrence-and-defence/countering-hybrid-threats>

The challenge, therefore, is not one of threat recognition but of strategic adaptation. NATO has devoted increasing attention to resilience, civil preparedness, cyber defence, and societal security across successive Strategic Concepts, Summit declarations, and official reports. Nevertheless, resilience has not yet acquired the same institutional weight, operational urgency, or resource commitment as conventional deterrence and defence. While military capabilities are supported by measurable spending targets, multinational procurement programmes, force planning processes, and increasingly integrated defence-industrial initiatives, resilience remains dispersed across national policies, civilian institutions, and broad political commitments that are considerably more difficult to coordinate, operationalise, and evaluate.

THE NEXT CHALLENGE: FROM DETERRENCE TO RESILIENCE

The Ankara Summit should be regarded as a significant milestone in NATO's ongoing adaptation to a deteriorating security environment. It demonstrated unprecedented political commitment to strengthening conventional military capabilities of the Alliance, expanding defence-industrial production, and reinforcing transatlantic burden sharing. At the same time, it reflected an important strategic shift: deterrence is increasingly understood not only in terms of military power but also through the industrial capacity required to sustain it over time. However, political

commitments alone do not generate military capability. New procurement programmes require years of production, infrastructure must be expanded, supply chains secured, emerging technologies integrated, and multinational command structures adapted before announced capabilities become operational. The central question after Ankara is whether defence investments can be translated into credible military capability quickly enough to keep pace with an increasingly dynamic security environment.

Nevertheless, implementation alone will not resolve NATO's broader strategic challenge. Conventional military superiority remains indispensable, but it cannot by itself prevent hostile actors from exploiting vulnerabilities below the threshold of armed conflict. The battlefield has expanded beyond conventional domains, but NATO's institutional adaptation has not advanced at the same pace. The Alliance has become progressively better prepared to deter and, if necessary, fight a conventional war, but comparatively less equipped to impose meaningful costs on persistent hybrid aggression that remains below the Article 5 threshold. Thus, the next phase of NATO's adaptation should focus on making resilience as operational as deterrence itself. This does not require replacing conventional defence with resilience but integrating the two as mutually reinforcing pillars of collective security. Just as capability targets, force planning, and defence spending benchmarks have strengthened military readiness,

resilience requires comparable strategic discipline, measurable objectives, and institutional mechanisms capable of translating political commitments into practical outcomes.

Therefore, three priorities stand out:

1. NATO should establish Alliance-wide resilience capability targets comparable to those used in defence planning. These should include measurable standards for critical infrastructure protection, cyber readiness, civil preparedness, supply chain resilience, information integrity, and continuity of government, enabling Allies to assess progress through common benchmarks rather than broad political commitments.
2. The Alliance should develop a collective framework for responding to persistent hybrid aggression below the Article 5 threshold by defining attribution procedures, proportional response options, and coordinated political, economic, cyber, and diplomatic measures capable of imposing visible and predictable costs on hostile actors. Strengthening deterrence in the grey zone requires reducing strategic ambiguity not only for Allies but also for potential adversaries.

3. NATO should institutionalise operational lessons from Ukraine by integrating Ukrainian expertise in drone warfare, cyber defence, electronic warfare, civil resilience, and rapid defence innovation into Allied planning, training, capability development, and defence-industrial cooperation. Ukraine's experience represents one of the most valuable sources of contemporary military adaptation available to the Alliance.

Ultimately, the Ankara Summit demonstrates both how far NATO has progressed and where its next transformation must occur. The Alliance has taken decisive steps to strengthen its military posture and rebuild the industrial foundations of collective defence. The next challenge is to ensure that resilience becomes an equally operational component of Allied security. Preparing for the next conventional war will remain an essential task, but preparing for the persistent hybrid competition that is already unfolding across the Euro-Atlantic area may prove even more decisive for preserving NATO's long-term credibility, cohesion, and deterrence.